



# Methodology and Objectives

Quantitative: Online Survey via Tangere Mobile Application

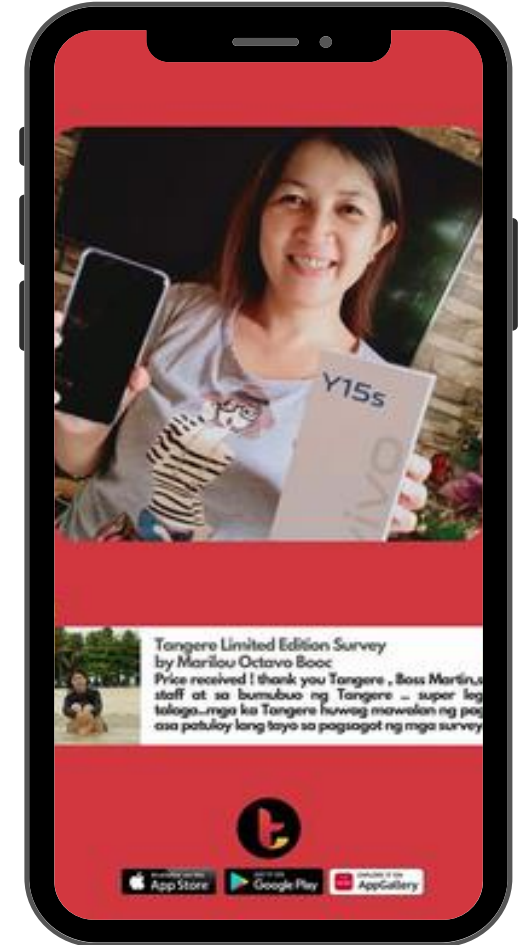
Tangere leveraged its mobile application that is available on



The study surveyed n=2000 18 to 51+ year old with various civil status nationwide (both males and females) from ABCDE households, nationwide.

Tangere has its very own ***bayanihan study*** to gather insights regarding ***Filipino Breakfast***, that brands and business decision makers may find useful, with the following objectives:

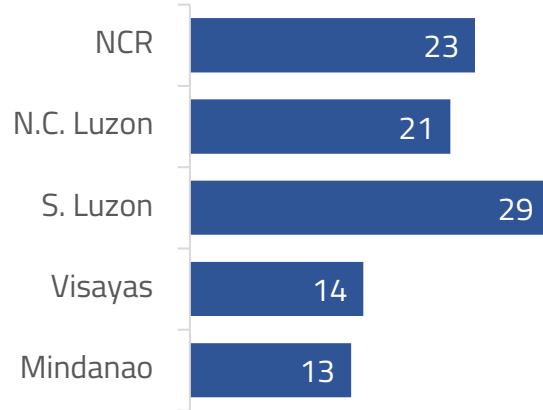
- To know the food preference of Filipinos during breakfast
- To understand the considerations of Filipinos towards breakfast



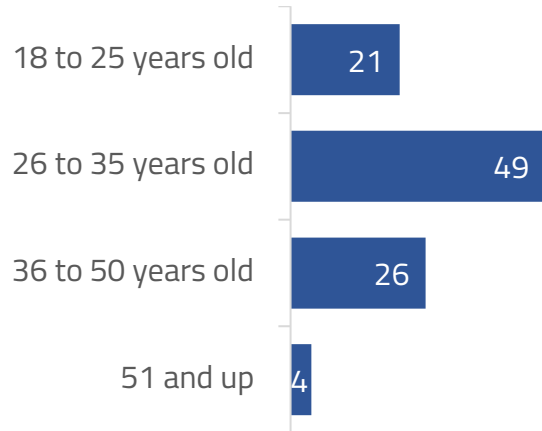
# Respondent Demographics



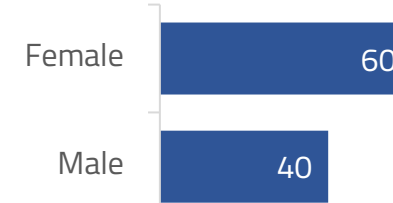
**AREA**



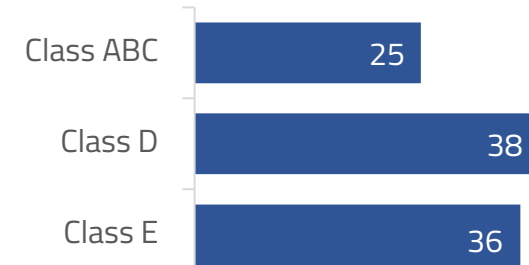
**AGE**



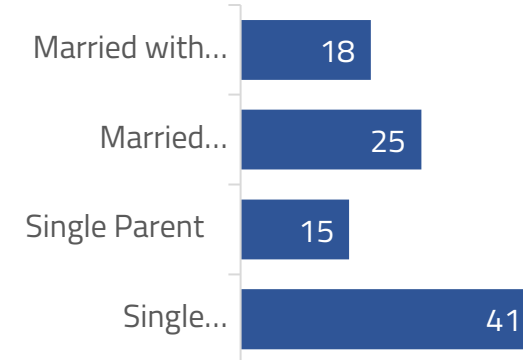
**GENDER**



**SEC**



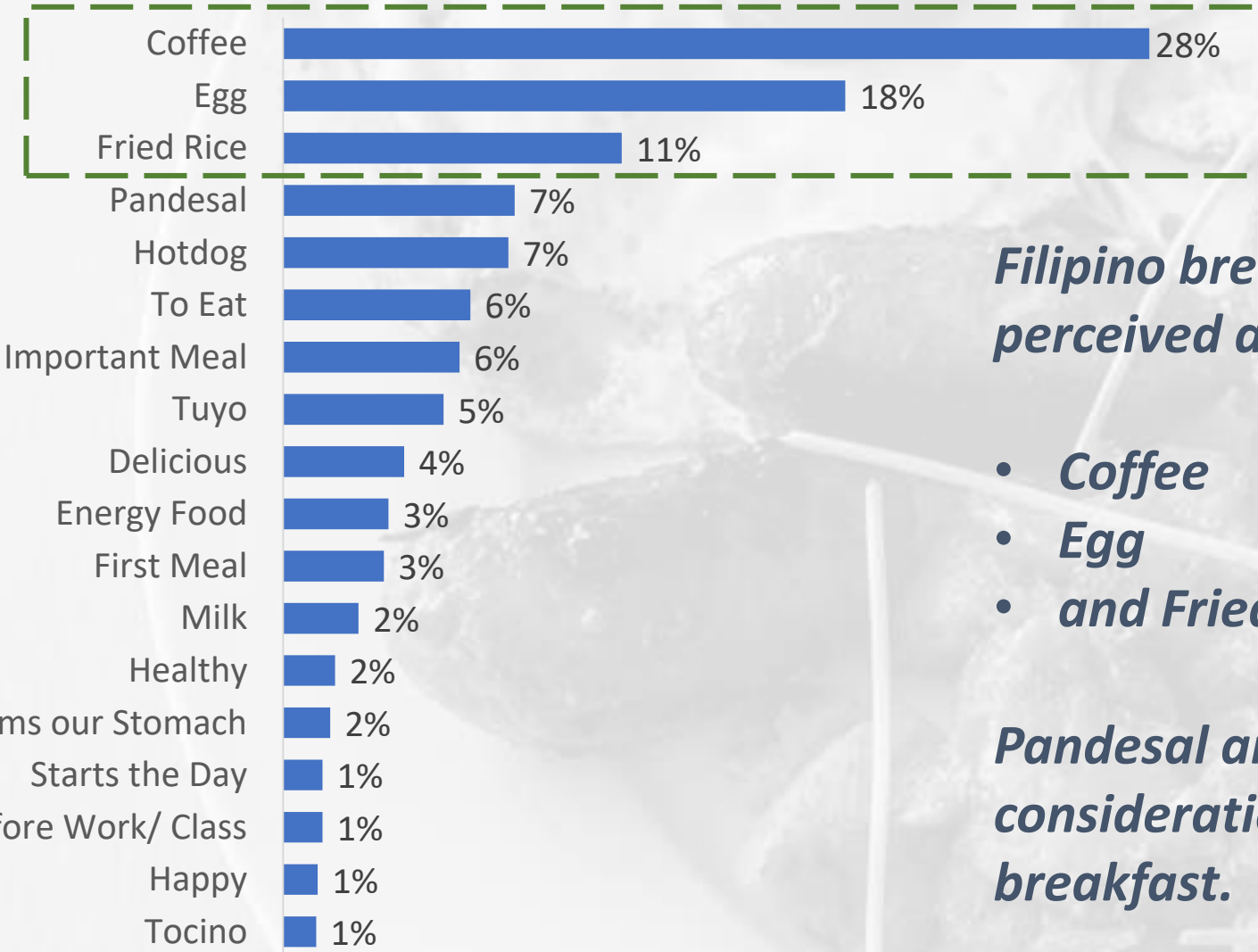
**CIVIL STATUS**





## ASSOCIATIONS TO FILIPINO BREAKFAST

# What comes to your mind when you hear about “Breakfast”?



*Filipino breakfast is often perceived as:*

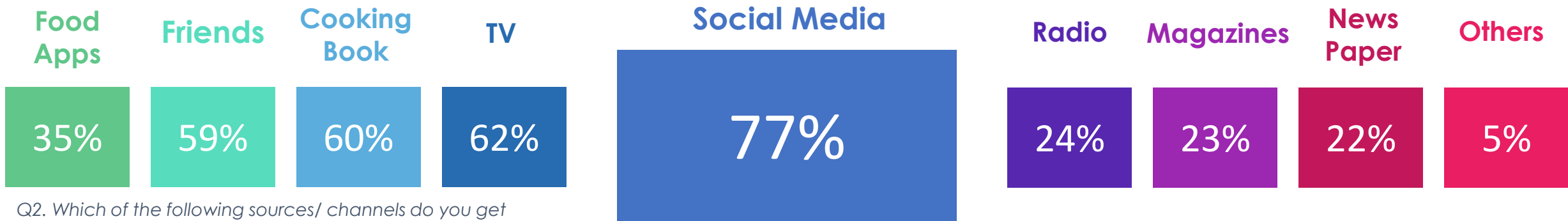
- *Coffee*
- *Egg*
- *and Fried Rice*

*Pandesal and Hotdog are also considerations when asked about breakfast.*



**SOURCES OF INFORMATION AND CHANNELS OF PURCHASE**

When looking at information or ideas that Filipinos would like to eat for breakfast. Social media platforms like Facebook and Youtube, TV, Cooking Book are the primary sources for Filipinos.



Q2. Which of the following sources/ channels do you get information/ ideas about food that you want to eat for breakfast?



Tiktok  
**57%**



Website  
Blogs  
**62%**



YouTube  
**84%**



Facebook  
**95%**



Instagram  
**35%**



Twitter  
**21%**



Pinterest  
**19%**

Q3. Which of the following social media apps do you go to get information/ ideas about the food that you want to eat for breakfast? Choose all the answers that apply to you.

# Sources of Information by Demographics

ABC households drive the use of **different channels for information**. Visayas dwellers prefer Radio, Newspaper and Magazine, while Mindanao dwellers prefer TV as their channel for information.

SOURCES OF INFORMATION			Social Media (ex. Facebook, TikTok, Instagram, etc.)	TV	Cooking / Recipe book	Friends/ family	Food aggregator apps (ex. FoodPanda, Grab, etc.)	Radio	Newspaper	Magazine	Other answers
<b>Total</b>		<b>2000</b>	<b>77%</b>	<b>62%</b>	<b>60%</b>	<b>59%</b>	<b>35%</b>	<b>24%</b>	<b>22%</b>	<b>23%</b>	<b>5%</b>
<b>AREA</b>	NCR	465	81%	63%	60%	59%	37%	20%	21%	23%	3%
	Northern Luzon and Central Luzon	428	78%	60%	61%	59%	30%	21%	20%	22%	6%
	Southern Luzon and Bicol Region	582	75%	58%	58%	57%	32%	21%	19%	19%	6%
	Visayas	274	74%	68%	63%	63%	39%	37%	31%	31%	5%
	Mindanao	251	79%	70%	59%	60%	37%	29%	20%	23%	4%
<b>AGE</b>	18 to 25 years old	416	74%	59%	56%	58%	35%	22%	22%	22%	6%
	26 to 35 years old	987	78%	63%	59%	58%	34%	22%	20%	21%	4%
	36 to 50 years old	525	79%	64%	64%	61%	36%	26%	23%	26%	6%
	51 and up	72	76%	71%	68%	65%	36%	40%	32%	29%	8%
<b>GENDER</b>	Male	801	74%	63%	58%	57%	36%	25%	24%	26%	6%
	Female	1199	80%	62%	61%	60%	34%	23%	20%	21%	4%
<b>SEC</b>	Class ABC	508	83%	66%	65%	65%	44%	26%	26%	27%	3%
	Class D	765	76%	61%	57%	57%	29%	23%	19%	19%	6%
	Class E	727	75%	62%	59%	57%	34%	24%	21%	23%	5%
<b>CIVIL STATUS</b>	Married with children	362	80%	64%	57%	59%	31%	24%	21%	21%	5%
	Married without children	493	78%	67%	66%	62%	35%	26%	21%	25%	5%
	Single Parent	297	80%	62%	56%	62%	36%	25%	22%	22%	5%
	Single without children	848	75%	60%	59%	57%	35%	23%	22%	23%	5%

  - Significantly Higher/Lower vs. the Total

# Social Media Usage by Demographics

Social Media usage is propelled across different demographics.

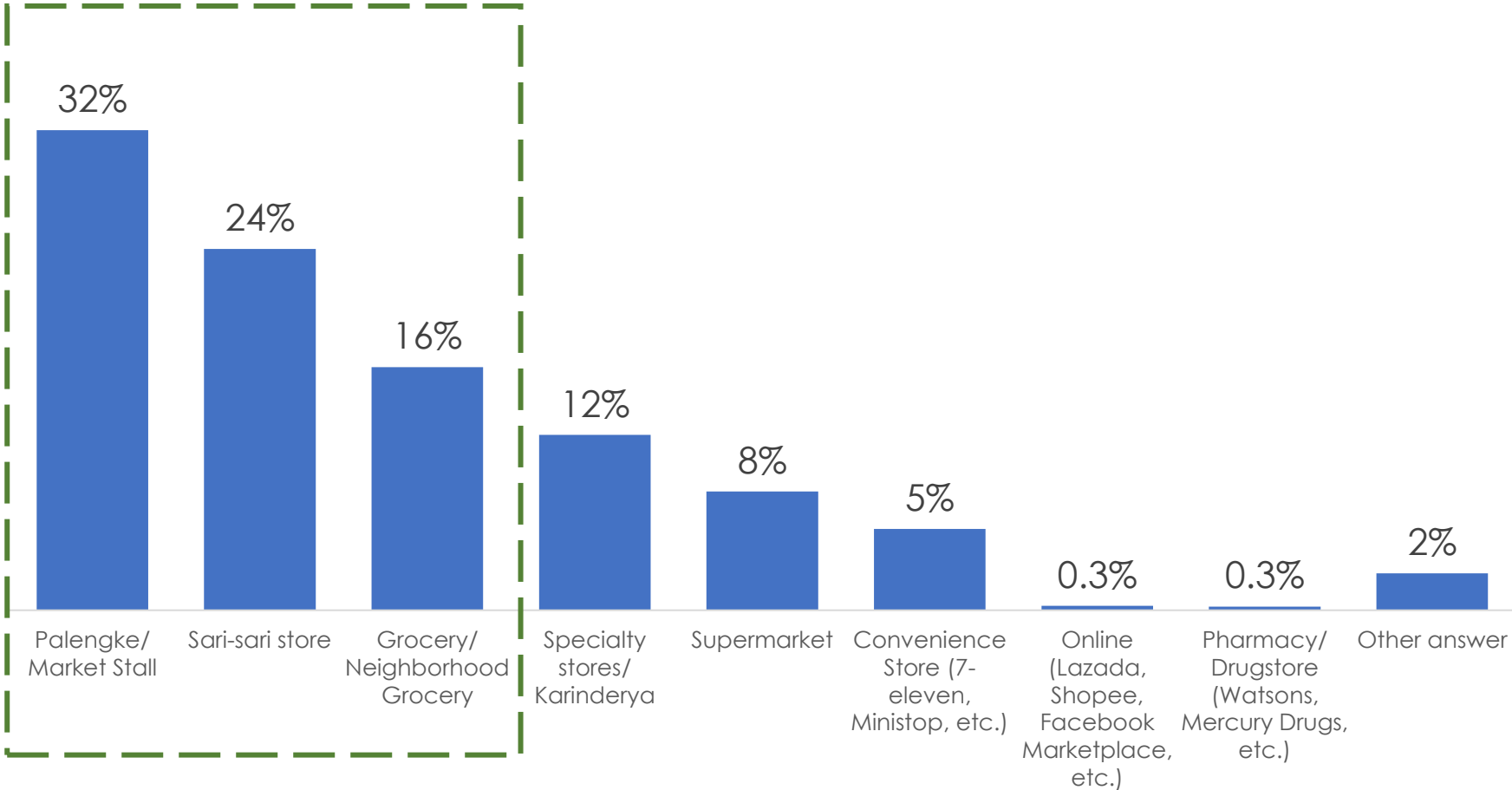
SOCIAL MEDIA			Facebook	YouTube	Food blogs/ websites	TikTok	Instagram	Twitter	Pinterest	Other answers
	<b>Total</b>	1549	<b>95%</b>	<b>84%</b>	<b>62%</b>	<b>55%</b>	<b>35%</b>	<b>21%</b>	<b>19%</b>	<b>1%</b>
<b>AREA</b>	NCR	377	97%	81%	65%	51%	34%	20%	16%	1%
	Northern Luzon and Central Luzon	332	94%	83%	61%	57%	32%	18%	17%	0%
	Southern Luzon and Bicol Region	439	94%	81%	57%	54%	36%	21%	17%	0%
	Visayas	202	95%	90%	71%	57%	41%	28%	30%	0%
	Mindanao	199	94%	86%	64%	57%	34%	22%	20%	2%
<b>AGE</b>	18 to 25 years old	307	96%	83%	56%	65%	35%	19%	20%	0%
	26 to 35 years old	772	94%	82%	60%	53%	34%	22%	19%	1%
	36 to 50 years old	415	95%	87%	68%	51%	34%	20%	18%	1%
	51 and up	55	100%	82%	82%	55%	53%	29%	22%	0%
<b>GENDER</b>	Male	593	94%	83%	61%	54%	37%	24%	20%	1%
	Female	956	95%	84%	63%	55%	34%	19%	18%	0%
<b>SEC</b>	Class ABC	420	97%	86%	66%	55%	39%	25%	21%	0%
	Class D	582	93%	80%	61%	53%	30%	19%	18%	1%
	Class E	547	95%	85%	61%	57%	37%	21%	18%	0%
<b>CIVIL STATUS</b>	Married with children	291	97%	84%	63%	51%	29%	17%	15%	0%
	Married without children	385	96%	87%	68%	57%	37%	22%	22%	0%
	Single Parent	237	92%	79%	63%	56%	34%	22%	19%	1%
	Single without children	636	94%	83%	58%	55%	37%	22%	19%	1%

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 - Significantly Higher/Lower vs. the Total



# Where do Filipinos usually purchase breakfast or ingredients for breakfast?

Palengke or Market Stalls, Sari-Sari Store, and Grocery are top channels where Filipinos often buy their ingredient or breakfast.



Q4. Among qualified respondents n=2000



# CONSIDERATIONS AND BREAKFAST CATEGORIES

**2.48** Affordability

**3.80** Healthy

**4.06** Portion and Size

**4.41** Delicious

**5.20** Recommended by Family and Friends

**5.83** Promo and Discounts

**5.90** Distance of the Store

**6.57** Ease or Convenience of Purchase

**7.99** Available Online

**8.76** Trending Online

**What are the things that you consider when purchasing food for breakfast?**

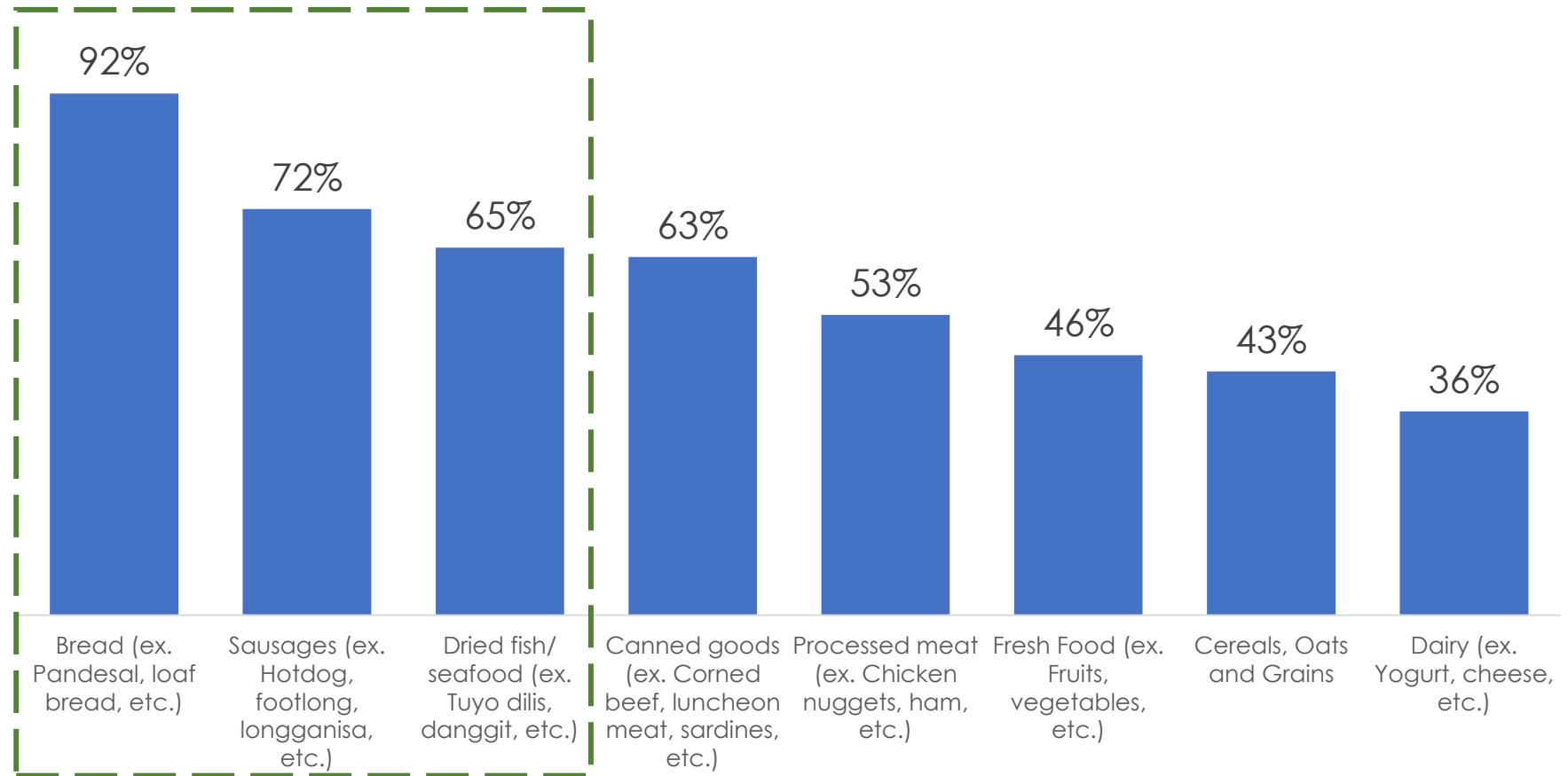
*Affordability, Healthy, Portion and Size are the top considerations when purchasing or choosing food for breakfast.*

*Meanwhile Availability Online and Trending Food Online are the least considered when choosing food for breakfast.*



## Which of the following categories do you usually consume for breakfast?

Bread, sausages, and dried fish are usually the top breakfast choice of Filipinos.



# Breakfast Categories by Demographics

Different breakfast categories are propelled across different demographic segments. E.g. NCR drives the consumption of bread and dairy for breakfast, while VIS-MIN dwellers consume more canned goods.

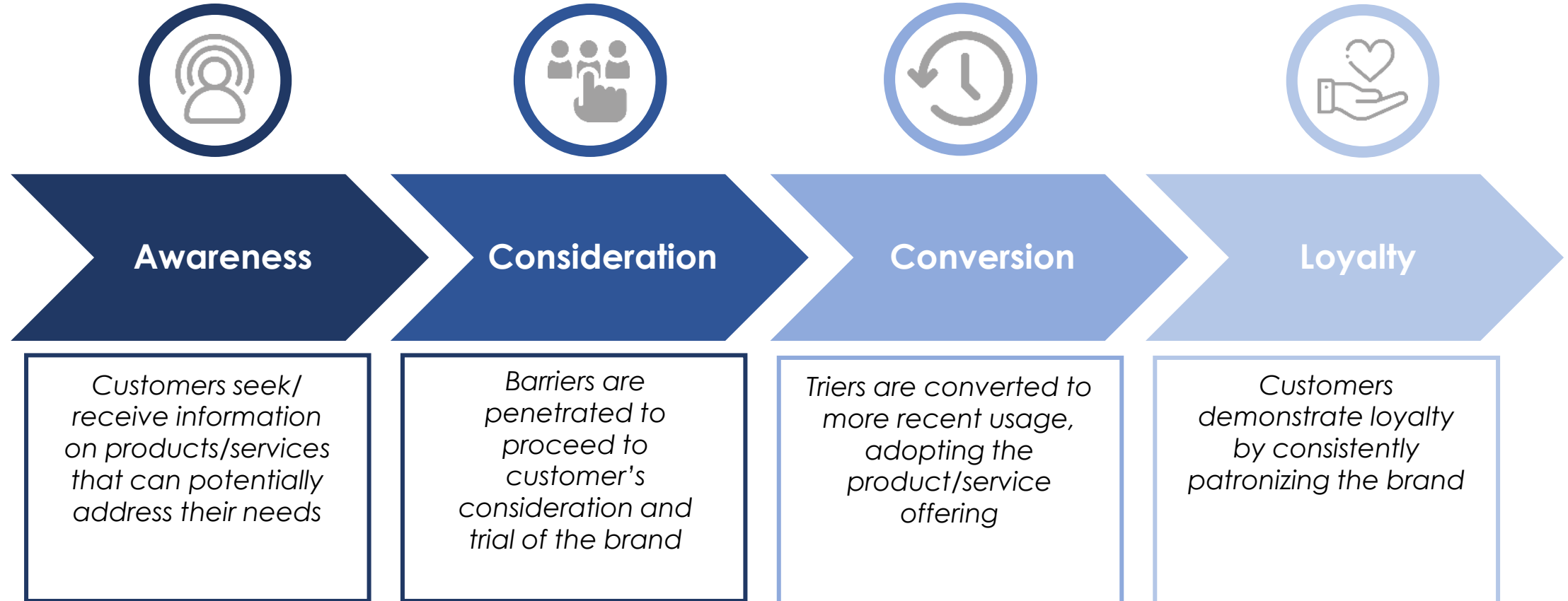
BREAKFAST CATEGORIES			Bread (ex. Pandesal, loaf bread, etc.)	Sausages (ex. Hotdog, footlong, longganis a, etc.)	Dried fish/ seafood (ex. Tuyo dilis, danggit, etc.)	Canned goods (ex. Corned beef, luncheon meat, sardines, etc.)	Processed meat (ex. Chicken nuggets, ham, etc.)	Fresh Food (ex. Fruits, vegetables, etc.)	Cereals, Oats and Grains	Dairy (ex. Yogurt, cheese, etc.)	Other answers
<b>Total</b>		<b>2000</b>	<b>92%</b>	<b>72%</b>	<b>65%</b>	<b>63%</b>	<b>53%</b>	<b>46%</b>	<b>43%</b>	<b>36%</b>	<b>6%</b>
<b>AREA</b>	NCR	465	95%	75%	63%	60%	53%	44%	48%	43%	6%
	Northern Luzon and Central Luzon	428	89%	71%	67%	60%	51%	41%	41%	31%	6%
	Southern Luzon and Bicol Region	582	94%	69%	61%	61%	51%	41%	40%	36%	6%
	Visayas	274	91%	74%	67%	70%	58%	52%	47%	37%	7%
	Mindanao	251	88%	71%	69%	72%	57%	63%	42%	31%	9%
<b>AGE</b>	18 to 25 years old	416	89%	66%	59%	61%	48%	45%	38%	30%	7%
	26 to 35 years old	987	92%	73%	66%	64%	52%	46%	40%	33%	5%
	36 to 50 years old	525	94%	73%	68%	64%	58%	47%	50%	43%	8%
	51 and up	72	96%	69%	64%	64%	56%	46%	61%	61%	6%
<b>GENDER</b>	Male	801	91%	71%	65%	64%	55%	45%	40%	36%	5%
	Female	1199	92%	72%	65%	63%	52%	47%	45%	36%	7%
<b>SEC</b>	Class ABC	508	95%	79%	67%	65%	59%	47%	52%	47%	6%
	Class D	765	91%	70%	64%	61%	53%	44%	41%	32%	7%
	Class E	727	91%	69%	64%	64%	49%	46%	39%	32%	6%
<b>CIVIL STATUS</b>	Married with children	362	91%	73%	67%	65%	54%	51%	45%	38%	6%
	Married without children	493	92%	75%	68%	67%	59%	51%	48%	39%	7%
	Single Parent	297	95%	74%	70%	65%	51%	44%	44%	35%	5%
	Single without children	848	91%	68%	60%	59%	49%	42%	39%	34%	7%

■ ■ - Significantly Higher/Lower vs. the Total

# UNDERSTANDING THE CUSTOMER JOURNEY:

The end-to-end experience of a customer with a brand

## CATEGORY LANDSCAPE

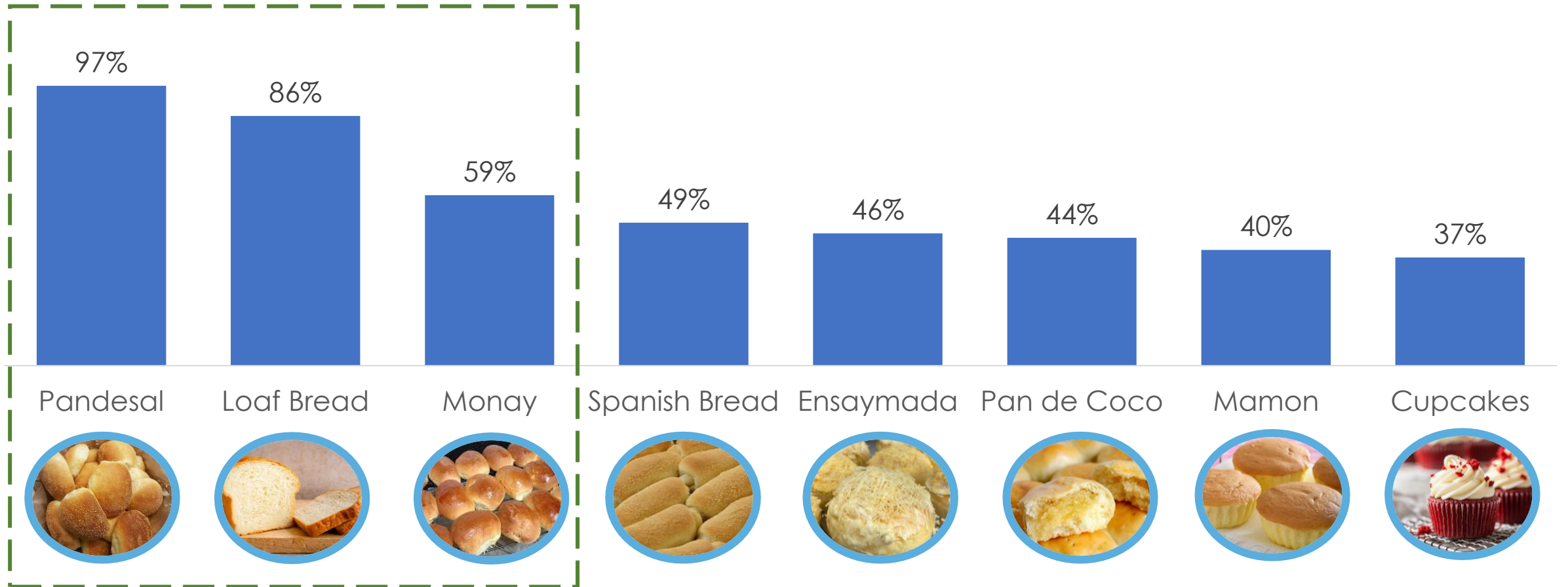




**BREAD CONSUMPTION AND BRAND PERFORMANCE**

# What Type of Bread Do Filipino's Usually Eat for Breakfast?

Filipinos usually consume *pandesal*, *loaf bread*, and *monay* for their choice of bread during breakfast.



Q8. You mentioned in the previous question that you eat Bread for breakfast, what type of bread do you usually eat? Choose all the answers that apply to you.

Among respondents who consumes bread n=1840

# Bread Consumption by Demographics

TYPE OF BREAD CONSUMED			Pandesal	Loaf Bread	Ensaymada	Monay	Pan de Coco	Spanish Bread	Mamon	Cupcakes	Others
<b>Total</b>		<b>1840</b>	<b>97%</b>	<b>86%</b>	<b>46%</b>	<b>59%</b>	<b>44%</b>	<b>49%</b>	<b>40%</b>	<b>37%</b>	<b>0%</b>
<b>AREA</b>	NCR	441	98%	87%	41%	54%	43%	47%	39%	37%	0%
	Northern Luzon and Central Luzon	382	98%	85%	43%	57%	43%	48%	35%	33%	0%
	Southern Luzon and Bicol Region	548	97%	83%	45%	60%	42%	48%	39%	37%	0%
	Visayas	248	96%	88%	57%	68%	54%	60%	54%	47%	0%
	Mindanao	221	94%	95%	48%	58%	43%	50%	38%	34%	0%
<b>AGE</b>	18 to 25 years old	370	96%	81%	57%	58%	50%	56%	46%	44%	0%
	26 to 35 years old	909	97%	86%	42%	58%	42%	47%	39%	36%	0%
	36 to 50 years old	492	98%	91%	44%	62%	45%	49%	37%	36%	0%
	51 and up	69	96%	88%	42%	55%	42%	51%	35%	33%	1%
<b>GENDER</b>	Male	732	97%	84%	45%	58%	45%	49%	37%	35%	0%
	Female	1108	97%	88%	46%	59%	44%	49%	42%	39%	0%
<b>SEC</b>	Class ABC	485	97%	92%	44%	56%	44%	49%	42%	38%	0%
	Class D	697	98%	86%	45%	60%	42%	48%	41%	37%	0%
	Class E	658	96%	83%	48%	60%	47%	52%	38%	38%	0%
<b>CIVIL STATUS</b>	Married with children	331	99%	85%	40%	58%	40%	43%	37%	34%	0%
	Married without children	455	96%	90%	46%	62%	44%	51%	43%	40%	0%
	Single Parent	282	97%	89%	46%	58%	45%	48%	39%	35%	0%
	Single without children	772	96%	84%	48%	58%	46%	52%	40%	38%	0%

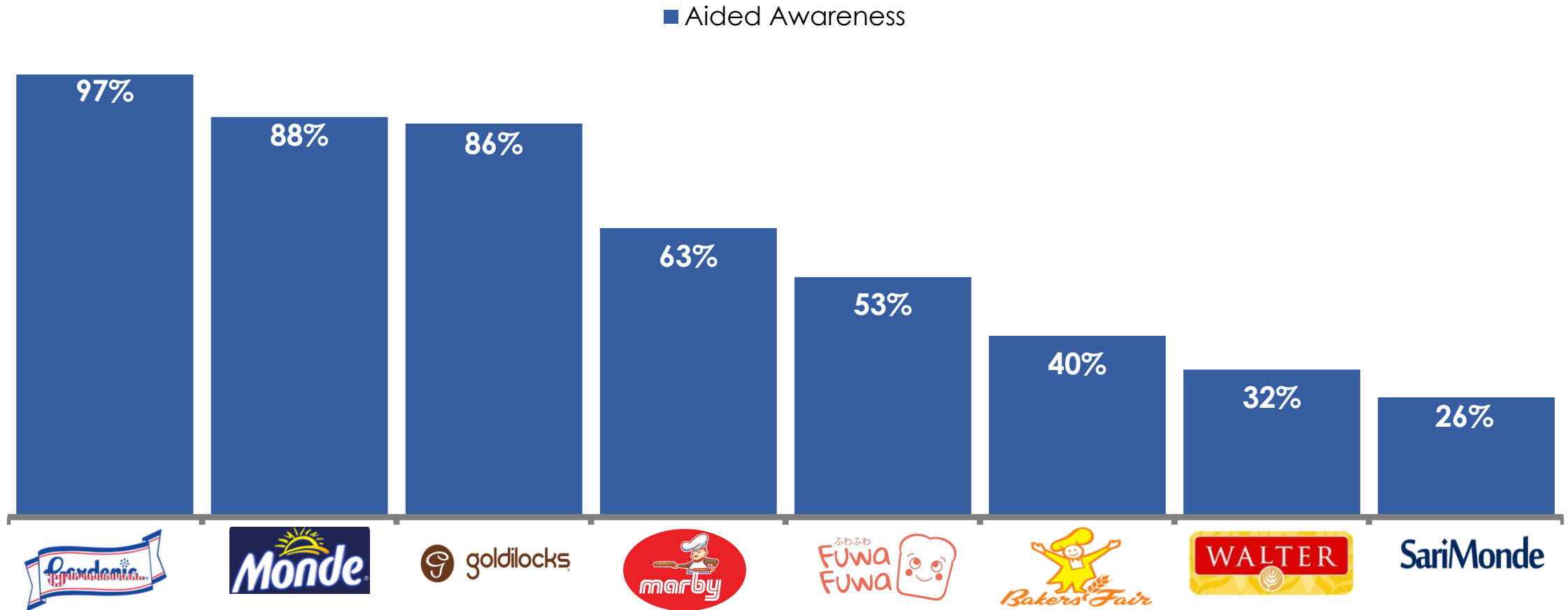
Bread consumption is driven across different demographic segments.

■
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 - Significantly Higher/Lower vs. the Total

# Awareness on Different Brands of Bread



Gardenia is known by almost 10 out of 10 of Filipinos, followed by Monde and Goldilocks.



Q9. Which of the following brands of bread are you aware of? Choose all the answers that apply to you.

Among respondents who consumes bread n=1840

# Awareness on Brands of Bread by Demographics



Awareness of bread brands is driven across different demographic segments.

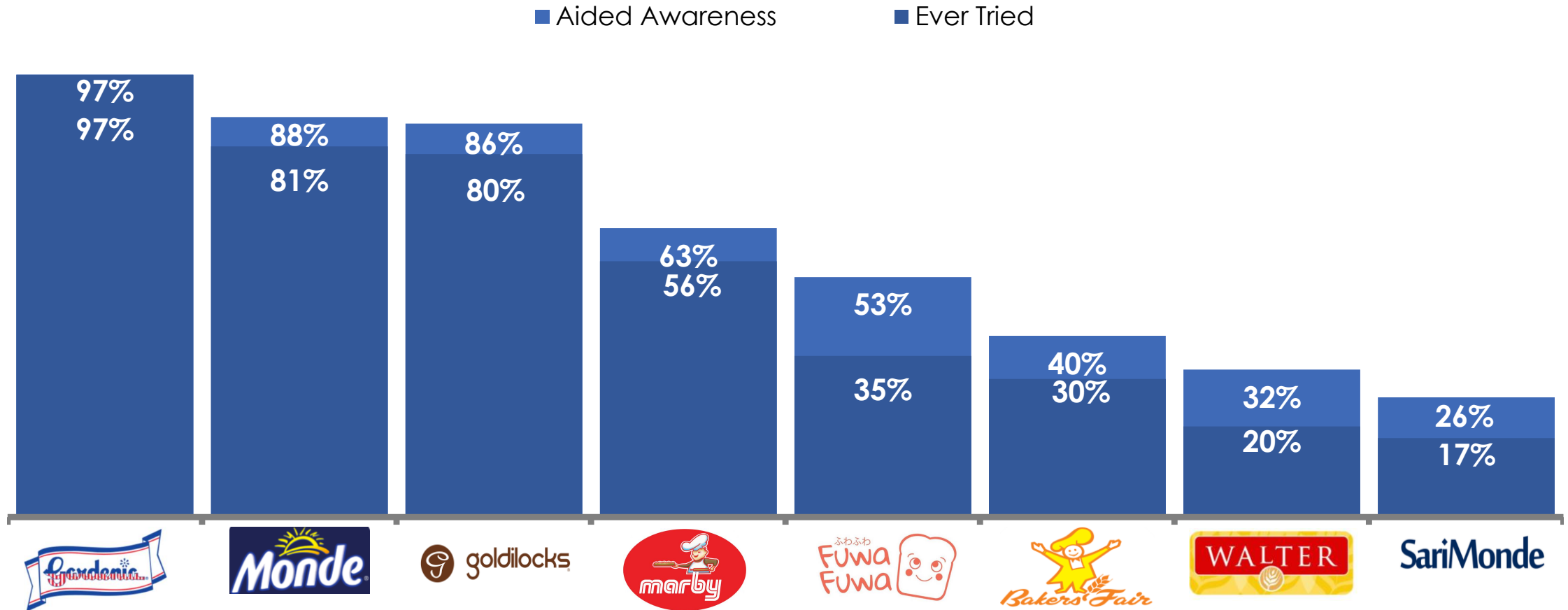
BREAD AWARENESS			Gardenia	Monde	Goldilocks	Marbys	Fuwa-Fuwa	Baker's Fair	Walter	Sarimond e	Others
<b>Total</b>		<b>1840</b>	<b>97%</b>	<b>88%</b>	<b>86%</b>	<b>63%</b>	<b>53%</b>	<b>40%</b>	<b>32%</b>	<b>26%</b>	<b>32%</b>
<b>AREA</b>	NCR	441	99%	89%	90%	79%	65%	60%	36%	28%	36%
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	Visayas	248	96%	87%	87%	46%	50%	35%	34%	31%	34%
	Mindanao	221	93%	84%	86%	36%	38%	29%	28%	24%	28%
<b>AGE</b>	18 to 25 years old	370	94%	89%	85%	47%	47%	31%	27%	22%	27%
	26 to 35 years old	909	98%	86%	85%	63%	53%	37%	30%	26%	30%
	36 to 50 years old	492	98%	90%	89%	75%	56%	48%	40%	31%	40%
	51 and up	69	97%	81%	91%	75%	58%	68%	41%	23%	41%
<b>GENDER</b>	Male	732	96%	86%	86%	62%	53%	40%	33%	27%	33%
	Female	1108	97%	89%	87%	64%	52%	39%	32%	26%	32%
<b>SEC</b>	Class ABC	485	98%	91%	90%	74%	60%	48%	36%	30%	36%
	Class D	697	97%	88%	86%	65%	54%	39%	32%	24%	32%
	Class E	658	96%	86%	84%	54%	46%	35%	30%	26%	30%
<b>CIVIL STATUS</b>	Married with children	331	96%	86%	85%	62%	55%	41%	32%	25%	32%
	Married without children	455	98%	89%	89%	70%	56%	41%	37%	28%	37%
	Single Parent	282	98%	89%	86%	67%	54%	40%	30%	28%	30%
	Single without children	772	96%	87%	85%	59%	49%	38%	30%	25%	30%

■ ■ - Significantly Higher/Lower vs. the Total

# Trial on Different Brands of Bread



Reflective on bread awareness, Gardenia leads the overall trial followed by Monde and Goldilocks.



Q10. Which of the following brands of bread have you ever tried? Choose all the answers that apply to you.

Among respondents who consumes bread n=1840

# Trial on Different Brands of Bread by Demographics



BREAD - EVER TRIED		Gardenia	Monde	Goldilocks	Marbys	Fuwa-Fuwa	Baker's Fair	Walter	Sarimonde	
<b>Total</b>		<b>1840</b>	<b>97%</b>	<b>81%</b>	<b>80%</b>	<b>56%</b>	<b>35%</b>	<b>30%</b>	<b>20%</b>	<b>17%</b>
<b>AREA</b>	NCR	441	99%	81%	84%	73%	46%	50%	23%	18%
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	Visayas	248	96%	82%	80%	35%	33%	28%	24%	24%
	Mindanao	221	95%	76%	78%	23%	21%	18%	14%	14%
<b>AGE</b>	18 to 25 years old	370	95%	84%	77%	38%	30%	24%	15%	14%
	26 to 35 years old	909	97%	80%	79%	56%	36%	26%	19%	17%
	36 to 50 years old	492	98%	83%	83%	68%	37%	39%	25%	20%
	51 and up	69	97%	70%	78%	70%	43%	55%	25%	17%
<b>GENDER</b>	Male	732	96%	79%	78%	56%	38%	32%	21%	17%
	Female	1108	97%	83%	80%	56%	34%	29%	19%	17%
<b>SEC</b>	Class ABC	485	98%	82%	85%	67%	47%	38%	23%	19%
	Class D	697	97%	80%	79%	59%	32%	28%	20%	18%
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	Married without children	455	98%	82%	84%	62%	37%	30%	23%	18%
	Single Parent	282	99%	83%	81%	59%	37%	34%	20%	20%
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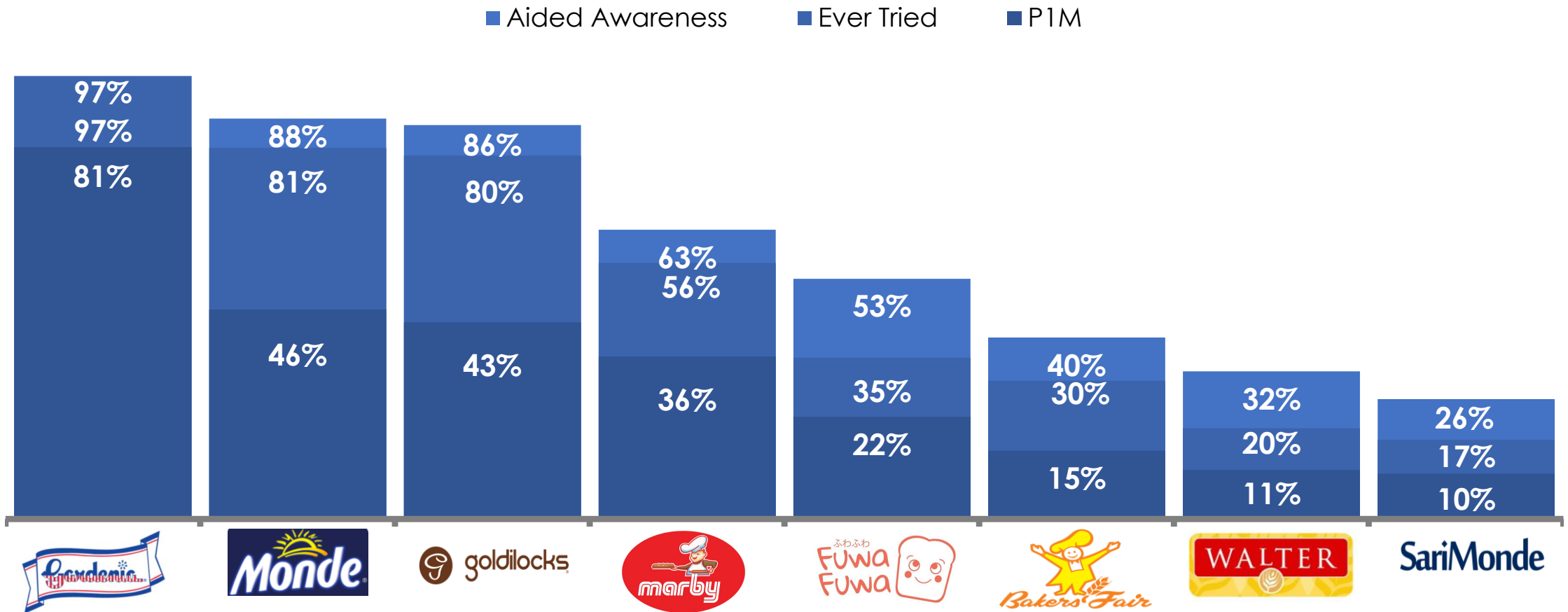
Trials of different bread brands is driven across different demographic segments.

■
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 - Significantly Higher/Lower vs. the Total

# One-month usage on Different Brands of Bread



Past one-month usage still dominantly led by Gardenia, almost half have purchased from Monde and over a third from Goldilocks and Marbys.



Q11. Which of the following brands of bread did you eat in the past 1 month? Choose all the answers that apply to you.

Among respondents who consumes bread n=1840

# Usage on Different Brands of Bread by Demographics



BREAD - P1M			Gardenia	Monde	Goldilocks	Marbys	Fuwa-Fuwa	Baker's Fair	Walter	Sarimonde
<b>Total</b>		<b>1840</b>	<b>81%</b>	<b>46%</b>	<b>43%</b>	<b>36%</b>	<b>22%</b>	<b>15%</b>	<b>11%</b>	<b>10%</b>
<b>AREA</b>	NCR	441	86%	40%	46%	44%	26%	18%	11%	9%
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	Southern Luzon and Bicol Region	548	84%	48%	40%	39%	23%	12%	10%	9%
	Visayas	248	76%	52%	40%	25%	25%	22%	19%	19%
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<b>AGE</b>	18 to 25 years old	370	77%	44%	41%	25%	20%	15%	9%	9%
	26 to 35 years old	909	83%	47%	44%	35%	24%	14%	10%	10%
	36 to 50 years old	492	81%	45%	43%	43%	21%	15%	12%	11%
	51 and up	69	91%	43%	46%	48%	28%	20%	14%	12%
<b>GENDER</b>	Male	732	83%	45%	43%	36%	25%	17%	12%	11%
	Female	1108	81%	46%	43%	35%	20%	14%	10%	9%
<b>SEC</b>	Class ABC	485	85%	48%	48%	45%	32%	15%	12%	10%
	Class D	697	80%	44%	41%	36%	19%	15%	11%	10%
	Class E	658	80%	46%	42%	28%	19%	15%	10%	10%
<b>CIVIL STATUS</b>	Married with children	331	78%	42%	43%	35%	24%	14%	9%	8%
	Married without children	455	83%	48%	44%	39%	23%	14%	12%	10%
	Single Parent	282	84%	46%	44%	38%	23%	14%	10%	11%
	Single without children	772	81%	46%	42%	33%	21%	16%	11%	11%

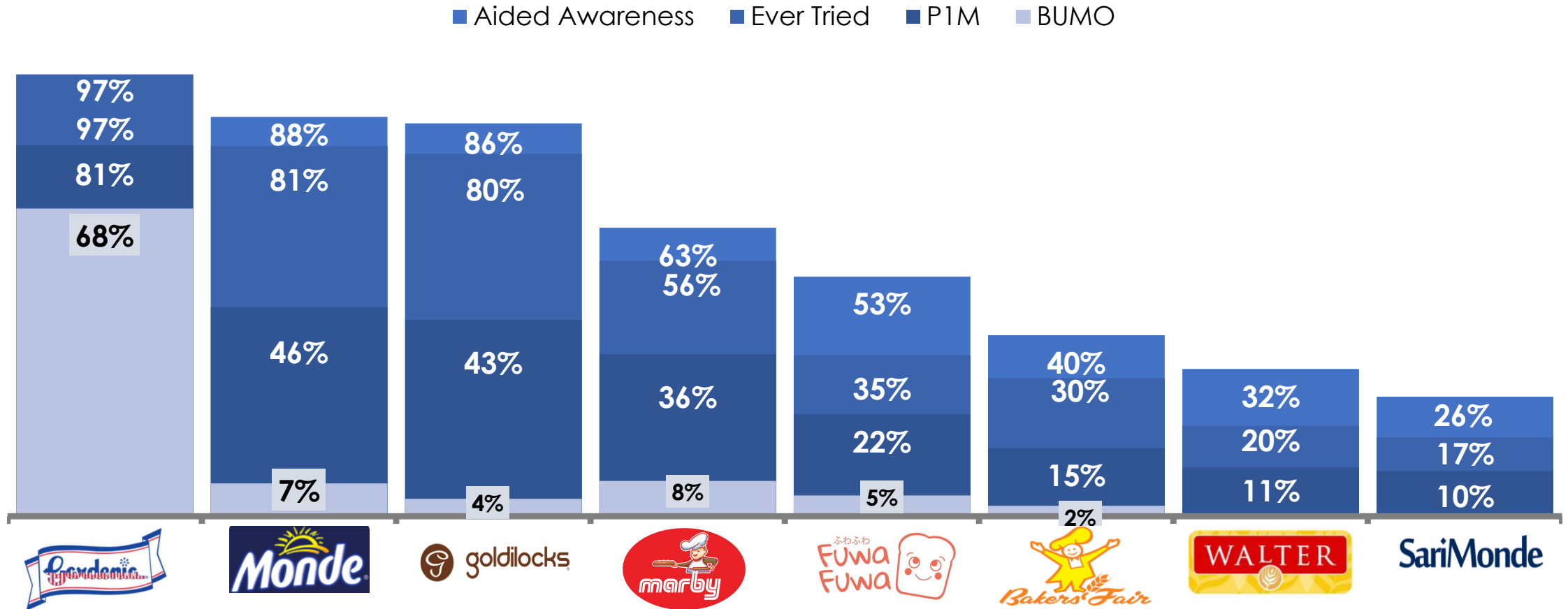
Usage of different bread brands is driven across different demographic segments.

■
■
 - Significantly Higher/Lower vs. the Total

# Loyalty on Different Brands of Bread



Gardenia still leads the overall share of loyal customers, surprisingly Marby and Fuwa Fuwa leads over Goldilocks in terms of brand loyalty.



Q12. Which of the following brands of bread do you eat most often?

Among respondents who consumes bread n=1840

# Loyalty on Different Brands of Bread by Demographics



BUMO of Monde bread products is driven by the younger generation (18 to 25 years old).

While BUMO of Goldilocks bread products is driven by Visayas dwellers.

Brands are significantly weak across different demographics

BREAD - BUMO			Gardenia	Marbys	Monde	Fuwa-Fuwa	Goldilocks	Baker's Fair	Sarimond e	Walter	Others	
		<b>Total</b>	<b>1840</b>	<b>68%</b>	<b>8%</b>	<b>7%</b>	<b>5%</b>	<b>4%</b>	<b>2%</b>	<b>0%</b>	<b>0%</b>	<b>7%</b>
<b>AREA</b>	NCR	441	71%	11%	4%	5%	2%	3%	0%	0%	3%	
	Northern Luzon and Central Luzon	382	65%	10%	8%	6%	2%	1%	0%	0%	7%	
	Southern Luzon and Bicol Region	548	68%	9%	7%	5%	3%	2%	0%	0%	5%	
	Visayas	248	65%	0%	10%	3%	8%	3%	0%	0%	10%	
	Mindanao	221	65%	2%	10%	2%	7%	4%	0%	0%	12%	
<b>AGE</b>	18 to 25 years old	370	62%	5%	11%	4%	6%	3%	0%	0%	8%	
	26 to 35 years old	909	67%	9%	7%	5%	4%	3%	0%	0%	6%	
	36 to 50 years old	492	72%	8%	5%	4%	2%	1%	0%	0%	8%	
	51 and up	69	77%	7%	3%	6%	4%	1%	0%	0%	1%	
<b>GENDER</b>	Male	732	67%	8%	7%	5%	4%	2%	0%	0%	6%	
	Female	1108	68%	7%	7%	4%	4%	2%	0%	0%	7%	
<b>SEC</b>	Class ABC	485	70%	10%	4%	7%	4%	2%	0%	0%	3%	
	Class D	697	66%	8%	8%	3%	3%	3%	0%	0%	9%	
	Class E	658	67%	6%	9%	4%	5%	2%	0%	0%	7%	
<b>CIVIL STATUS</b>	Married with children	331	64%	7%	8%	6%	4%	2%	0%	0%	9%	
	Married without children	455	71%	9%	5%	4%	3%	1%	0%	0%	7%	
	Single Parent	282	70%	9%	7%	4%	3%	3%	0%	0%	5%	
	Single without children	772	66%	7%	8%	4%	5%	3%	0%	0%	7%	

■
■
 - Significantly Higher/Lower vs. the Total

# Bread Category Landscape Summary

Gardenia has been established as the top brand of bread. However, Marbys and Fuwa-Fuwa have potential with good conversion and retention rates.



	Awareness	Trial Rate	Ever Tried	Conversion Rate	Past 1 Month	Retention Rate	BUMO
<b>Gardenia</b>	97%	100%	97%	84%	81%	83%	68%
<b>Monde</b>	88%	93%	81%	56%	46%	16%	7%
<b>Goldilocks</b>	86%	92%	80%	54%	43%	9%	4%
<b>Marbys</b>	63%	89%	56%	63%	36%	22%	8%
<b>Fuwa-Fuwa</b>	53%	67%	35%	63%	22%	20%	5%
<b>Baker's Fair</b>	40%	76%	30%	50%	15%	16%	2%
<b>Walter</b>	32%	62%	20%	54%	11%	0%	0%
<b>Sarimonde</b>	26%	66%	17%	57%	10%	0%	0%



## Summary of Findings For Bread



68%  
BUMO

Gardenia is a **market leader** in the bread category market with **high performance** across the customer journey in 1<sup>st</sup> place.

The current goal of Gardenia is to ensure **brand loyalty** to prevent **lapsing** or **switching to another brand**.

Top potential challengers of Gardenia are **Marby** and **Fuwa-Fuwa**, both of which still have a high potential for growth in the market.



Both brands have exceptionally weak performance in **Visayas and Mindanao regions**, in each phase of the customer journey.

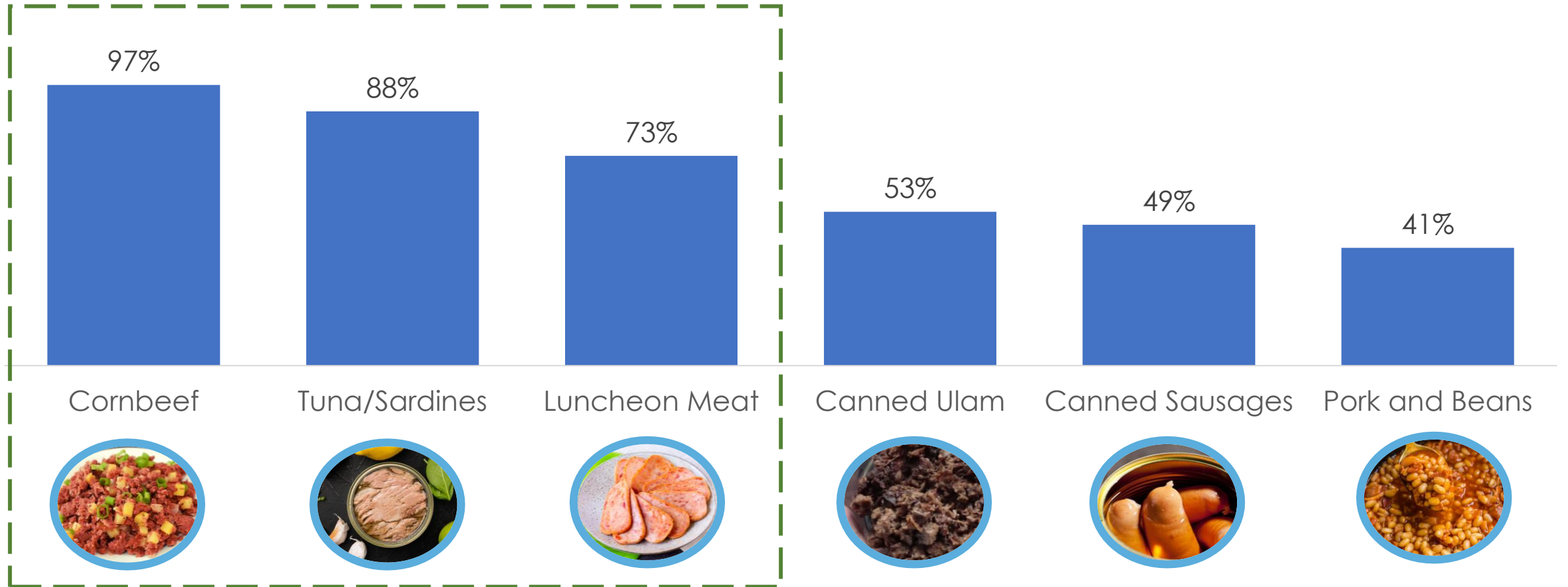
However, having both a high conversion rate and retention rate there is **high potential for growth** given that **awareness and trial are increased**.



**CANNED GOOD CONSUMPTION AND BRAND PERFORMANCE**

# What Type of Canned Goods Do Filipino's Usually Eat For Breakfast?

Filipinos usually consume Cornbeef, Tuna or Sardines, and Luncheon Meat for their choice of canned good breakfast.



Q13. You mentioned in the previous question that you eat Canned goods for breakfast, which of the following Canned Goods do you eat? Choose all the answers that apply to you.

Among respondents who consumes canned goods n=1263

# Canned Good Consumption by Demographics

- Cornbeef consumption is propelled by Married with children
- Luncheon meat consumption is driven across demographic segments
- Pork and Beans and Canned Sausages are more consumed by the upper-income household.

TYPE OF CANNED GOOD CONSUMED			Cornbeef	Tuna/Sardines	Luncheon Meat	Canned Ulam	Canned Sausages	Pork and Beans	Others
<b>Total</b>		<b>1263</b>	<b>97%</b>	<b>88%</b>	<b>73%</b>	<b>53%</b>	<b>49%</b>	<b>41%</b>	<b>0%</b>
<b>AREA</b>	NCR	280	97%	89%	84%	55%	51%	44%	1%
	Northern Luzon and Central Luzon	256	96%	85%	79%	49%	49%	41%	0%
	Southern Luzon and Bicol Region	353	97%	86%	73%	56%	48%	36%	1%
	Visayas	193	98%	91%	66%	55%	49%	49%	0%
	Mindanao	181	98%	91%	53%	50%	46%	37%	0%
<b>AGE</b>	18 to 25 years old	253	96%	88%	58%	58%	44%	37%	1%
	26 to 35 years old	628	98%	88%	72%	52%	47%	38%	0%
	36 to 50 years old	336	97%	89%	82%	53%	54%	46%	0%
	51 and up	46	96%	87%	89%	52%	59%	54%	0%
<b>GENDER</b>	Male	513	97%	88%	77%	57%	51%	42%	1%
	Female	750	97%	88%	70%	51%	47%	40%	0%
<b>SEC</b>	Class ABC	332	97%	88%	87%	57%	58%	51%	0%
	Class D	466	98%	88%	73%	53%	47%	38%	0%
	Class E	465	97%	88%	63%	51%	44%	37%	0%
<b>CIVIL STATUS</b>	Married with children	235	99%	86%	74%	49%	48%	41%	0%
	Married without children	332	97%	89%	72%	50%	49%	42%	0%
	Single Parent	192	95%	90%	79%	54%	49%	39%	1%
	Single without children	504	97%	88%	70%	57%	48%	40%	0%

  - Significantly Higher/Lower vs. the Total

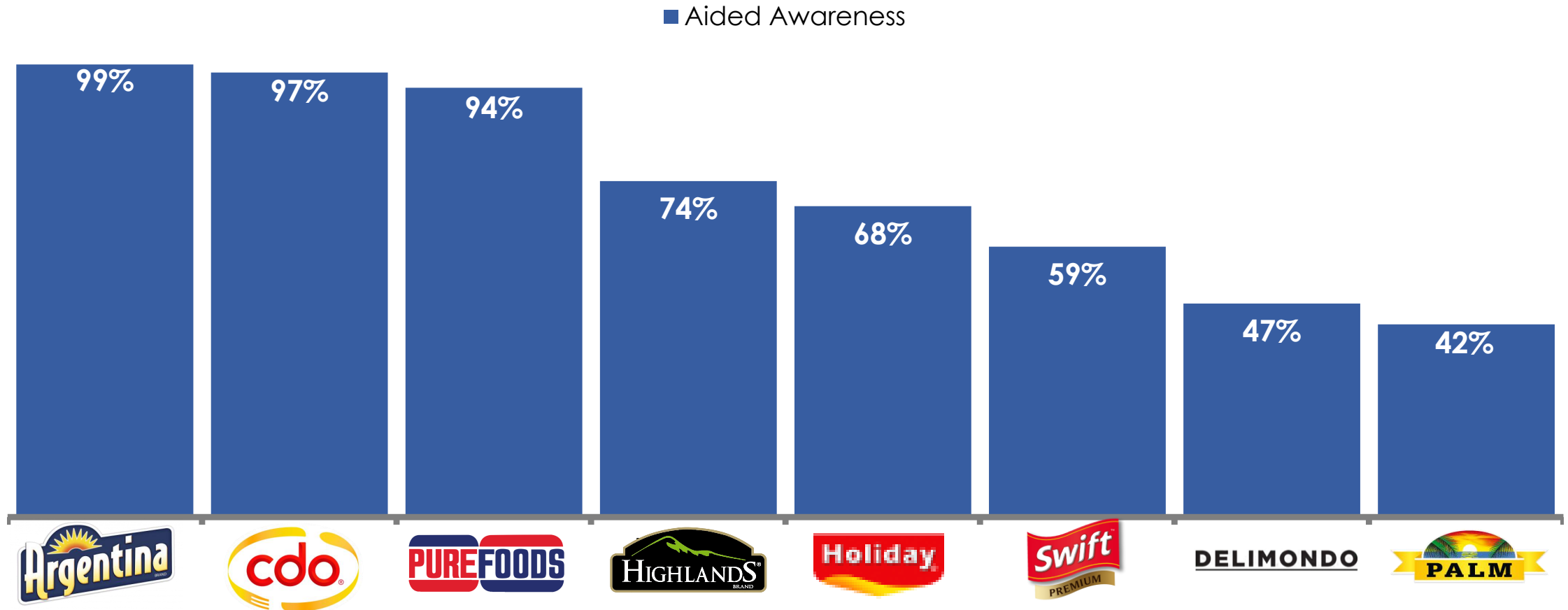


**CORNED BEEF  
CATEGORY LANDSCAPE**

# Awareness on Different Brands of Corned Beef



Argentina is known by almost 10 out of 10 of Filipinos, closely followed by CDO and Purefoods.



Q14. Which of the following corned beef brands are you aware of?  
Choose all the answers that apply to you.

Among respondents who consumes corned beef n=1228

# Awareness on Brands of Corned Beef by Demographics



CORNBEEF BRANDS AWARENESS			Argentina	CDO	Purefoods	Highlands	Holiday	Swift	Delimond o	Palm
<b>Total</b>		<b>1228</b>	<b>99%</b>	<b>97%</b>	<b>94%</b>	<b>74%</b>	<b>68%</b>	<b>59%</b>	<b>47%</b>	<b>42%</b>
<b>AREA</b>	NCR	271	99%	98%	97%	82%	55%	66%	57%	45%
	Northern Luzon and Central Luzon	245	99%	99%	96%	70%	59%	56%	47%	41%
	Southern Luzon and Bicol Region	344	99%	98%	93%	74%	55%	58%	47%	41%
	Visayas	190	98%	96%	92%	70%	96%	61%	44%	50%
	Mindanao	178	99%	95%	92%	69%	97%	53%	34%	34%
<b>AGE</b>	18 to 25 years old	243	99%	97%	91%	65%	67%	42%	41%	34%
	26 to 35 years old	615	100%	98%	93%	73%	67%	58%	47%	43%
	36 to 50 years old	326	99%	97%	99%	80%	72%	71%	49%	45%
	51 and up	44	98%	95%	95%	75%	55%	84%	64%	55%
<b>GENDER</b>	Male	500	99%	98%	93%	74%	67%	61%	49%	43%
	Female	728	99%	97%	95%	73%	69%	58%	45%	42%
<b>SEC</b>	Class ABC	322	98%	97%	98%	83%	64%	69%	60%	48%
	Class D	457	99%	98%	94%	75%	66%	58%	44%	41%
	Class E	449	100%	98%	91%	65%	73%	53%	41%	39%
<b>CIVIL STATUS</b>	Married with children	233	100%	97%	92%	74%	71%	58%	46%	40%
	Married without children	322	99%	98%	95%	73%	70%	65%	46%	45%
	Single Parent	183	99%	98%	95%	75%	67%	63%	48%	40%
	Single without children	490	99%	97%	94%	73%	66%	55%	47%	42%

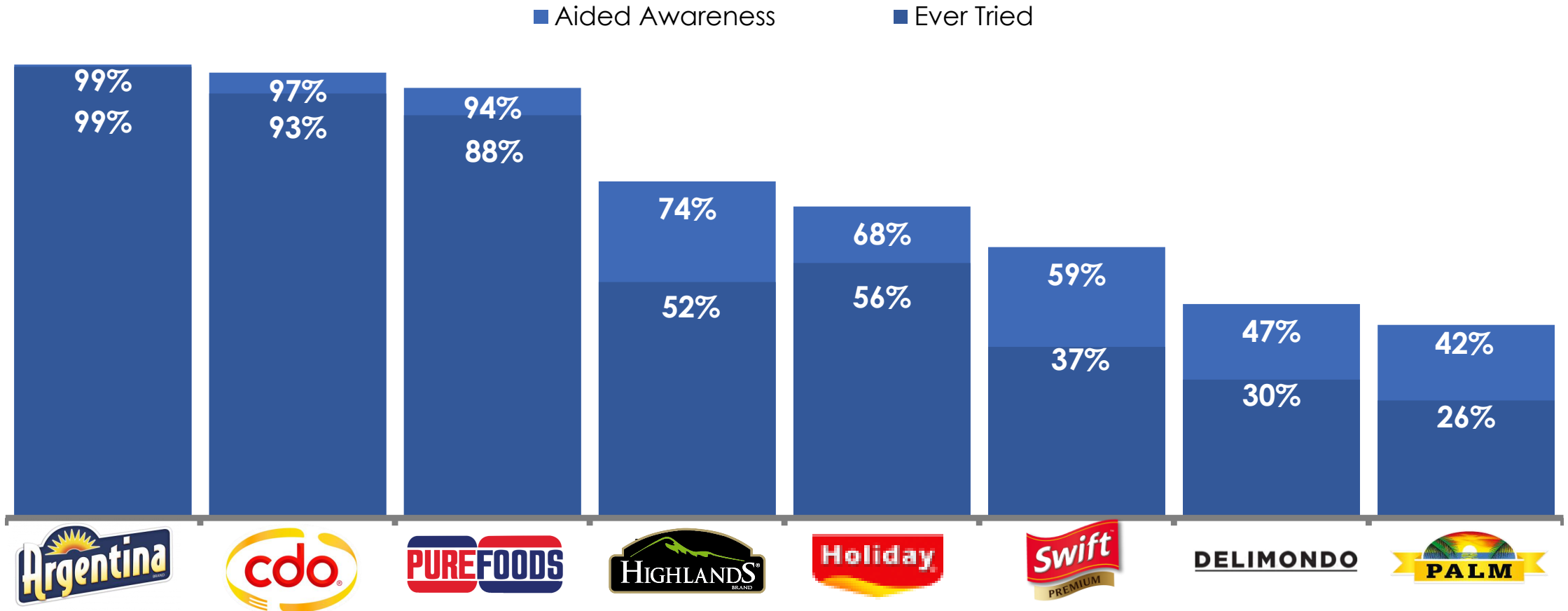
Awareness of different corned beef brands is driven across different demographic segments.

■
■
 - Significantly Higher/Lower vs. the Total

# Trial on Different Brands of Corned Beef



Reflective on brand awareness, Argentina leads the overall trial followed by CDO and Purefoods.



Q15. Which of the following corned beef brands have you ever tried? Choose all the answers that apply to you.

Among respondents who consumes corned beef n=1228

# Trial on Different Brands of Corned Beef by Demographics



CORNBEEF BRANDS - EVER TRIED			Argentina	CDO	Purefoods	Holiday	Highlands	Delimondo	Swift	Palm
<b>Total</b>		<b>1228</b>	<b>99%</b>	<b>93%</b>	<b>88%</b>	<b>56%</b>	<b>52%</b>	<b>30%</b>	<b>37%</b>	<b>26%</b>
<b>AREA</b>	NCR	271	99%	96%	92%	41%	62%	42%	44%	27%
	Northern Luzon and Central Luzon	245	98%	93%	88%	42%	49%	28%	36%	29%
	Southern Luzon and Bicol Region	344	99%	95%	88%	36%	51%	29%	34%	23%
	Visayas	190	98%	90%	87%	93%	49%	31%	43%	33%
	Mindanao	178	99%	87%	84%	94%	42%	19%	31%	18%
<b>AGE</b>	18 to 25 years old	243	98%	91%	83%	56%	39%	26%	23%	19%
	26 to 35 years old	615	99%	93%	87%	55%	51%	28%	36%	25%
	36 to 50 years old	326	98%	94%	94%	58%	59%	35%	48%	29%
	51 and up	44	98%	91%	93%	52%	73%	50%	66%	41%
<b>GENDER</b>	Male	500	99%	95%	87%	56%	56%	33%	41%	27%
	Female	728	98%	91%	89%	56%	49%	29%	35%	25%
<b>SEC</b>	Class ABC	322	98%	93%	94%	49%	63%	39%	46%	30%
	Class D	457	99%	93%	88%	55%	51%	27%	37%	25%
	Class E	449	99%	92%	84%	62%	44%	27%	31%	23%
<b>CIVIL STATUS</b>	Married with children	233	99%	90%	85%	58%	53%	30%	36%	23%
	Married without children	322	99%	93%	90%	59%	52%	31%	41%	28%
	Single Parent	183	98%	96%	91%	60%	55%	34%	42%	28%
	Single without children	490	99%	93%	88%	51%	49%	28%	34%	25%

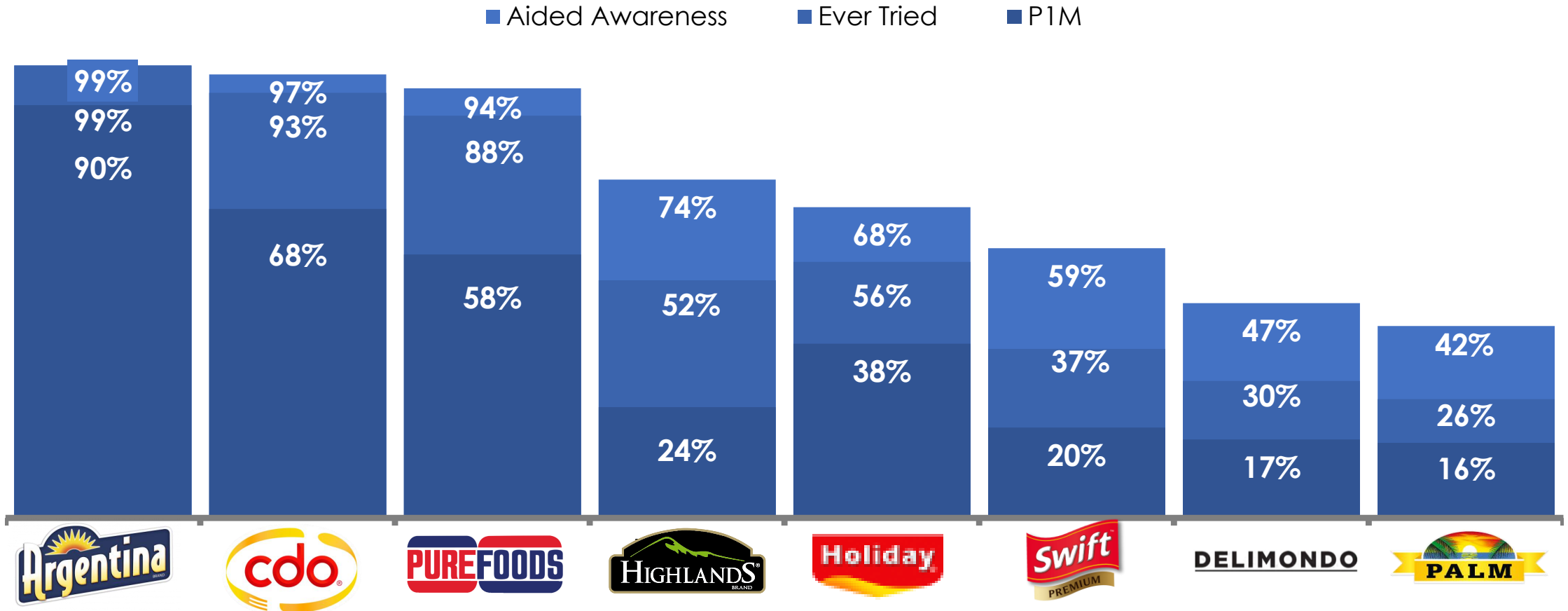
Trial of different corned beef brands is driven across different demographic segments.

■
■
 - Significantly Higher/Lower vs. the Total

# One-month usage on Different Brands of Corned Beef



Past one-month usage still dominantly led by Argentina, and is followed by CDO and Purefoods



Q16. Which of the following corned beef brands have you consumed in the past 1 month? Choose all the answers that apply to you.

Among respondents who consumes corned beef n=1228

# Usage on Different Brands of Corned Beef by Demographics



CORNBEEF BRANDS - P1M			Argentina	CDO	Purefoods	Holiday	Highlands	Swift	Delimondo	Palm
<b>Total</b>		<b>1228</b>	<b>90%</b>	<b>68%</b>	<b>58%</b>	<b>38%</b>	<b>24%</b>	<b>20%</b>	<b>17%</b>	<b>16%</b>
<b>AREA</b>	NCR	271	92%	76%	59%	23%	31%	21%	21%	15%
	Northern Luzon and Central Luzon	245	92%	73%	59%	23%	24%	18%	17%	17%
	Southern Luzon and Bicol Region	344	92%	69%	58%	21%	20%	18%	15%	15%
	Visayas	190	86%	62%	59%	76%	28%	26%	23%	24%
	Mindanao	178	89%	52%	50%	75%	18%	16%	11%	11%
<b>AGE</b>	18 to 25 years old	243	91%	63%	53%	38%	18%	14%	16%	14%
	26 to 35 years old	615	91%	66%	53%	39%	24%	19%	16%	16%
	36 to 50 years old	326	88%	73%	67%	38%	28%	24%	19%	17%
	51 and up	44	93%	66%	77%	34%	32%	34%	23%	27%
<b>GENDER</b>	Male	500	91%	70%	57%	39%	28%	22%	20%	18%
	Female	728	90%	66%	58%	38%	22%	19%	15%	15%
<b>SEC</b>	Class ABC	322	90%	68%	63%	31%	29%	22%	23%	16%
	Class D	457	92%	69%	56%	35%	24%	19%	15%	17%
	Class E	449	89%	65%	55%	46%	22%	19%	16%	16%
<b>CIVIL STATUS</b>	Married with children	233	88%	65%	55%	40%	23%	17%	14%	13%
	Married without children	322	91%	72%	61%	43%	25%	20%	19%	16%
	Single Parent	183	91%	63%	58%	37%	28%	25%	20%	18%
	Single without children	490	91%	68%	56%	34%	23%	19%	17%	18%

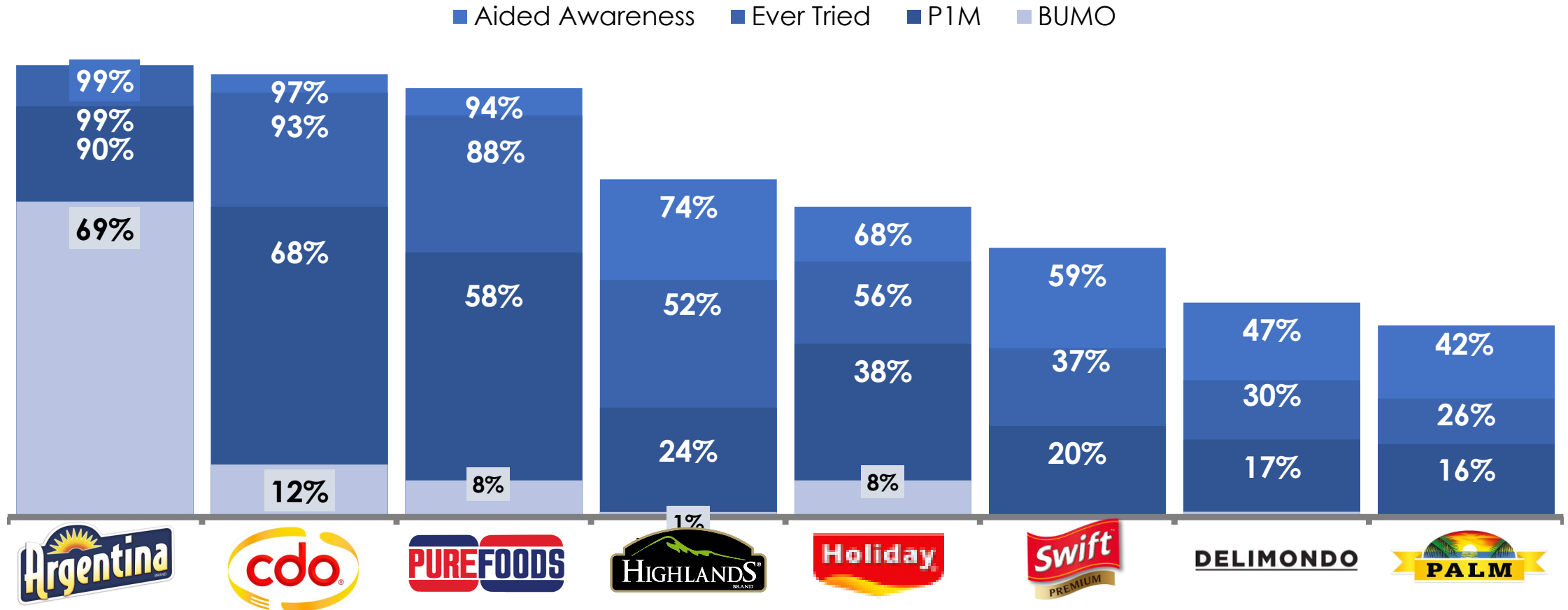
Usage of different corned beef brands is driven across different demographic segments.

■ ■ - Significantly Higher/Lower vs. the Total

# Loyalty on Different Brands of Corned Beef



Argentina still leads the overall share of loyal customers, followed by CDO and Purefoods, surprisingly Holiday leads over Highlands in terms of brand loyalty.



Q17. Which of the following corned beef brands do you eat most often?

Among respondents who consumes corned beef n=1228

# Loyalty on Different Brands of Corned Beef by Demographics



BUMO of Argentina Corned Beef products is propelled by NCR dwellers and the younger generation (18-25 years old)

On the other hand, CDO is propelled by SLBR dwellers, and Holiday is propelled by VISMIN dwellers and those in the lower-income household groups.

Purefoods corned beef is more patronized by older adults (36 to 50 years old) and from the upper-income class.

CORNBEEF BRANDS- BUMO			Argentina	CDO	Purefoods	Holiday	Delimondo	Highlands	Palm	Swift	
		<b>Total</b>	<b>1228</b>	<b>69%</b>	<b>12%</b>	<b>8%</b>	<b>8%</b>	<b>1%</b>	<b>1%</b>	<b>0%</b>	<b>0%</b>
<b>AREA</b>	NCR	271	69%	14%	10%	0%	3%	3%	0%	0%	
	Northern Luzon and Central Luzon	245	75%	13%	9%	0%	1%	1%	0%	0%	
	Southern Luzon and Bicol Region	344	71%	17%	8%	1%	1%	1%	0%	0%	
	Visayas	190	68%	6%	4%	19%	1%	1%	0%	0%	
	Mindanao	178	58%	1%	7%	32%	1%	0%	1%	1%	
<b>AGE</b>	18 to 25 years old	243	76%	9%	4%	8%	0%	1%	0%	0%	
	26 to 35 years old	615	71%	11%	6%	8%	1%	1%	0%	0%	
	36 to 50 years old	326	62%	13%	14%	8%	2%	1%	0%	0%	
	51 and up	44	55%	16%	18%	5%	2%	5%	0%	0%	
<b>GENDER</b>	Male	500	70%	12%	8%	7%	2%	1%	0%	0%	
	Female	728	69%	11%	8%	9%	1%	2%	0%	0%	
<b>SEC</b>	Class ABC	322	65%	12%	12%	4%	2%	1%	0%	1%	
	Class D	457	71%	12%	8%	7%	1%	1%	0%	0%	
	Class E	449	70%	10%	5%	12%	1%	1%	0%	0%	
<b>CIVIL STATUS</b>	Married with children	233	65%	12%	8%	11%	0%	3%	0%	0%	
	Married without children	322	64%	13%	10%	8%	2%	1%	0%	0%	
	Single Parent	183	72%	9%	9%	7%	2%	1%	0%	1%	
	Single without children	490	73%	11%	7%	7%	1%	0%	0%	0%	

■ ■ - Significantly Higher/Lower vs. the Total

# Corned Beef Category Landscape Summary

Argentina has been established as the top brand of corned beef. Although CDO and Purefoods have high awareness and trial rate, it has a seemingly weak retention rate. Holiday on the other hand has potential with good conversion and retention rates.



	Awareness	Trial Rate	Ever Tried	Conversion Rate	Past 1 Month	Retention Rate	BUMO
<b>Argentina</b>	99%	100%	99%	92%	90%	77%	69%
<b>CDO</b>	97%	95%	93%	73%	68%	17%	12%
<b>Purefoods</b>	94%	94%	88%	65%	58%	14%	8%
<b>Highlands</b>	74%	70%	52%	47%	24%	5%	1%
<b>Holiday</b>	68%	82%	56%	68%	38%	21%	8%
<b>Swift</b>	59%	63%	37%	53%	20%	1%	0%
<b>Delimondo</b>	47%	65%	30%	57%	17%	7%	1%
<b>Palm</b>	42%	61%	26%	64%	16%	0%	0%



## Summary of Findings For Corned Beef



69%  
BUMO

Argentina is a **market leader** in the corned beef category market with **high performance** across the customer journey at 1<sup>st</sup> place.

The current goal of Argentina is to ensure **brand loyalty** to prevent **lapsing** or **switching to another brand**. Argentina still has the potential to capture the market as its close competitors have **low retention rates** despite having good awareness and trial rates.

Top potential challengers of Argentina are **CDO** and **PUREFOODS**, both of which have high awareness and trial rates.



Both brands have exceptionally weak performance in **Mindanao** for brand usage **and in Visayas** for brand retention.

However, having both a high awareness and trial rate there is a **high potential for growth** given that **consumers** are retained.

**Holiday**

Holiday corned beef on the other hand has surprisingly good conversion and retention rates. There is also **high potential for growth** of the brand, if awareness and trial grow in NCR and Luzon Region, given the brand has a good retention rate, especially among lower-income class individuals.

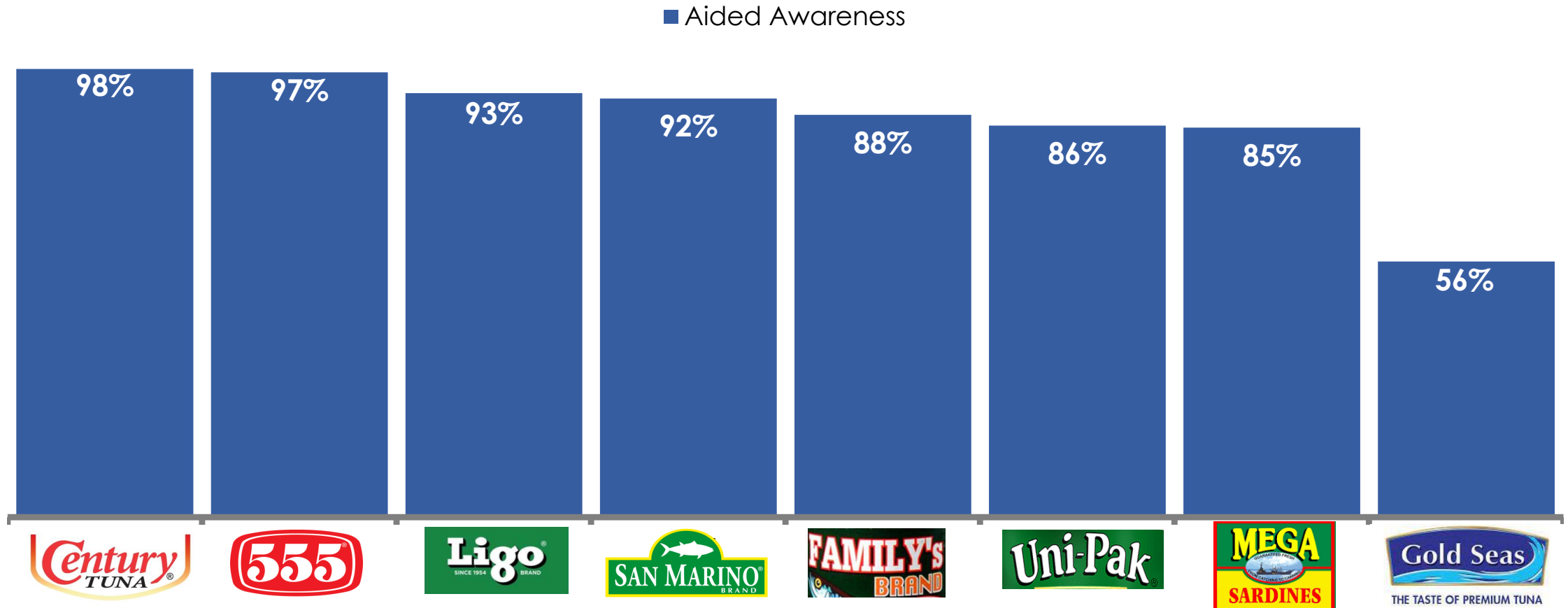


**TUNA-SARDINES  
CATEGORY LANDSCAPE**

# Awareness on Different Brands of Tuna/Sardines



Century Tuna and 555 of the Tuna/Sardines category is known by almost 10 out of 10 Filipinos, closely followed by Ligo and San Marino.



Q19. Which of the following brands of canned tuna/ sardines are you aware of?  
Choose all the answers that apply to you.

Among respondents who consumes tuna/sardines n=1112

# Awareness on Brands of Tuna/Sardines by Demographics

Bread brands are driven across different demographic segments.



SARDINES/TUNA BRAND AWARENESS			Century Tuna	555	Ligo	San Marino	Family's Brand	Uni-Pak	Mega	Gold Seas
<b>Total</b>		<b>1112</b>	<b>98%</b>	<b>97%</b>	<b>93%</b>	<b>92%</b>	<b>88%</b>	<b>86%</b>	<b>85%</b>	<b>56%</b>
<b>AREA</b>	NCR	249	99%	98%	96%	98%	86%	86%	91%	63%
	Northern Luzon and Central Luzon	218	98%	98%	91%	93%	85%	87%	83%	55%
	Southern Luzon and Bicol Region	305	99%	97%	95%	91%	85%	85%	84%	54%
	Visayas	175	98%	98%	94%	90%	96%	90%	87%	61%
	Mindanao	165	96%	96%	85%	85%	93%	81%	81%	47%
<b>AGE</b>	18 to 25 years old	222	97%	96%	92%	88%	86%	84%	80%	46%
	26 to 35 years old	551	99%	98%	93%	92%	88%	87%	86%	55%
	36 to 50 years old	299	98%	97%	94%	93%	91%	86%	88%	64%
	51 and up	40	100%	100%	90%	95%	80%	78%	85%	70%
<b>GENDER</b>	Male	449	99%	97%	92%	92%	87%	85%	86%	57%
	Female	663	98%	98%	93%	91%	89%	86%	85%	56%
<b>SEC</b>	Class ABC	293	99%	97%	95%	95%	89%	87%	89%	64%
	Class D	408	99%	99%	94%	95%	89%	87%	86%	57%
	Class E	411	97%	97%	91%	87%	87%	84%	82%	50%
<b>CIVIL STATUS</b>	Married with children	201	97%	98%	89%	92%	91%	85%	85%	57%
	Married without children	294	98%	98%	95%	93%	90%	89%	89%	61%
	Single Parent	173	98%	99%	94%	94%	84%	84%	81%	57%
	Single without children	444	99%	96%	93%	90%	87%	84%	85%	52%

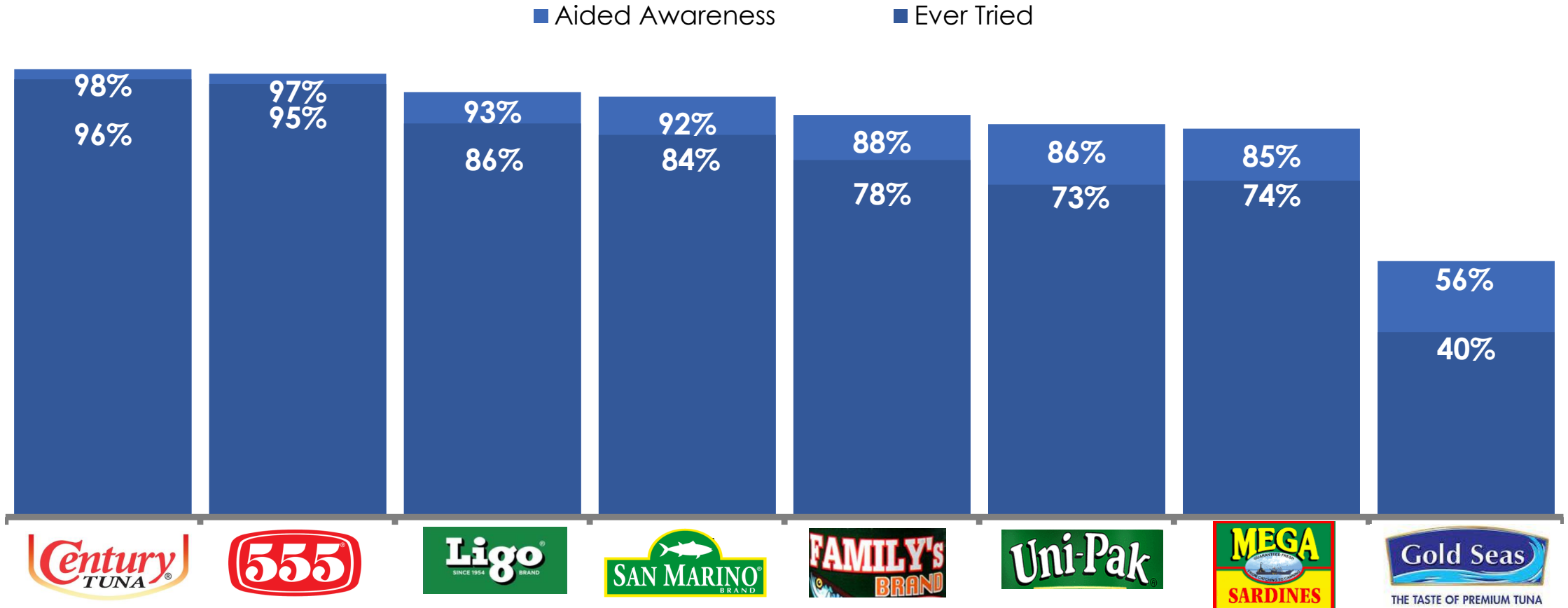
Awareness of different Tuna/Sardines brands is driven across different demographic segments.

■ ■ - Significantly Higher/Lower vs. the Total

# Trial on Different Brands of Tuna/Sardines



Reflective on brand awareness, Century Tuna and 555 lead the overall trial followed by Ligo and San Marino.



Q20. Which of the following brands of canned tuna/ sardines have you ever tried? Choose all the answers that apply to you.

Among respondents who consumes tuna/sardines n=1112

# Trial on Different Brands of Tuna/Sardines



SARDINES/TUNA BRAND EVER TRIED		Century Tuna	555	Ligo	San Marino	Family's Brand	Mega	Uni-Pak	Gold Seas	
<b>Total</b>		<b>1112</b>	<b>96%</b>	<b>95%</b>	<b>86%</b>	<b>84%</b>	<b>78%</b>	<b>74%</b>	<b>73%</b>	<b>40%</b>
<b>AREA</b>	NCR	249	98%	96%	92%	92%	71%	83%	73%	47%
	Northern Luzon and Central Luzon	218	92%	94%	83%	85%	76%	70%	77%	39%
	Southern Luzon and Bicol Region	305	99%	94%	90%	87%	72%	73%	71%	36%
	Visayas	175	95%	97%	87%	78%	92%	72%	74%	48%
	Mindanao	165	92%	93%	73%	70%	88%	67%	68%	34%
<b>AGE</b>	18 to 25 years old	222	93%	94%	84%	75%	76%	67%	70%	31%
	26 to 35 years old	551	96%	96%	87%	84%	79%	74%	74%	39%
	36 to 50 years old	299	97%	92%	87%	88%	80%	77%	73%	47%
	51 and up	40	95%	100%	85%	93%	65%	75%	70%	60%
<b>GENDER</b>	Male	449	97%	94%	87%	85%	78%	76%	73%	42%
	Female	663	95%	95%	86%	83%	78%	72%	73%	39%
<b>SEC</b>	Class ABC	293	98%	95%	89%	90%	78%	80%	75%	49%
	Class D	408	98%	95%	88%	87%	76%	74%	72%	38%
	Class E	411	93%	94%	82%	76%	80%	69%	71%	37%
<b>CIVIL STATUS</b>	Married with children	201	97%	94%	83%	82%	81%	76%	73%	43%
	Married without children	294	94%	95%	86%	84%	80%	78%	76%	44%
	Single Parent	173	95%	97%	88%	85%	76%	68%	70%	44%
	Single without children	444	97%	95%	87%	84%	77%	72%	72%	36%

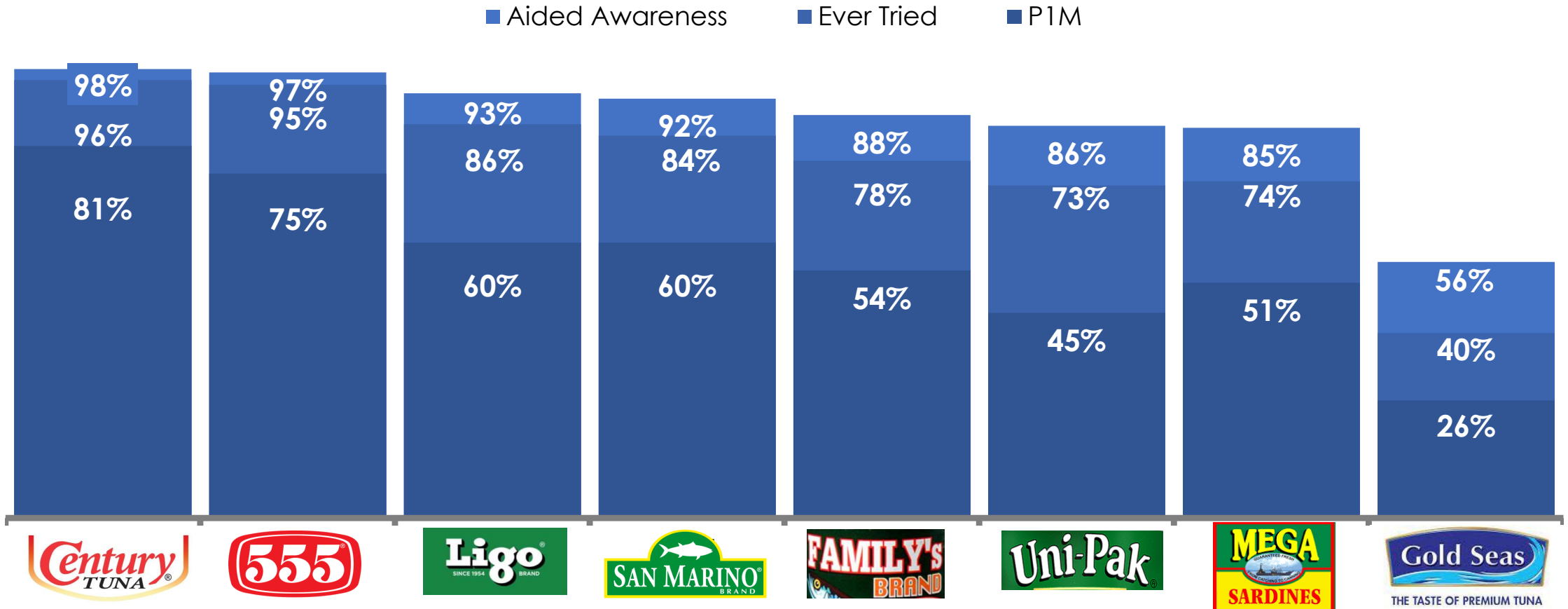
Trial of different Tuna/Sardines brands is driven across different demographic segments.

■ ■ - Significantly Higher/Lower vs. the Total

# One-month usage on Different Brands of Tuna/Sardines



Past one-month usage still dominantly led by Century Tuna, and is followed by 555, Ligo and San Marino.



Q21. Which of the following brands of canned tuna/ sardines have you consumed in the past 1 month? Choose all the answers that apply to you.

Among respondents who consumes tuna/sardines n=1112

# Usage on Different Brands of Tuna/Sardines by Demographics



SARDINES/TUNA BRAND P1M		Century Tuna	555	Ligo	San Marino	Family's Brand	Mega	Uni-Pak	Gold Seas	
<b>Total</b>		<b>1112</b>	<b>81%</b>	<b>75%</b>	<b>60%</b>	<b>60%</b>	<b>54%</b>	<b>51%</b>	<b>45%</b>	<b>26%</b>
<b>AREA</b>	NCR	249	88%	77%	64%	74%	49%	58%	46%	28%
	Northern Luzon and Central Luzon	218	75%	74%	59%	64%	50%	44%	50%	23%
	Southern Luzon and Bicol Region	305	86%	75%	68%	61%	43%	53%	42%	24%
	Visayas	175	83%	79%	61%	55%	71%	53%	48%	34%
	Mindanao	165	70%	71%	42%	38%	70%	47%	39%	21%
<b>AGE</b>	18 to 25 years old	222	75%	75%	61%	50%	53%	47%	44%	22%
	26 to 35 years old	551	81%	78%	60%	62%	55%	52%	45%	25%
	36 to 50 years old	299	86%	71%	60%	63%	55%	53%	45%	29%
	51 and up	40	85%	78%	68%	70%	40%	53%	45%	28%
<b>GENDER</b>	Male	449	84%	74%	63%	63%	52%	55%	45%	27%
	Female	663	80%	76%	58%	58%	55%	49%	44%	25%
<b>SEC</b>	Class ABC	293	86%	76%	64%	72%	54%	59%	47%	33%
	Class D	408	83%	77%	63%	61%	51%	51%	42%	23%
	Class E	411	76%	73%	55%	51%	57%	46%	45%	23%
<b>CIVIL STATUS</b>	Married with children	201	82%	78%	58%	58%	61%	57%	42%	25%
	Married without children	294	81%	74%	56%	59%	56%	52%	44%	26%
	Single Parent	173	82%	76%	60%	65%	48%	46%	43%	29%
	Single without children	444	81%	75%	64%	60%	52%	50%	47%	25%

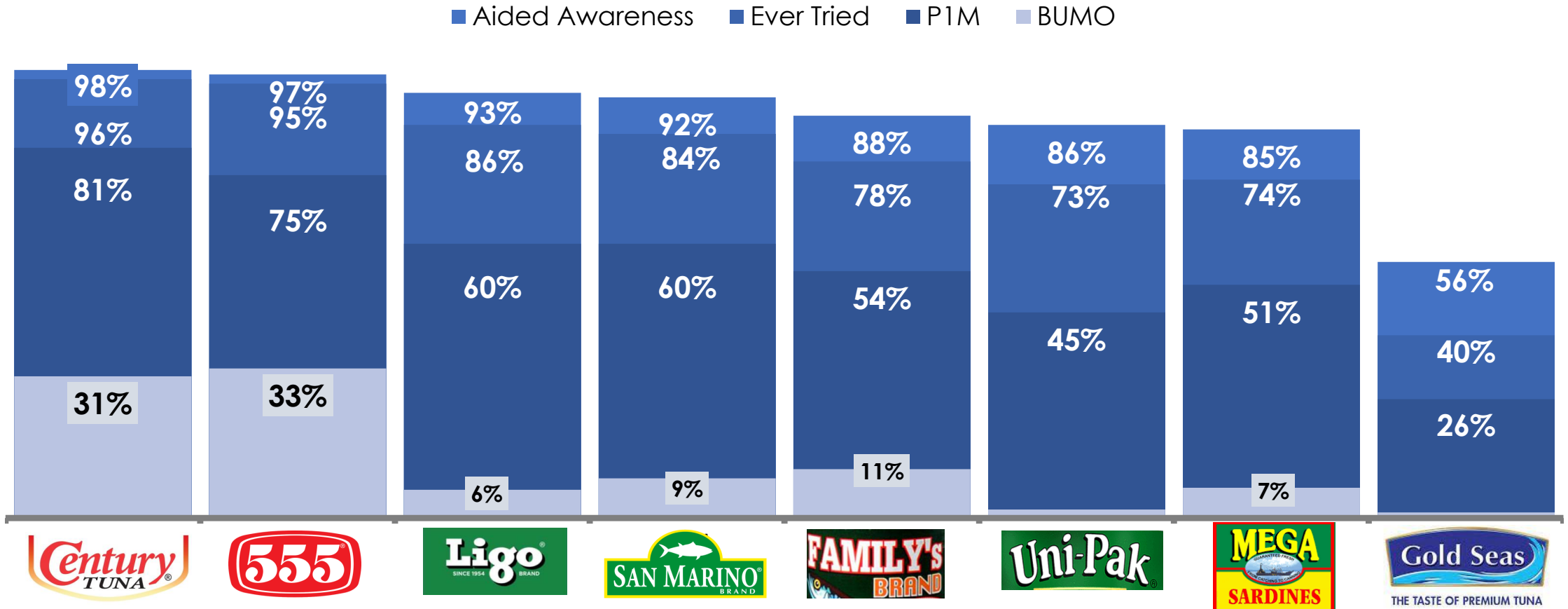
Usage of different Tuna/Sardines brands is driven across different demographic segments.

■
■
 - Significantly Higher/Lower vs. the Total

# Loyalty on Different Brands of Tuna/Sardines



Surprisingly for the Tuna/Sardines category, 555 leads over Century Tuna. Meanwhile, Family's brand fares better in BUMO/Loyalty compared to Ligo.



Q22. Which of the following brands of canned tuna/ sardines do you eat most often?

Among respondents who consumes tuna/sardines n=1112

# Loyalty on Different Brands of Tuna/Sardines by Demographics



Family's Brand is driven more by VISMIN dwellers while San Marino is driven by NCR and Ligo by SLBR dwellers.

In terms of income classes, Century Tune is propelled by the upper-income class whereas Family's brand is more preferred by the lower-income class.

Meanwhile 555 is more patronized by single parents.

SARDINES/TUNA BRAND BUMO		555	Century Tuna	Family's Brand	San Marino	Mega	Ligo	Uni-Pak	Gold Seas	
<b>Total</b>		<b>1112</b>	<b>33%</b>	<b>31%</b>	<b>11%</b>	<b>9%</b>	<b>7%</b>	<b>6%</b>	<b>2%</b>	<b>1%</b>
<b>AREA</b>	NCR	249	30%	37%	2%	14%	8%	6%	1%	2%
	Northern Luzon and Central Luzon	218	34%	31%	8%	10%	5%	6%	5%	0%
	Southern Luzon and Bicol Region	305	30%	32%	3%	10%	10%	11%	1%	3%
	Visayas	175	41%	27%	19%	4%	3%	2%	1%	1%
	Mindanao	165	32%	23%	33%	2%	6%	1%	2%	1%
<b>AGE</b>	18 to 25 years old	222	38%	27%	12%	6%	5%	6%	4%	0%
	26 to 35 years old	551	35%	30%	11%	8%	7%	6%	1%	1%
	36 to 50 years old	299	25%	36%	9%	11%	7%	6%	1%	2%
	51 and up	40	30%	38%	3%	18%	5%	8%	0%	0%
<b>GENDER</b>	Male	449	33%	31%	10%	8%	7%	7%	2%	1%
	Female	663	33%	31%	11%	9%	6%	6%	2%	1%
<b>SEC</b>	Class ABC	293	27%	39%	4%	10%	8%	6%	1%	3%
	Class D	408	31%	31%	11%	10%	7%	8%	2%	0%
	Class E	411	38%	25%	15%	7%	6%	5%	3%	1%
<b>CIVIL STATUS</b>	Married with children	201	30%	32%	12%	10%	5%	7%	2%	1%
	Married without children	294	26%	33%	14%	8%	9%	6%	2%	2%
	Single Parent	173	41%	29%	8%	10%	6%	3%	1%	1%
	Single without children	444	35%	30%	9%	8%	6%	7%	2%	1%

■
■
 - Significantly Higher/Lower vs. the Total

# Tuna/Sardines Category Landscape Summary

Century Tuna and 555 have a good overall customer journey. Ligo although achieving high awareness and trial rates has low retention leading to low loyalty. Family's Brand has high potential given the high conversion and improving retention rates.



	Awareness	Trial Rate	Ever Tried	Conversion Rate	Past 1 Month	Retention Rate	BUMO
<b>Century Tuna</b>	98%	98%	96%	85%	81%	38%	31%
<b>555</b>	97%	97%	95%	80%	75%	43%	33%
<b>Ligo</b>	93%	93%	86%	70%	60%	10%	6%
<b>San Marino</b>	92%	91%	84%	72%	60%	14%	9%
<b>Family's Brand</b>	88%	89%	78%	69%	54%	20%	11%
<b>Uni-Pak</b>	86%	85%	73%	62%	45%	4%	2%
<b>Mega</b>	85%	86%	74%	70%	51%	13%	7%
<b>Gold Seas</b>	56%	72%	40%	64%	26%	5%	1%

# Summary of Findings For Tuna/Sardines



Century Pacific Food is a **clear market leader** in the combined tuna and sardines market with **high performance** across the customer journey.

The current goal of Century Pacific Food Inc., is to ensure and maintain **brand loyalty** to prevent **lapsing** or **switching to another brand**.

Top potential challengers of Century Pacific Foods are **San Marino** and **Family's Brand** both of which also have good results on overall customer journey reading.



Both brands have potential in terms of improving customer retention, given that there is already a nationwide footprint on both brands.



Ligo on the other hand although part of Century Pacific food Inc. has low retention rate.

However, Ligo as a known brand can also achieve **growth** of the brand, if the brand can improve its customer loyalty programs.



# PROCESSED FOOD CONSUMPTION AND BRAND PERFORMANCE

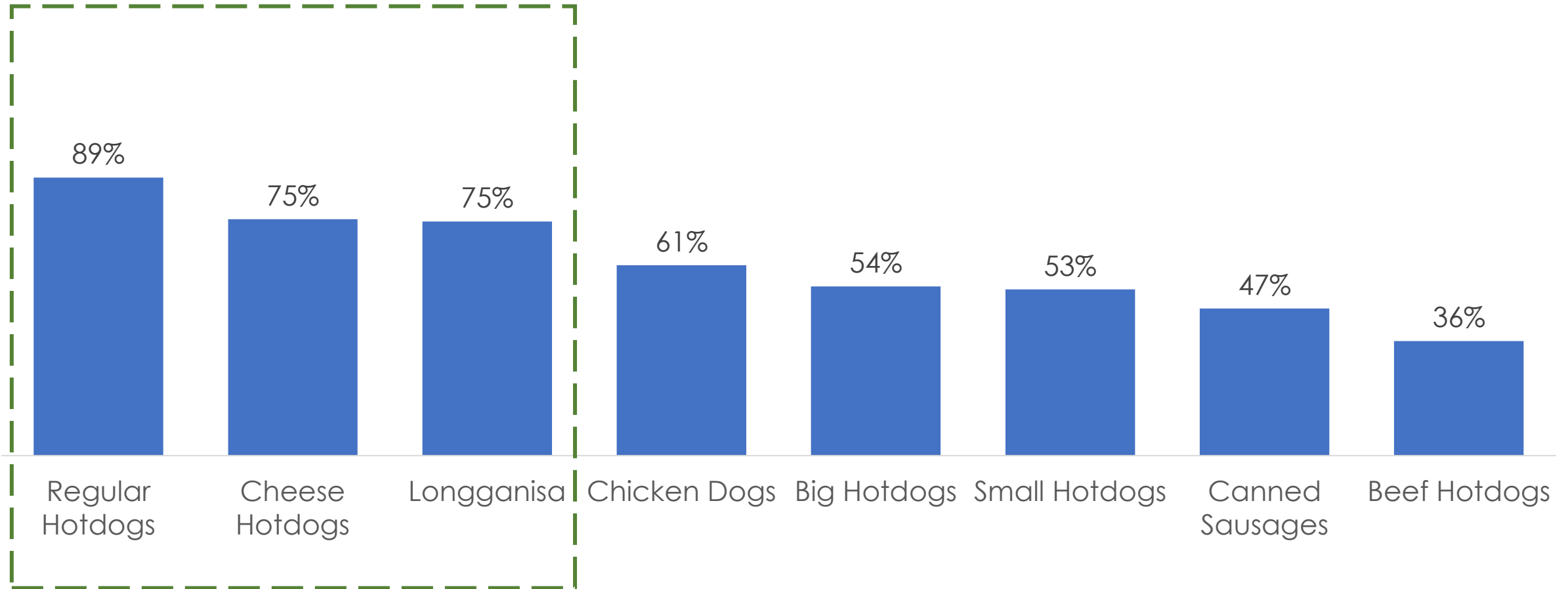


A close-up photograph of several sausages and hotdogs cooking on a black metal grill. The grill is set over a fire, with bright orange and yellow flames visible through the slats. The sausages are browned and sizzling, with some showing char marks. The hotdogs are also cooking, with one in the foreground showing a distinct char. The overall scene is warm and appetizing.

# SAUSAGE AND HOTDOG CATEGORY LANDSCAPE

## What Type of Sausage or Hotdog Do You Usually Eat for Breakfast?

Filipinos usually consume either regular hotdogs, cheese dogs, and longganisa as their choice of sausage or hotdog meals during breakfast.



Q23. You mentioned in the previous question that you eat sausages for breakfast, which of the following type of sausages do you eat?

Among respondents who consumes sausage or hotdogs n=1432

# Sausage or Hotdog Consumption by Demographics

TYPE OF SAUSAGE CONSUMPTION			Regular Hotdogs	Cheese Hotdogs	Longganisa	Chicken Dogs	Big Hotdogs	Small Hotdogs	Canned Sausages	Beef Hotdogs
<b>Total</b>		<b>1432</b>	<b>89%</b>	<b>75%</b>	<b>75%</b>	<b>61%</b>	<b>54%</b>	<b>53%</b>	<b>47%</b>	<b>36%</b>
<b>AREA</b>	NCR	347	87%	83%	76%	65%	59%	48%	50%	35%
	Northern Luzon and Central Luzon	303	87%	77%	74%	62%	50%	52%	43%	34%
	Southern Luzon and Bicol Region	402	89%	73%	72%	55%	53%	51%	44%	33%
	Visayas	203	89%	72%	79%	65%	57%	62%	53%	42%
	Mindanao	177	92%	67%	72%	60%	50%	56%	47%	46%
<b>AGE</b>	18 to 25 years old	273	87%	72%	73%	57%	48%	53%	42%	36%
	26 to 35 years old	725	90%	74%	73%	58%	54%	52%	45%	35%
	36 to 50 years old	384	88%	78%	77%	65%	56%	55%	51%	39%
	51 and up	50	86%	88%	88%	78%	64%	50%	70%	42%
<b>GENDER</b>	Male	570	89%	76%	76%	63%	55%	55%	46%	39%
	Female	862	88%	75%	73%	59%	53%	52%	47%	35%
<b>SEC</b>	Class ABC	399	91%	80%	77%	66%	55%	54%	53%	39%
	Class D	533	88%	77%	76%	58%	56%	52%	48%	36%
	Class E	500	87%	70%	71%	59%	51%	53%	41%	35%
<b>CIVIL STATUS</b>	Married with children	266	86%	77%	76%	59%	54%	46%	44%	31%
	Married without children	369	89%	75%	75%	63%	56%	57%	48%	39%
	Single Parent	220	90%	76%	71%	64%	57%	55%	54%	41%
	Single without children	577	89%	74%	75%	59%	51%	53%	45%	35%

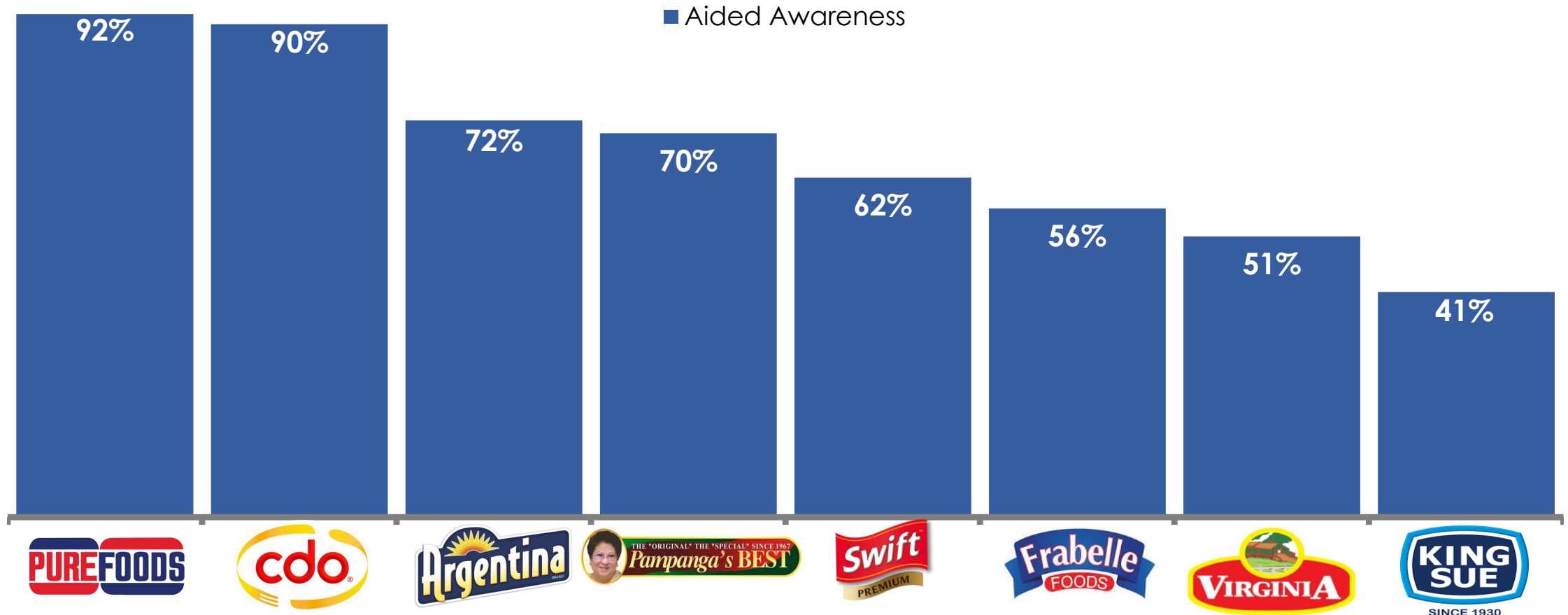
Consumption of different Sausage or Hotdog brands is driven across different demographic segments.

  - Significantly Higher/Lower vs. the Total

# Awareness on Different Brands of Sausage or Hotdog



Purefoods leads the overall awareness for sausage and hotdogs, followed closely by CDO.



Q24. Which of the following brands of sausages are you aware of?  
Choose all the answers that apply to you.

Among respondents who consumes sausage or hotdog n=1432

# Awareness on Brands of Sausage or Hotdog by Demographics



SAUGE BRANDS AWARENESS			Purefoods	CDO	Argentina	Pampanga's Best	Swift	Frabelle	Virginia	King Sue
<b>Total</b>		<b>1432</b>	<b>92%</b>	<b>90%</b>	<b>72%</b>	<b>70%</b>	<b>62%</b>	<b>56%</b>	<b>51%</b>	<b>41%</b>
<b>AREA</b>	NCR	347	93%	94%	70%	80%	67%	72%	45%	51%
	Northern Luzon and Central Luzon	303	90%	91%	69%	79%	60%	63%	35%	40%
	Southern Luzon and Bicol Region	402	92%	90%	69%	71%	65%	60%	37%	39%
	Visayas	203	92%	87%	83%	60%	63%	40%	84%	42%
	Mindanao	177	93%	84%	77%	44%	46%	26%	87%	27%
<b>AGE</b>	18 to 25 years old	273	90%	90%	78%	63%	47%	41%	52%	29%
	26 to 35 years old	725	93%	89%	71%	68%	60%	56%	50%	40%
	36 to 50 years old	384	92%	92%	71%	77%	73%	66%	52%	49%
	51 and up	50	90%	90%	74%	80%	84%	68%	56%	60%
<b>GENDER</b>	Male	570	91%	90%	74%	71%	65%	54%	52%	43%
	Female	862	92%	90%	71%	69%	60%	58%	51%	40%
<b>SEC</b>	Class ABC	399	93%	92%	75%	77%	71%	64%	55%	49%
	Class D	533	92%	90%	69%	72%	60%	57%	47%	40%
	Class E	500	90%	88%	74%	62%	56%	49%	53%	36%
<b>CIVIL STATUS</b>	Married with children	266	92%	90%	73%	72%	63%	60%	56%	42%
	Married without children	369	93%	89%	73%	71%	68%	59%	56%	46%
	Single Parent	220	92%	94%	71%	70%	65%	60%	52%	41%
	Single without children	577	91%	89%	72%	69%	57%	52%	46%	37%

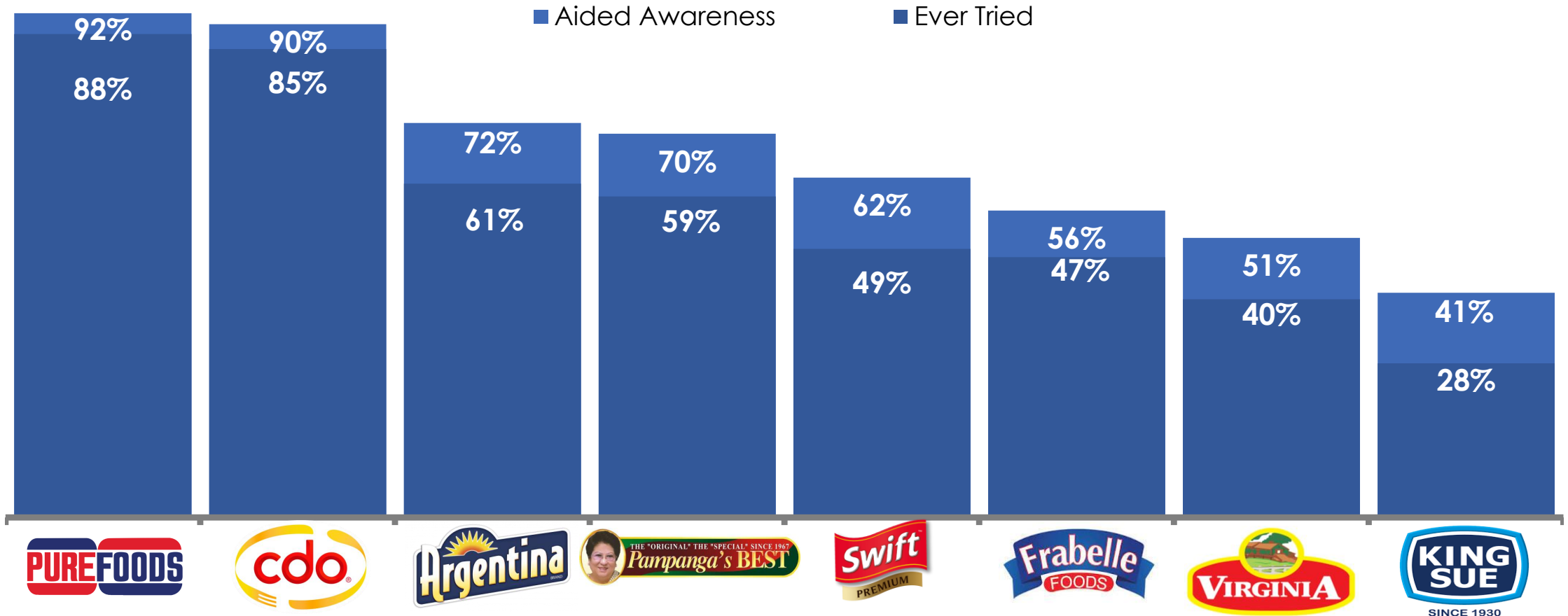
Awareness of different Sausage or Hotdog brands is driven across different demographic segments.

■ ■ - Significantly Higher/Lower vs. the Total

# Trial on Different Brands of Sausage or Hotdog



Reflective on bread awareness, Purefoods leads the overall trial followed by CDO.



Q25. Which of the following brands of sausages have you ever tried?  
Choose all the answers that apply to you.

Among respondents who consumes sausage or hotdog n=1432

# Trial on Different Brands of Sausage or Hotdog



SAUGE BRANDS EVER TRIED		Purefoods	CDO	Argentina	Pampanga's Best	Swift	Frabelle	Virginia	King Sue	
<b>Total</b>		<b>1432</b>	<b>88%</b>	<b>85%</b>	<b>61%</b>	<b>59%</b>	<b>49%</b>	<b>47%</b>	<b>40%</b>	<b>28%</b>
<b>AREA</b>	NCR	347	91%	89%	57%	67%	54%	62%	28%	35%
	Northern Luzon and Central Luzon	303	85%	88%	59%	68%	50%	52%	24%	24%
	Southern Luzon and Bicol Region	402	89%	87%	56%	60%	49%	50%	23%	26%
	Visayas	203	88%	81%	74%	49%	50%	36%	79%	34%
	Mindanao	177	86%	76%	68%	33%	38%	19%	81%	21%
<b>AGE</b>	18 to 25 years old	273	86%	84%	68%	55%	36%	33%	44%	24%
	26 to 35 years old	725	87%	85%	59%	57%	44%	48%	38%	26%
	36 to 50 years old	384	91%	88%	58%	64%	63%	56%	40%	34%
	51 and up	50	94%	82%	62%	66%	80%	50%	40%	44%
<b>GENDER</b>	Male	570	88%	86%	64%	59%	52%	48%	41%	31%
	Female	862	88%	85%	59%	58%	47%	47%	39%	26%
<b>SEC</b>	Class ABC	399	91%	85%	64%	65%	57%	55%	41%	33%
	Class D	533	89%	87%	58%	59%	48%	47%	36%	27%
	Class E	500	84%	83%	61%	53%	44%	42%	43%	26%
<b>CIVIL STATUS</b>	Married with children	266	90%	85%	59%	58%	51%	52%	42%	28%
	Married without children	369	90%	86%	62%	60%	55%	49%	43%	32%
	Single Parent	220	88%	87%	58%	59%	49%	49%	42%	30%
	Single without children	577	86%	85%	62%	58%	44%	44%	35%	25%

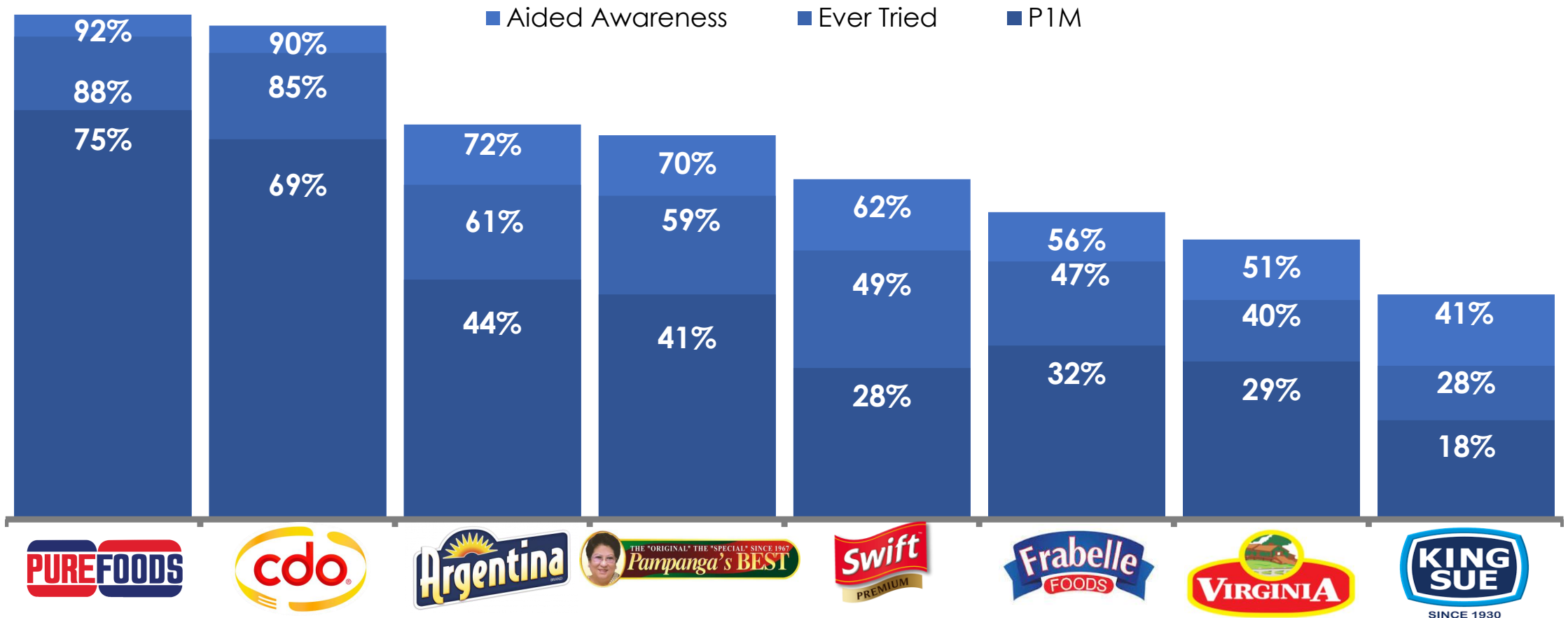
Trial of different Sausage or Hotdog brands is driven across different demographic segments.

■ ■ - Significantly Higher/Lower vs. the Total

# One-month usage on Different Brands of Sausage or Hotdog



Past one-month usage is still dominantly led by Purefoods, and again followed by CDO.



Q26. Which of the following brands of sausages have you consumed in the past 1 month? Choose all the answers that apply to you.

Among respondents who consumes sausage or hotdog n=1432

# Usage on Different Brands of Sausage or Hotdog by Demographics



SAUGE BRANDS P1M			Purefoods	CDO	Argentina	Pampanga's Best	Frabelle	Virginia	Swift	King Sue
<b>Total</b>		<b>1432</b>	<b>75%</b>	<b>69%</b>	<b>44%</b>	<b>41%</b>	<b>32%</b>	<b>29%</b>	<b>28%</b>	<b>18%</b>
<b>AREA</b>	NCR	347	76%	77%	39%	46%	36%	16%	28%	18%
	Northern Luzon and Central Luzon	303	71%	77%	41%	48%	39%	15%	27%	17%
	Southern Luzon and Bicol Region	402	78%	67%	39%	41%	31%	15%	27%	17%
	Visayas	203	73%	60%	56%	37%	30%	67%	32%	28%
	Mindanao	177	72%	55%	54%	24%	13%	66%	23%	14%
<b>AGE</b>	18 to 25 years old	273	72%	68%	52%	40%	27%	32%	25%	21%
	26 to 35 years old	725	72%	70%	43%	40%	31%	28%	25%	18%
	36 to 50 years old	384	80%	69%	38%	43%	35%	28%	32%	17%
	51 and up	50	84%	74%	48%	50%	36%	26%	54%	18%
<b>GENDER</b>	Male	570	76%	70%	46%	44%	31%	28%	29%	20%
	Female	862	74%	69%	42%	39%	32%	29%	27%	17%
<b>SEC</b>	Class ABC	399	79%	72%	46%	46%	34%	28%	32%	20%
	Class D	533	75%	71%	39%	40%	31%	24%	27%	16%
	Class E	500	70%	65%	47%	38%	31%	34%	25%	18%
<b>CIVIL STATUS</b>	Married with children	266	73%	67%	42%	39%	30%	29%	25%	14%
	Married without children	369	77%	69%	43%	39%	32%	33%	30%	20%
	Single Parent	220	76%	72%	45%	44%	36%	30%	29%	19%
	Single without children	577	73%	69%	45%	42%	30%	25%	27%	19%

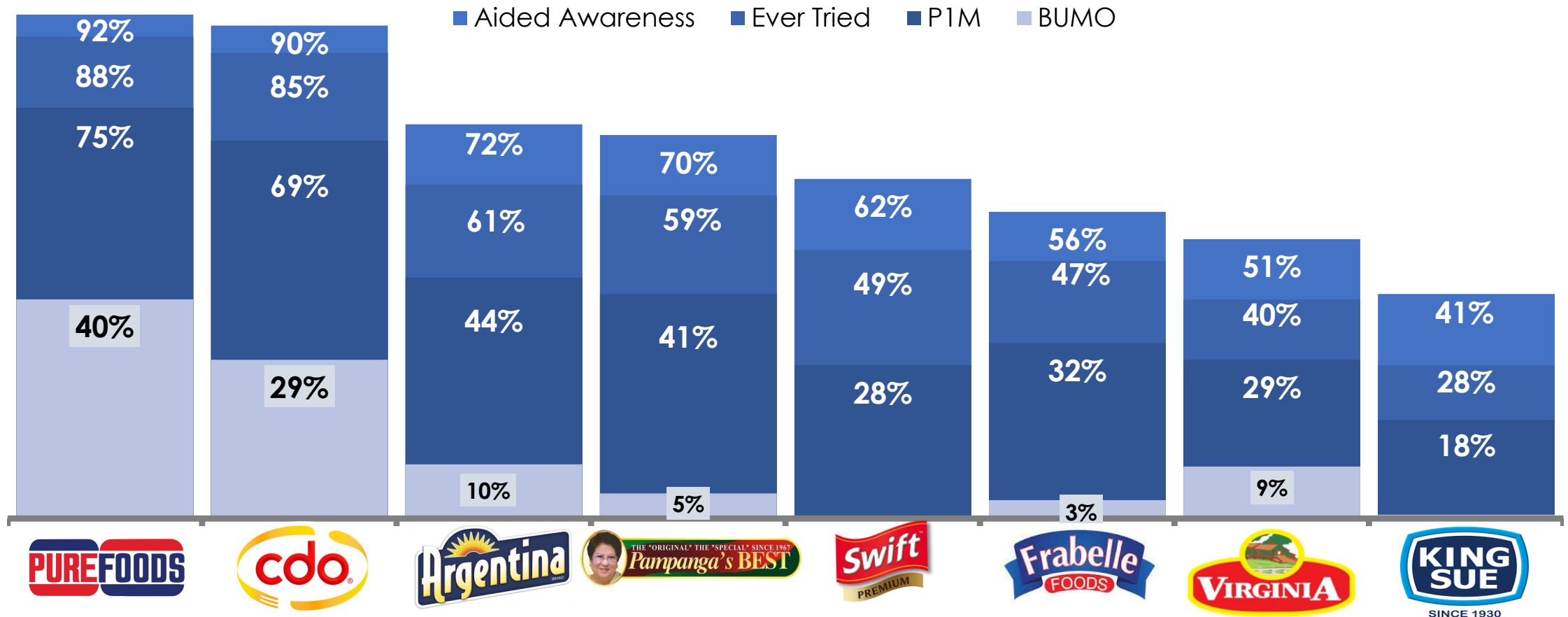
Usage of different Sausage or Hotdog brands is driven across different demographic segments.

■ ■ - Significantly Higher/Lower vs. the Total

# Loyalty on Different Brands of Sausage or Hotdog



Given high awareness, trial, and usage, Purefoods leads the loyalty among Sausage and Hotdog customers, followed by CDO.



Q27. Which of the following brands of sausages do you eat most often?

Among respondents who consumes sausage or hotdog n=1432

# Loyalty on Different Brands of Sausage or Hotdog by Demographics



Loyalty over Purefoods sausage or hotdogs is driven by SLBR dwellers and older adults (36 to 50 years old).

CDO is propelled mostly by NCR and NLCL dwellers.

Argentine on the other hand is driven more by Visayas, the younger generation and those in the lower-income class.

Meanwhile, Virginia is more patronized by VISMIN dwellers.

SAUGE BRANDS BUMO			Purefoods	CDO	Argentina	Virginia	Pampanga's Best	Frabelle	King Sue	Swift
<b>Total</b>		<b>1432</b>	<b>40%</b>	<b>29%</b>	<b>10%</b>	<b>9%</b>	<b>5%</b>	<b>3%</b>	<b>1%</b>	<b>0%</b>
<b>AREA</b>	NCR	347	44%	36%	6%	1%	5%	5%	0%	0%
	Northern Luzon and Central Luzon	303	34%	37%	12%	0%	8%	5%	2%	1%
	Southern Luzon and Bicol Region	402	48%	32%	6%	1%	5%	3%	1%	1%
	Visayas	203	33%	16%	19%	27%	0%	1%	0%	0%
	Mindanao	177	31%	11%	13%	41%	1%	0%	0%	0%
<b>AGE</b>	18 to 25 years old	273	38%	26%	18%	8%	3%	2%	1%	0%
	26 to 35 years old	725	36%	31%	10%	10%	6%	4%	1%	1%
	36 to 50 years old	384	46%	29%	4%	11%	4%	3%	0%	1%
	51 and up	50	54%	16%	18%	4%	2%	6%	0%	0%
<b>GENDER</b>	Male	570	41%	28%	11%	9%	6%	2%	1%	0%
	Female	862	39%	30%	9%	10%	4%	4%	1%	0%
<b>SEC</b>	Class ABC	399	45%	26%	7%	9%	6%	3%	1%	1%
	Class D	533	44%	30%	7%	7%	4%	4%	1%	0%
	Class E	500	32%	30%	15%	12%	4%	3%	1%	0%
<b>CIVIL STATUS</b>	Married with children	266	41%	29%	8%	12%	4%	3%	1%	0%
	Married without children	369	40%	28%	8%	13%	5%	4%	1%	1%
	Single Parent	220	38%	26%	12%	7%	7%	5%	1%	0%
	Single without children	577	41%	31%	12%	7%	4%	3%	1%	0%

■
■
 - Significantly Higher/Lower vs. the Total

# Sausage or Hotdog Category Landscape Summary

Purefoods has been established as the top brand of Sausage and Hotdogs. Followed by CDO across the overall customer journey. Argentina and Virginia has room for improvement given the good conversion and retention rate for Argentine, and retention rate for Virginia



	Awareness	Trial Rate	Ever Tried	Conversion Rate	Past 1 Month	Retention Rate	BUMO
<b>Purefoods</b>	92%	96%	88%	85%	75%	54%	40%
<b>CDO</b>	90%	95%	85%	81%	69%	42%	29%
<b>Argentina</b>	72%	84%	61%	72%	44%	23%	10%
<b>Pampanga's Best</b>	70%	84%	59%	70%	41%	11%	5%
<b>Swift</b>	62%	79%	49%	56%	28%	2%	0%
<b>Frabelle</b>	56%	84%	47%	67%	32%	11%	3%
<b>Virginia</b>	51%	78%	40%	72%	29%	33%	9%
<b>King Sue</b>	41%	68%	28%	64%	18%	4%	1%

# Summary of Findings For Sausages or Hotdogs



40%  
BUMO

Purefoods **leads the market** in the sausage and hotdog category with **high performance** across the customer journey at 1<sup>st</sup> place.

The current goal of Purefoods is to capture more of the market, ensuring more customer retention to convert into **brand loyalty** and prevent **lapsing** or **switching to another brand**.



**CDO** as the top competitor of Purefoods, has 29% or 3 out of 10 of Filipino patrons.

The brand can excessively increase its share over **weak areas** such as Visayas and Mindanao to increase its **market share**.

Meanwhile Argentine and Virginia are also brands worth mentioning, these brands have a **high potential for growth** in the sausage and hotdog category given that have brand-building efforts that would increase further their **conversion and retention rates**.

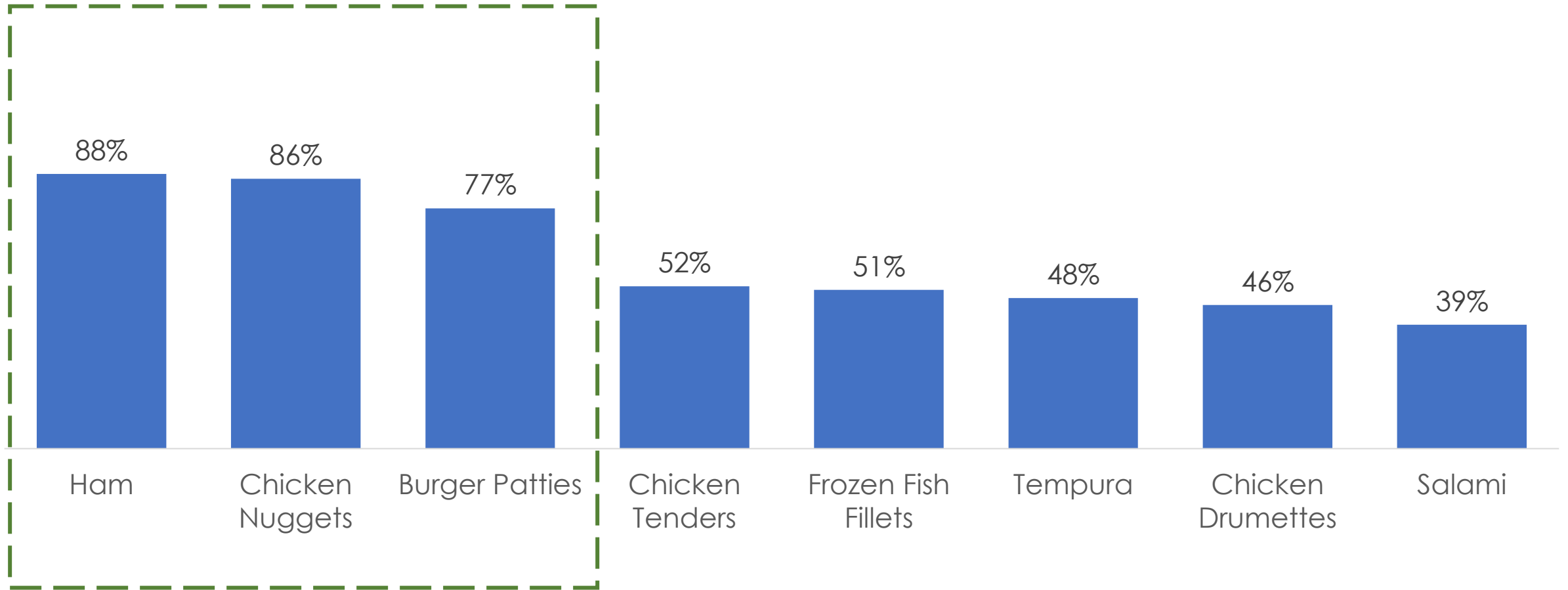




**PROCESSED MEAT  
CATEGORY LANDSCAPE**

## What Type of Processed Meat Do You Usually Eat for Breakfast?

Filipinos usually consume either Ham, Chicken Nuggets, and Burger Patties as their choice of processed meat during breakfast.



Q28. You mentioned in the previous question that you eat processed meats for breakfast, which of the following processed meats do you usually eat? Choose all the answers that apply to you.

Among respondents who consumes processed meat n=1059

# Processed Meat Consumption by Demographics

Consumption of Ham is propelled by Mindanao dwellers, Salami by NCR dwellers, and Tempura for VISMIN dwellers.

Meanwhile consumption of Chicken Nuggets and Burger Patties is driven more by the upper-income class.

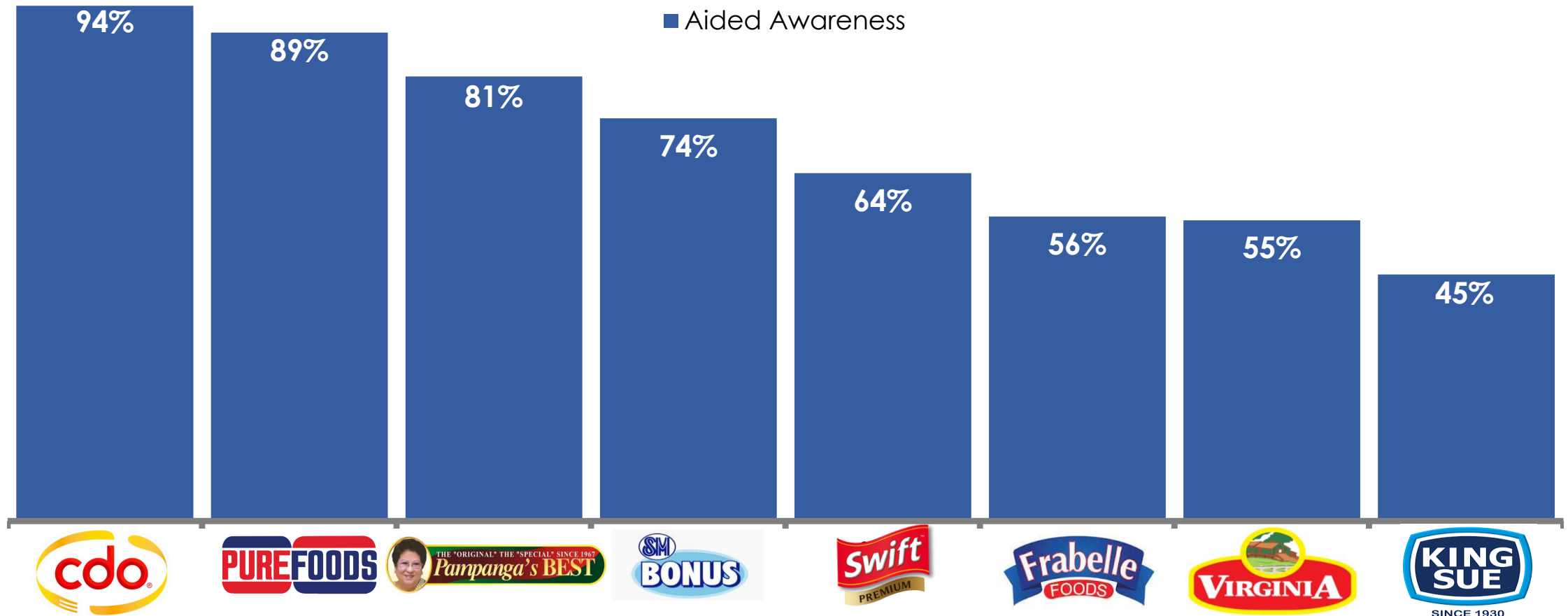
TYPES OF PROCESSED FOOD CONSUMED		Ham	Chicken Nuggets	Burger Patties	Chicken Tenders	Frozen Fish Fillets	Tempura	Chicken Drumettes	Salami	
<b>Total</b>		<b>1059</b>	<b>88%</b>	<b>86%</b>	<b>77%</b>	<b>52%</b>	<b>51%</b>	<b>48%</b>	<b>46%</b>	<b>39%</b>
<b>AREA</b>	NCR	246	90%	88%	79%	53%	52%	42%	50%	46%
	Northern Luzon and Central Luzon	218	88%	87%	78%	51%	48%	41%	44%	36%
	Southern Luzon and Bicol Region	295	86%	86%	79%	49%	49%	41%	42%	40%
	Visayas	158	92%	86%	75%	57%	55%	68%	52%	42%
	Mindanao	142	80%	80%	67%	50%	50%	60%	42%	28%
<b>AGE</b>	18 to 25 years old	199	87%	85%	77%	53%	50%	52%	46%	39%
	26 to 35 years old	516	88%	86%	76%	52%	50%	48%	46%	40%
	36 to 50 years old	304	87%	87%	78%	50%	53%	44%	45%	38%
	51 and up	40	88%	90%	75%	60%	53%	50%	45%	48%
<b>GENDER</b>	Male	440	89%	85%	78%	51%	50%	48%	45%	39%
	Female	619	87%	87%	76%	52%	51%	48%	47%	40%
<b>SEC</b>	Class ABC	298	90%	90%	83%	58%	56%	53%	52%	43%
	Class D	407	88%	86%	75%	47%	48%	42%	41%	39%
	Class E	354	84%	82%	73%	53%	49%	51%	46%	37%
<b>CIVIL STATUS</b>	Married with children	197	86%	85%	75%	50%	48%	50%	43%	38%
	Married without children	291	88%	87%	78%	54%	49%	50%	46%	40%
	Single Parent	152	90%	89%	76%	55%	55%	50%	49%	44%
	Single without children	419	87%	85%	77%	50%	52%	45%	46%	38%

  - Significantly Higher/Lower vs. the Total

# Awareness on Different Brands of Processed Meat



CDO leads the overall awareness of Processed Meat types, followed by Purefoods and Pampanga's Best



Q29. Which of the following brands of processed meats are you aware of? Choose all the answers that apply to you.

Among respondents who consumes processed meat n=1059

# Awareness on Brands of Processed Meat by Demographics



PROCESSED FOOD BRANDS AWARENESS			CDO	Purefoods	Pampanga's Best	Bonus	Swift	Frabelle	Virginia	King Sue
<b>Total</b>		<b>1059</b>	<b>94%</b>	<b>89%</b>	<b>81%</b>	<b>74%</b>	<b>64%</b>	<b>56%</b>	<b>55%</b>	<b>45%</b>
<b>AREA</b>	NCR	246	96%	91%	90%	78%	69%	66%	50%	53%
	Northern Luzon and Central Luzon	218	93%	86%	91%	74%	63%	64%	40%	46%
	Southern Luzon and Bicol Region	295	95%	88%	84%	74%	63%	59%	38%	41%
	Visayas	158	94%	94%	68%	77%	63%	44%	88%	47%
	Mindanao	142	91%	87%	60%	61%	58%	31%	86%	36%
<b>AGE</b>	18 to 25 years old	199	92%	84%	75%	73%	45%	41%	49%	34%
	26 to 35 years old	516	94%	89%	79%	72%	63%	55%	57%	44%
	36 to 50 years old	304	96%	93%	88%	78%	73%	65%	55%	52%
	51 and up	40	90%	93%	88%	68%	88%	60%	60%	68%
<b>GENDER</b>	Male	440	95%	90%	80%	74%	65%	57%	56%	45%
	Female	619	94%	89%	82%	73%	63%	55%	54%	45%
<b>SEC</b>	Class ABC	298	96%	93%	88%	78%	73%	65%	58%	53%
	Class D	407	94%	89%	81%	74%	60%	54%	50%	44%
	Class E	354	92%	87%	75%	70%	59%	49%	58%	40%
<b>CIVIL STATUS</b>	Married with children	197	96%	91%	82%	70%	60%	54%	59%	46%
	Married without children	291	96%	90%	81%	76%	70%	55%	60%	49%
	Single Parent	152	95%	88%	80%	80%	67%	66%	57%	49%
	Single without children	419	92%	88%	81%	71%	59%	53%	49%	41%

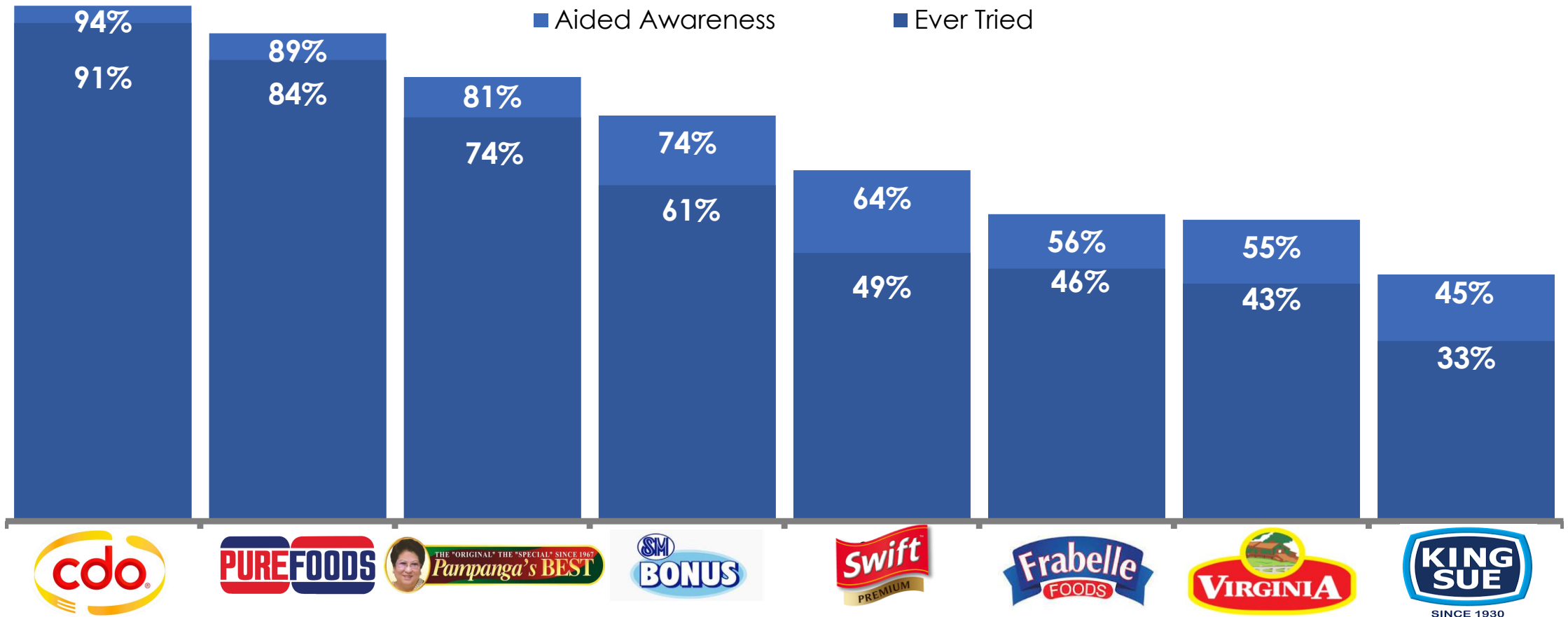
Awareness of different Processed Meat brands is driven across different demographic segments.

■ ■ - Significantly Higher/Lower vs. the Total

# Trial on Different Brands of Processed Meat



Reflective on brand awareness, CDO leads the overall trial followed by Purefoods and Pamapanga's Best



Q30. Which of the following brands of processed meats have you ever tried? Choose all the answers that apply to you.

Among respondents who consumes processed meat n=1059

# Trial on Different Brands of Processed Meat



Trial of different Processed Meat brands is driven across different demographic segments.

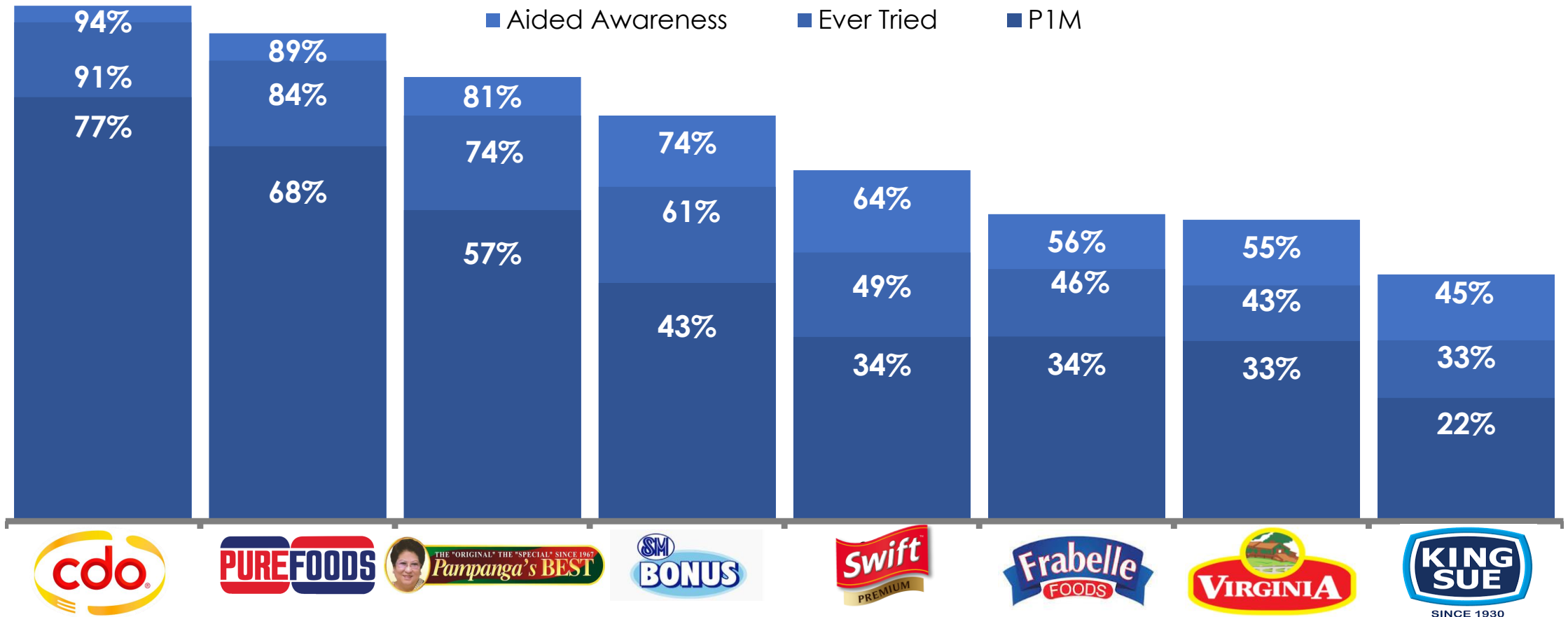
PROCESSED FOOD BRANDS EVER TRIED		CDO	Purefoods	Pampanga's Best	Bonus	Swift	Frabelle	Virginia	King Sue	
<b>Total</b>		<b>1059</b>	<b>91%</b>	<b>84%</b>	<b>74%</b>	<b>61%</b>	<b>49%</b>	<b>46%</b>	<b>43%</b>	<b>33%</b>
<b>AREA</b>	NCR	246	91%	87%	84%	67%	51%	54%	29%	36%
	Northern Luzon and Central Luzon	218	93%	79%	83%	59%	50%	54%	29%	33%
	Southern Luzon and Bicol Region	295	92%	84%	78%	59%	48%	49%	27%	29%
	Visayas	158	91%	87%	59%	68%	52%	39%	84%	42%
	Mindanao	142	85%	85%	47%	52%	40%	20%	78%	25%
<b>AGE</b>	18 to 25 years old	199	90%	76%	66%	64%	33%	34%	37%	29%
	26 to 35 years old	516	91%	84%	71%	62%	48%	46%	46%	31%
	36 to 50 years old	304	91%	88%	82%	59%	56%	54%	43%	37%
	51 and up	40	90%	95%	85%	58%	80%	48%	45%	48%
<b>GENDER</b>	Male	440	92%	83%	72%	62%	49%	45%	42%	34%
	Female	619	90%	85%	75%	61%	49%	47%	44%	32%
<b>SEC</b>	Class ABC	298	93%	90%	80%	66%	56%	54%	46%	39%
	Class D	407	92%	84%	74%	60%	47%	46%	40%	31%
	Class E	354	88%	79%	68%	58%	45%	40%	45%	30%
<b>CIVIL STATUS</b>	Married with children	197	90%	85%	75%	59%	46%	44%	48%	32%
	Married without children	291	91%	86%	74%	62%	55%	47%	48%	35%
	Single Parent	152	95%	87%	74%	67%	51%	54%	49%	41%
	Single without children	419	89%	81%	72%	60%	45%	44%	36%	29%

■ ■ - Significantly Higher/Lower vs. the Total

# One-month usage on Different Brands of Processed Meat



Past one-month usage is still led by CDO, followed by Purefoods and Pamapanga's Best



Q31. Which of the following brands of processed meats have you consumed in the past 1 month? Choose all the answers that apply to you.

Among respondents who consumes processed meat n=1059

# Usage on Different Brands of Processed Meat by Demographics



PROCESSED FOOD BRANDS P1M		CDO	Purefoods	Pampanga's Best	Bonus	Virginia	Frabelle	Swift	King Sue	
<b>Total</b>		<b>1059</b>	<b>77%</b>	<b>68%</b>	<b>57%</b>	<b>43%</b>	<b>34%</b>	<b>34%</b>	<b>33%</b>	<b>22%</b>
<b>AREA</b>	NCR	246	81%	68%	64%	46%	19%	39%	31%	20%
	Northern Luzon and Central Luzon	218	82%	67%	69%	44%	21%	40%	34%	26%
	Southern Luzon and Bicol Region	295	78%	71%	60%	40%	19%	34%	31%	20%
	Visayas	158	75%	70%	47%	55%	74%	34%	43%	35%
	Mindanao	142	65%	63%	29%	34%	65%	14%	27%	14%
<b>AGE</b>	18 to 25 years old	199	74%	65%	56%	49%	32%	31%	30%	24%
	26 to 35 years old	516	79%	67%	55%	45%	36%	32%	31%	22%
	36 to 50 years old	304	76%	72%	60%	38%	31%	38%	35%	21%
	51 and up	40	80%	78%	65%	40%	33%	35%	53%	30%
<b>GENDER</b>	Male	440	78%	67%	55%	43%	32%	32%	34%	23%
	Female	619	77%	69%	58%	44%	35%	35%	32%	22%
<b>SEC</b>	Class ABC	298	79%	74%	64%	46%	34%	38%	37%	23%
	Class D	407	79%	69%	55%	41%	29%	32%	30%	20%
	Class E	354	75%	63%	53%	45%	39%	32%	33%	25%
<b>CIVIL STATUS</b>	Married with children	197	74%	66%	54%	41%	36%	28%	29%	21%
	Married without children	291	77%	69%	55%	42%	37%	33%	35%	23%
	Single Parent	152	86%	72%	63%	51%	35%	44%	41%	28%
	Single without children	419	76%	68%	57%	43%	30%	33%	31%	21%

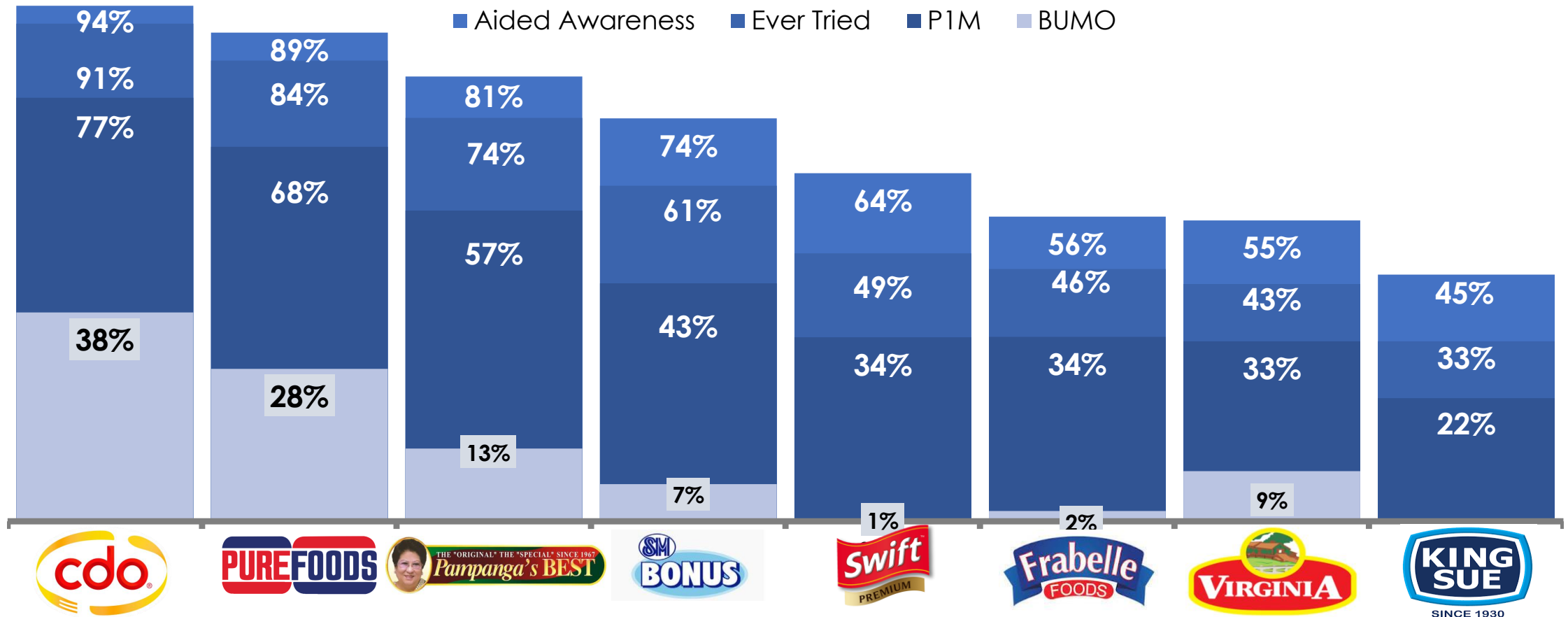
Usage of different Processed Meat brands is driven across different demographic segments.

■ ■ - Significantly Higher/Lower vs. the Total

# Loyalty on Different Brands of Processed Meat



CDO still leads the overall share of loyal customers, and again followed by Purefoods and Pampanga's Best



Q32. Which of the following brands of processed meats do you eat most often?

Among respondents who consumes processed meat n=1059

# Loyalty on Different Brands of Processed Meat by Demographics



CDO processed meat products are highly driven by NLCL dwellers.

Purefoods products are driven by SLBR dwellers.

Pampanga's Best products are driven by both NCR and NLCL dwellers.

And Virginia products are driven by both Visayas and Mindanao dwellers.

Meanwhile, Bonus brand is patronized by the younger age group (18 to 25 years old)

PROCESSED FOOD BRANDS BUMO			CDO	Purefoods	Pampanga's Best	Virginia	Bonus	Frabelle	Swift	King Sue
<b>Total</b>		<b>1059</b>	<b>38%</b>	<b>28%</b>	<b>13%</b>	<b>9%</b>	<b>7%</b>	<b>2%</b>	<b>1%</b>	<b>0%</b>
<b>AREA</b>	NCR	246	41%	27%	20%	1%	4%	3%	1%	0%
	Northern Luzon and Central Luzon	218	46%	20%	19%	0%	8%	4%	0%	1%
	Southern Luzon and Bicol Region	295	39%	35%	14%	1%	7%	1%	1%	0%
	Visayas	158	29%	26%	4%	30%	9%	0%	0%	0%
	Mindanao	142	28%	30%	4%	29%	6%	0%	1%	1%
<b>AGE</b>	18 to 25 years old	199	39%	24%	12%	9%	13%	1%	0%	1%
	26 to 35 years old	516	41%	26%	12%	9%	6%	2%	1%	0%
	36 to 50 years old	304	33%	32%	16%	10%	4%	3%	1%	0%
	51 and up	40	33%	38%	13%	8%	5%	3%	3%	0%
<b>GENDER</b>	Male	440	38%	26%	13%	10%	8%	2%	1%	0%
	Female	619	38%	29%	14%	9%	6%	2%	0%	0%
<b>SEC</b>	Class ABC	298	34%	30%	17%	9%	4%	3%	1%	0%
	Class D	407	37%	33%	13%	8%	7%	2%	0%	0%
	Class E	354	43%	21%	11%	11%	9%	1%	0%	1%
<b>CIVIL STATUS</b>	Married with children	197	38%	29%	13%	11%	4%	3%	1%	1%
	Married without children	291	39%	27%	11%	11%	6%	2%	1%	0%
	Single Parent	152	36%	29%	14%	8%	8%	1%	1%	1%
	Single without children	419	38%	27%	15%	7%	8%	2%	0%	0%

■
■
 - Significantly Higher/Lower vs. the Total

# Processed Meat Category Landscape Summary

CDO has been established as the top processed meat brand across the overall customer journey.



	Awareness	Trial Rate	Ever Tried	Conversion Rate	Past 1 Month	Retention Rate	BUMO
<b>CDO</b>	94%	96%	91%	85%	77%	49%	38%
<b>Purefoods</b>	89%	94%	84%	81%	68%	41%	28%
<b>Pampanga's Best</b>	81%	91%	74%	77%	57%	23%	13%
<b>Bonus</b>	74%	83%	61%	71%	43%	16%	7%
<b>Swift</b>	64%	77%	49%	69%	34%	2%	1%
<b>Frabelle</b>	56%	83%	46%	73%	34%	6%	2%
<b>Virginia</b>	55%	79%	43%	76%	33%	28%	9%
<b>King Sue</b>	45%	73%	33%	68%	22%	2%	0%

# Summary of Findings For Processed Meat



38%  
BUMO

CDO *leads the market* in the processed food category with *high performance* across the customer journey at 1<sup>st</sup> place.

The current goal of CDO is to capture more of the market, further increasing its retention achieving a **higher brand loyalty** and prevent **lapsing** or **switching to another brand**.

Top potential challengers of Gardenia are **PUREFOODS** and **Pampanga's Best** both of which already have a good nationwide footprint among processed meat products.



Purefoods reach is stronger in Southern Luzon and Bicol Region while Pampanga's Best is the close competitor in the NLCL region, and is more driven in the NCR region.

There is **potential for growth** for these two brands given more **brand retention efforts** are given so that other brand patrons will switch to their brands.

# THANK YOU

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- ✓ Are you in need of *Consumer Insights?*
- ✓ Are you targeting the *Right Consumers?*

## Contact Us!

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