

**Jak wygrać
uwagę shopperów
przy półce?**

**Czego oczekują w
kontekście ESG?**

Inspiracje i analizy
Kantar Polska

13.03.2024

The background of the slide features a large, glowing circular shape composed of many small, colorful dots (orange, yellow, and blue) against a dark background. The word "KANTAR" is written in white, bold, uppercase letters across the center of this circular shape. The letter "K" is stylized with a vertical bar to its left.

KANTAR

Dzień dobry!



Katarzyna Zalewska
HEAD OF SUSTAINABILITY
EXPERTISE



Piotr Ciąćka
CLIENT BUSINESS & KANTAR
PARTNERSHIP DIRECTOR

#1

**presja konsumencka
w kontekście ESG**

#2

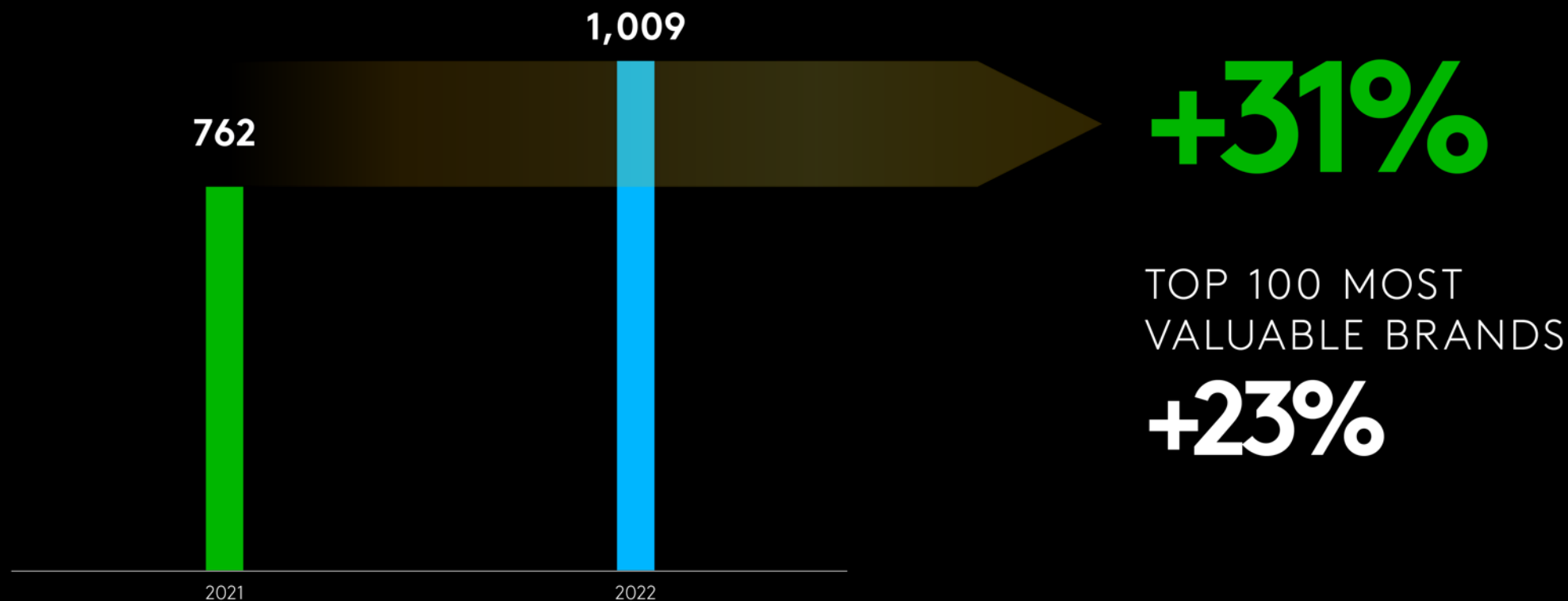
**realne wyzwanie: chwila
prawdy przy półce**

A close-up photograph of a metal pipe dripping water into a pool of water. The pipe is angled downwards from the top right, and a single drop of water is captured mid-fall, just above the surface of the water. The water surface is dark and shows concentric ripples from the falling drop. In the background, there are blurred green leaves, suggesting an outdoor setting. A white rectangular frame is superimposed over the center of the image, containing the text.

Dlaczego warto?

Marki, które uzyskały wysokie wyniki w rankingu BrandZ Sustainability Index zanotowały łączny wzrost wartości o 31% w porównaniu do roku 2021 – to więcej niż średnia dla Top 100 marek.

Total Brand Value (\$bn)



“

Information is
endlessly available
to us; where shall
wisdom be found?

Harold Bloom
„How to read and why“, 2001

KANTAR

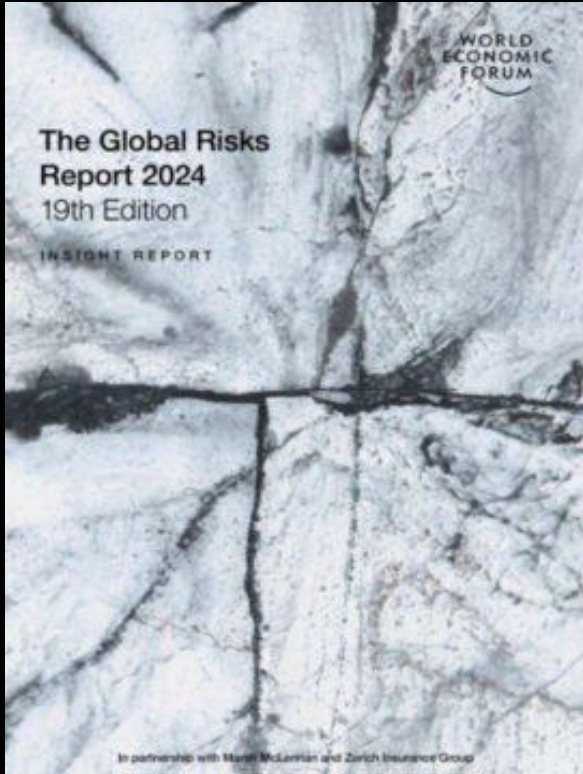


INSIGHT

(wgląd, spostrzeżenie, obserwacja)

POLARYZACJA POSTAW





Global risks ranked by severity over the short and long term

"Please estimate the likely impact (severity) of the following risks over a 2-year and 10-year period."

2 years



10 years



Source

World Economic Forum Global Risks
Perception Survey 2023-2024.

<https://weforum.org/publications/global-risks-report-2024/>



ACTIVES



CONSIDERERS

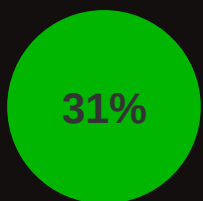


BELIEVERS

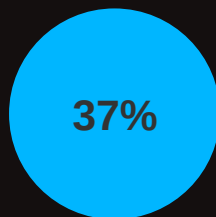


DISMISSERS

Polska
2023



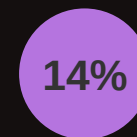
+6 pp.



-7 pp.

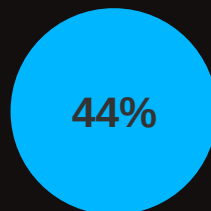
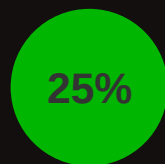


-7 pp.



+9 pp.

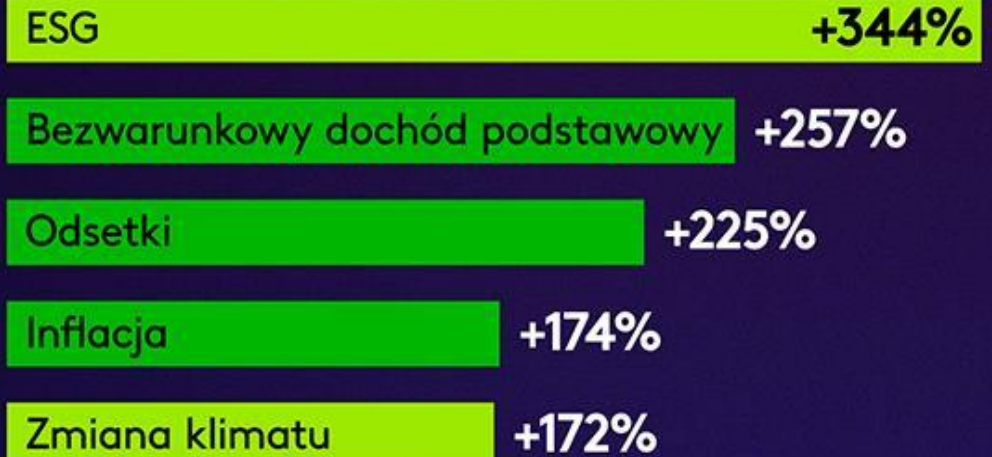
Polska
2022



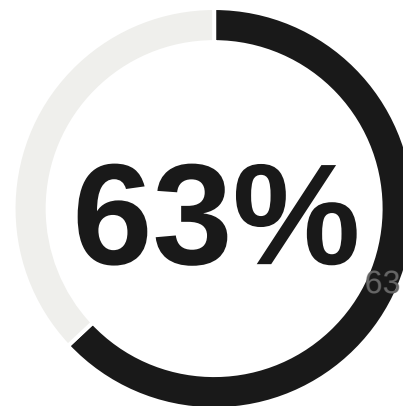
ROSNAĆE OCZEKIWANIA

ESG

TOP5 tematów dla Polski o najwyższej dynamice wzrostu (w ujęciu długoterminowym)



Czujni!



zwraca **dużą uwagę** na kwestie
środowiskowe i społeczne poruszane
w serwisach informacyjnych

Nieufni...



GLOBAL

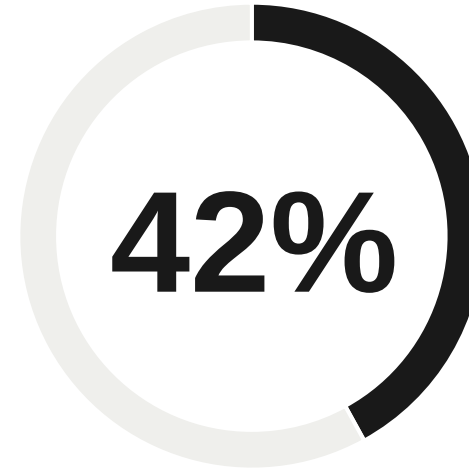
59%



POLSKA

65%

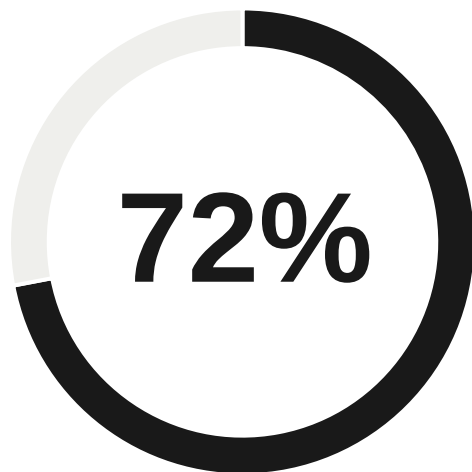
ma obawy, że marki angażują się w sprawy społeczne lub środowiskowe **wyłącznie ze względów komercyjnych**



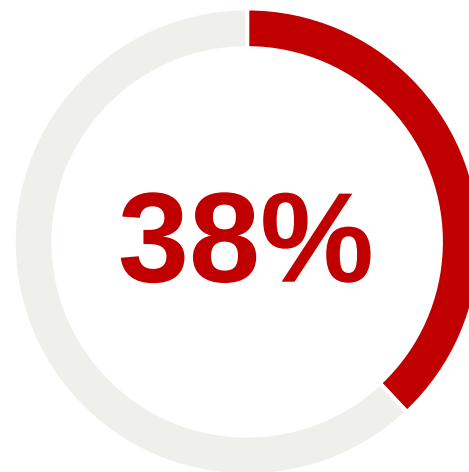
Polek i Polaków twierdzi, że widział(a) lub słyszał(a) **falszywe lub wprowadzające w błąd informacje** o działaniach podejmowanych przez marki w kontekście zrównoważonego rozwoju

CHEĆCI A DECYZJE ZAKUPOWE

Istnieje pewna rozbieżność między tym, co mówią konsumenci, a tym, jak się zachowują



Ludzie tacy jak ja **powinni robić wszystko, co możliwe**, aby przeciwdziałać katastrofie klimatycznej



Jestem gotowy(a) **zainwestować czas i pieniądze**, aby wspierać firmy, które próbują postępować właściwie



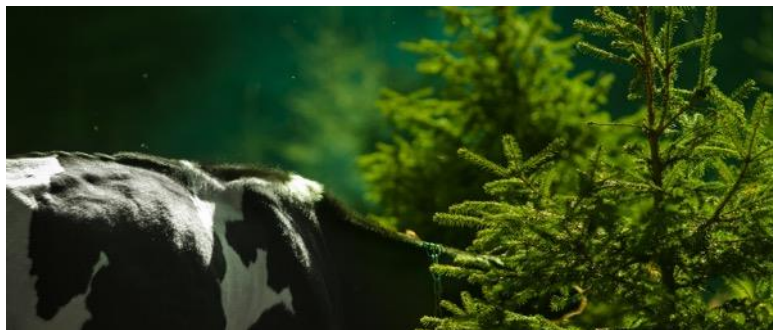
80%

Polaków dostrzega i oczekuje
rozwiązania przez firmy konkretnych
wyzwań ZR w kategoriach

21%

aktywnie zmienia swoje zachowania
(zakupowe) w danej kategorii
produktów lub usług

ESG a bariery shopperów „przy półce”



ŚWIADOMOŚĆ

(odpowiedzialność)

56%

Bardzo trudno jest stwierdzić, które produkty lub usługi **są dobre lub złe z punktu widzenia etyki** albo dla środowiska



WYGODA

(w tym: dostępność)

37%

Nie wiem, **gdzie szukać zrównoważonych/ etycznych** produktów lub usług



CENA

(percepcja kosztów)

75%

Produkty i usługi, które są lepsze dla środowiska i/lub społeczeństwa, **są droższe**

How to Win at the Point of Sale



Communication clutter vs. perception capabilities



Average Gaze
Duration per POS
Item (seconds)

0,25s



% POSM actually
noticed by individuals
in the average
grocery store

7%

3 stimuli

per second! **3000** different kinds of information
while shopping!



Perception drops off after 15 min
PERCEPTION of messages drops off after about
15 minutes after entering a store.



Humans are very inefficient at processing visual
information

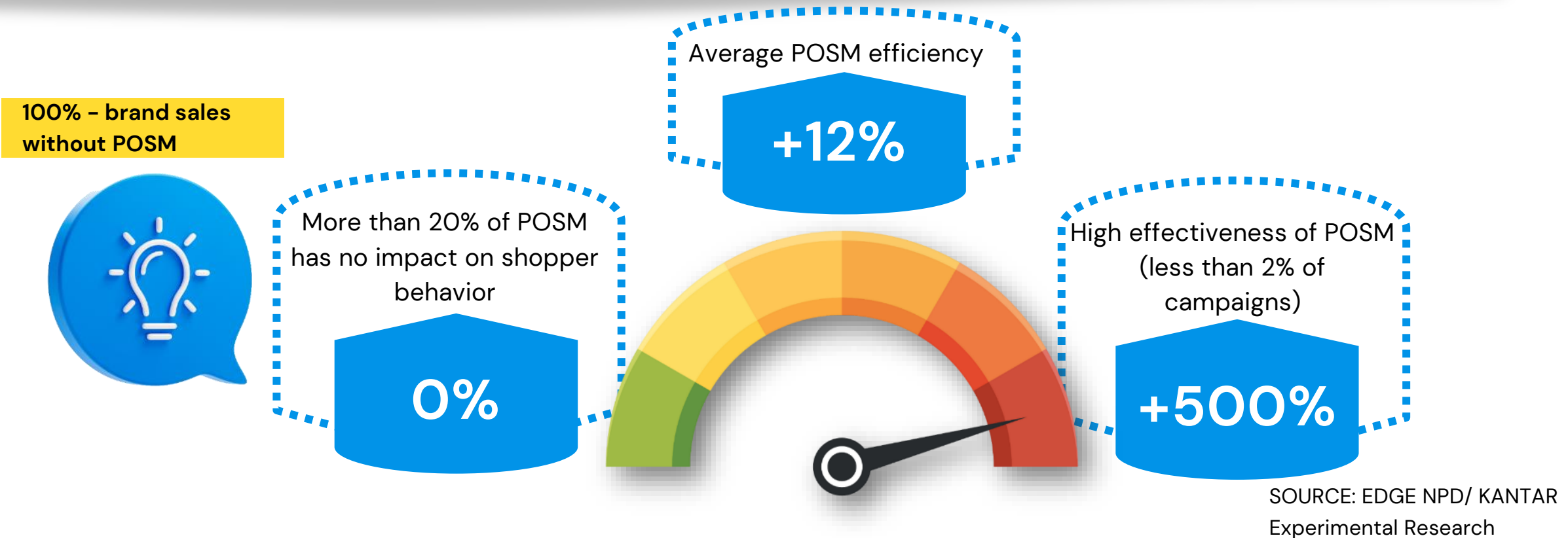
We deselect **99%** of visual information and only
process **5%** of the remaining 1%.



POSM effectiveness

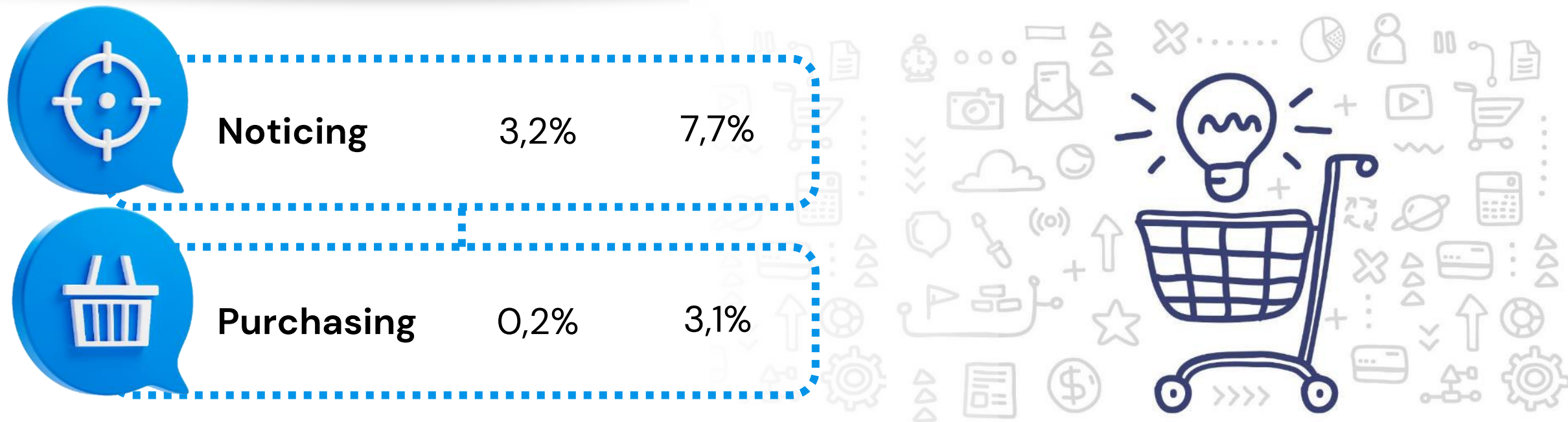
What does it take to have a positive ROI from a POSM campaign?

Experimental studies and observations related to the impact of POSM on product preferences show that **more than 50% of POSM campaigns are unlikely to have a positive ROI** (sales yield vs. POSM campaign costs)



POSM effectiveness

The effectiveness of different types of display and types of shopping spaces vary: research results show that POSM notice can vary between 2-8% and final purchase is made by 0-5% of buyer traffic.



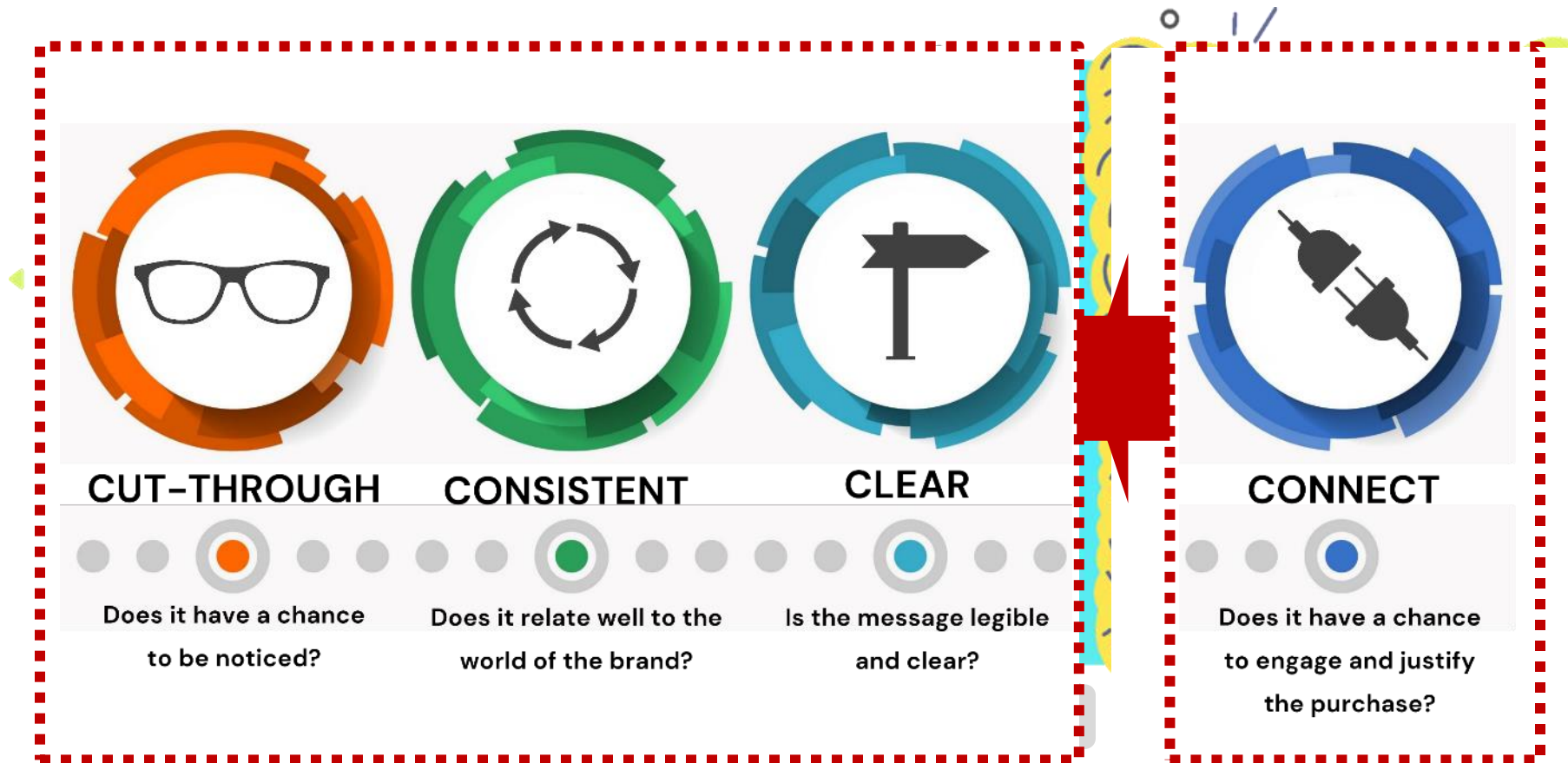
SOURCE: EDGE NPD/ KANTAR
Experimental Research

4C Framework of POSM Evaluation



4C Framework of POSM Evaluation

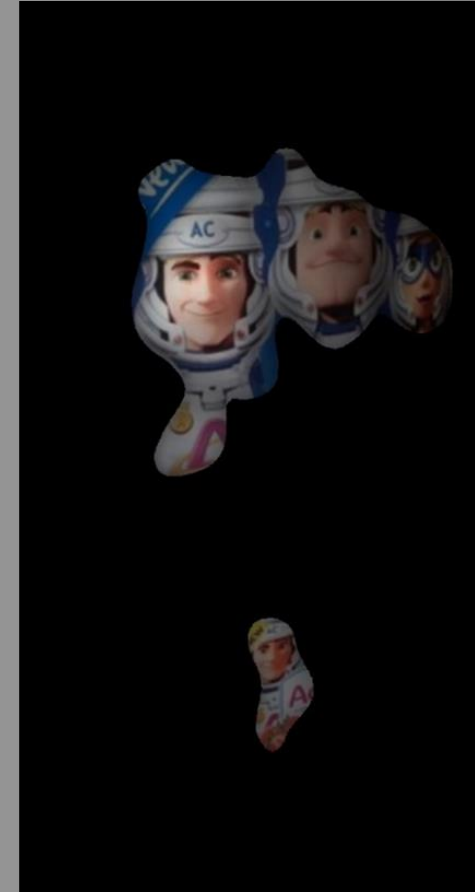
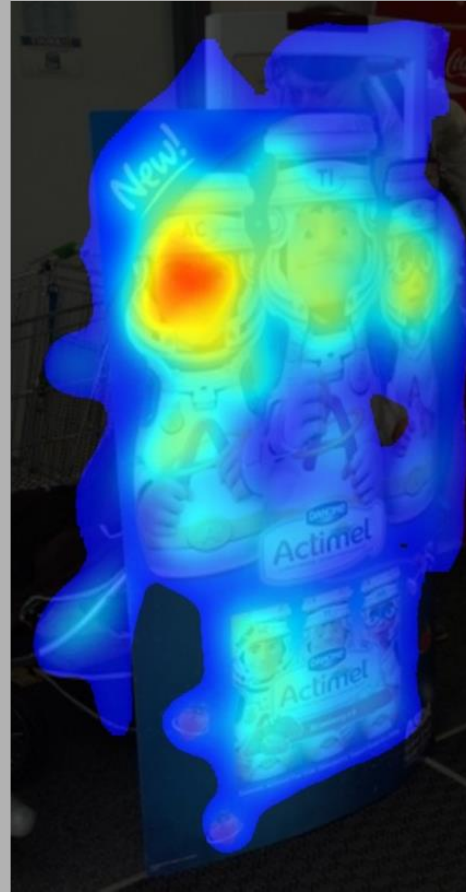
Key questions



Cut-Through: guidelines

The Art of Standing Out

Role of Faces



Consistent: guidelines

Leveraging Brand Symbols and Colors for Effective Messaging

These examples illustrate the importance of POSM being recognizable and consistent with the brand's iconography. The shopper will immediately link these POSM to the brand.



Consistent

Leveraging Brand Symbols and Colors for Effective Messaging



These companies have spent billions of dollars to make buyers' brain reaction spot-
on

Consistent: guidelines

Leveraging Brand Symbols and Colors for Effective Messaging

POSM at off-trade



POSM targeted

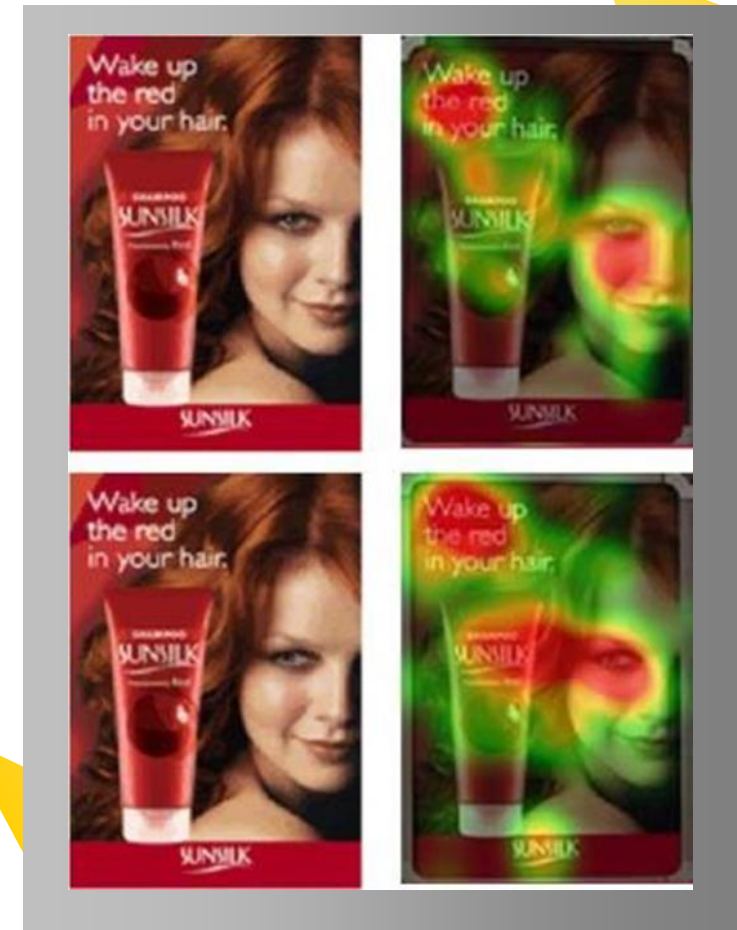
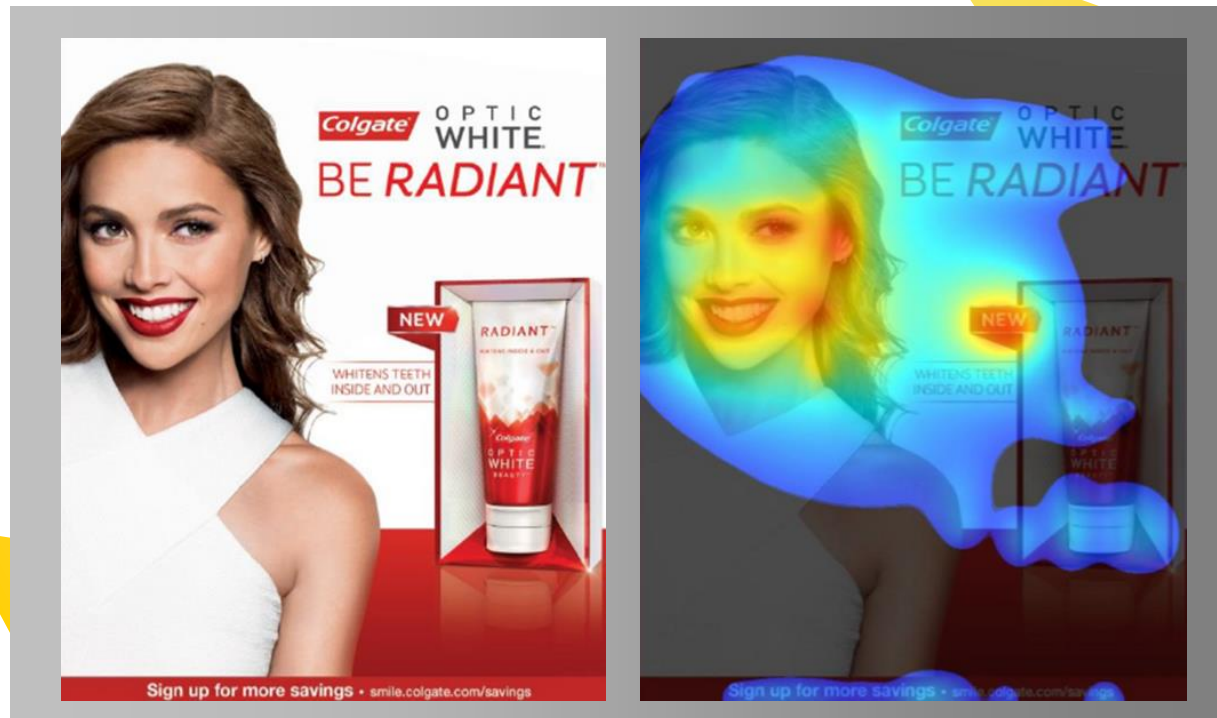


- Greater visibility for promotions
- Increased sales

Clear: guidelines

Maximizing Impact with Simple Messaging

Using faces to navigate buyers' gaze



Connect: guidelines

Persuade and Motivate Shoppers to Buy

These examples illustrate POSM that emotionally connect and support building the brand storytelling. The shopper will feel good and emotionally connected to the brand.

POSM Displays



Showing lifestyle and enjoyment with the brand increases emotional connection



Packaging



4C Evaluation Example



SCORE VS EUROPE OFF-TRADE
BENCHMARKS

Overall score	95%	✓
Cut-Through	80%	
Consistency	100%	
Clear	78%	
Connecting	99%	

Areas for
improvement

- Product visibility
- Text message complexity (number of words)



Visible claim

Clear layout

Consistent with the brand's colors

Very good visibility of logo on the side



SCORE VS EUROPE OFF-TRADE
BENCHMARKS

Overall score	22%
Cut-Through	66%
Consistency	5%
Clear	85%
Connecting	1%

Areas for improvement

- Long distance visibility
- Overall brand identification
- Text message complexity
(number of words)



SCORE VS EUROPE OFF-TRADE
BENCHMARKS

Overall score	32%
Cut-Through	73%
Consistency	5%
Clear	19%
Connecting	96%

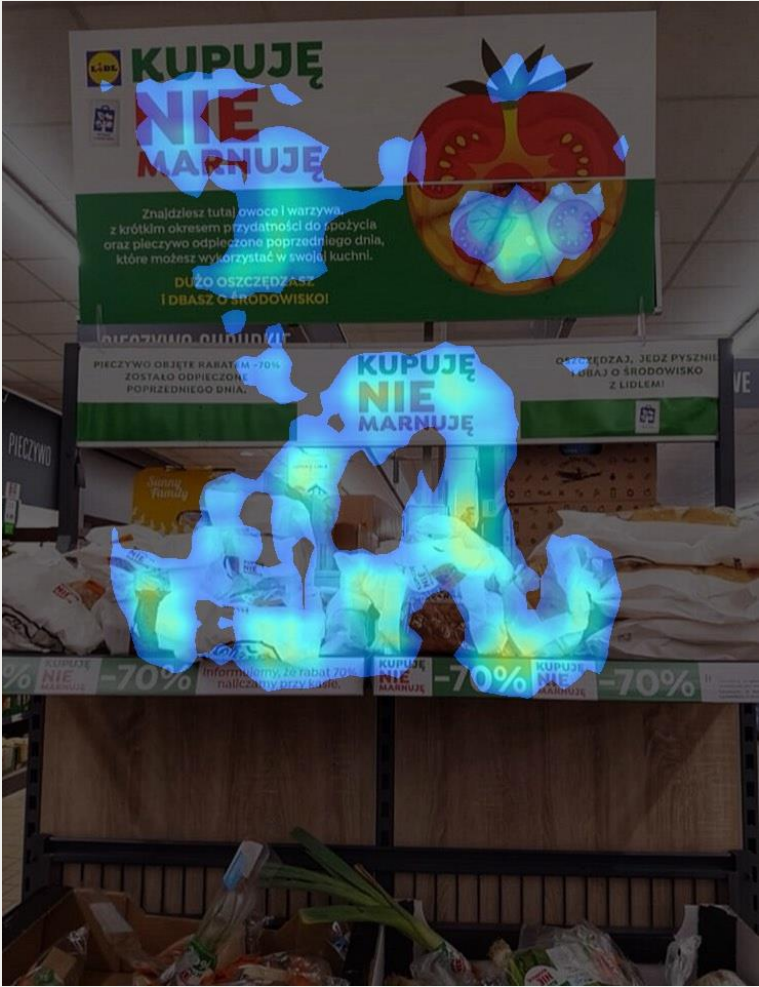
Areas for improvement

- Text message complexity
(number of words)
- Lack of dominating visual
element

Call-to-action

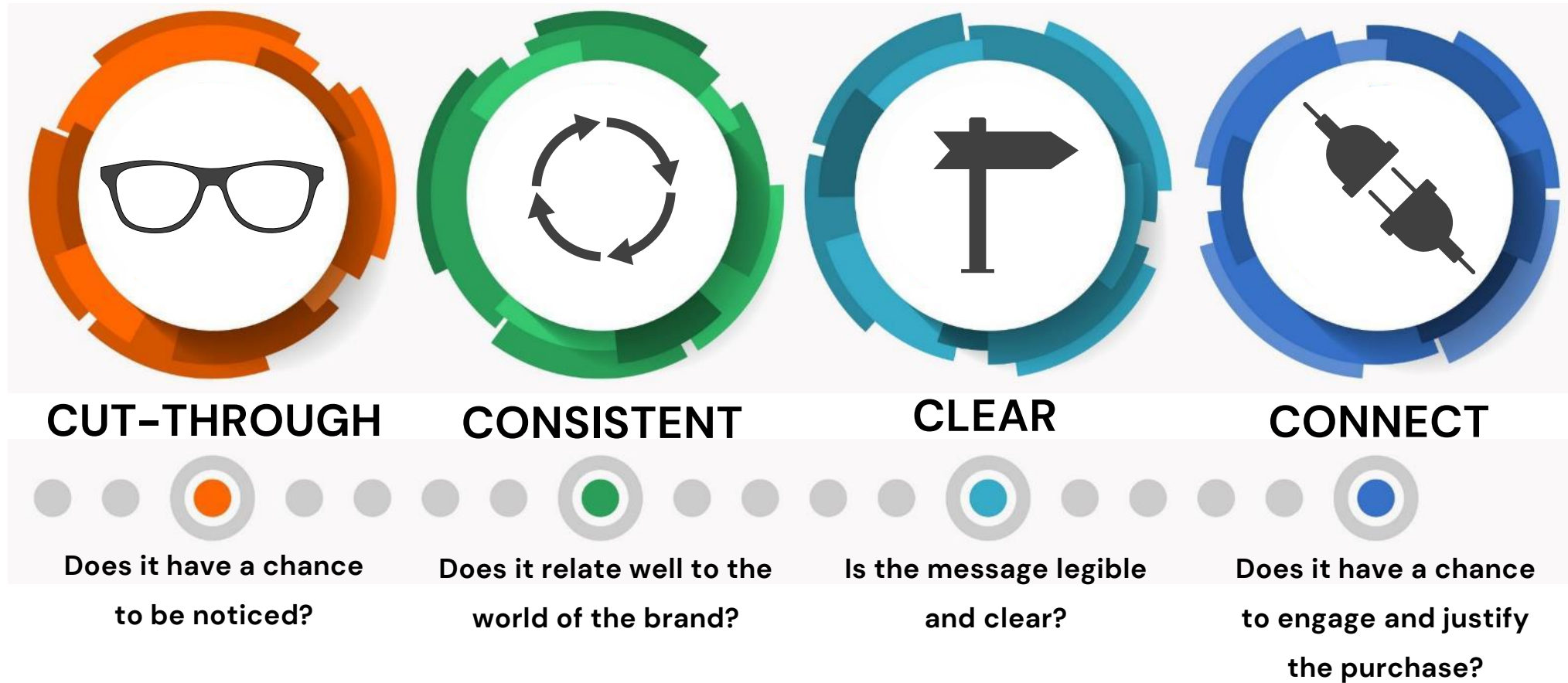


Suggestive visuals that promise the experience associated with the consumption of the product and provide a good rationale for the purchase.



4C Framework of POSM Evaluation

Key questions



DZIĘKUJEMY!

KANTAR

Katarzyna Zalewska
Piotr Ciąćka

KANTAR POLSKA