

ИССЛЕДОВАНИЯ, КОТОРЫЕ РАБОТАЮТ НА ПРИБЫЛЬ. СЕГМЕНТИРУЙ И ВЛАСТВУЙ!

TOP Marketing – ИССЛЕДОВАНИЯ
18 октября 2017



Рост начинается с понимания потребителя

1

Лучше понимать потребителя

Чем увлечен и что движет потребителей, и не только в приложение к еде вне дома

2

Широкий спектр рынка

Не замыкаться только на крупных игроках, но включать и ниши и новые тренды (например, доставка)

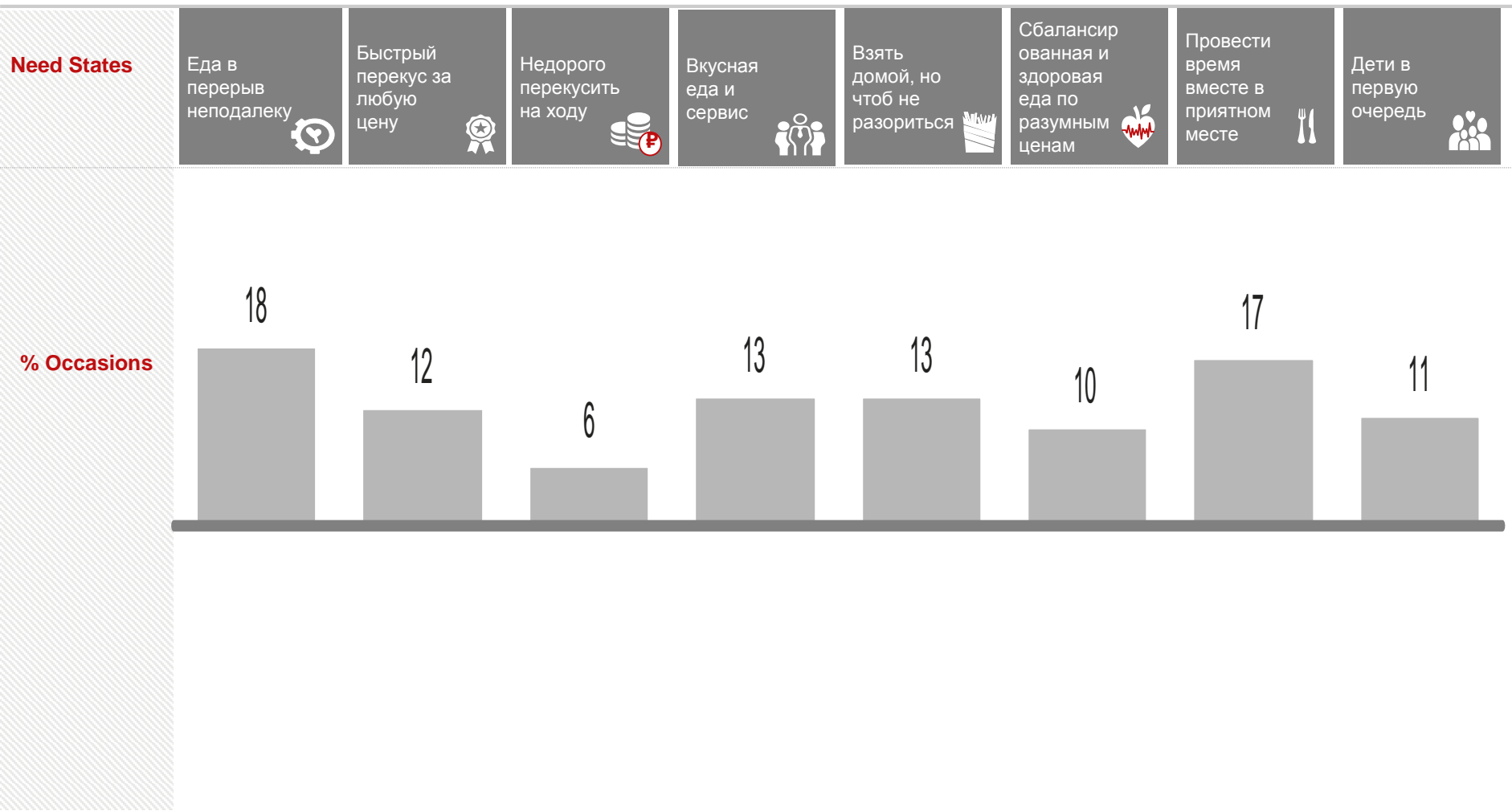
3

Фокус на действия

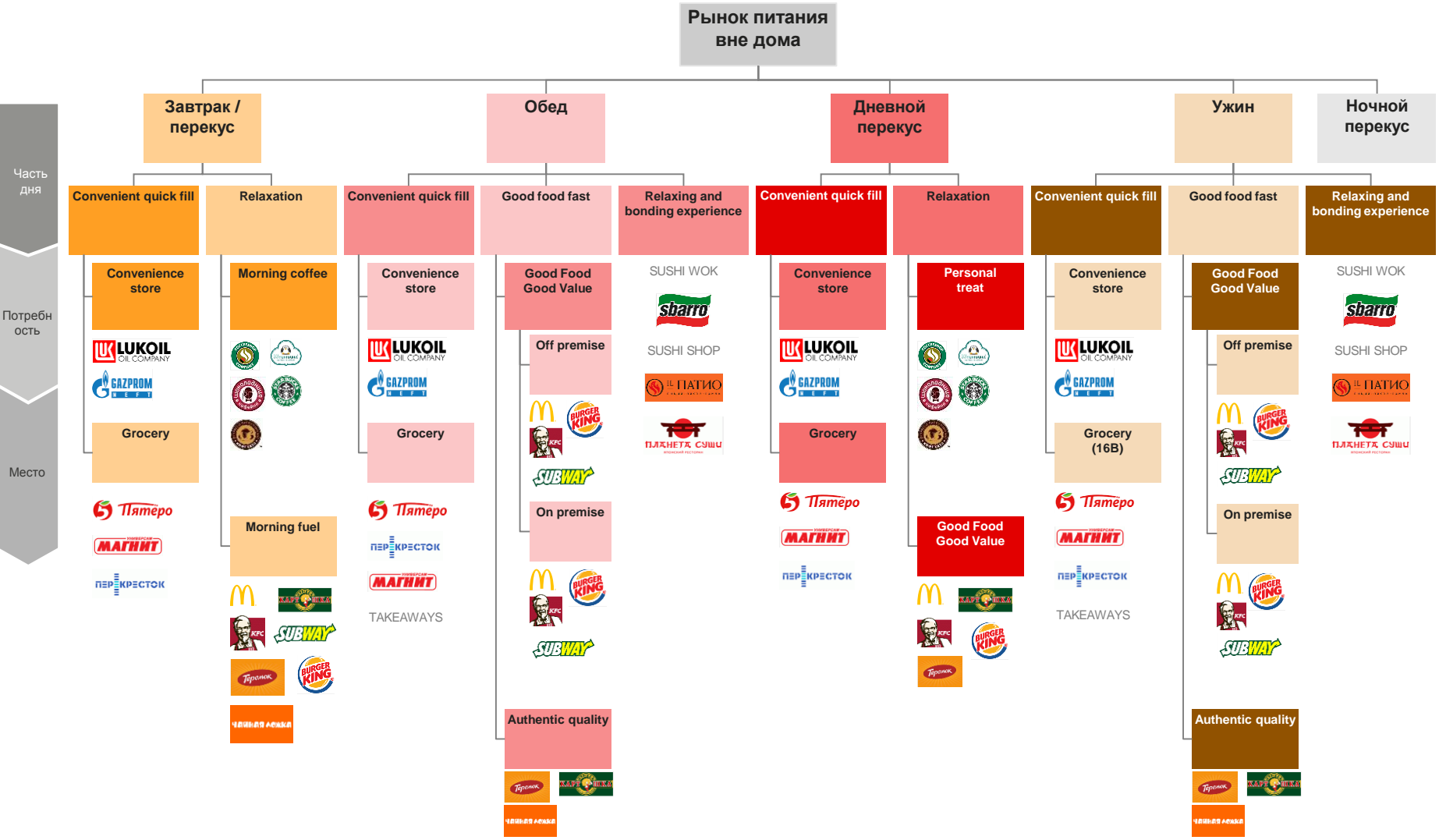
Рабочие стратегии для обеспечения роста, а не просто теоретические находка и серии «неплохо бы знать»



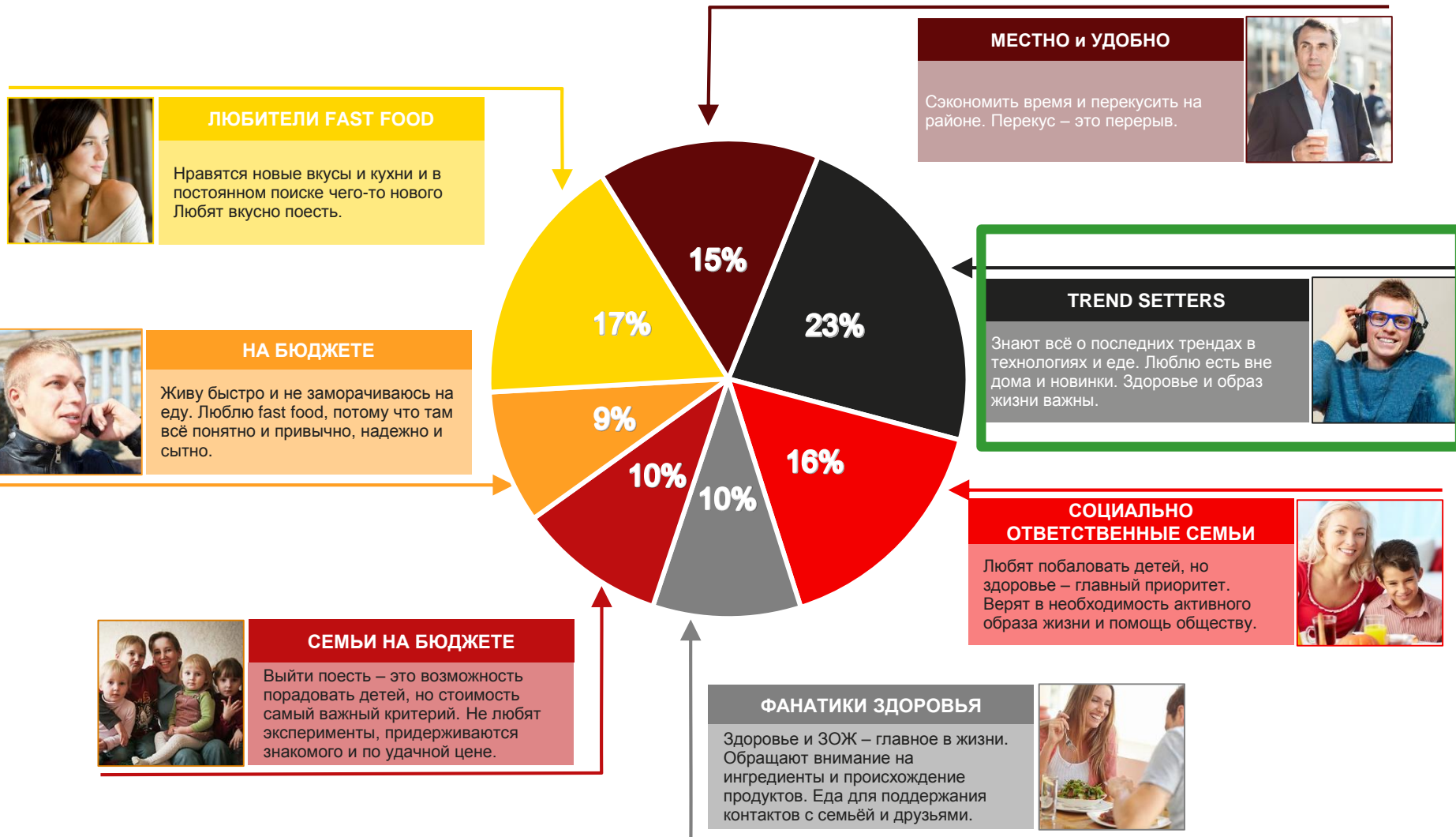
Текущие потребности (need states) в питании вне дома










Карта рынка










7 сегментов



7 сегментов: детали

						
BUDGET BASICS	FAST FOOD LOVERS	TREND SETTERS	SOCIALLY CONSCIOUS FAMILIES	BUDGET-ORIENTED FAMILIES	LOCAL CONVENIENCE SEEKERS	HEALTH FANATICS
Segment Headlines <ul style="list-style-type: none">• Value fast food and its consistent and familiar tastes• Don't think too much about food or nutritional profile – it just needs to be tasty and filling• Lead a hectic, dynamic lifestyle and is a thrill seeker, preferring change over routine• Often eat on the go and values convenience	Segment Headlines <ul style="list-style-type: none">• Enthusiastic about all types of food• Place high importance on the dining experience (ambiance, environment, etc.)• Often go to trendy new places• Friends and family often ask for opinions on places to eat• Willing to spend money on food they enjoy• Spend time with family/friends during meals	Segment Headlines <ul style="list-style-type: none">• Prefer to buy organic, locally sourced foods• Adopt new super foods into diet• Eat healthy and exercises often• Consider themselves foodies and like visiting trendy restaurants• Quick adopters of new technology• Want to live a lifestyle that impresses others	Segment Headlines <ul style="list-style-type: none">• Goes out to eat to treat their children• High focus on health, wellness, and exercise• Faith and spirituality plays a large role• Highly committed to the local community – volunteer and patronize brands that give back• Prefer to buy organic, locally sourced foods	Segment Headlines <ul style="list-style-type: none">• Goes out to eat to treat their children• Budget conscious• Consider themselves uncomplicated• Don't invest much time or thought into food• Prefer to not eat fast food• Prioritize spending time with family• Seek familiar tastes and flavors	Segment Headlines <ul style="list-style-type: none">• High focus on saving time and convenience• Prefer to get in and out quickly when buying food• Usually seek familiar tastes – stick to a routine• Prefer to not eat fast food• Budget conscious and chooses price over brand	Segment Headlines <ul style="list-style-type: none">• Have a holistic view toward wellness/ well-being, including health, exercise, and diet• Willing to spend more on foods with clean ingredients and higher quality• Like to socialize when eating out• Place high importance on atmosphere, ambiance, and service• Prefer to not eat fast food
Segment Size: 9% McD Pref Index: 111	Segment Size: 17% McD Pref Index: 114	Segment Size: 23% McD Pref Index: 106	Segment Size: 16% McD Pref Index: 109	Segment Size: 10% McD Pref Index: 113	Segment Size: 15% McD Pref Index: 84	Segment Size: 10% McD Pref Index: 51

7 сегментов: демография

						
BUDGET BASICS	FAST FOOD LOVERS	TREND SETTERS	SOCIALLY CONSCIOUS FAMILIES	BUDGET-ORIENTED FAMILIES	LOCAL CONVENIENCE SEEKERS	HEALTH FANATICS
Segment Demos • Avg. Age: 32 • Income: ₽56k • Location:	Segment Demos • Avg. Age: 33 • Income: ₽65k • Location:	Segment Demos • Avg. Age: 36 • Income: ₽64k • Location:	Segment Demos • Avg. Age: 40 • Income: ₽71k • Location:	Segment Demos • Avg. Age: 41 • Income: ₽59K • Location:	Segment Demos • Avg. Age: 38 • Income: ₽55k • Location:	Segment Demos • Avg. Age: 43 • Income: ₽56k • Location:
Urban 89%, Suburban 9%, Rural 3% • Kids in HH: 34% • Life Stage: Millennials 61%, Gen X 29%, Boomers 10%	Urban 90%, Suburban 6%, Rural 4% • Kids in HH: 53% • Life Stage: Millennials 59%, Gen X 31%, Boomers 10%	Urban 89%, Suburban 6%, Rural 5% • Kids in HH: 51% • Life Stage: Millennials 51%, Gen X 32%, Boomers 18%	Urban 88%, Suburban 6%, Rural 6% • Kids in HH: 89% • Life Stage: Millennials 30%, Gen X 53%, Boomers 17%	Urban 88%, Suburban 7%, Rural 6% • Kids in HH: 88% • Life Stage: Millennials 25%, Gen X 58%, Boomers 17%	Urban 90%, Suburban 5%, Rural 5% • Kids in HH: 38% • Life Stage: Millennials 43%, Gen X 33%, Boomers 24%	Urban 88%, Suburban 7%, Rural 5% • Kids in HH: 36% • Life Stage: Millennials 29%, Gen X 33%, Boomers 38%
IEO Behavior • IEO Spend: ₽53,227 • Fast Food Share of Wallet: 30%	IEO Behavior • IEO Spend: ₽84,828 • Fast Food Share of Wallet: 26%	IEO Behavior • IEO Spend: ₽82,427 • Fast Food Share of Wallet: 23%	IEO Behavior • IEO Spend: ₽104,682 • Fast Food Share of Wallet: 23%	IEO Behavior • IEO Spend: ₽47,692 • Fast Food Share of Wallet: 29%	IEO Behavior • IEO Spend: ₽39,829 • Fast Food Share of Wallet: 19%	IEO Behavior • IEO Spend: ₽42,257 • Fast Food Share of Wallet: 11%
Segment Size: 9% McD Pref Index: 111	Segment Size: 17% McD Pref Index: 114	Segment Size: 23% McD Pref Index: 106	Segment Size: 16% McD Pref Index: 109	Segment Size: 10% McD Pref Index: 113	Segment Size: 15% McD Pref Index: 84	Segment Size: 10% McD Pref Index: 51

Драйверы визитов



BUDGET BASICS



FAST FOOD LOVERS



TREND SETTERS



SOCIALLY CONSCIOUS FAMILIES



BUDGET-ORIENTED FAMILIES










LOCAL CONVENIENCE SEEKERS



HEALTH FANATICS

Top IEO Purchase Drivers	To satisfy hunger	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	Delicious foods/beverages	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	Convenient location	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	To satisfy a craving	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	Choices in terms of what to eat/drink	<div></div>				<div></div>	<div></div>	<div></div>
	Wanted to relax		<div></div>	<div></div>				
	To bond with others							

Что может подстегнуть визиты

								
		BUDGET BASICS	FAST FOOD LOVERS	TREND SETTERS	SOCIALLY CONSCIOUS FAMILIES	BUDGET-ORIENTED FAMILIES	LOCAL CONVENIENCE SEEKERS	HEALTH FANATICS
Top Ways To Encourage More McD Visits	Lower prices	●	●	●	●	●	●	●
	New menu items	●	●	●	●	●	●	●
	Healthier menu items for adults	●	●	●	●	●	●	●
	New value menus	●	●	●		●	●	
	Healthier menu items for kids				●	●		
	More deals/coupons	●	○					
	More dessert options				○			
	More side dish options			○				
	Local sourcing of ingredients							○
	Nothing						○	●
Other Differentiated Ways To Encourage More Frequent McD Visits				Better interior		Digital ordering/paying		
				Ability to customize my food				
				More bakery options				

Тестирование стратегических концепций



BUDGET BASICS



TREND SETTERS



SOCIALLY CONSCIOUS FAMILIES



BUDGET-ORIENTED FAMILIES



LOCAL CONVENIENCE SEEKERS



HEALTH FANATICS

Health Benefits Wanted	Natural		43%	48%	52%	40%	40%	57%
	GMO free		36%	42%	47%			49%
	Hormone free							36%
	Antibiotic free							35%
Health Benefits Willing to Pay More For	Natural			39%	42%			46%
Concept Purchase Interest (T2B)	Concept 1	42%	45%	34%	46%	38%	31%	22%
	Concept 2	35%	55%	51%	51%	23%	26%	16%
	Concept 3	26%	44%	50%	42%	24%	21%	21%
	Concept 4	21%	37%	39%	41%	23%	16%	6%
	Concept 5	23%	51%	42%	44%	33%	23%	15%

Only health benefits that had a rating of 35% or higher shown
Highlighting on concept ratings indicate high interest vs. the overall sample (index of 120 or higher) or low interest vs. the overall sample (index less than 80)



Выводы

- 1) Важные сегменты vs. не важные
- 2) Общие драйверы
- 3) Общие подходы к улучшению и развитию
- 4) Наиболее подходящие стратегические концепции



Распределение ресурсов

Рост продаж

Лучший возврат на
инвестиции

Вопросы и дискуссия