



# Consumer X or the future of consumption

**The Portuguese Cliffish consumer**

**Kantar's point of view**

Marta Santos

Client Director, at Kantar Worldpanel

**KANTAR** **WORLD**PANEL

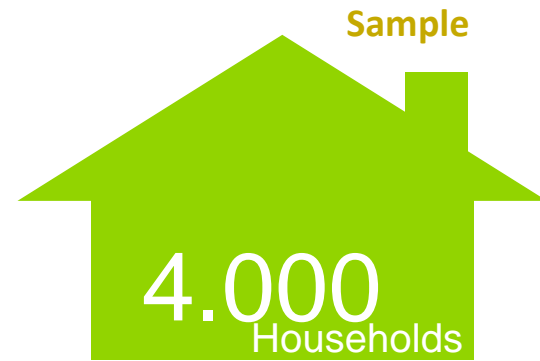
# HH'S PANEL

## MEASURES WHAT THE HH PURCHASES

It collects the purchases made in all type of establishments (not only in Hypermarkets and Supermarkets, Perfumeries, Fairs, Catalog ... etc) destined to the **HOMES**

It allows to know constantly the response of buyers to actions of **PRICES, ADVERTISING, TRADE ...**

It allows to **MAKE ANALYZES ON THE MODERN DISTRIBUTION**



All household members enter the purchases they make

All FMCG products are included: all categories

Purchases of products without a bar code are collected through a Codebook

### Scope:

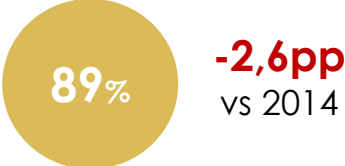
Universe: Homes of Continental Portugal  
Complete coverage of distribution channels for consumer products

### 2017 Universe:

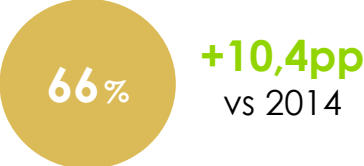
4.053.863 Household of Mainland of Portugal

# SHOPPER'S NEEDS CHANGE: MORE WELLBEING AND CONVENIENCE

## HIGHLY ENGAGED WITH "PROMO" AND "PRICE"

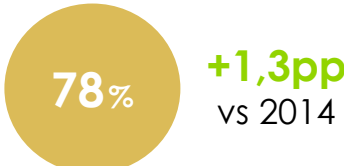


"I SEARCH THE PRODUCTS IN PROMOTION"



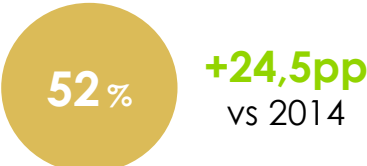
"I DO NOT MIND PAYING MORE FOR QUALITY"

## MORE "HEALTHY"



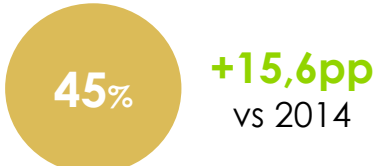
"NOWADAYS I EAT LESS FATS"

## MORE "CONVENIENCE"



"I AM WILLING TO PAY MORE FOR PRODUCTS THAT MAKE IT EASIER FOR ME TO DO THE HOUSEWORK"

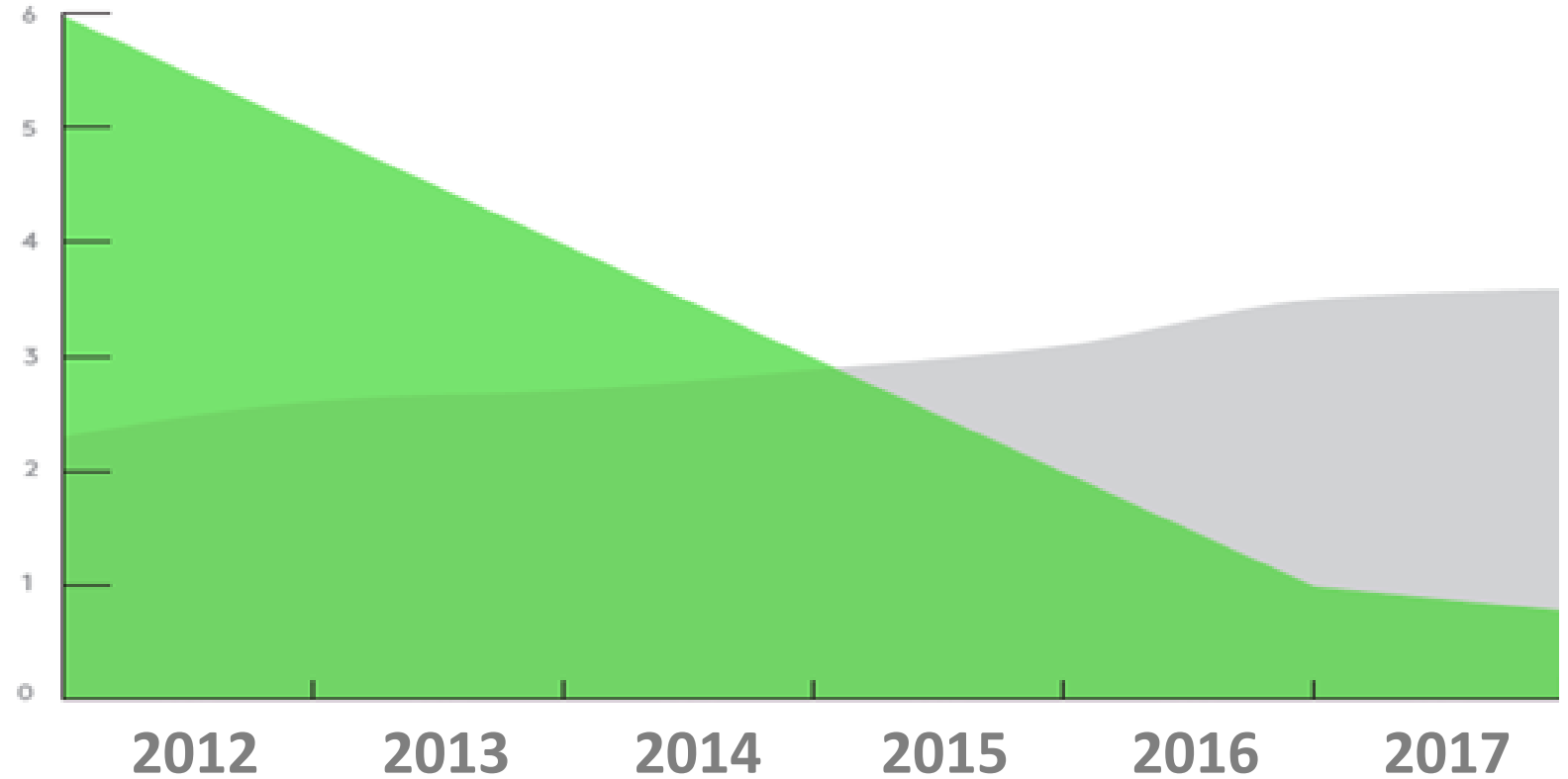
## MORE INFORMED



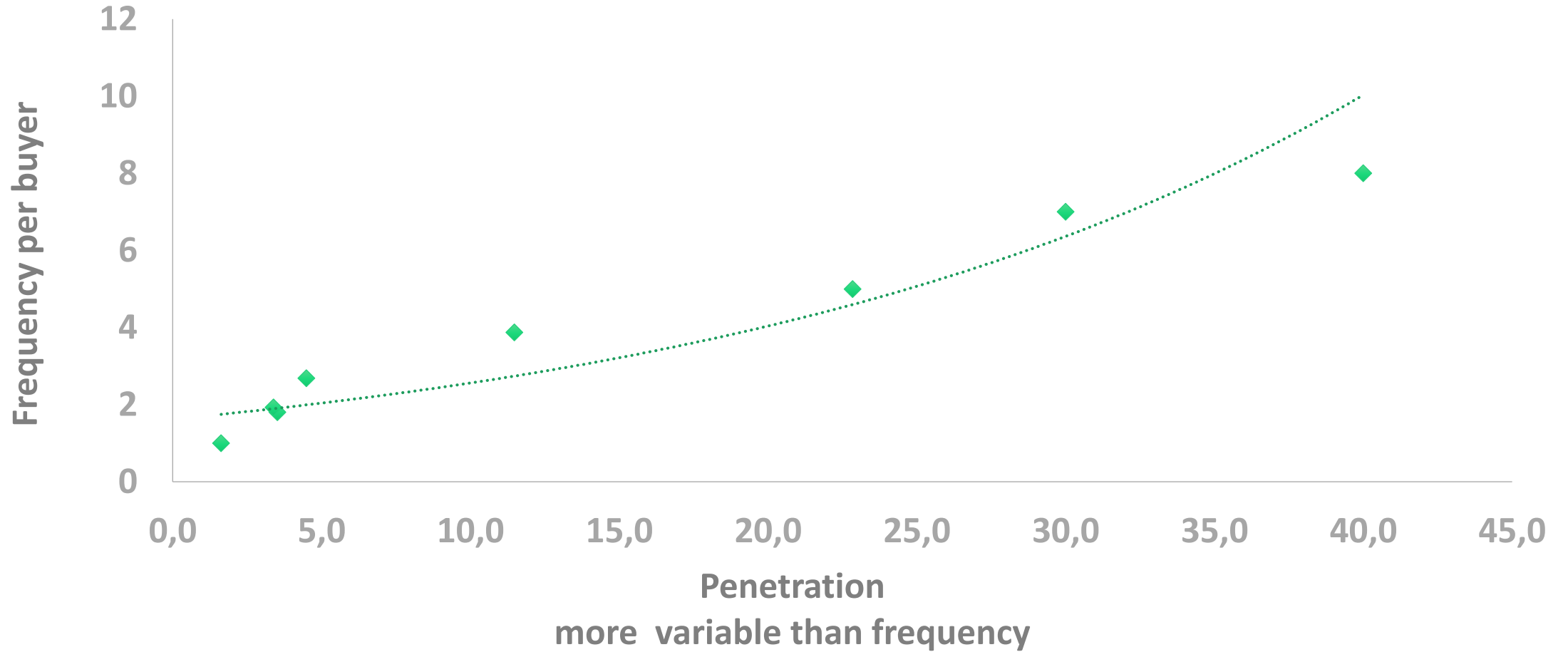
"I AM INFORMED ABOUT THE PRODUCTS IN TV ADS"

# FMCG DECOUPLED FROM ECONOMIC GROWTH

**% YEAR ON YEAR  
VALUE GROWTH**

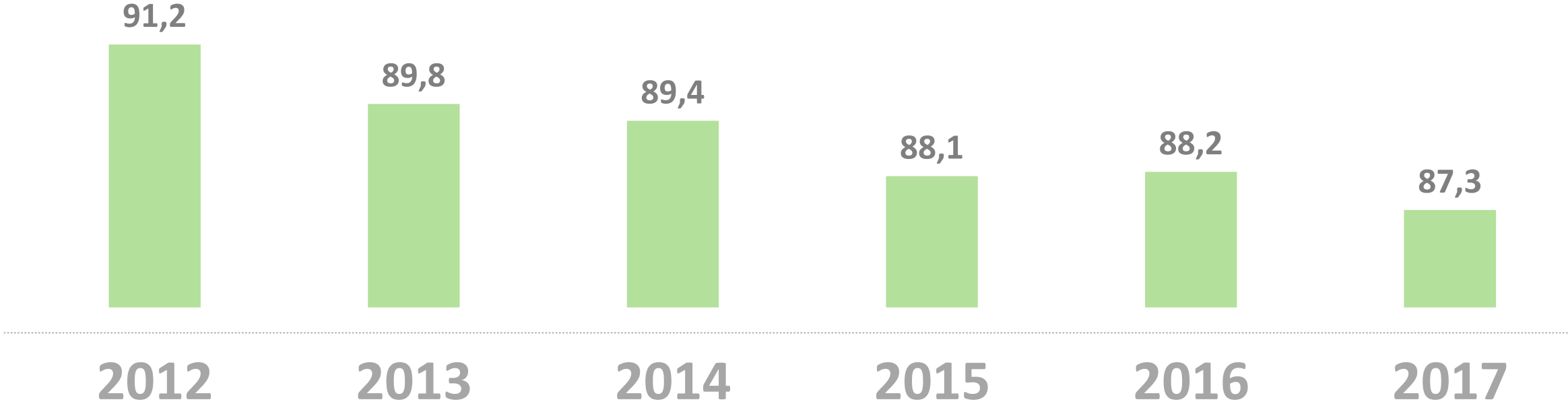


# GROWING PENETRATION IS THE ONLY WAY TO WIN



# COD ATTRACTIVENESS IS INCREASINGLY DIFFICULT

TOTAL CODFISH | % PENETRATION – ROLLING MAT





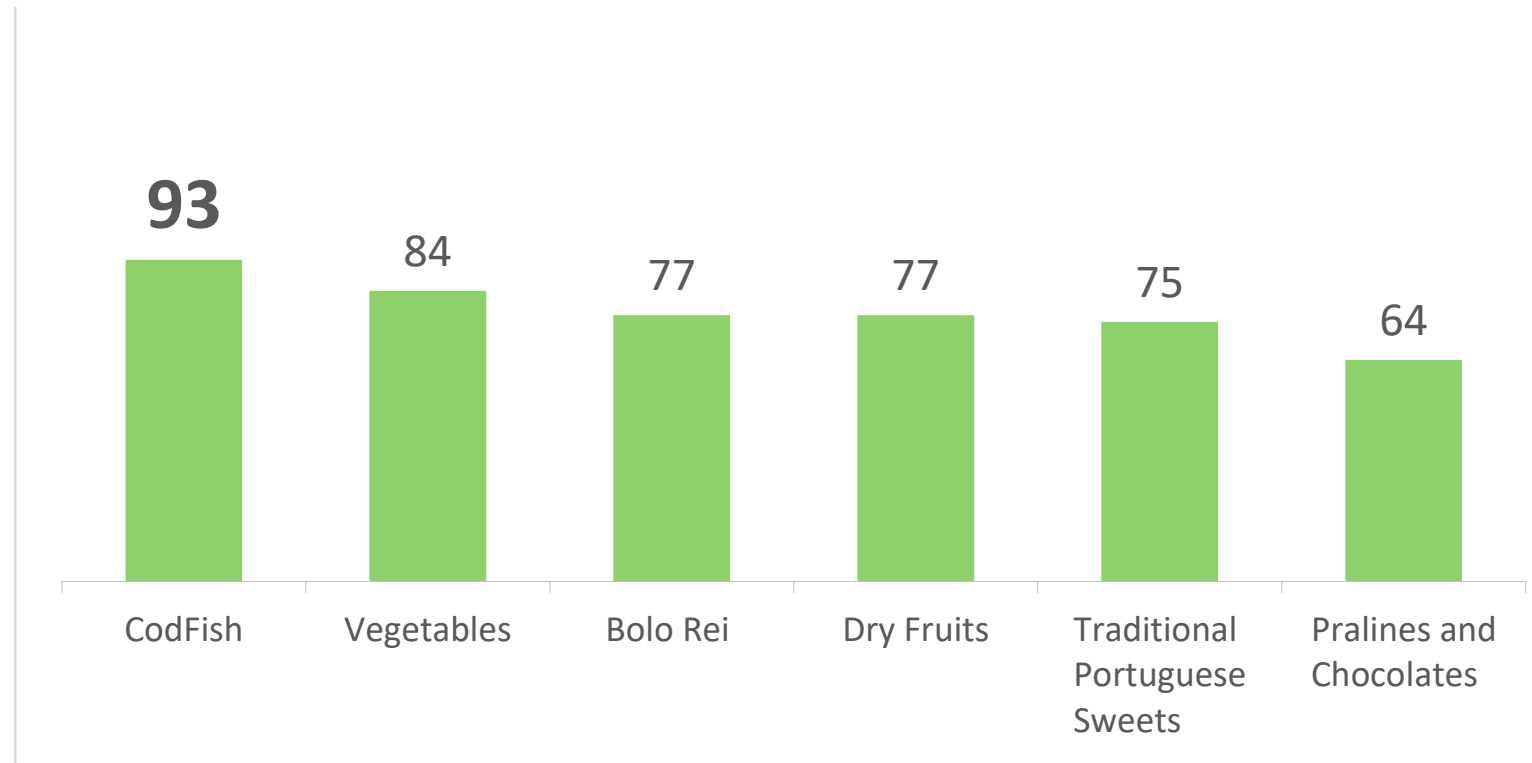
# AND STILL IN THE HEART OF PORTUGUESE HABITS

LINK Q | CHRISTMAS PLANNING 2017

54%

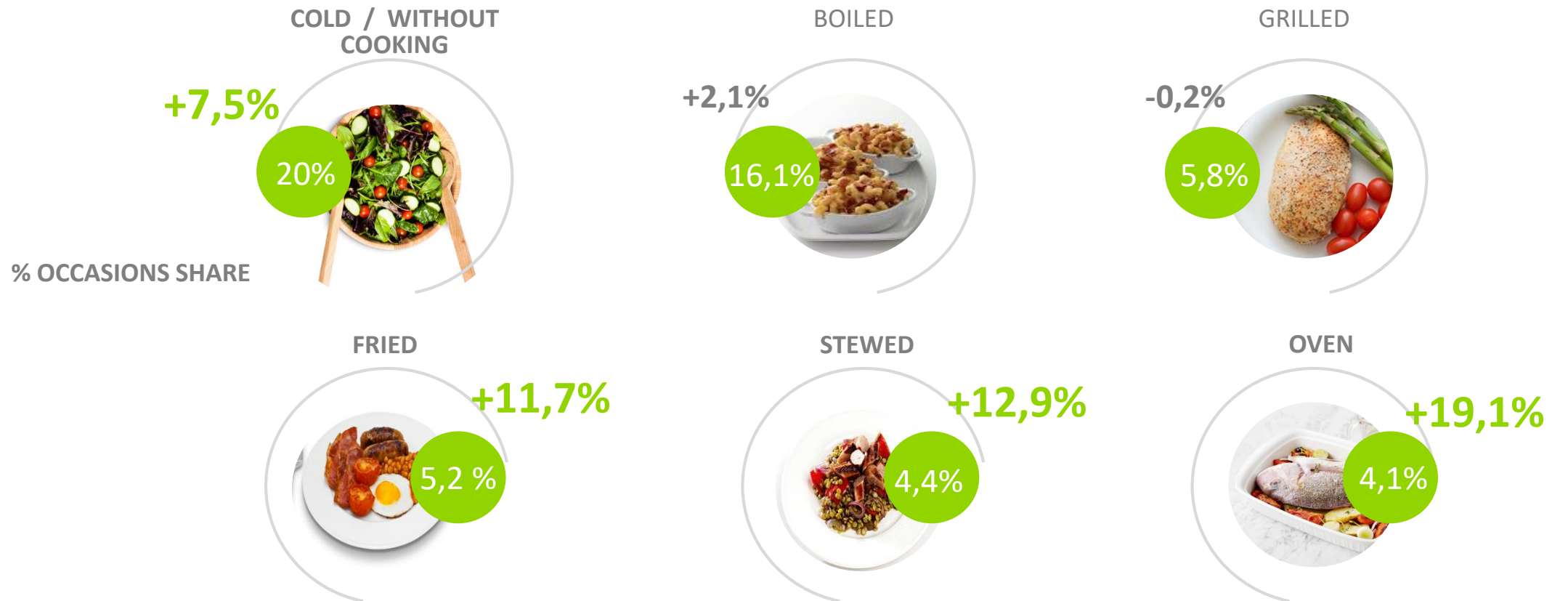
“I try to choose traditional dishes“

**TRADITION IS STILL ALIVE**



# LESS TYPICAL DISHES

CONSUMPTION | FOOD \* | 2016 vs 2015





# NOT ENOUGH TIME

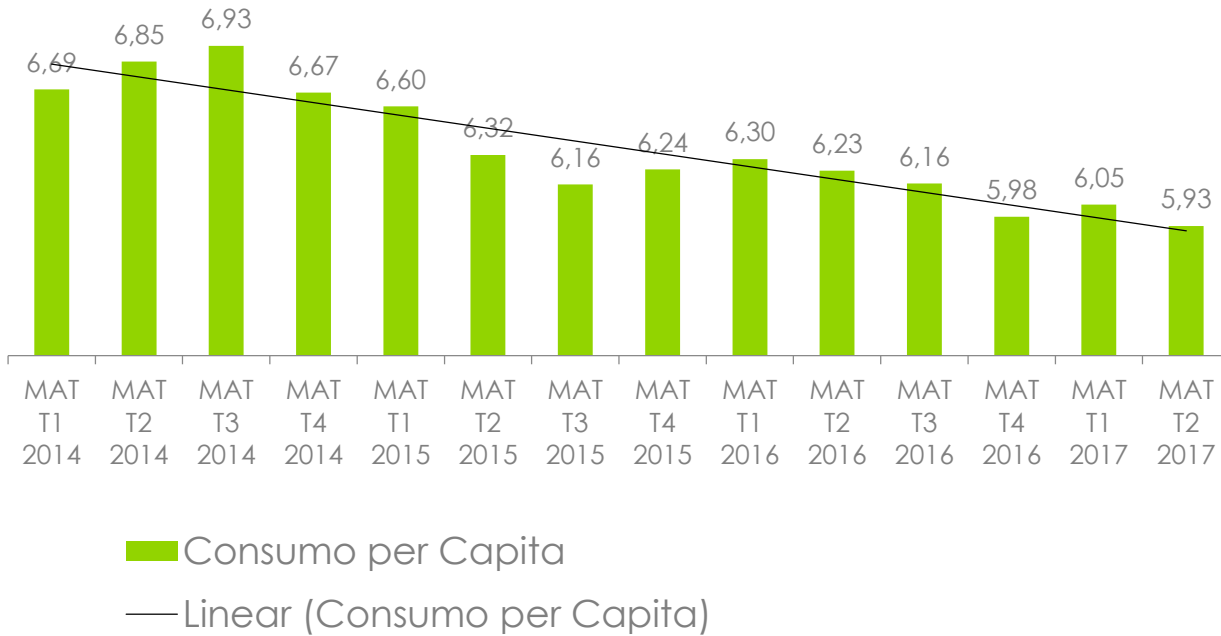
LIFESTYLE 2017 | % POSITIVE ANSWERS



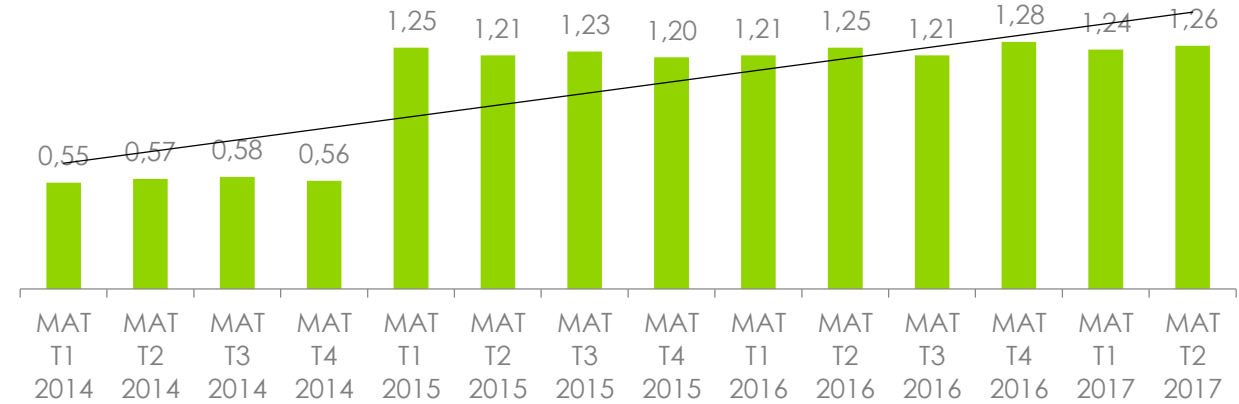
# CONVENIENT SOLUTION : FROZEN COD

**FROZEN COD vs DRIED COD | PER CAPITA CONSUMPTION | ROLLING MAT**

## DRIED COD

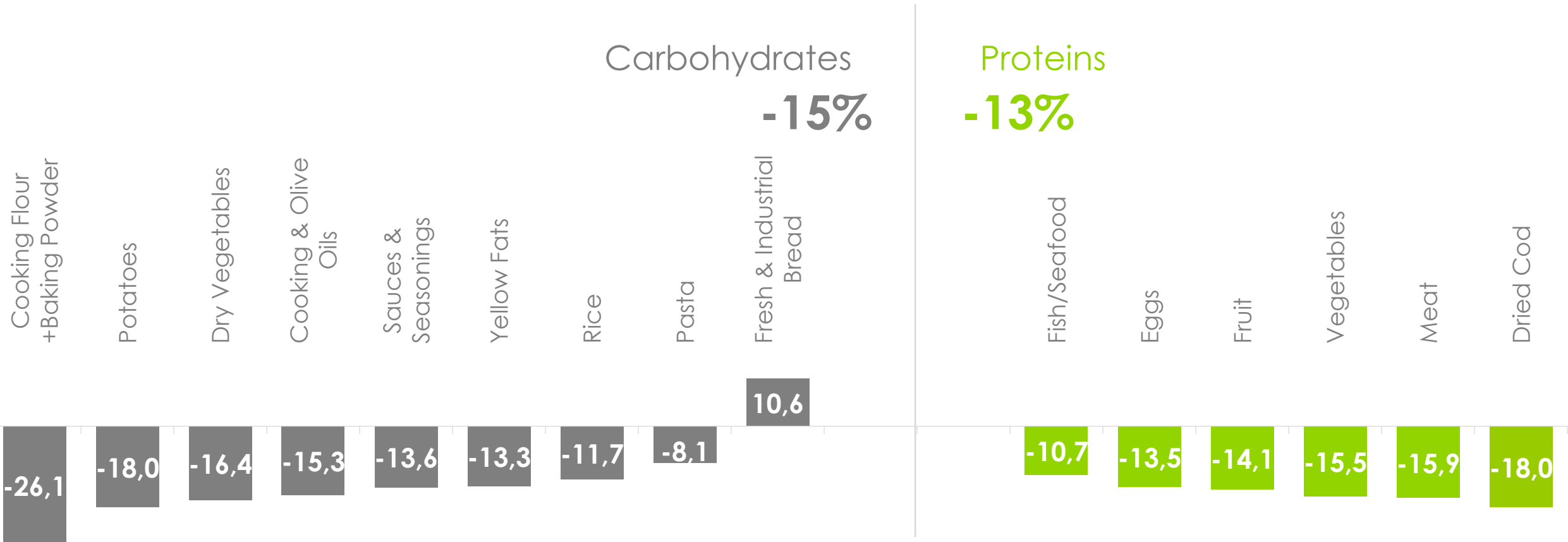


## FROZEN COD



# COD THE MOST IMPACTED PROTEIN

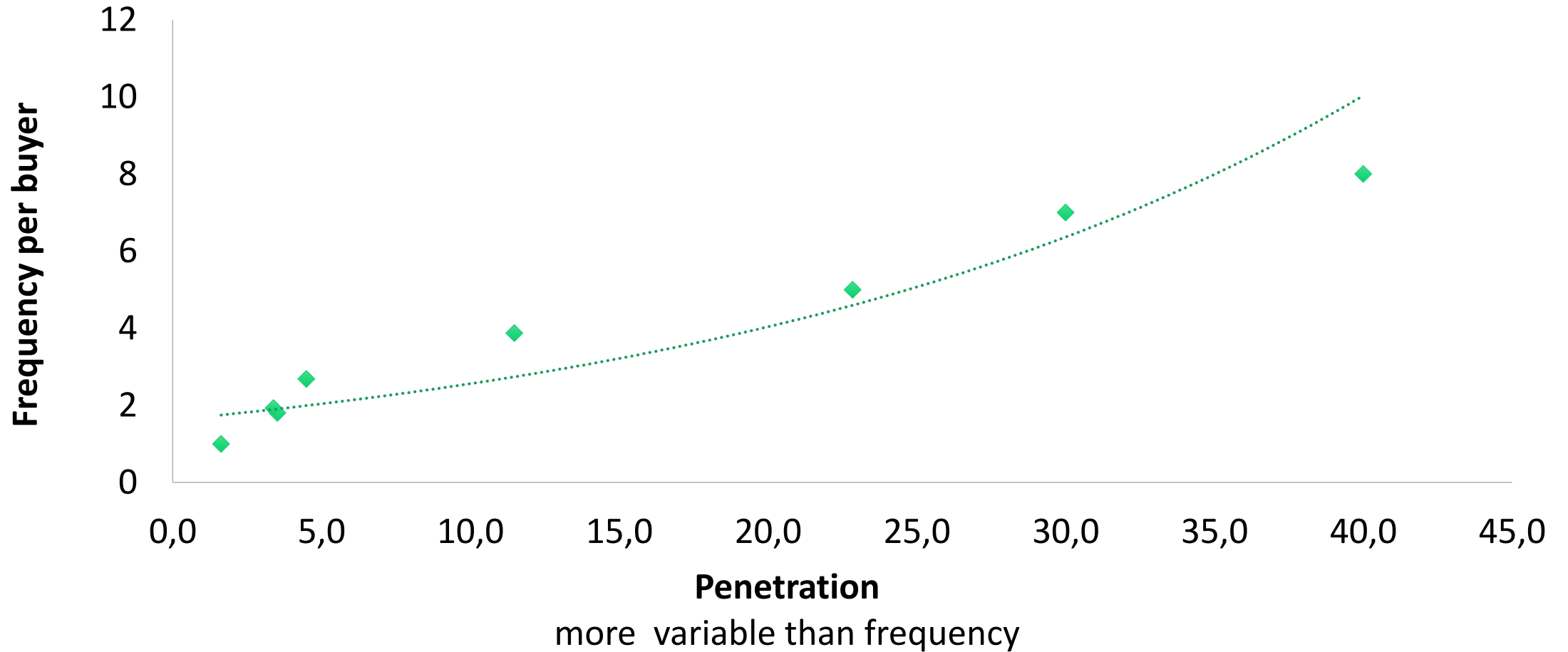
OCCASIONS EVOLUTION IN % - USAGE 2015 VS USAGE 2014



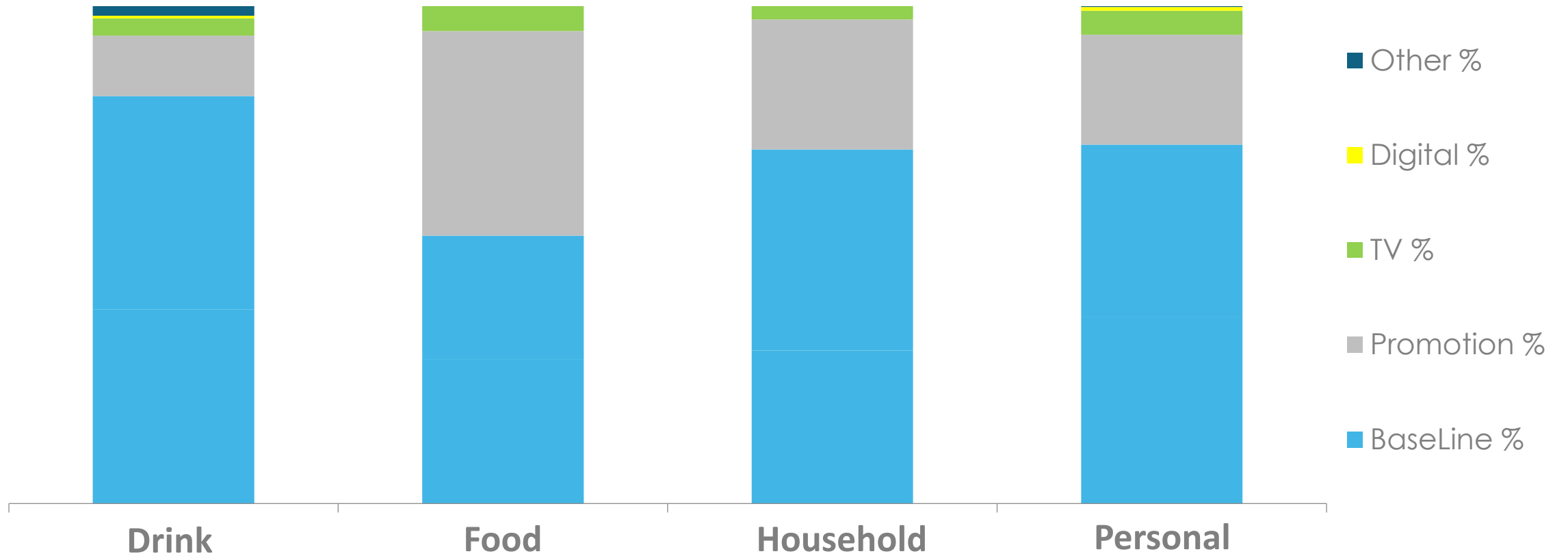


# INCONVENIENT CONCLUSIONS

# INCREASE PENETRATION IS THE ONLY WAY TO WIN

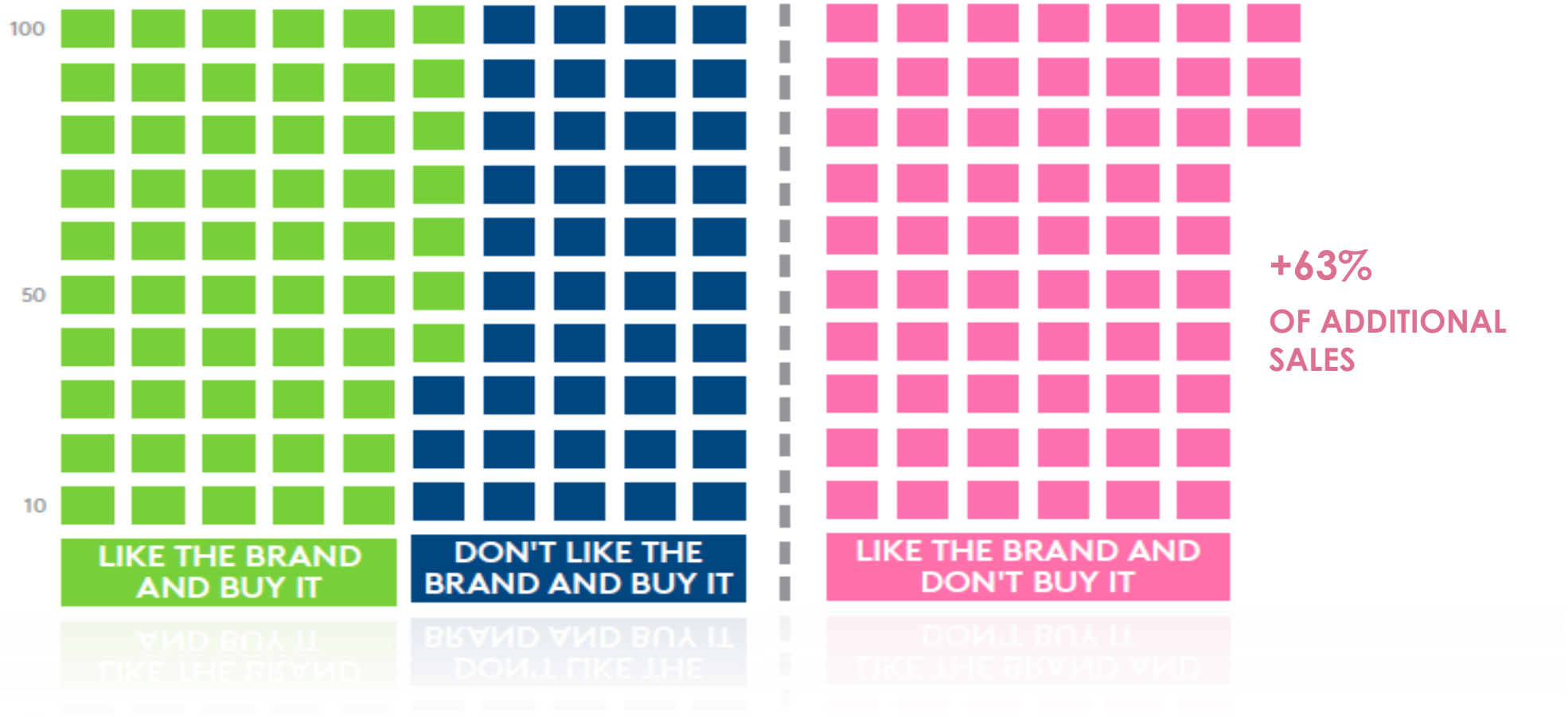


# PROMOTION IS ALL ABOUT THE SHORT TERM WHERE THEY BEAT ADVERTISING





# 2/3 OF PURCHASE PROPENSITY IS LOST AT POINT OF PURCHASE

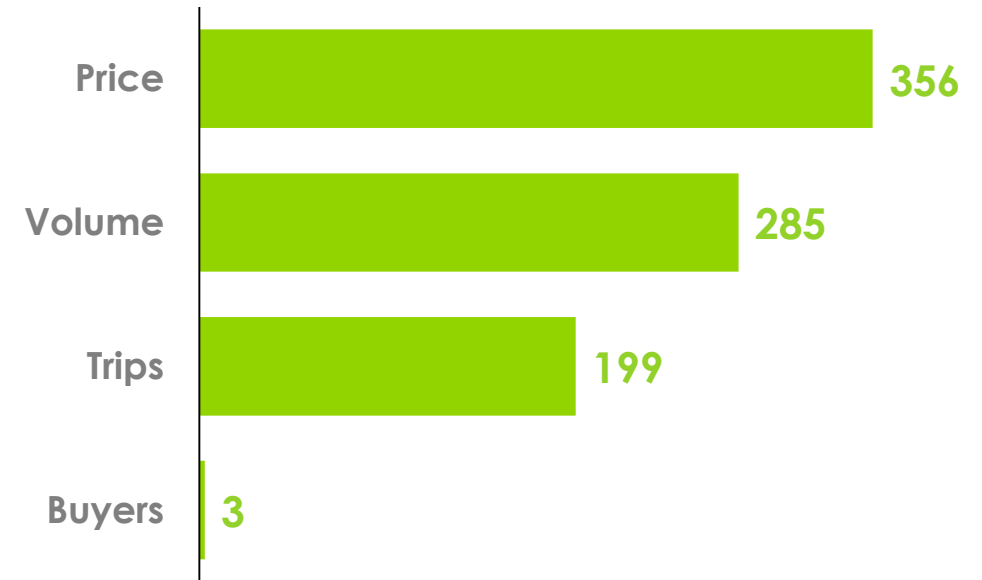


# TOO MANY SMALL INNOVATIONS DESPITE OPPORTUNITIES TO PREMIUMIZE

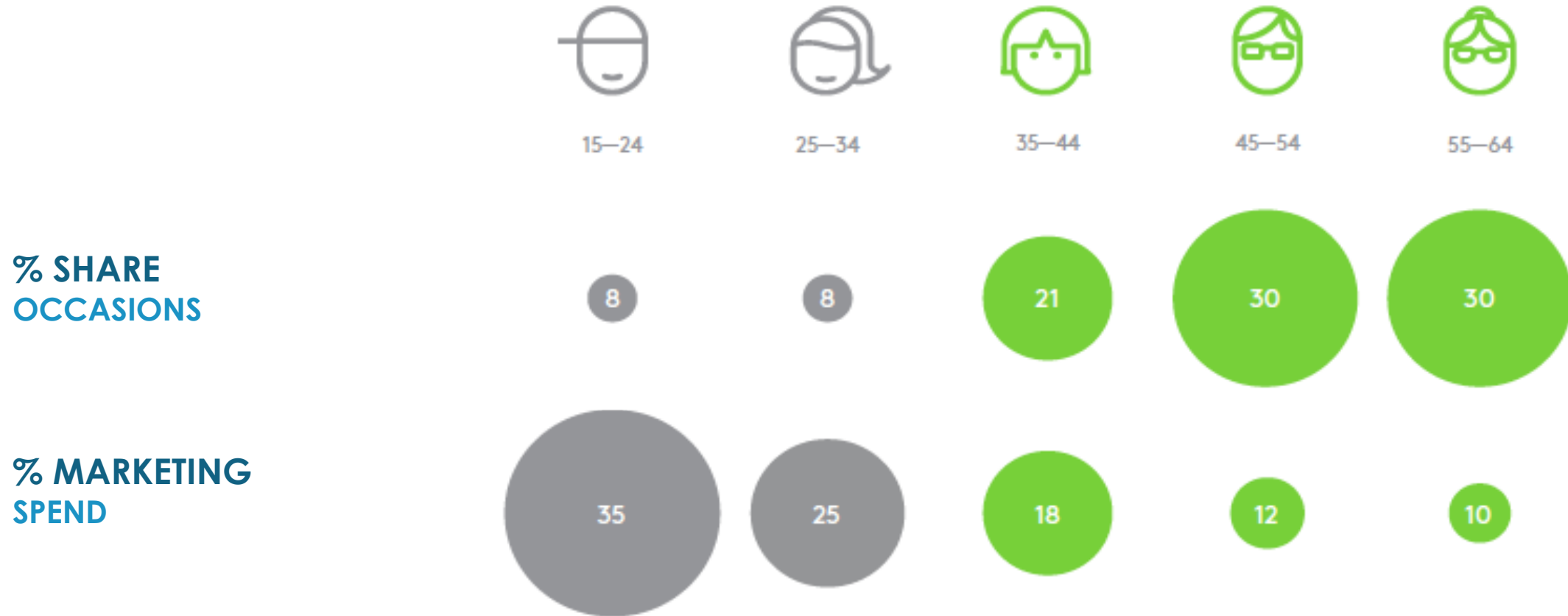
Only **1%** of new SKUs achieve a penetration of at least **1%** in their first year



**Number of launches** with significant positive shopper behavior change

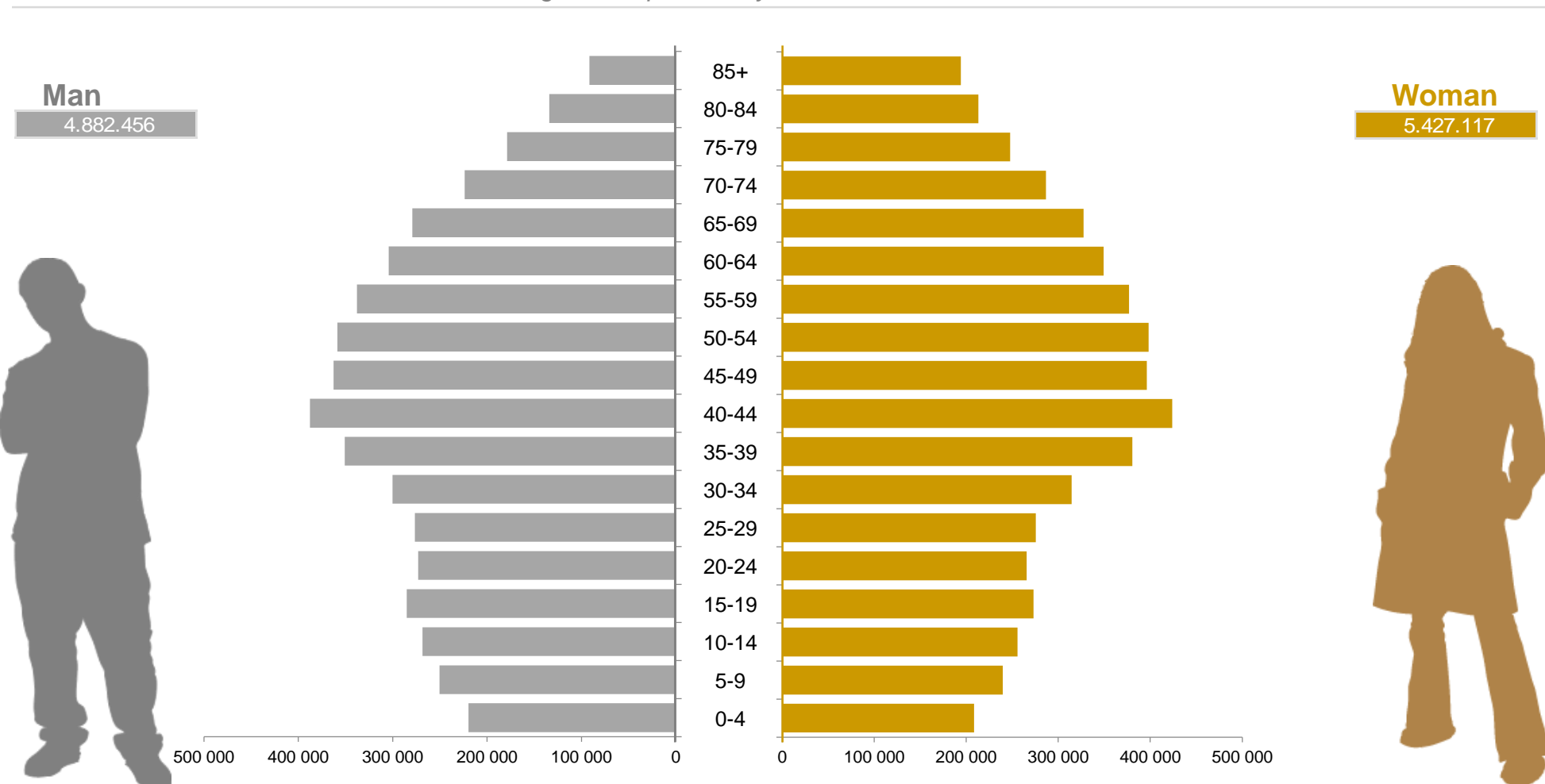


# NOTHING OLDER THAN AN IGNORANT YOUNG PERSON



# 4 OUT OF 10 PORTUGUESE HAVE MORE THAN 50 y.o

Portuguese Population by Gender (in thousands)



Portuguese Population Total (in thousands)

Age Group	Total (thousands)
85+	428.244
80-84	490.004
75-79	524.168
70-74	558.165
65-69	538.556
60-64	551.919
55-59	614.838
50-54	731.253
45-49	811.722
40-44	758.984
35-39	756.882
30-34	714.805
25-29	653.393
20-24	606.795
15-19	510.244
10-14	426.680
5-9	347.305
0-4	285.616
<b>Total</b>	<b>10.309.573</b>



# The Portuguese Cliffish consumer

Kantar's point of view

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Client Director, at Kantar Worldpanel

Thanks

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