



# Consumer Behaviour Analysis on **GREENFIELDS**

# Today's Agenda

Points for discussion



- 01 Introduction

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- 02 Qualitative Research

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- 03 Quantitative Research

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- 04 Recommendations

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- 05 Conclusion



# Introduction

Company Background  
Industry Trends  
Competitor Analysis  
Strengths & Weaknesses  
Retail Store Visits





# Who is Greenfields?

## Company Background



**Founded in 1997 and based in Malang, Indonesia**



**Market leader in Indonesia and largest dairy company in SEA**



**Famous for its 100% natural fresh milk from farms**



**Operates a vertically integrated business model, controlling entire process from farm to shelf**



# Industry Trends

## Fresh Milk Industry in Singapore

### Rise in Health Consciousness

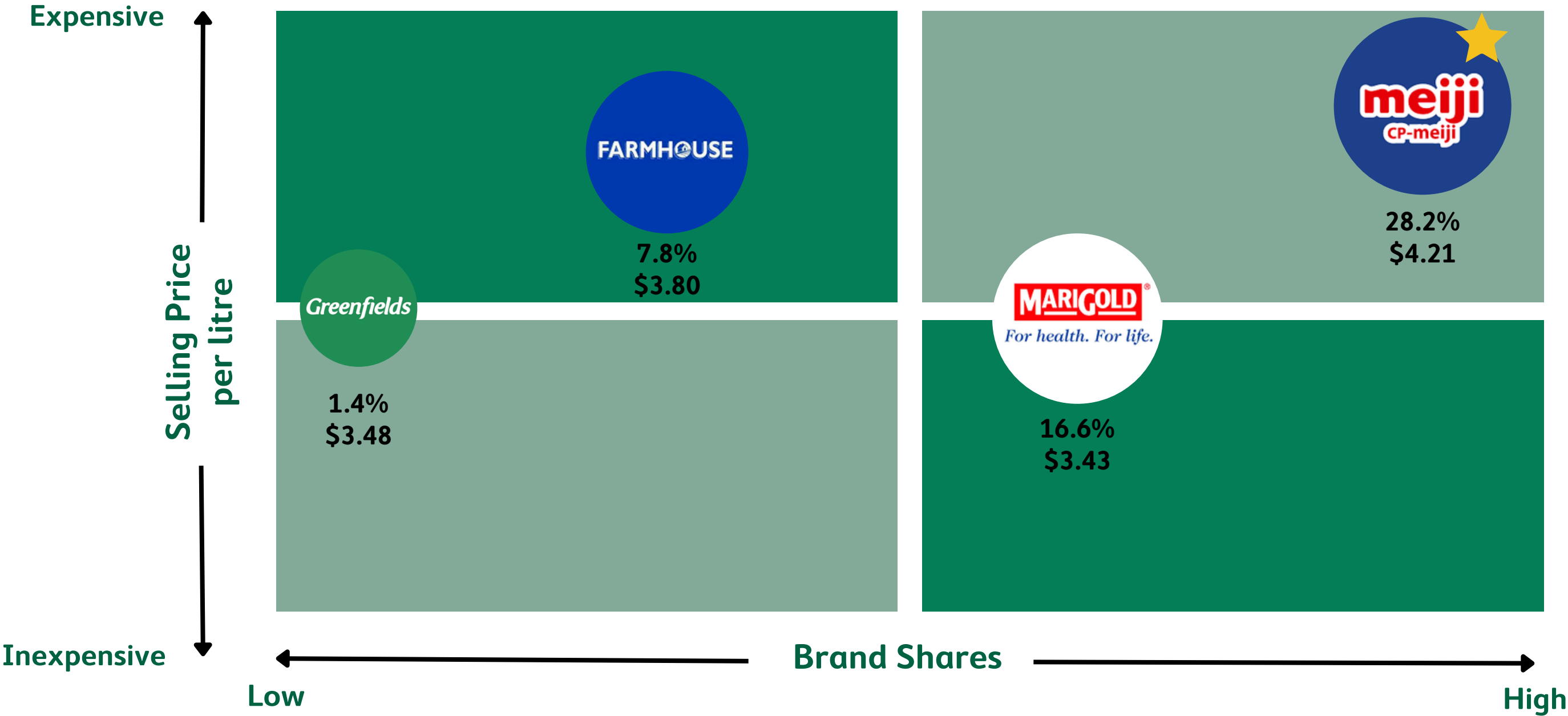
Consumers seeking for immune-boosting nutrients & gut health properties in fresh milk

Recent introduction to Nutri-Grade labelling further drives this

### Rise in Global Milk Output

Global output is expected to grow from 837 million tonnes in 2020 to 948 million tonnes in 2026

# Competitor Analysis



# Greenfields

## Strengths and Weaknesses



### Strengths

- Hygiene standards
- Loyal customer base in Indonesia
- Committed to producing high-quality fresh milk products



### Weaknesses

- Not as popular out of Indonesia
- Unable to keep up with demands for alternative milk flavours and sizes of packaging



# Retail Store Visits

We visited a total of 10 supermarkets in Singapore and had the following findings:

## Non-Ideal Placements

Placed closely with juices

High ratio of fresh milk to  
other milk types

Not at eye level & usually placed  
on higher shelves

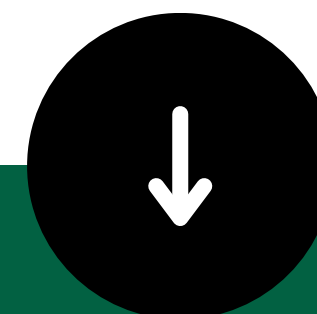
Domineering spread of 1.89L  
package sizes vs 1L package sizes





# Qualitative Research

Focus Group Interview  
Taste Test





# Focus Group

Who are our target segments?



Households **With** Children



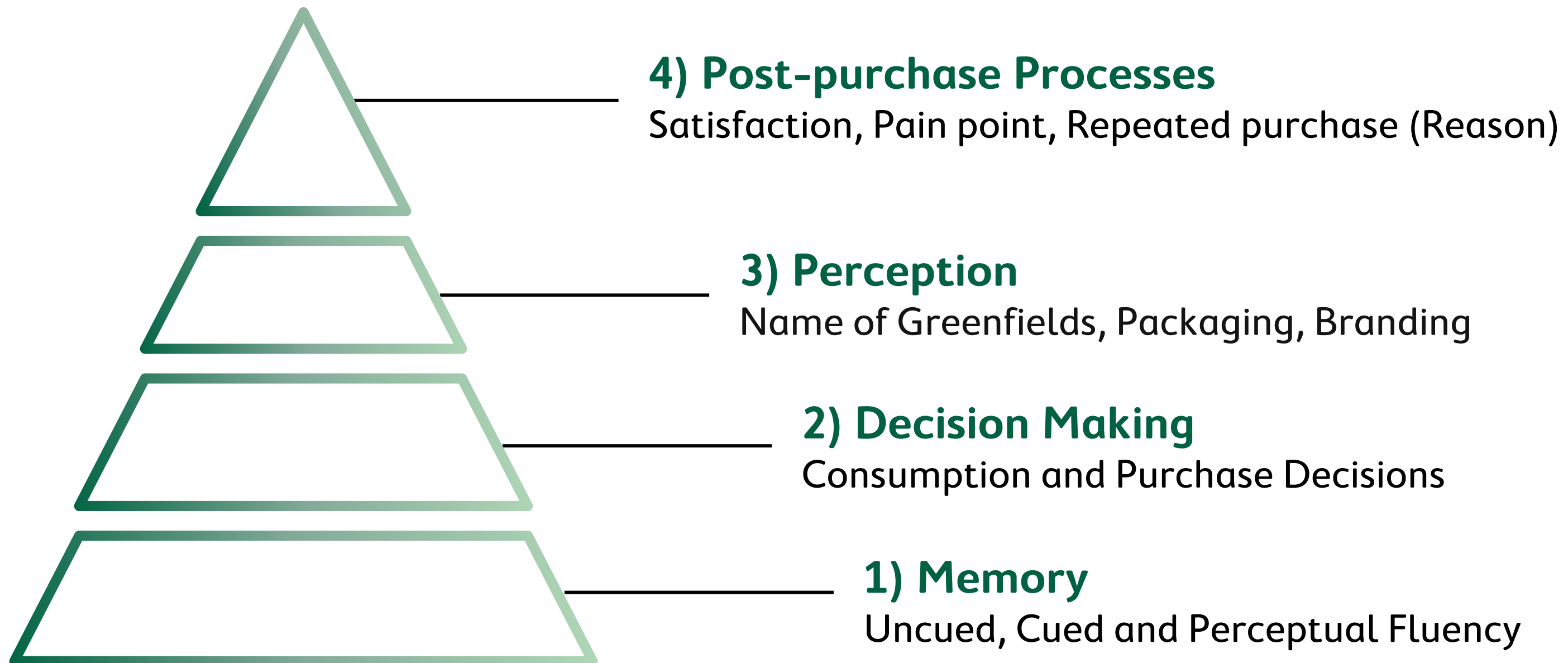
Households **Without** Children

## Demographic Segmentation

Head of households usually decide on which brand of milk to purchase, but may also be strongly influenced by their children's preferences



# Focus Group Questions



# Focus Group Findings



## Households With Children

- Generally buy for their children, not themselves
- Buys more frequently
- Considers taste, price, low-lactose and healthier options
- Common usages for milk are cereal and cooking
- All stick to 1 brand, buy based on family's taste preference & dietary needs



## Households Without Children

- Generally buy for themselves, not for others
- Buy less frequently
- Considers taste, price and low-lactose options
- Common usage for milk is to pair with drinks
- Majority don't stick to 1 brand, buy based on price

# Overarching Findings

## Focus Group Interview

**01**

### Children

Parents tend to buy milk simply because their children consumes the milk

**02**

### Price

Price point is a very important attribute that affects their decision making

**03**

### Habitual Buying

Assuming no sales promotion, they usually buy the brand they usually buy



# Hypotheses

Derived from Focus Group Interview

1

Greenfields does not have top of mind, uncued or cued recall among consumers.

2

There is a low trial rate for Greenfields among consumers.

3

Consumers have a perception that Greenfields is unattractive in terms of its taste.

# Taste Test



## Flavour

(1 - Unflavourful, 7 - Flavourful)



## Creaminess

(1 - Not creamy, 7 - Creamy)



# Quantitative Research

Qualtrics Survey Questionnaire





# Survey Questions

# 1

## Demographic

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- Age
- Gender
- No. of Children

# 2

## Memory

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- Top of Mind Recall
- Cued Recall
- Uncued Recall

# 3

## Attribute

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- Multi-Attribute Model
- What is anything you like/dislike about Greenfields

# 4

## Behaviour

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- Frequency of milk purchase
- How brand is chosen
- Type of milk consumed
- Packaging size
- Trial rate

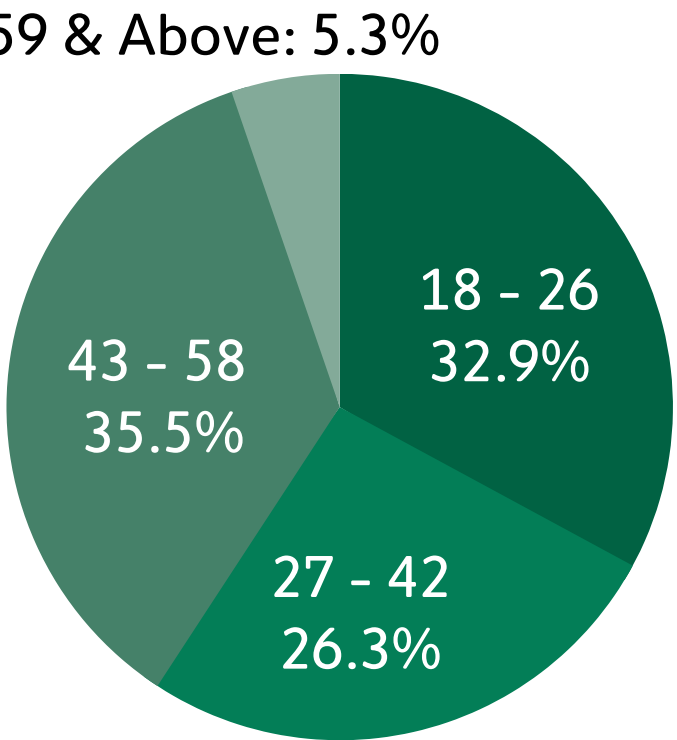
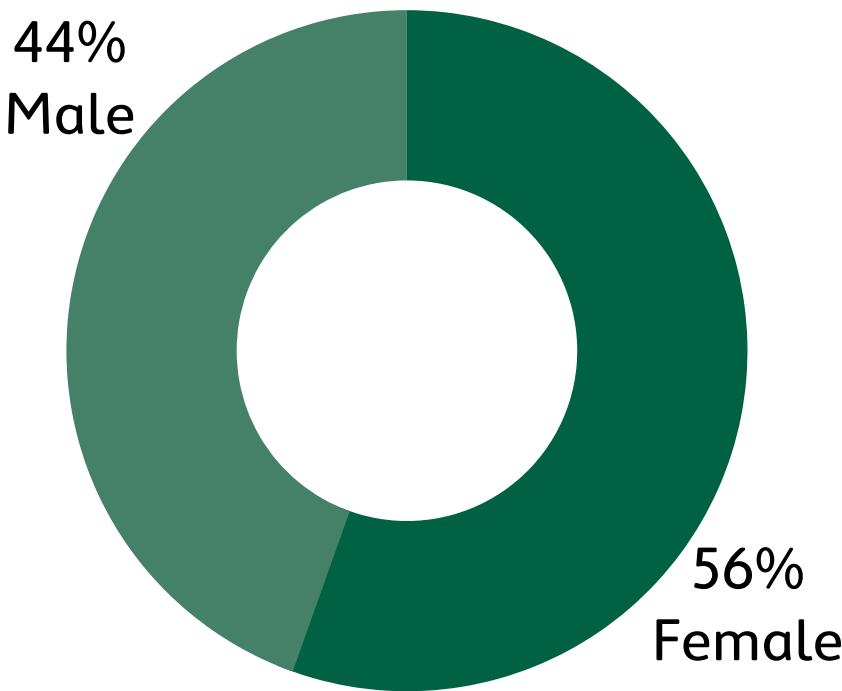
# Respondent Demographics

## Screenener Question:

Which of the following beverages have you purchased and consumed in the last month? Select all that apply.

Any respondent that did not check off the "Fresh Milk" category had their responses voided

76  
Respondents  
passed the screener



32  
Respondents  
are Parents

# Memory

1

## Top of Mind Recall and Uncued Recall

What brands of fresh milk have you heard of?

2

## Cued Recall

Other than the milk brands you have mentioned in the previous question, which of the following milk brands have you heard of before? Select all that apply

# Attitude

Please rate [Brand] on the following attributes.

Not Flavourful	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	Flavourful
Expensive	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	Inexpensive
Not Creamy	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	Creamy
Unhealthy	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	Healthy
Poor Brand Reputation	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	Good Brand Reputation
Unattractive Packaging	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	Attractive Packaging
Low Variety in Package Size	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	High Variety in Package Size

What, if anything, do you like/dislike about Greenfields?



# Shopping Behaviour

How frequently do you purchase milk?

More than once a week | Once a week | Once every 2 weeks | Once a month | Others

Which of the following best describes how you usually decide which brand of milk to purchase?

Always buy the same brand

Check the prices of the few flavoured brands, then pick cheapest among them

Pick among one of my few flavoured brands, switching back and forth between brands

Always buy the least expensive brand

Pick a different brand from the one I last used

Others

What brand(s) of milk do you usually purchase?

# Consumption Behaviour

Which of the following types of milk do you usually purchase?

Full Fat Milk | Low Fat Milk | Skim Milk | Flavoured Milk | Fresh Milk | Others

Which of the following package sizes do you usually buy?

200ML | 500ML | 1L | 2L

Which of the following brands have the type of milk/package sizes you selected above? Select all that apply.

Greenfields | Meiji | Farmhouse | Magnolia

Have you ever tried Greenfields Milk?

Yes | No

# Hypothesis 1

Greenfields does not have strong top of mind recall/uncued recall/cued recall among consumers



# Key Findings

## Hypothesis 1

01

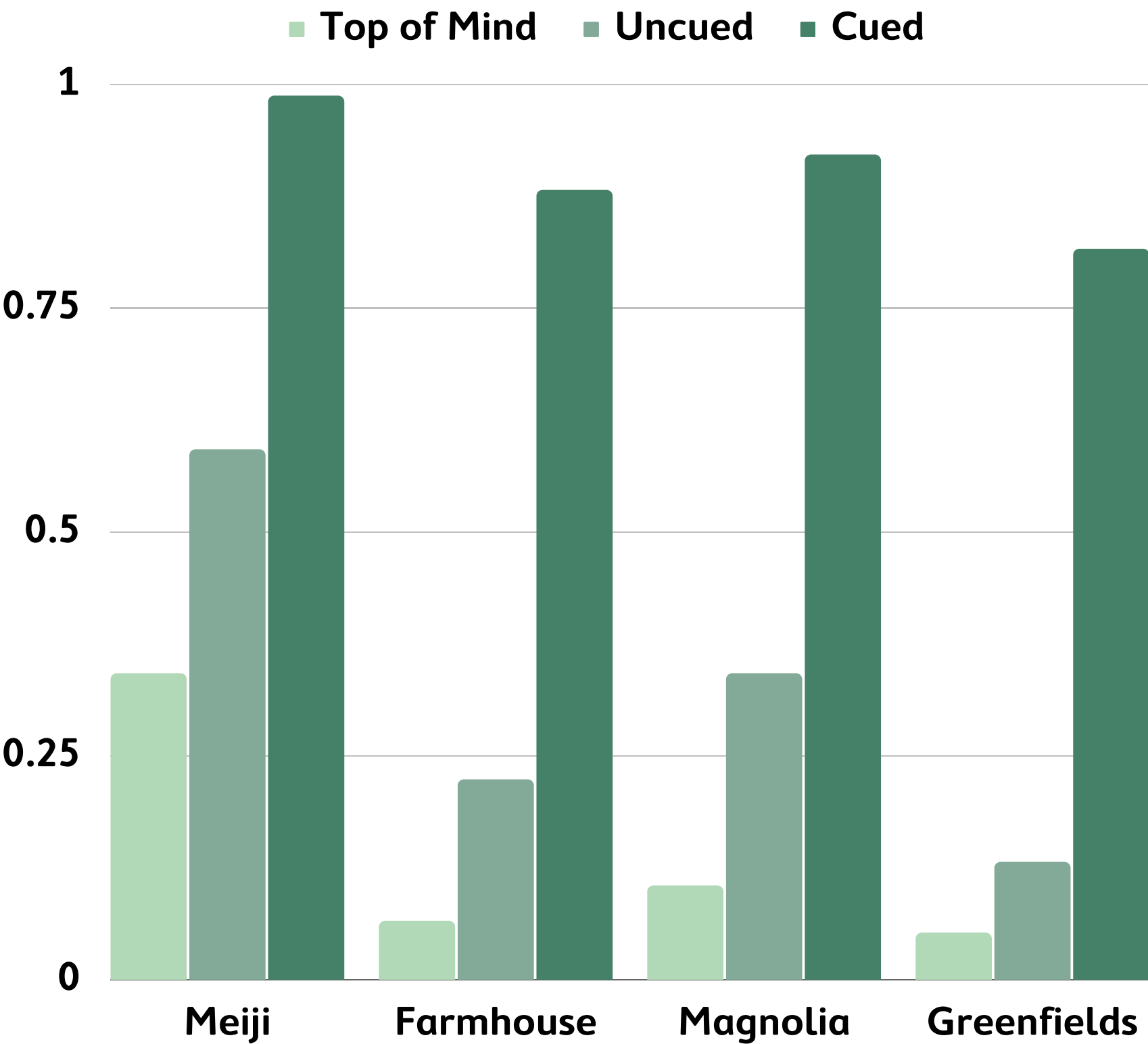
Top of Mind  
Meiji is the clear leader

02

Uncued  
Greenfields does not have sufficient recall in consumer's minds

03

Cued  
Several people have heard of Greenfields



# Implications

## Hypothesis 1

Greenfields does not have top of mind recall and uncued recall but have a strong enough cued recall among consumers

Issue: While consumers are aware of Greenfields, the ability to recall the brand without cues is not strong enough



Increasing exposure to Greenfields (Recirculation)

# Hypothesis 2

There is a low trial rate for Greenfields among consumers

# Key Findings

## Hypothesis 2

01

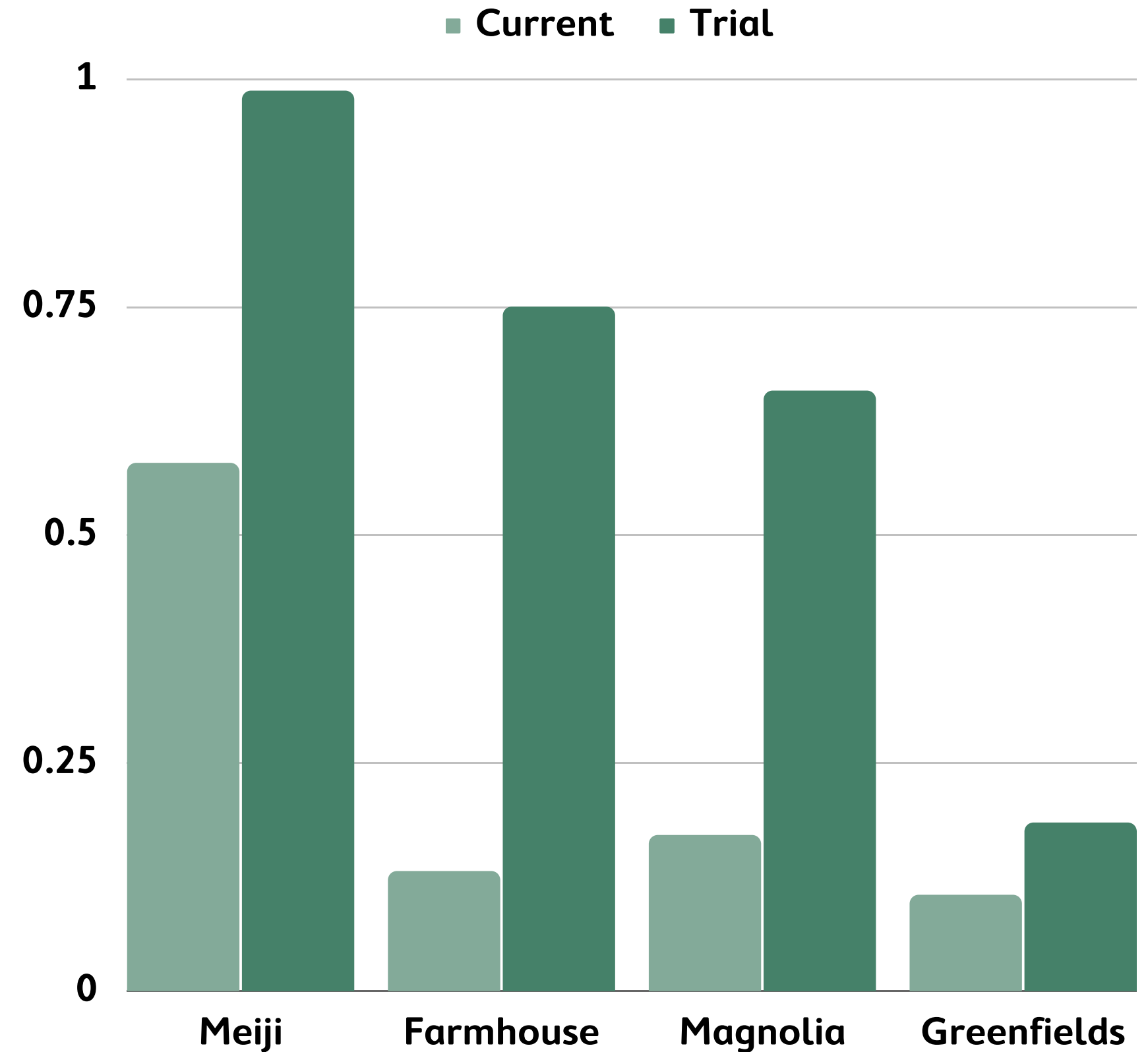
### Current Consumers

Only a small proportion of consumers are current users of Greenfields

02

### Trialed Consumers

Only a small proportion of consumers have tried Greenfields





# Key Findings

## Hypothesis 2

01

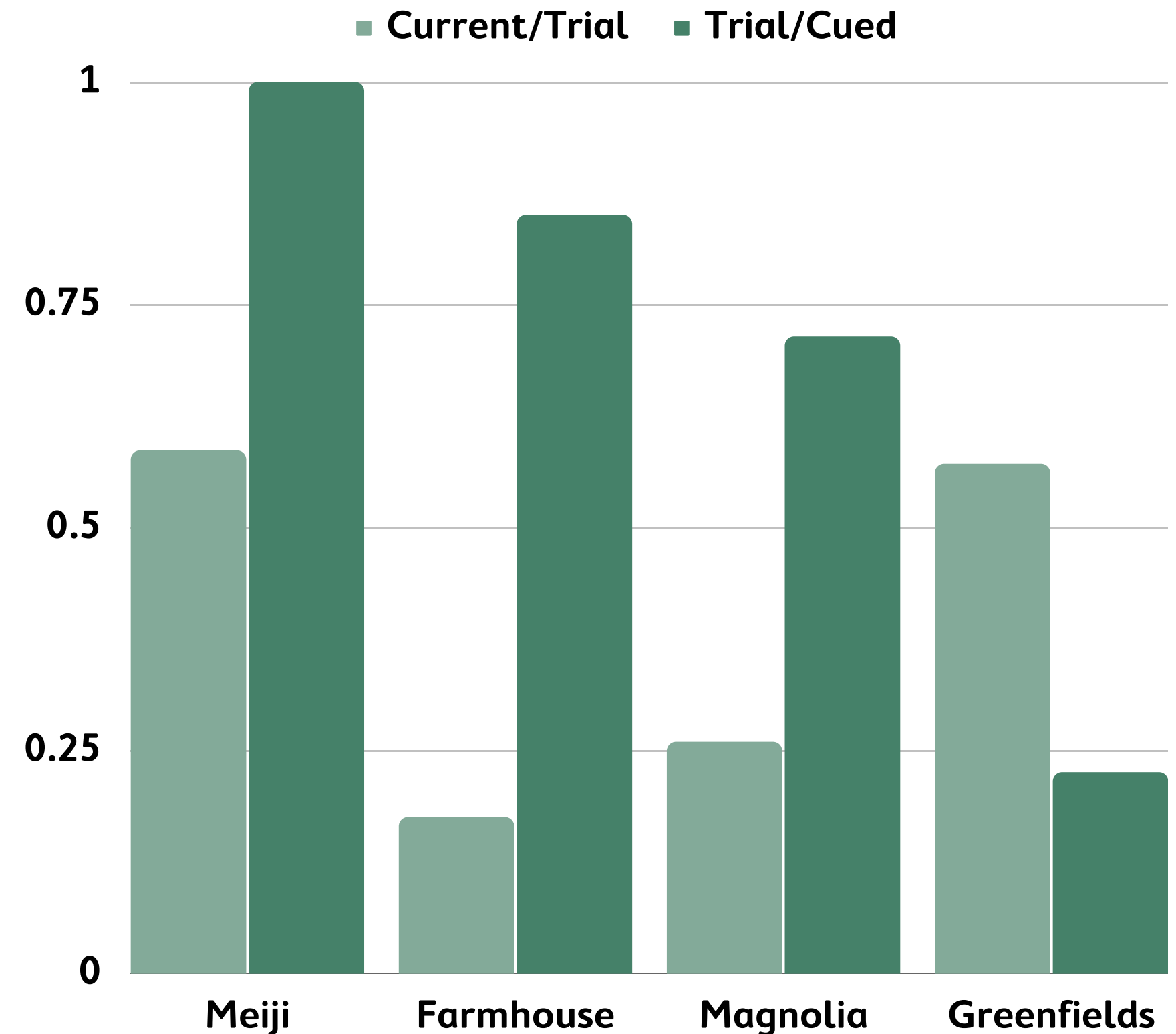
### Trial/Cued

Few who know about Greenfields have tried the brand

02

### Current/Trial

Many of those who tried greenfields continue to use greenfields



# Implications

## Hypothesis 2

There is a low trial rate for Greenfields among consumers who know about the brand

A huge percentage of consumers who have tried Greenfields, continued to patronise Greenfields



There is a need for consumer inertia for Greenfields

# Hypothesis 3

Consumers have a perception that Greenfields is  
unattractive in terms of its taste

# Key Findings

## Hypothesis 3

	<u>Flavour</u>	<u>Creaminess</u>	<u>Overall Rank</u>
Perceived	4	4	4
Actual	3	2	3



# Implications

## Hypothesis 3

There is a perception that Greenfields is unattractive in terms of its taste

**YET**

The taste test reveals that Greenfields is not as unattractive as it was perceived to be



There is a need to change consumers' perception of the taste of Greenfields milk

# Supplementary Findings

Wait, there's more?

# Key Findings

## Multi-Attribute Table

01

Price

Greenfields is ranked to be the most expensive brand

02

Variety of Size

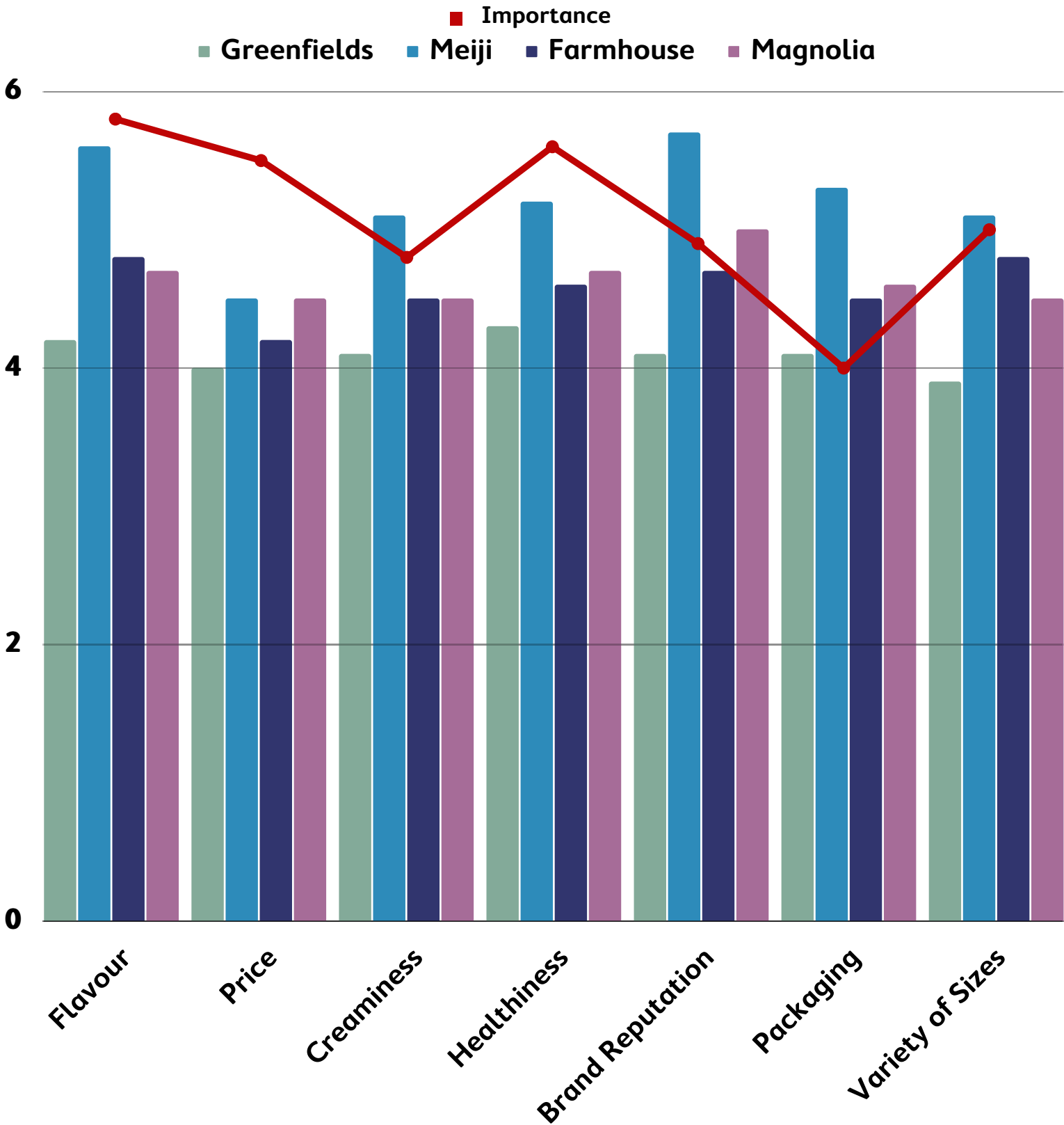
Greenfields is ranked the last for variety of sizes available

03

Healthiness

Greenfields is ranked the last for its level of healthiness

As these attributes are important in a consumer decision making, we need to improve these attributes



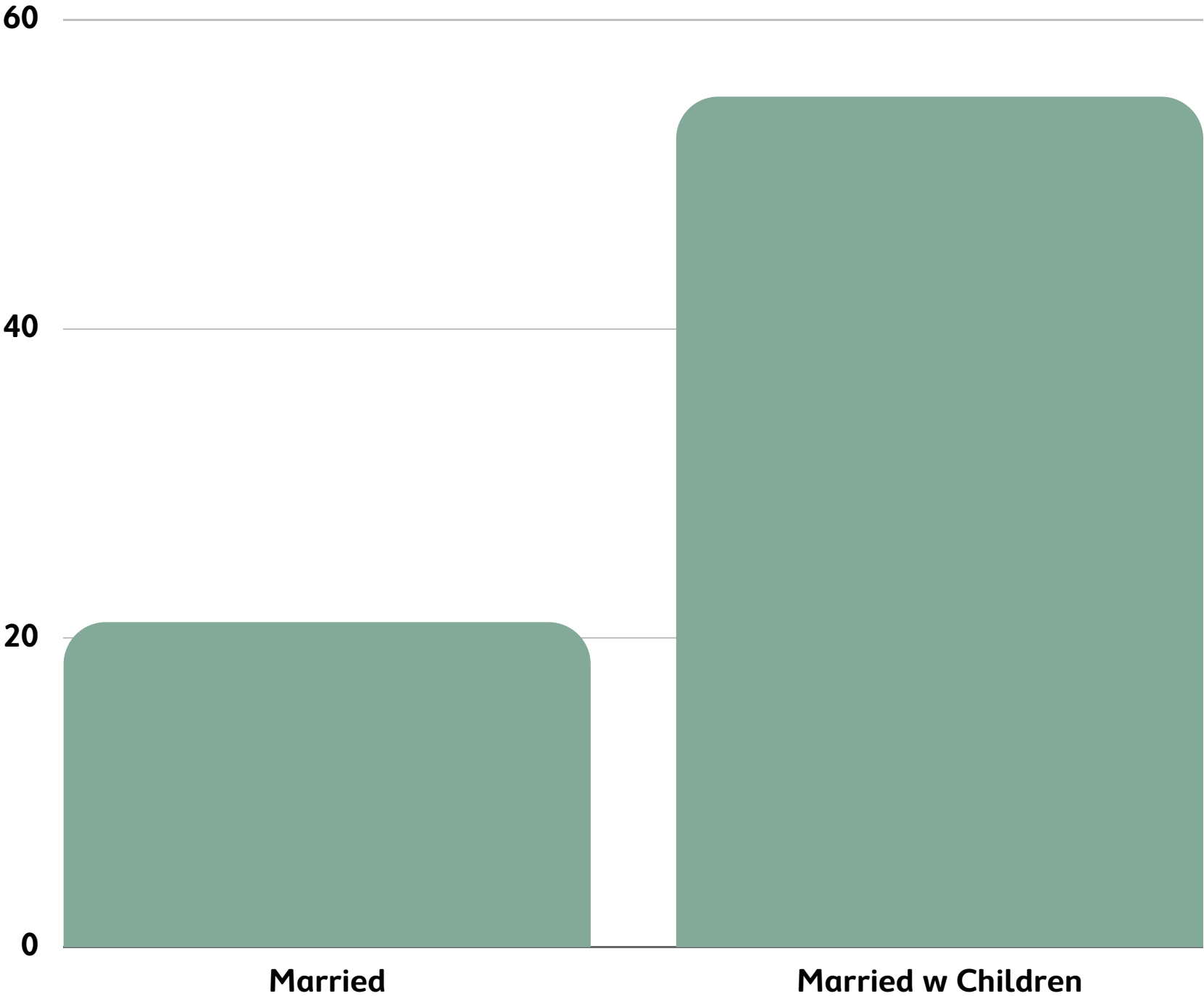
# Key Findings

## Consumption of Milk



### Consumption

Married adults with children are more likely to consume milk





# Key Findings

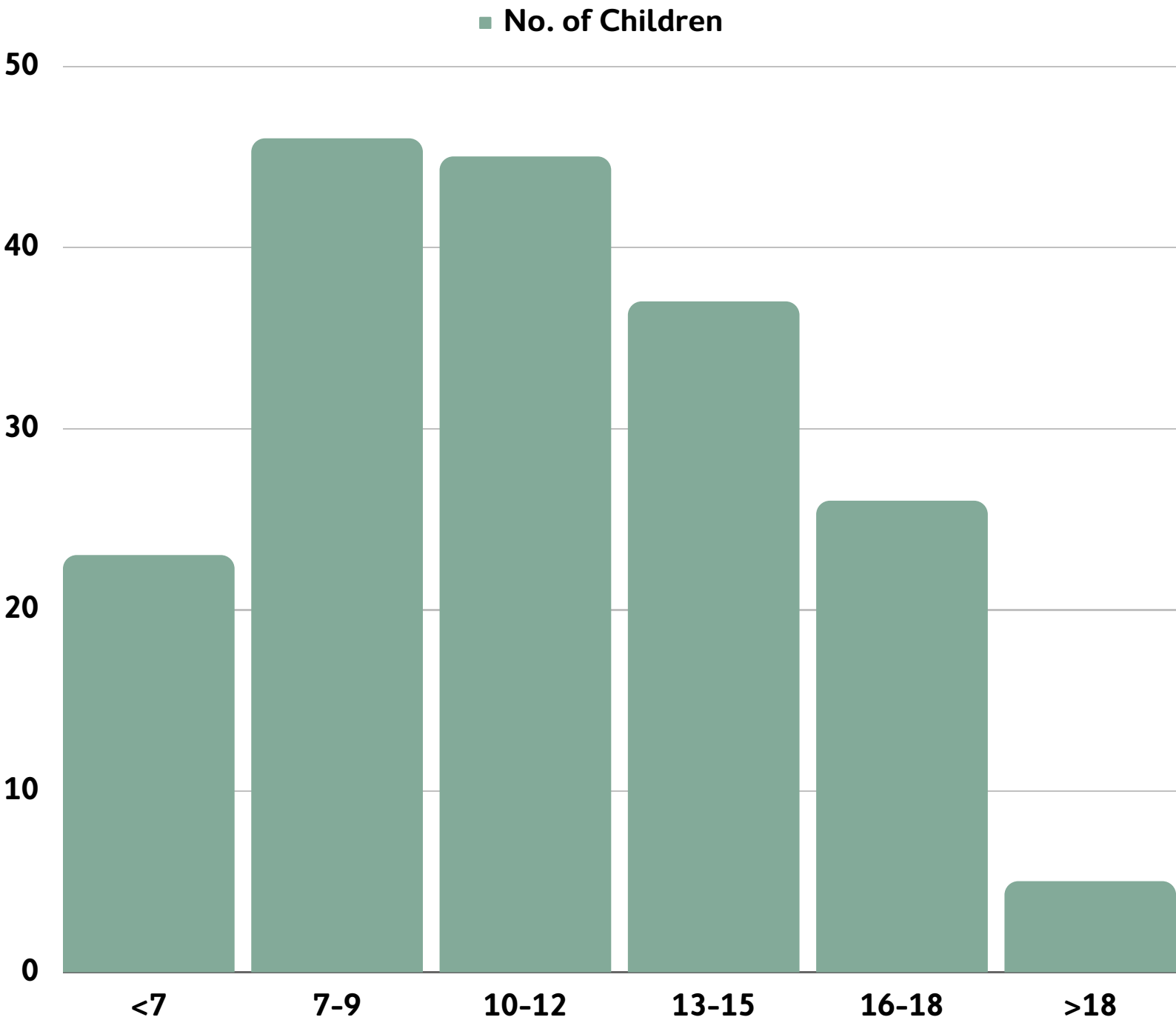
## Consumption of Milk



### Age Range of Children

Parents with children within the age of 7-12 are more likely to consume milk

We should target these parents through their children of the ages 7-12 years old





# Recommendations

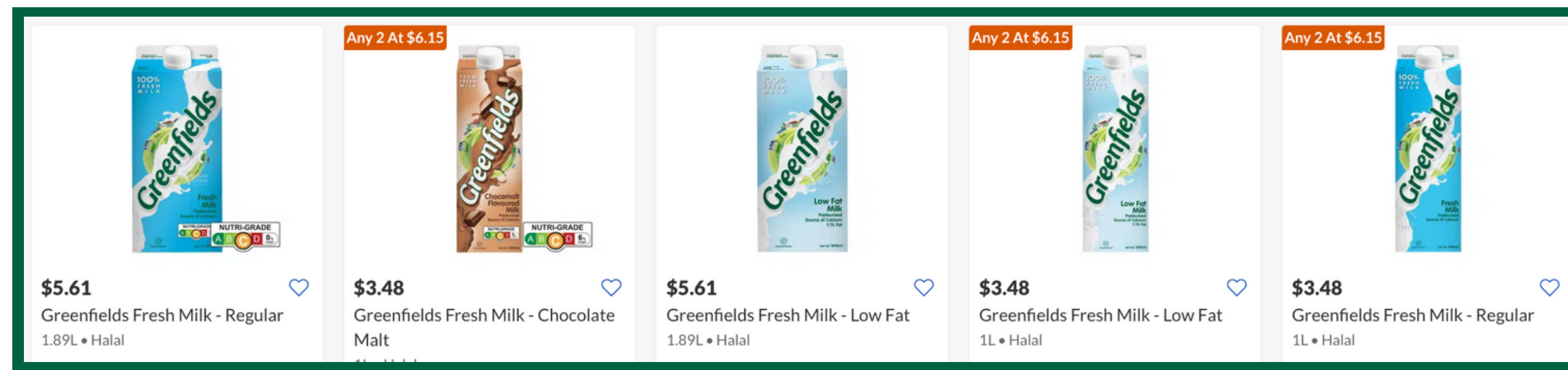
Expand Size Offerings  
Strategic Distribution



## Recommendation #1:

# Expanding Size Offerings

Most supermarkets in Singapore offer the following range of products under Greenfields:



**Greenfields can expand their package sizes offered to include 200ML:**

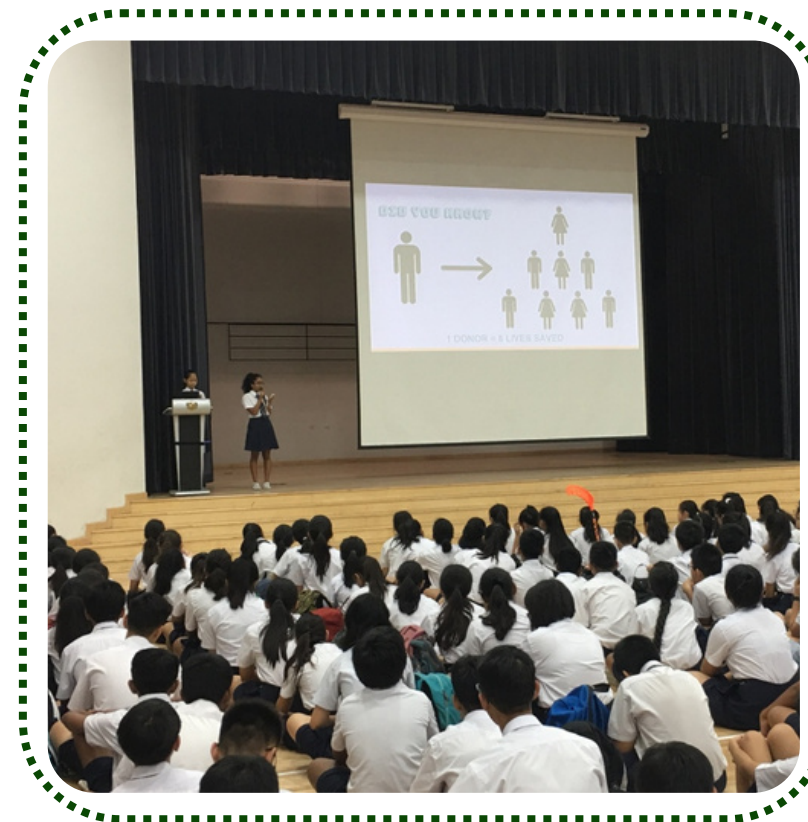
- Boost Trial Rates
  - Encourage consumers to purchase without committing to a larger package
- Convenient for grab-and-go which can be essential for busy Singaporean consumers
- Great package size for children as it is manageable to consume



## Recommendation #1:

# School Outreach

From our survey, children aged 7-12 consume milk the most. Targeting parents through their children will be another effective way to overcome consumer inertia. As such, Greenfields can hold joint collaborations with schools.



- Able to reach a mass of children through hosting talks at school assemblies which can be outsourced to a nutritionist
- Boost trial rates by giving free milk through Greenfields Milk Trucks during recess hours



Recommendation #2:

# Strategic Distribution



Supermarket

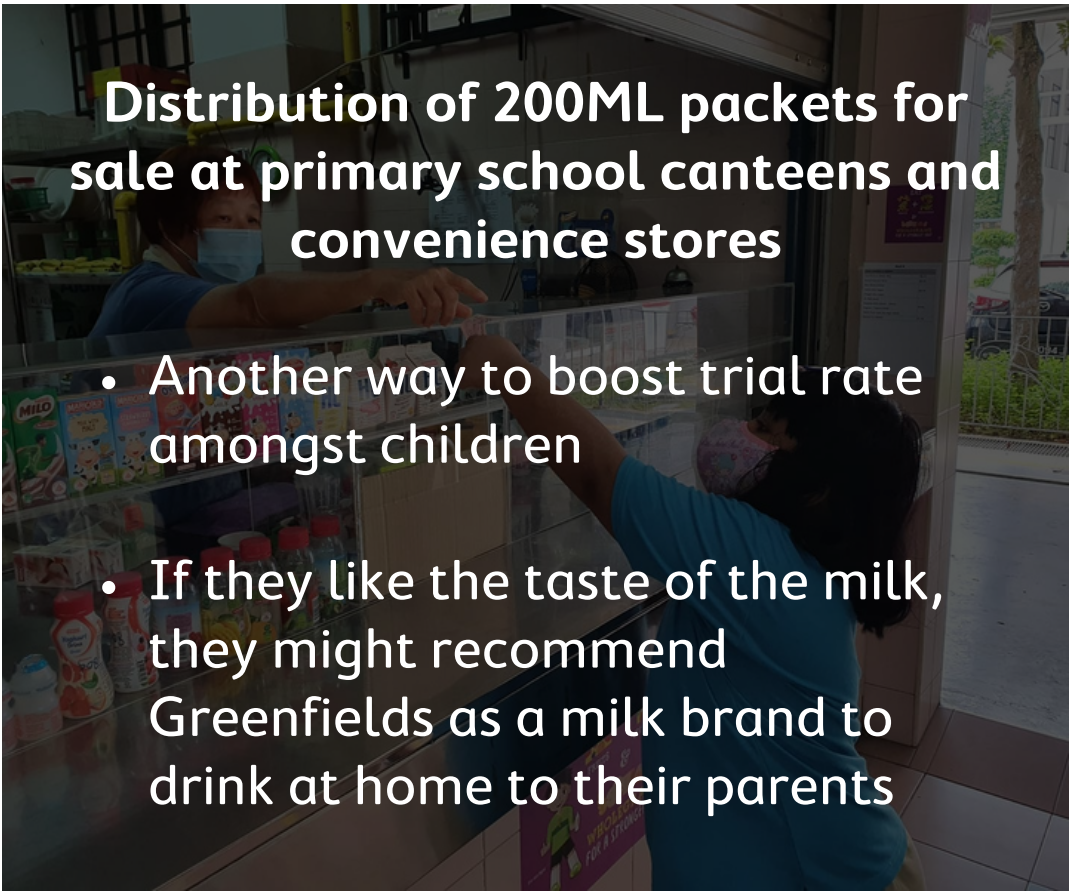


Convenience Stores



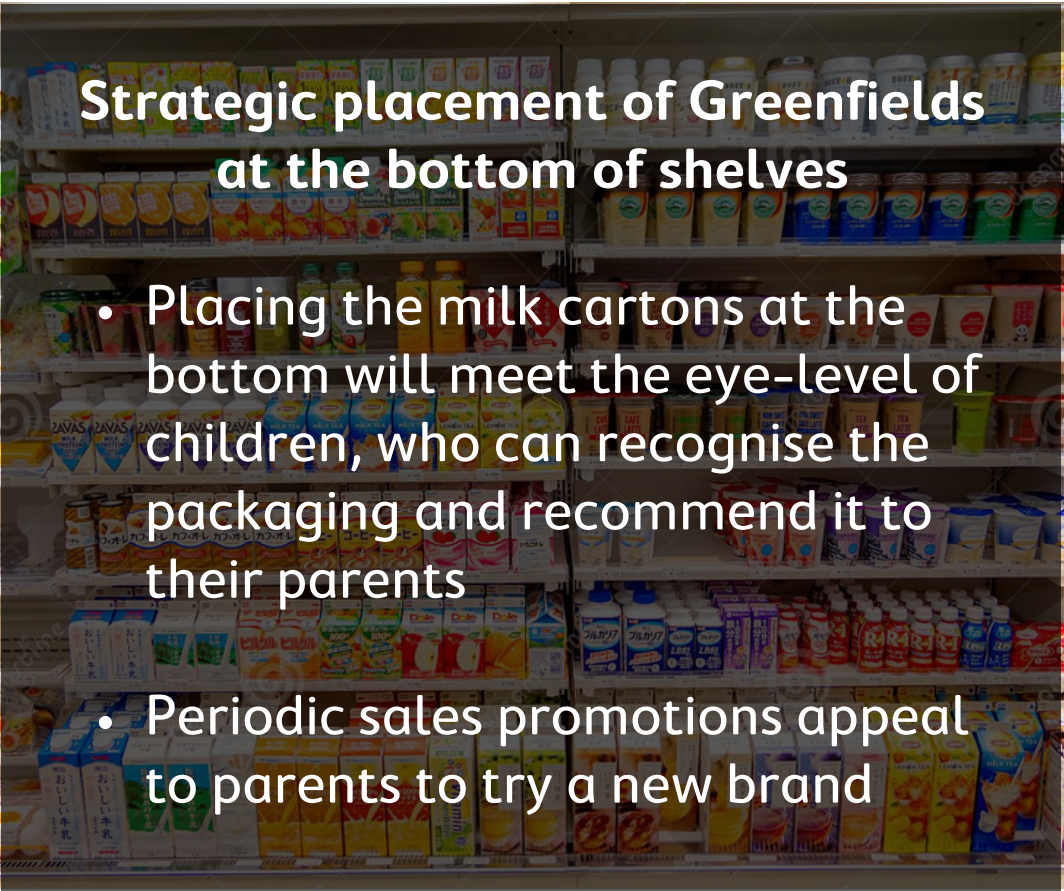
Schools

3 Primary Distributions Locations | 2 Methods



Distribution of 200ML packets for sale at primary school canteens and convenience stores

- Another way to boost trial rate amongst children
- If they like the taste of the milk, they might recommend Greenfields as a milk brand to drink at home to their parents



Strategic placement of Greenfields at the bottom of shelves

- Placing the milk cartons at the bottom will meet the eye-level of children, who can recognise the packaging and recommend it to their parents
- Periodic sales promotions appeal to parents to try a new brand



# CASE STUDY: OATSIDE

How Oatside boosted trial rates through **distributing 200ML packets** at 7-Eleven with attractive promotions, retailing at \$1 per packet



- Oatside ran \$1 promotions for its 200ML packets with the convenience store 7-Eleven from 15 - 28 February 2023
- Available at all 7-Eleven outlets islandwide
- 7-Eleven placed advertisements alerting viewers of the promotion and that they could save 47%



# MEDIA PLACEMENTS

To effectively target both children and their parents, we recommend:

## Promotional Messages

Greenfields Milk, now available in  
convenient 200ML sizes!

100% Fresh Milk only at \$3.50 per litre

Enjoy 1L + 1L for \$4.90 only this week!

## Media Channels



Bus Ads near Schools



Social Media



# Ad Disection



Natural Background with Fields and Mountains

- Builds and reinforces semantic memory for Greenfields as an all-natural product

200ML milk as the focal point of ad

Splashes of milk

- Creates a sense of freshness / Strengthens 100% Fresh Milk Brand Image for Greenfields

2 Flavours of Milk to appeal to Children

# Ad Dissection



Natural Background of a farm

- Builds and reinforces semantic memory for Greenfields as an all-natural product

Priced at \$3.50 per litre as focal point of ad

All varieties of Greenfields Milk in 1L on the advertisement to offer consumers variety in type and flavour

Various product variants of milk placed in the ad





# Ad Disection



- ..... Plain background to prevent drawing attention away from sales promotion
- ..... 1L + 1L at \$4.90 (Psychological Pricing Tactic)
- ..... Milk splashed to reinforce imagery of the milk's freshness
- ..... Locations of the milk promotions



# Ad Placements



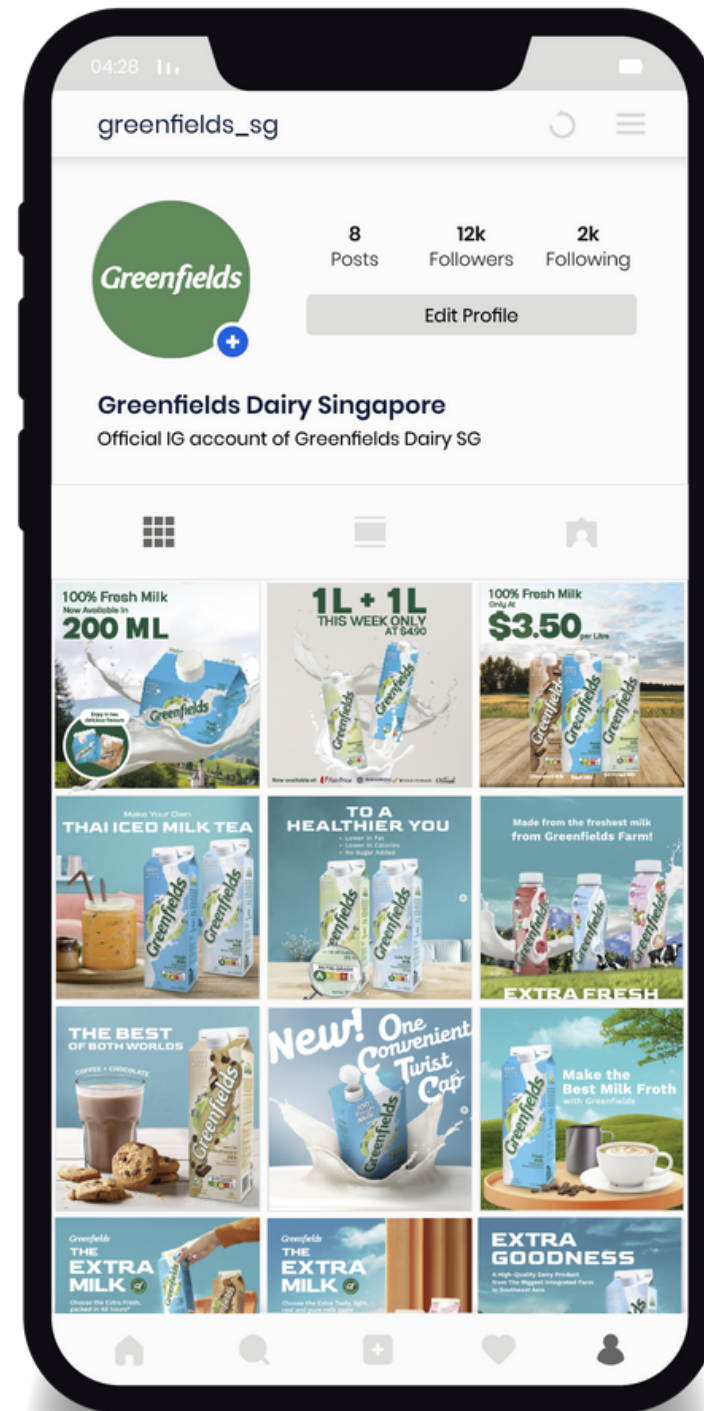
# Bus Stops near Schools



Heighten visibility amongst school children and parents who come to pick them up from school



# Ad Placements



# Social Media

## Why FaceBook and Instagram?

76.4%



64.4%

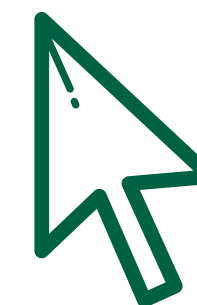


Of Singaporean internet users use these platforms, making them the second and third most-used platforms

62.7%

Singaporean internet users who use social media platforms to do brand research

<http://>



Additionally, 62.08% of web traffic comes from FaceBook and Instagram links

# CONCLUSION

Greenfields is a laggard brand largely because of poor memory and perception of the brand.  
This is evidenced by the fact that:

- 1 There is a low trial rate for Greenfields however:
  - A large % of consumers who have tried Greenfields continue drinking Greenfields
- 2 In particular, Greenfields struggle with perceptions related to Taste, Price, Healthiness and Variety of Sizes.
- 3 Additionally, we found that adults who are married with children (aged 7 to 12) are more likely to purchase and consume milk.

Hence, we have tailored our solutions to that target group, with promotional messages targeting perceptions related to Price and Healthiness. To improve trial rate, we recommend Greenfields to expand their package size offerings to include 200ML cartons and distributing these cartons at schools and convenience stores.



# Thank You!

## Q&A