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MEETUP
ROMANIA
2013

Bucharest/ 11 June

Market Research: Spender or Saver?

(An extension of the “Best Of ESOMAR”)

In partnership with the Marketing Faculty of the
Bucharest University of Economic Studies

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Opening

Alina Serbanica, ESOMAR Representative for Romania

The essential organisation for
encouraging, advancing and
elevating market research
worldwide.

4900 members

130 countries

ESOMAR's Mission is to

- promote the highest standards in market research
- safeguard the interests of our industry
- improve and promote international best practice
- promote the value of the industry to business and society



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Opening

Pavel Nastase, Rector ASE

Calin Veghes, Dean – Faculty of Marketing, ASE

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Session Chair

Alina Stepan

Ipsos Research, Romania

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Tracking is Exciting. For Real!

Daniel Enescu

Daedalus Group, Romania

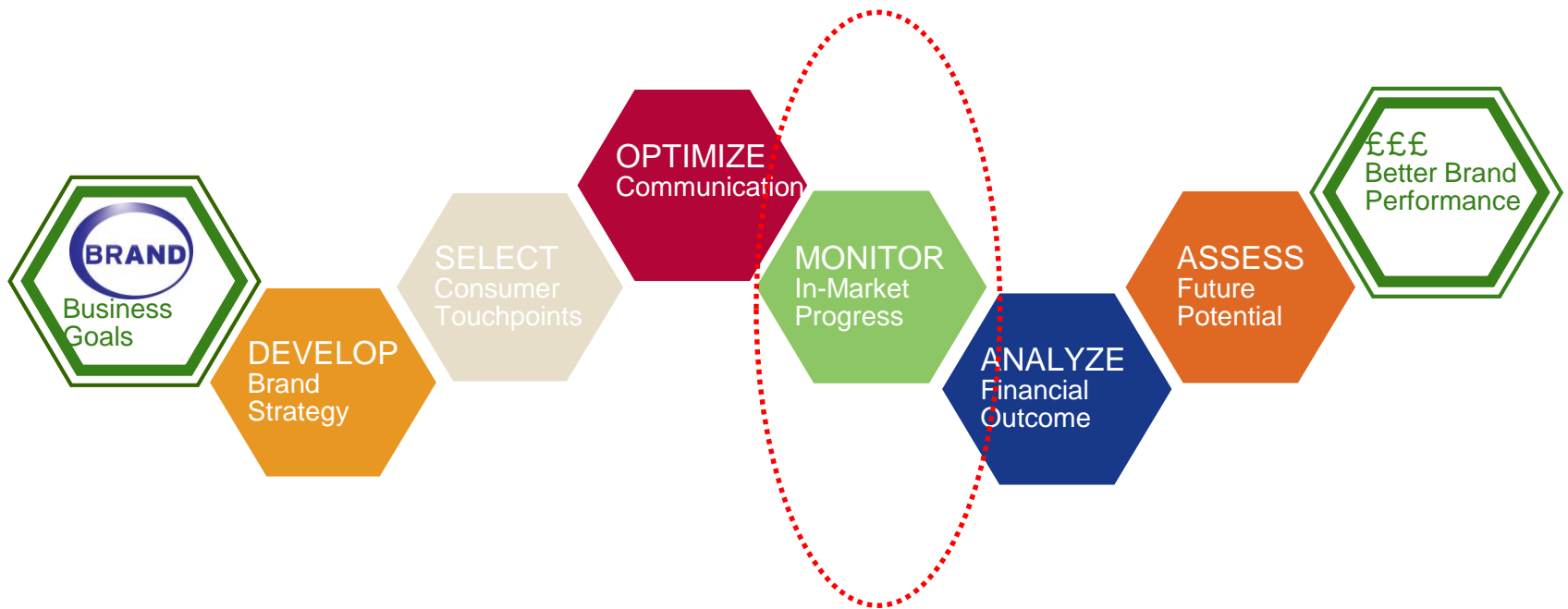


Tracking is Exciting. For Real!



June 2013

Key marketing decisions to be taken...



What are Tracking Studies Designed for?

- **Continuously monitors and evaluates** the effects of a client's **marketing decisions**;
- Helps them to understand the impact of **competitor activity** on their brands/the market
- **Informs their plans for future action**



Dynamic Tracking



Set of modules

Covering all influences on sales

Tailored to client

Changing over time

Tracking to Work – Case Studies



Case Study 1 – What drives Value for Money on the market and how can we further improve this perception?



Case Study 2 – Why are competitor's sales still up with no GRPs investment?



Case Study 3 – How is our price perceived vs competition? Do we have any pricing issues?

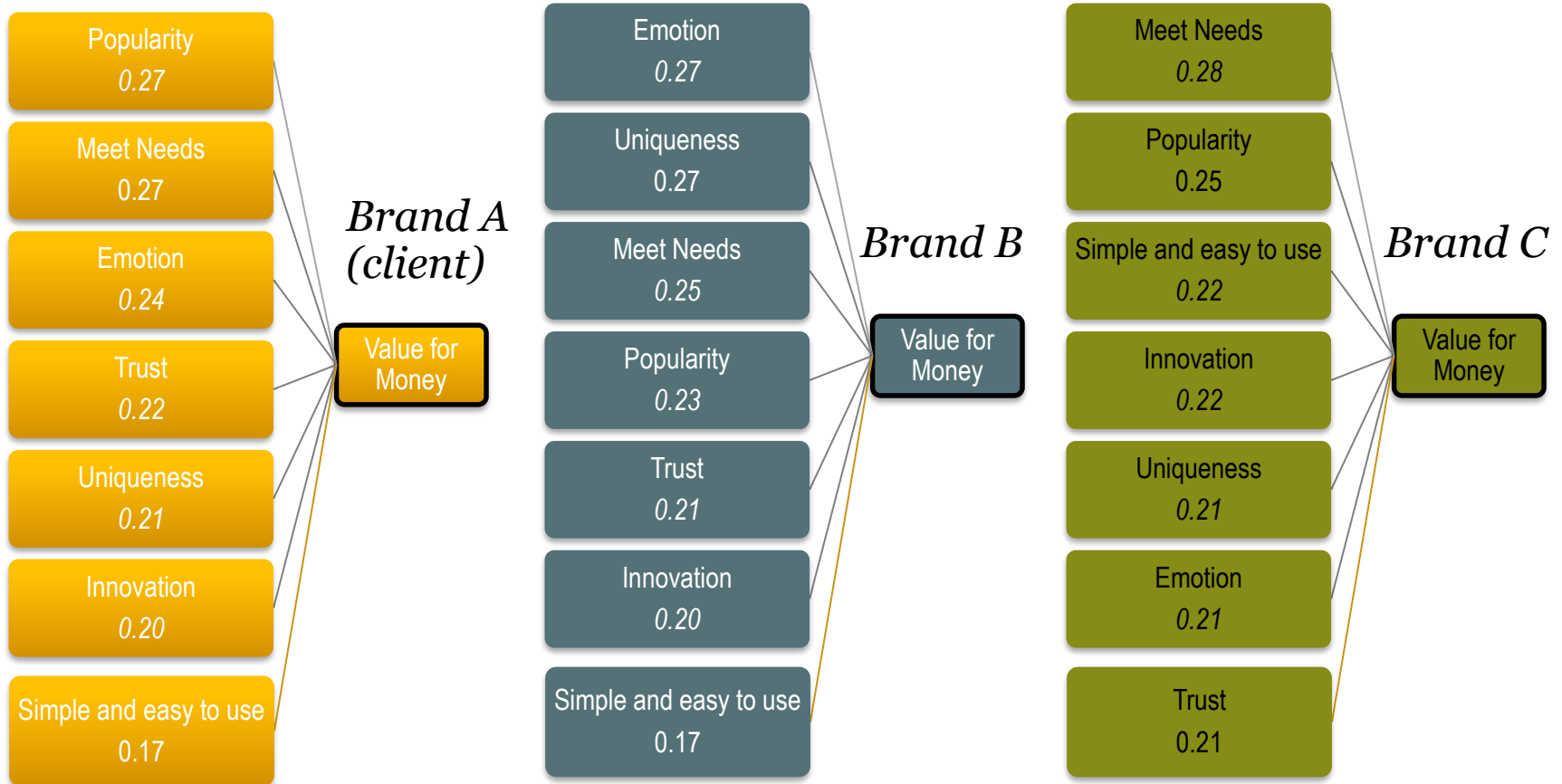


Case Study 7 – Did competitor's brand extension pay off?

Case Study 1 - What drives Value for Money on the market and how can we further improve this perception?

Case Study 1 – What drives Value for Money on the market and how can we further improve this perception?

Value for Money Drivers



Popularity and Meeting Needs are main drivers of Value for Money for Brand A. Trust could also be chosen in order to differentiate vs Brand C.

Case Study 1 – What Happened...

We recommended to build the communication strategy around **“Meeting needs”** – to differentiate against Brand B and **“Trust”** - to fight with Brand C

The client took our advice and started to build on Meeting Needs, focusing on relevant benefits related to product consumption.

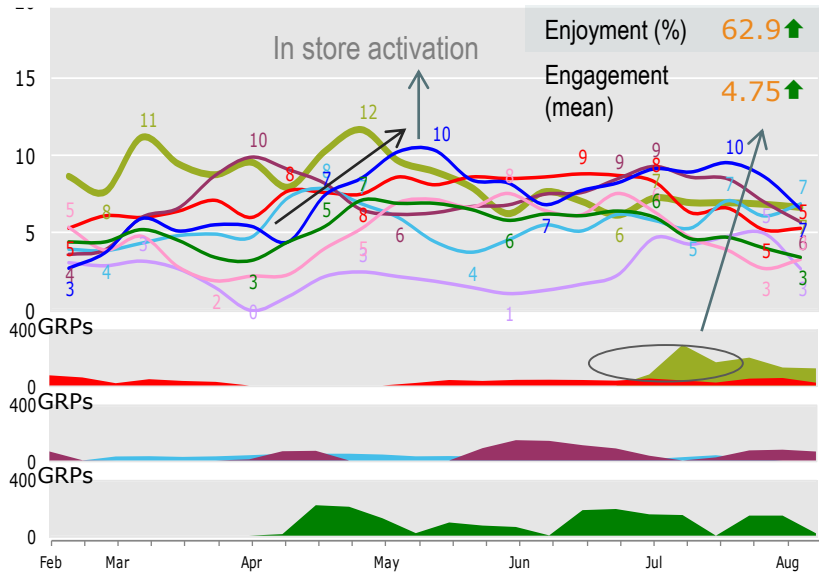
Brand equity improved both in absolute terms and relative to both Brand B and Brand C

Case Study 2 - Why are competitor's sales still up with NO GRPs investment?

Case Study 2 – Why are competitor’s sales still up with NO GRPs investment?

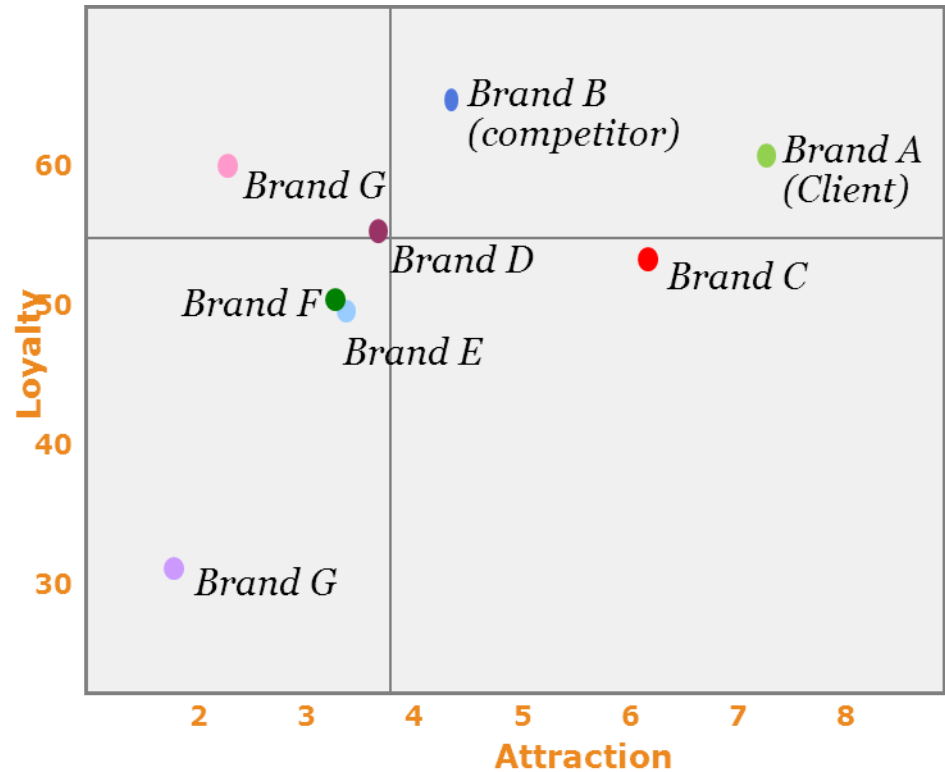
Consideration First Choice

Recognition (%)	51.1	↑
Branding (%)	69.7	↑
Enjoyment (%)	62.9	↑
Engagement (mean)	4.75	↑



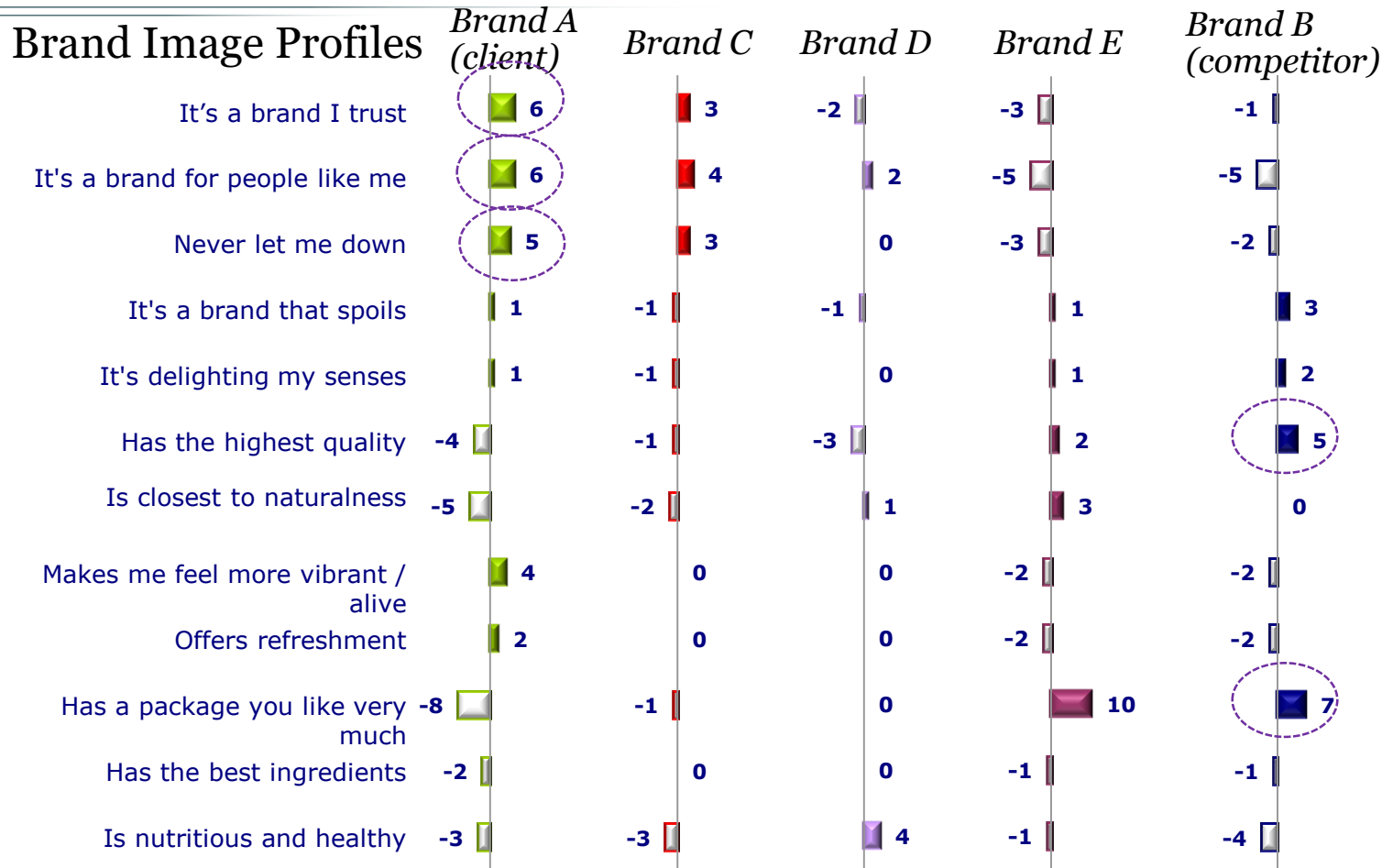
Brand A (client).
Brand B (competitor).

Brand Attraction Map



Brand A (client) communication did not move consideration, although the ad performed quite well. Looking more in depth, we discovered that the selling proposition was not relevant for the category. In the meantime competitor’s brand stands out through strong equity.

Case Study 2 – Why are competitor’s sales still up with NO GRPs investment?



Moreover, Brand B manages to differentiate being perceived as having the highest quality and a package people like .

Case Study 2 – What Happened...

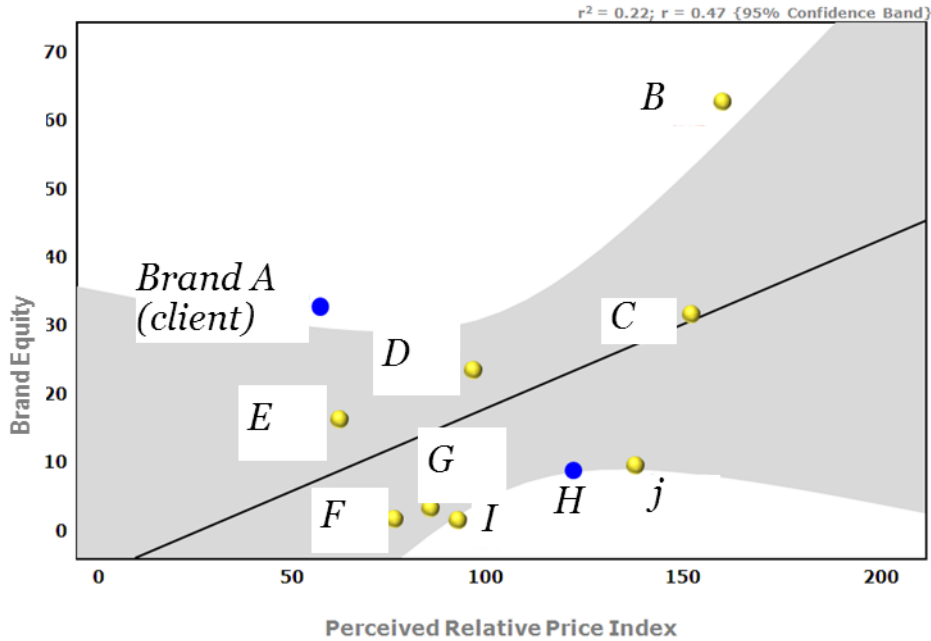
We recommended to reframe the selling proposition and change the packaging to deliver more premiumness.

Our client followed the above recommendation and sales increased significantly.

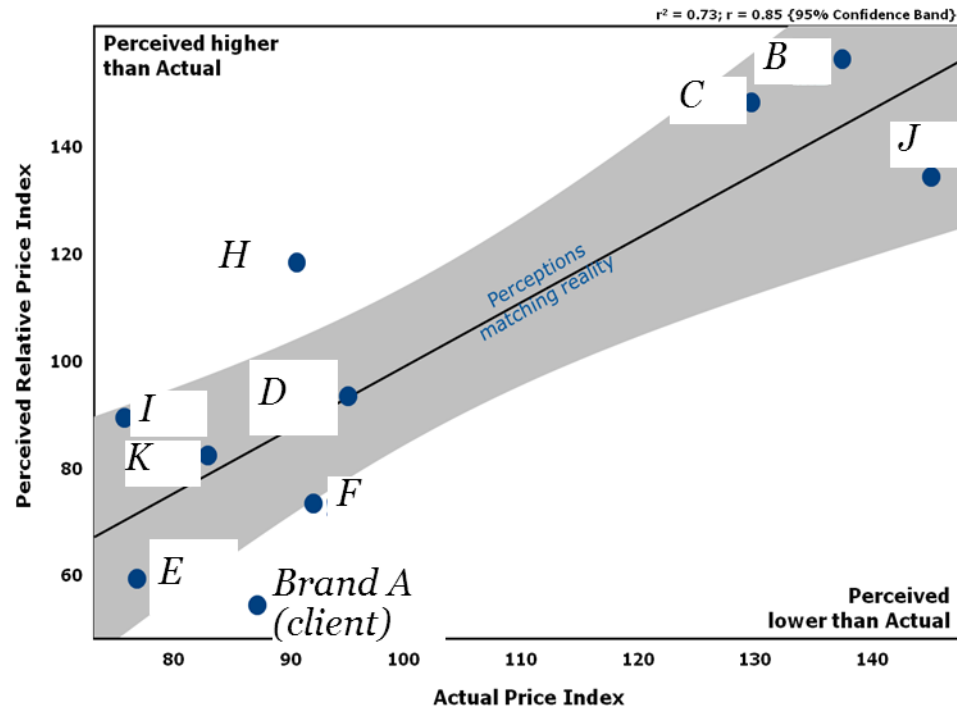
Case Study 3 - How is our price perceived vs competition? Do we have any pricing issues?

Case Study 3 – How is our price perceived vs competition? Do we have any pricing issues?

Is the brand seen as Value for Money?



Perceived Price vs Actual Price



Brand A and Brand B are seen as delivering more Value as compared to their perceived price. Brand A is also perceived as less expensive than its actual price (which is not the case with brand B). In such case there is a good opportunity of raising price for Brand A.

Case Study 3 – What Happened...

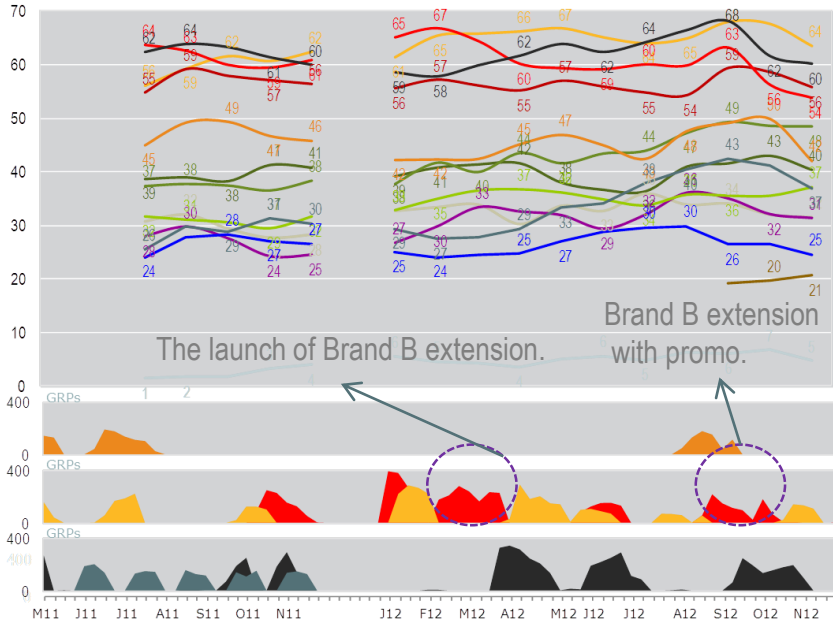
As Brand A was perceived as delivering value for money above market average and as having a lower price vs the actual one, the client decided to raise the price.

After raising the price the sales volume remained constant, so sales value and profitability grew as a result of the price increase.

Case Study 4 - Did competitor's brand extension launch pay off?

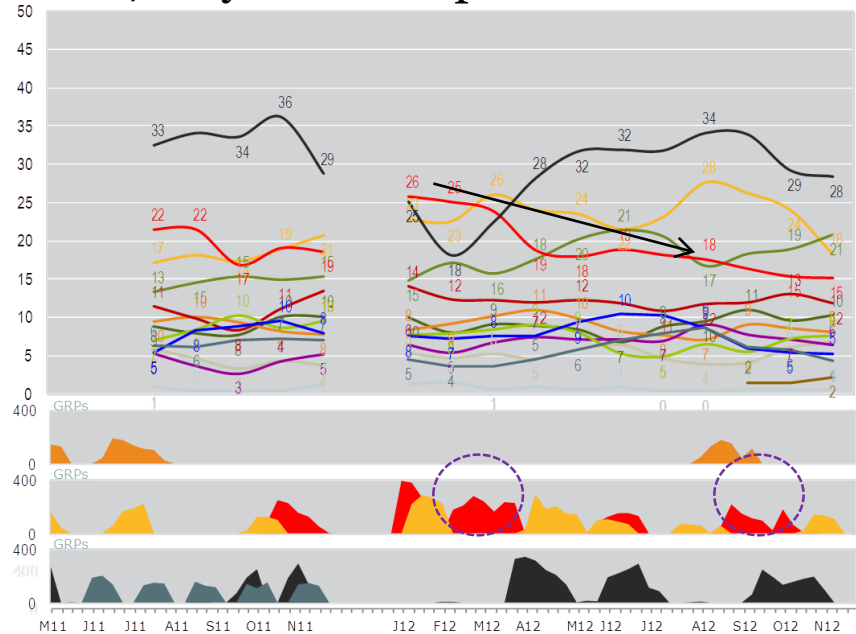
Case Study 4 – Did competitor’s brand extension launch pay off?

Trial (Past 12 Months Consumption)



Brand A (client).
Brand B (competitor).

Past 7 Days Consumption



The launch of a brand extension generated a decline in regular consumption. The product and communication did not deliver as expected. The promo succeeded to attract only new consumers, showing an alienation of the regular consumers.

Case Study 4 – What Happened...

The launch of Brand B extension decreased sales and brought more volumes to Brand A. Brand B wished to make a difference, so the new products had a special taste, but not really enjoyed by the mass market.

Our Client learned the lesson and understood that differentiation is good, but not by any means.

Other lesson learned: “Errare humanum est, perseverare diabolicum”



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The EURO Value of Market Research

Ioan Simu

Mercury Research, Romania

Story time first

Numbers time later

Agency talking to the big guys

Agency talking to the big guys

Failure on the Agency side

Research Dept. talking to the big guys

Research Dept. talking to the big guys

Failure on the Client side

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A gathering of related minds & interests

A gathering of related minds & interests

Research is not valued anymore...

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A gathering of related minds & interests

It's up to us!

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Thank you!

Case Study – The EURO Value of Market Research

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Case Study

SRT Company

DNT Company

Results

Market Research ROI


SRT <Context>

Products	
Pricing	
Distribution and Sales	
Media Budget	
Creative Brief	
Research	

SRT <Context>

Products	
Pricing	
Distribution and Sales	
Media Budget	
Creative Brief	
Research	NO

SRT <Context>

Products	
Pricing	
Distribution and Sales	
Media Budget	
Creative Brief	?
Research	NO

SRT <Brainstorming Session Output>

Good taste

Gourmet
quality

Best value for
money

Recipe respected as
if for drugs

Healthy, low
fat

Factory so clean you
can eat off the floor

SRT <Brainstorming Session Output>

Good taste

Gourmet
quality

Best value for
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Recipe respected as
if for drugs

Healthy, low
fat

Factory so clean you
can eat off the floor


DNT <Context>

Products	
Pricing	
Distribution and Sales	
Media Budget	
Creative Brief	
Research	

DNT <Context>

Products	
Pricing	
Distribution and Sales	
Media Budget	
Creative Brief	?
Research	

DNT <Context>

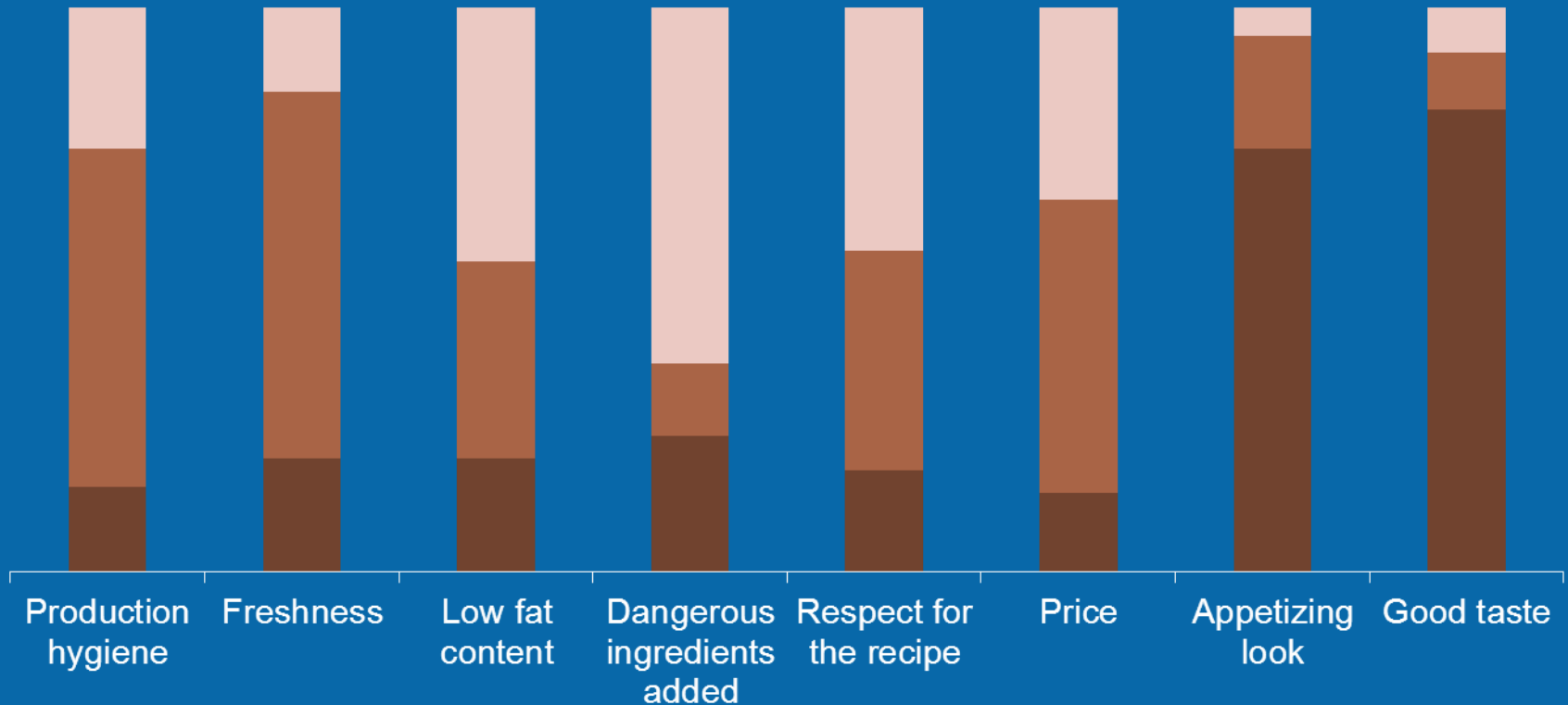
Products	
Pricing	
Distribution and Sales	
Media Budget	
Creative Brief	?
Research	YES

DNT <Qual Research Results>

Production hygiene	Freshness
Low fat content	Dangerous ingredients added
Respect for the recipe	Price
Appetizing aspect	Good taste

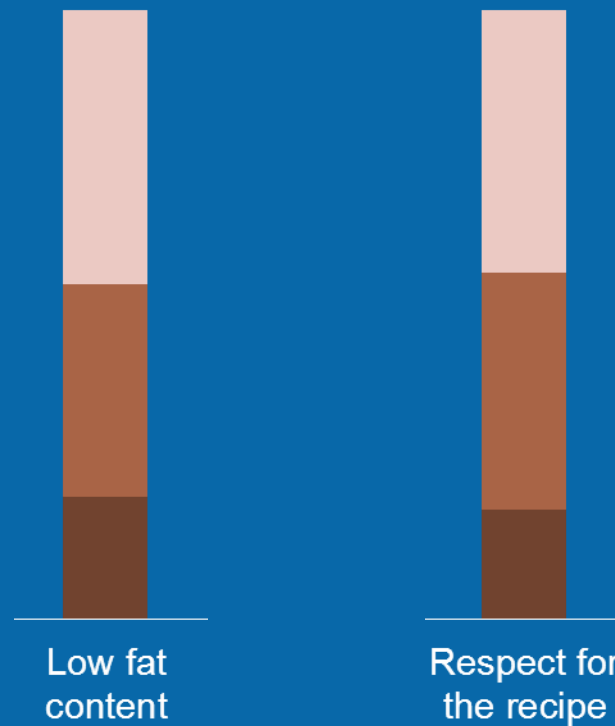
DNT <Quant Research Results>

■ Good ■ Acceptable ■ Bad

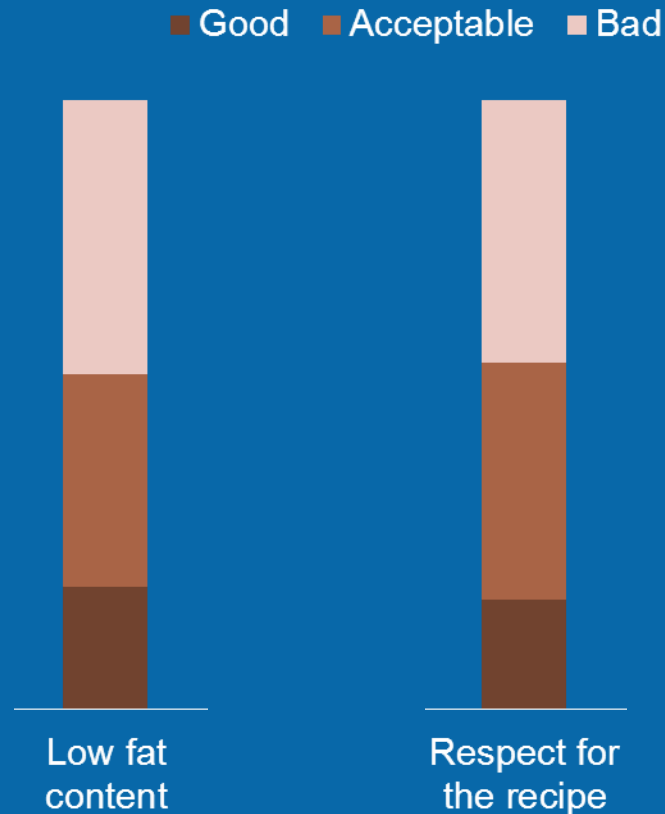


DNT <Quant Research Results>

■ Good ■ Acceptable ■ Bad

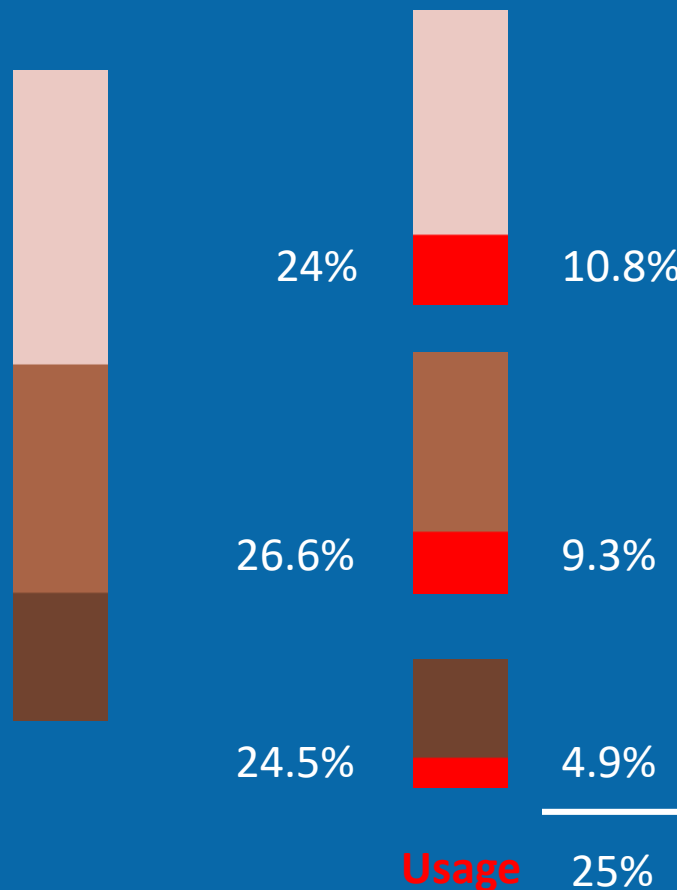


DNT <Quant Research Results>



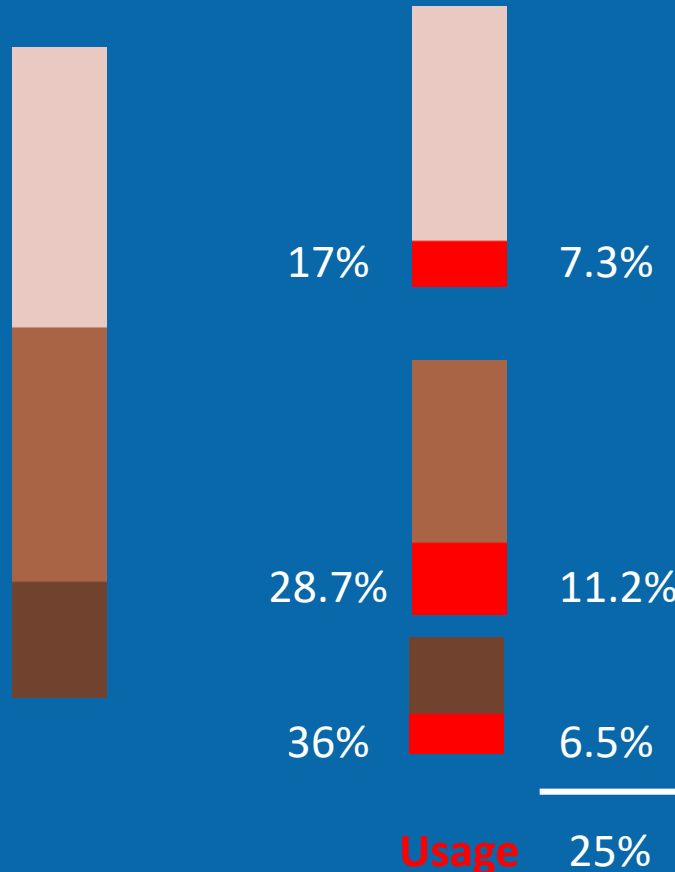
How would each route influence the brand usage?

DNT <Impact/Low Fat Content>



'Low fat content' route has little potential to generate sales increase

DNT <Impact/Respect for recipe>



'Respect for recipe' route has good potential to generate sales increase

SRT Campaign: 'Good taste'

DNT Campaign: 'Respect for recipe'

SRT Campaign: 'Good taste'

DNT Campaign: 'Respect for recipe'

Similar media planning & spending

SRT Campaign: 'Good taste'

DNT Campaign: 'Respect for recipe'

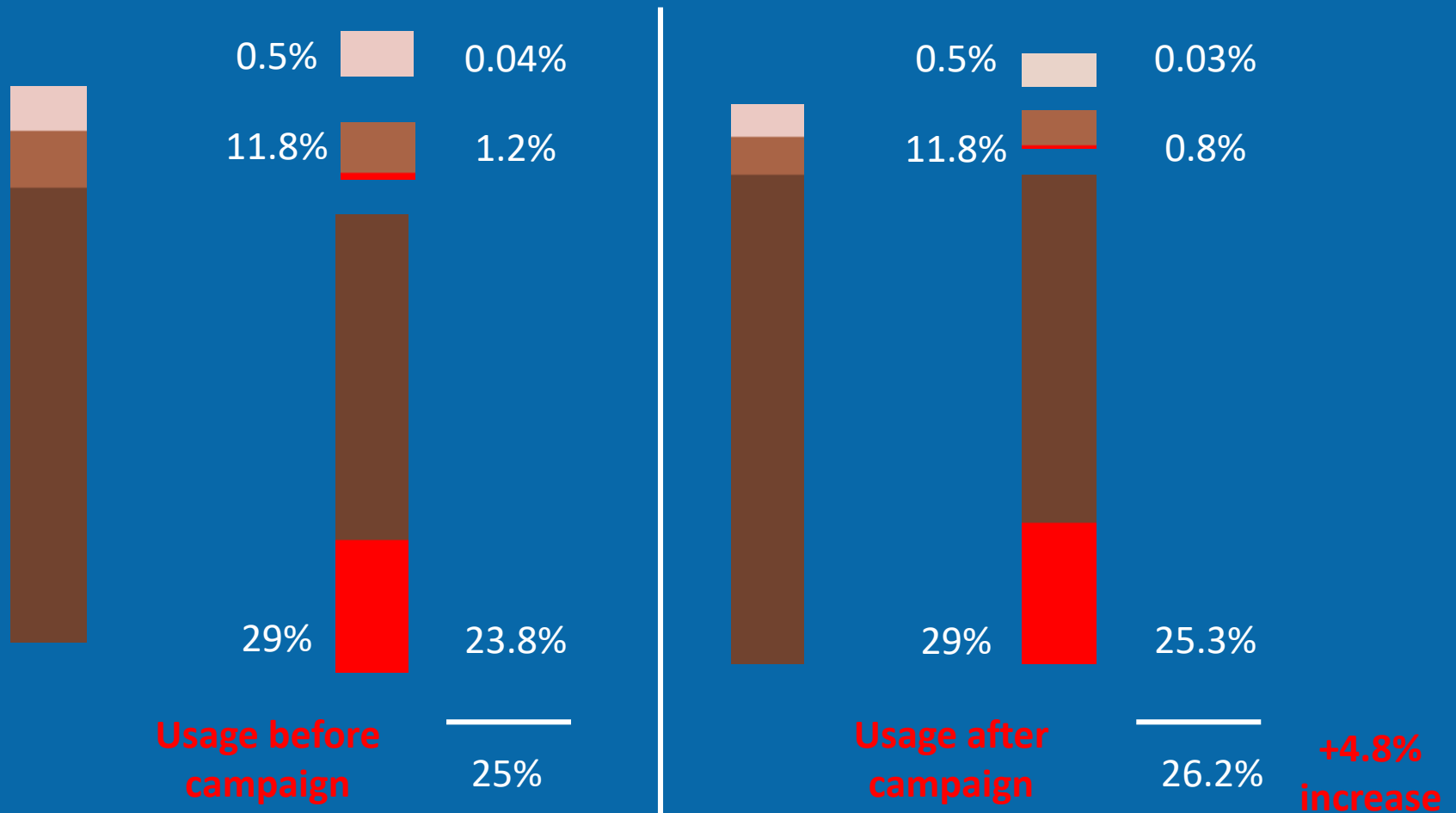
Similar media planning & spending

Let the Campaign run!

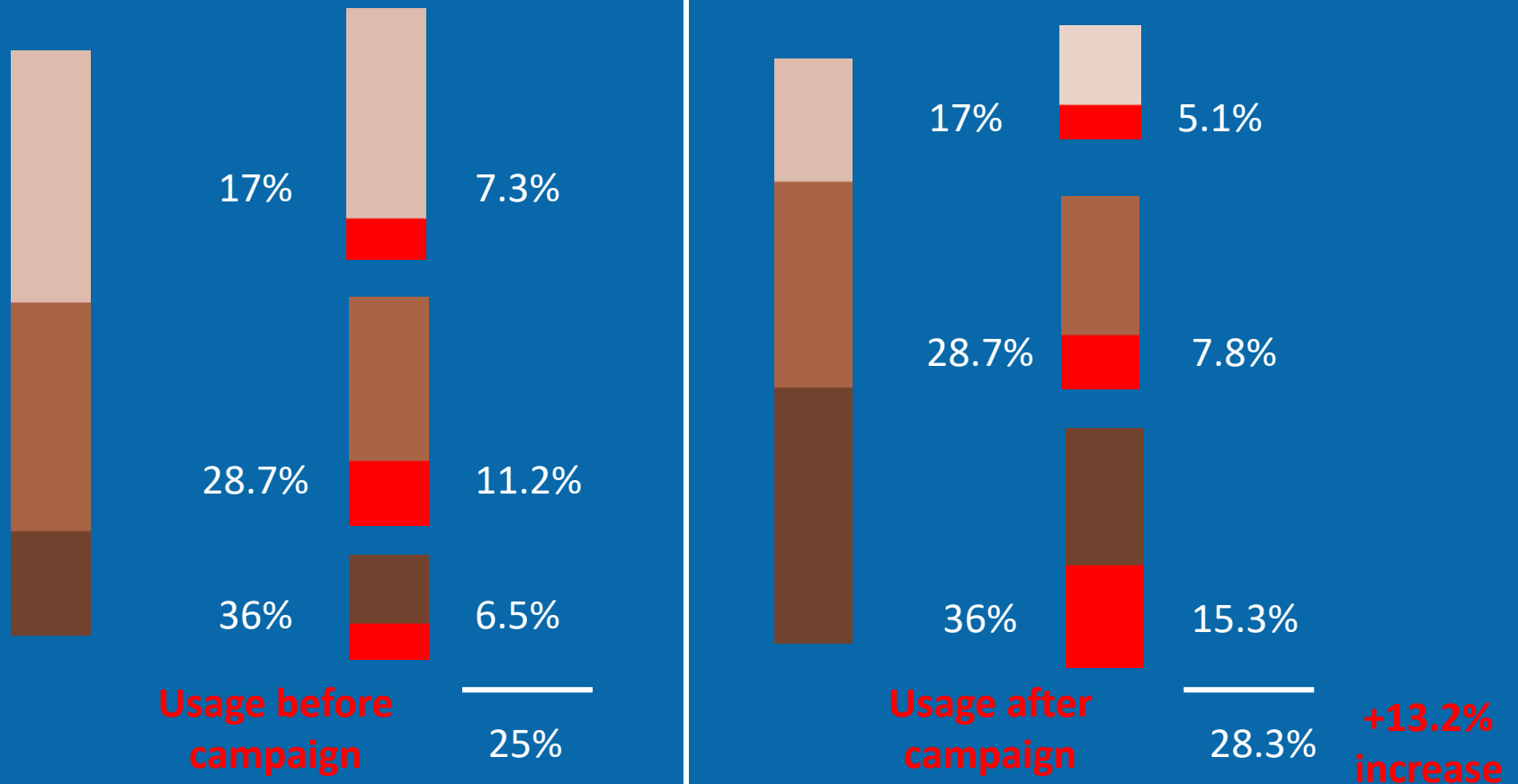
Let the campaign run!

$$\begin{array}{l} 60\% \text{ effective reach} \\ 3+ \end{array} \times \begin{array}{l} 50\% \\ \text{convinced} \end{array} = 30\% \text{ swayed}$$

Results <SRT: Impact/Good Taste>



Results <DNT: Impact/Respect for recipe>



Results <P&L>

EUR M	Previous Year		SRT Current Year	DNT Current Year
Revenue	50M		50.14M	54.16M
COGS	14M		14.04M	15.17M
Marketing Expenses	1.50M		1.50M	1.51M
Sales & Distribution	5M		5.01M	5.42M
General Admin	22.5M		22.56M	24.37M
Gross Profit	7M		7.024M	7.698M

Market Research ROI

Research expenses: EUR 10K

Difference in revenue: EUR 674K

% ROI in first year: 6,740%

Conclusion

Simple, cost-effective research can generate
6,000%+ ROI

More sophisticated research solutions = even more
value!

Thank you for your attention!

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Rainmaker

Exploiting unexpected price potentials for print media

Florian Bauer

Vocatus AG, Germany

RAINMAKER

Exploiting unexpected price potentials
for print media

In the past, our print pricing practice was not systematic - we were pricing by gut feeling...

Relevance of sales revenue

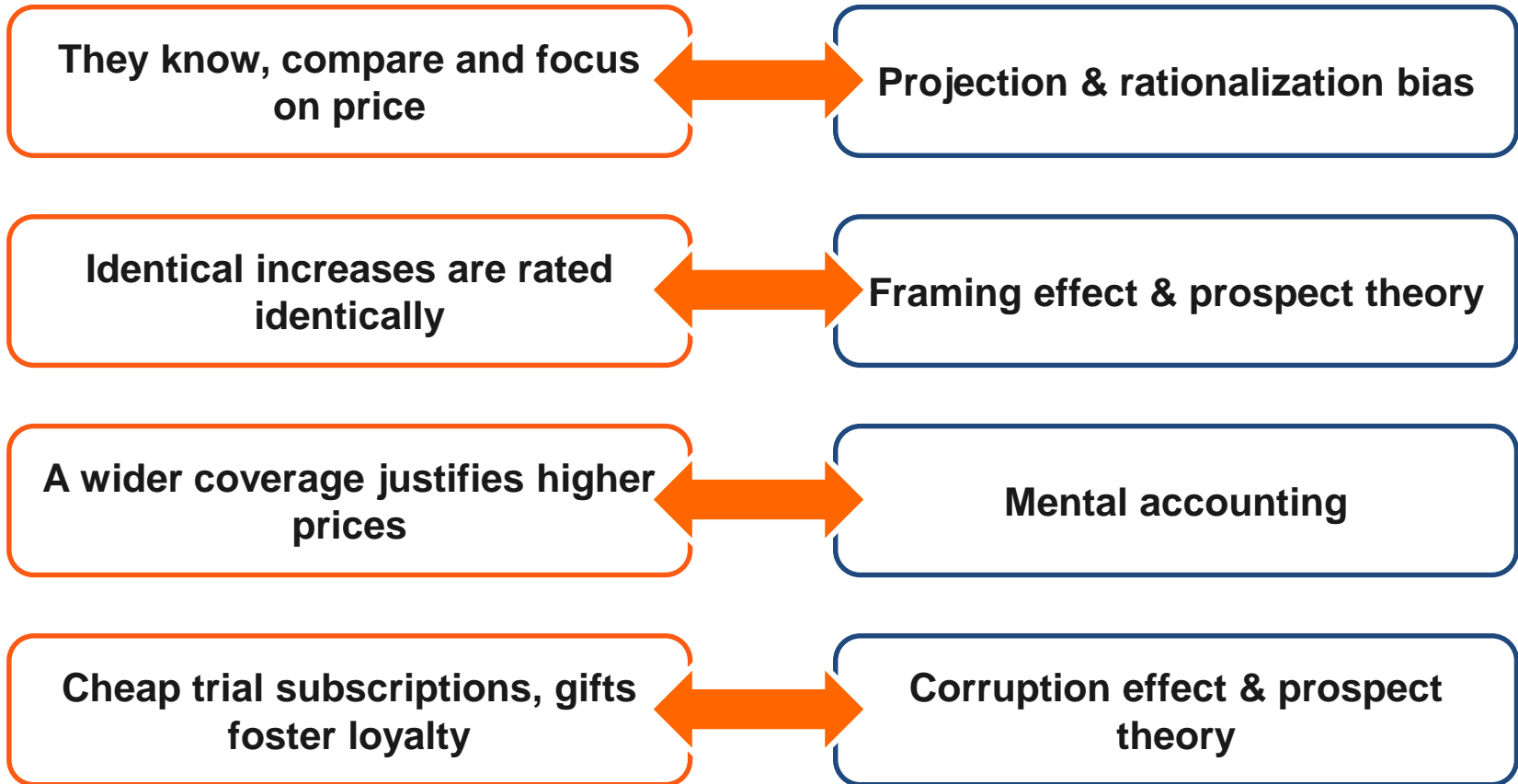


Current pricing practice

...and assumed a customer model that was proven to be wrong

How we at FAZ saw our readers...
("Homo Oeconomicus")

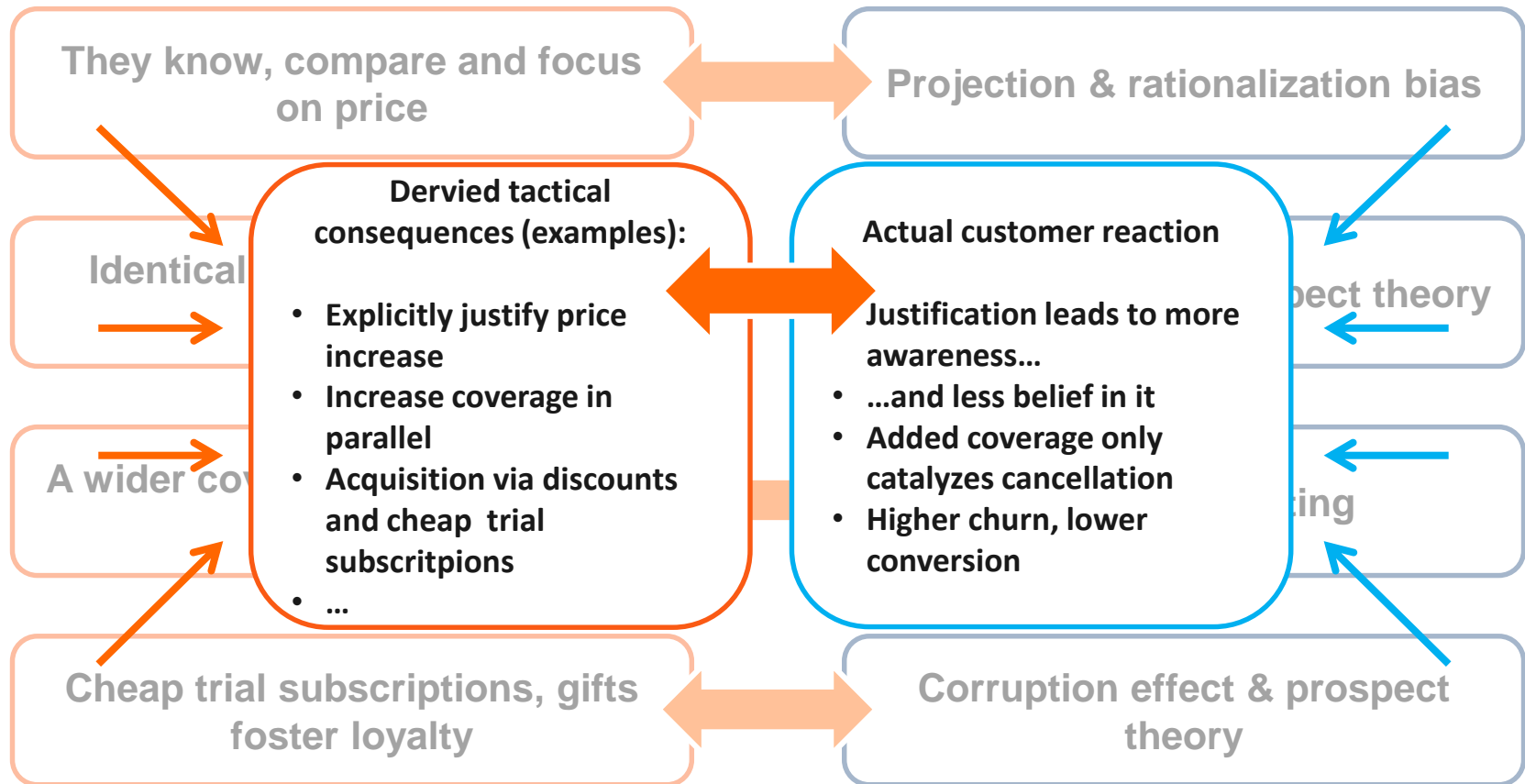
...and what we ignored in doing so
("Behavioral Economics")



Consequently, many tactical consequences derived from this rationalistic customer model are inherently suboptimal

How we at FAZ saw our readers...
("Homo Oeconomicus")

...and what we ignored in doing so
("Behavioral Economics")



**Our objective was as easy to define as it was difficult to achieve:
significantly higher prices without any risk**

We wanted to identify empirically...

- The maximum copy price
- The maximum subscription price (for different payment schedules)

Under the conditions that...

- Customer base: No additional losses of circulation due to price increases
- Sales pipeline: Acquisition should not get more difficult or more expensive

A much broader analytical scope and a more advanced design was necessary for clear and valid recommendations

Broader scope

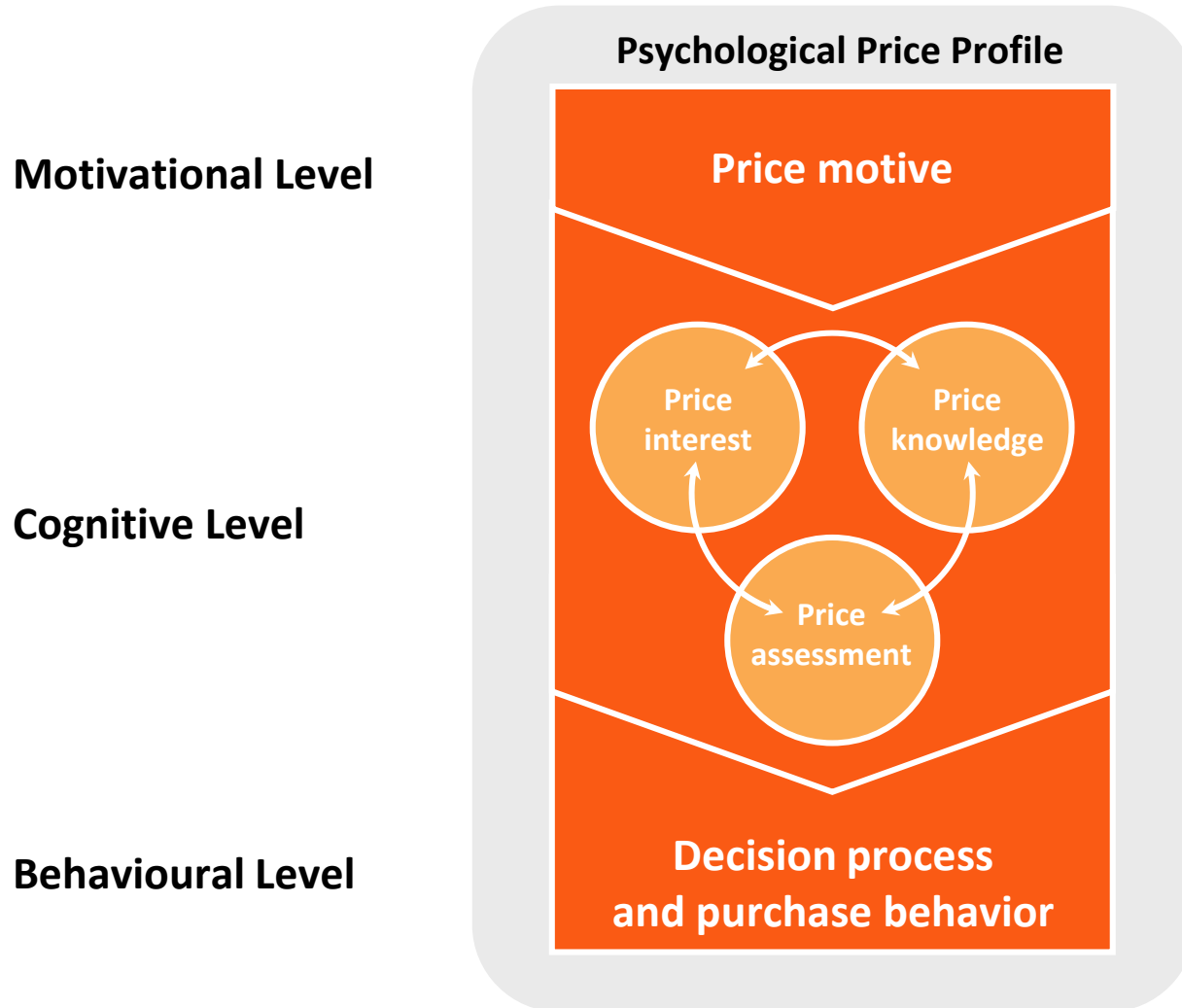
1. Analysis of dynamics and all relevant dimensions:

- Understand role of price in the decision process with all its inherent heuristics & biases
- Merge individual price evaluation, knowledge & interest into a clear recommendation

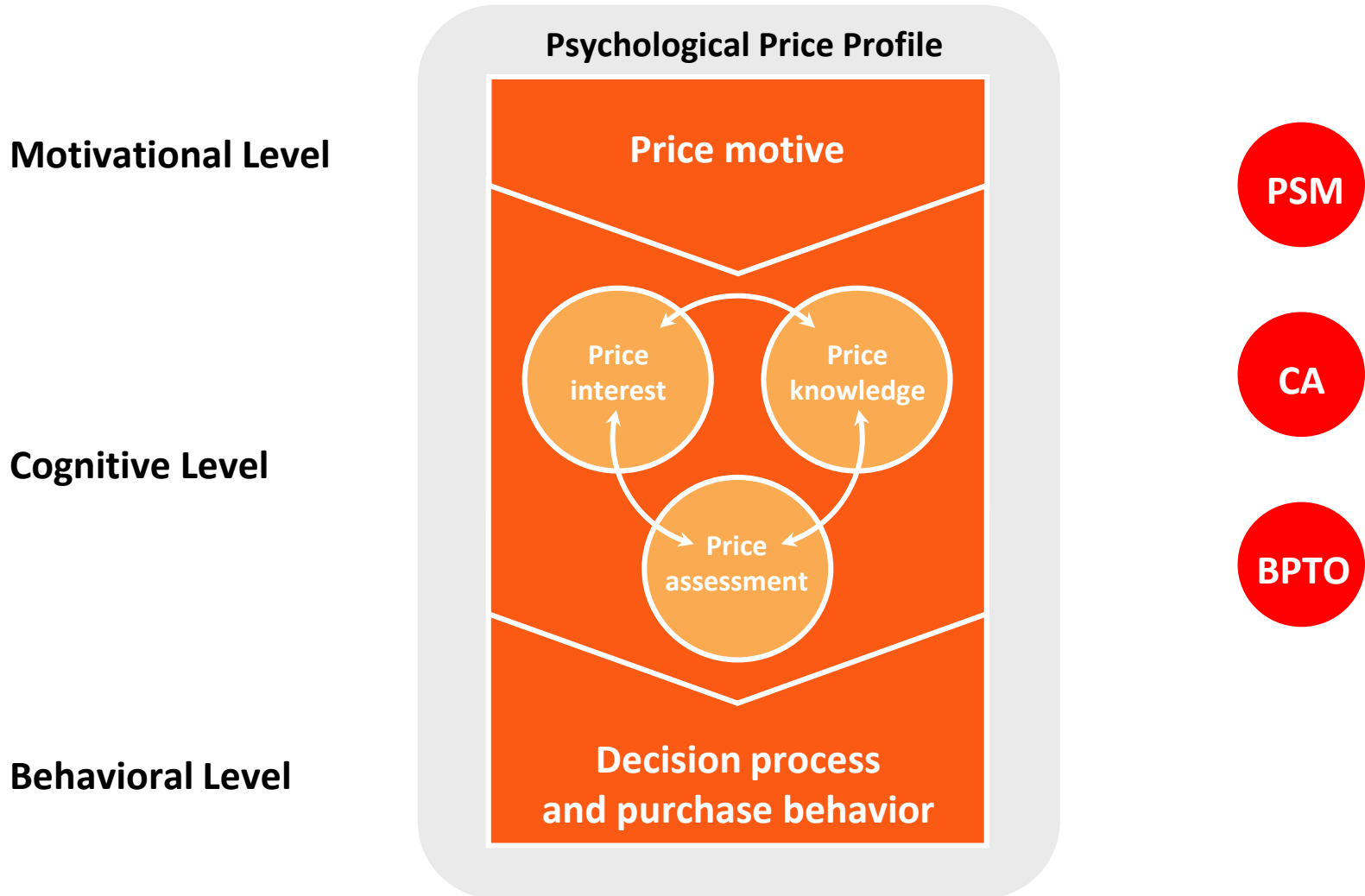
2. Experimental design based on behavioral segments

- New subscribers
- Existing subscribers
- Unsubscribers
- Single copy buyers

Without integrating Behavioral Economics' insights across the whole "Psycho-logical Price Profile" it is impossible to derive valid price recommendation...



...but the classical pricing tools fail to cover the breadth of the PPP by focusing on selective aspects only



A much broader analytical scope and a more advanced design was necessary for clear and valid recommendations

Broader scope

1. Analysis of dynamics and all relevant dimensions:

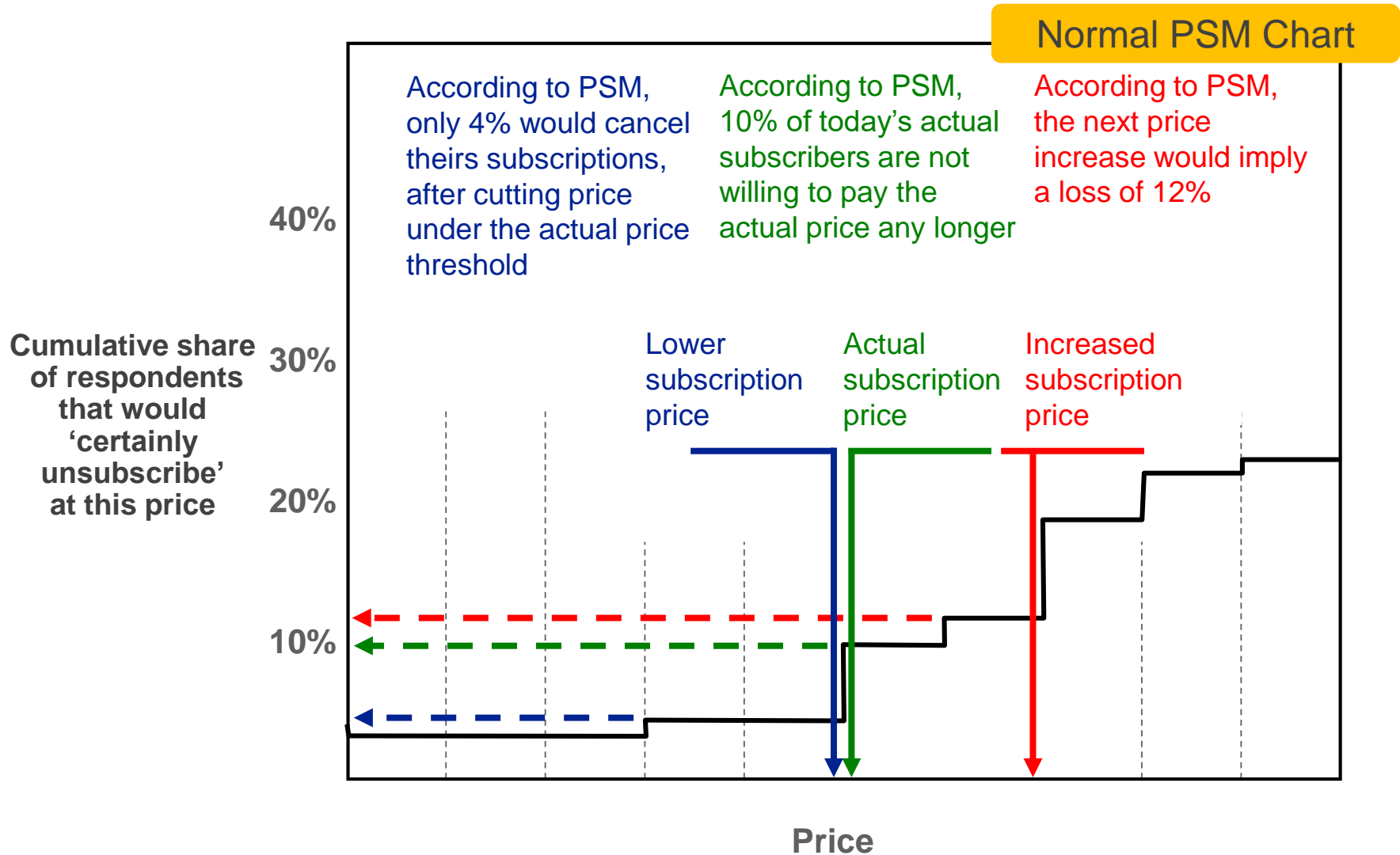
- Understand role of price in the decision process with all its inherent heuristics & biases
- Merge individual price evaluation, knowledge & interest into a clear recommendation

see example...

2. Experimental design based on behavioral segments

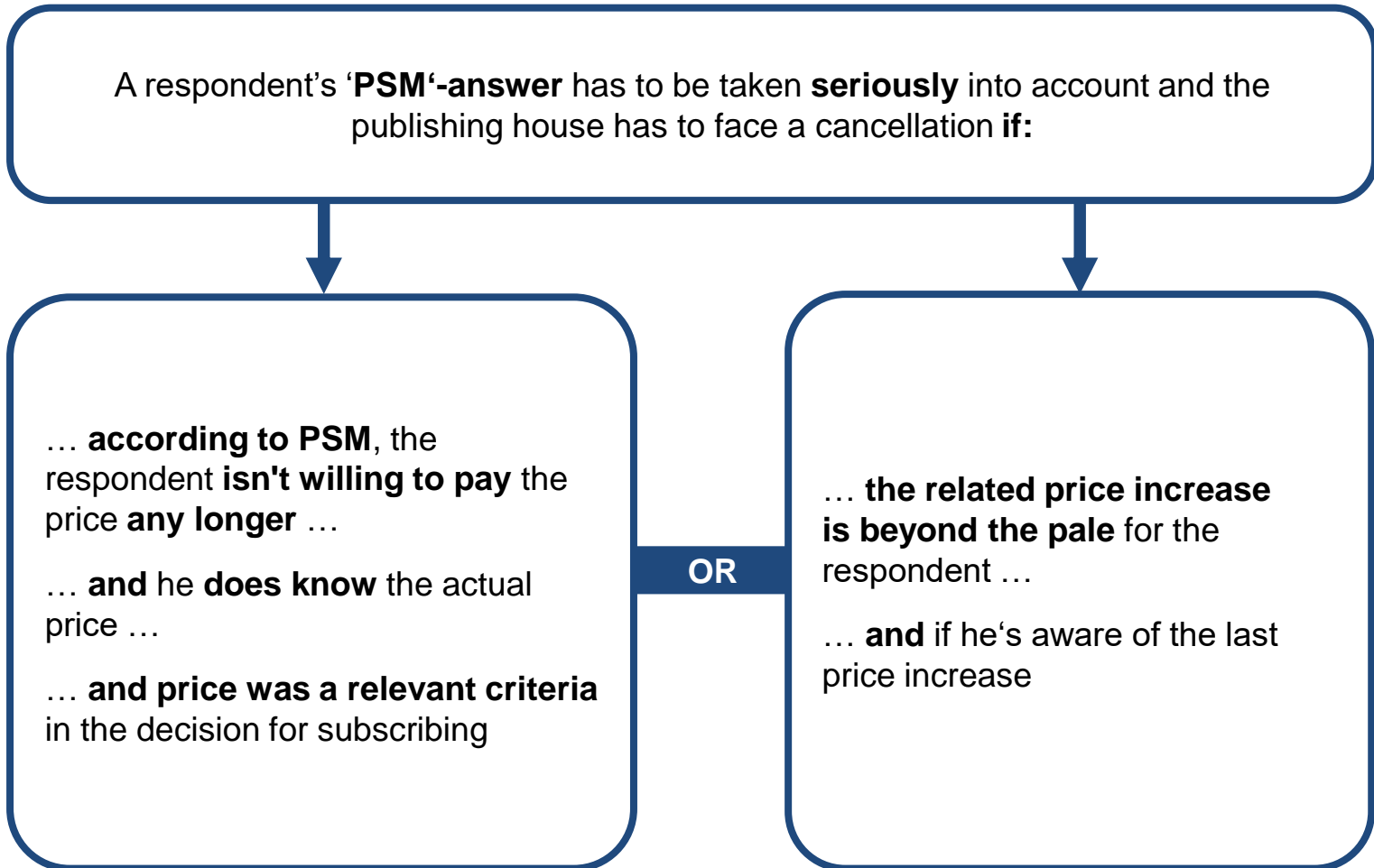
- New subscribers
- Existing subscribers
- Unsubscribers
- Single copy buyers

Classical statistical procedures where interpretation is focused on means and averages are inappropriate

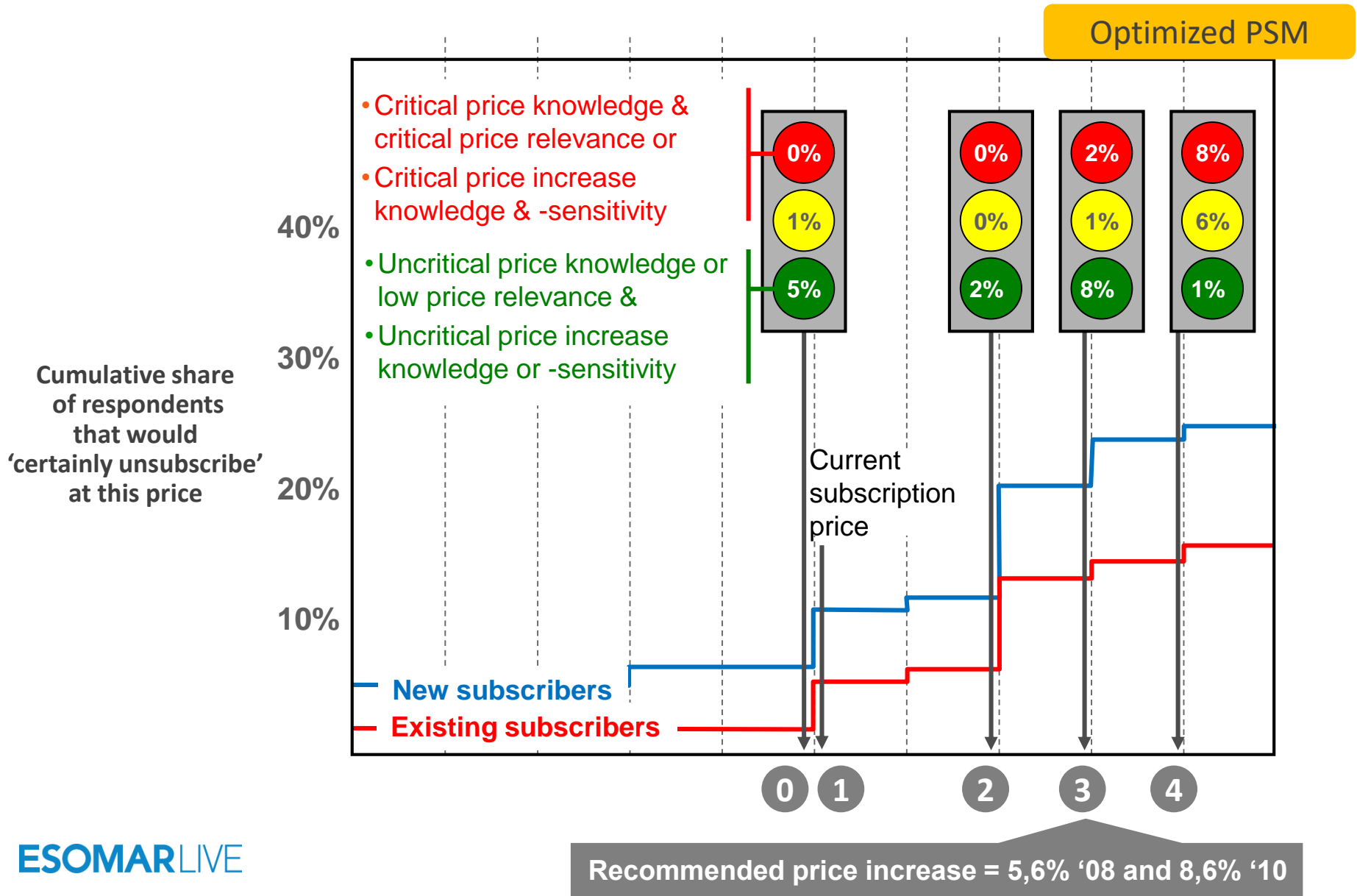


To capture all relevant dimensions, we need to employ analytical methods that aggregate interpretations instead of just interpreting aggregates

Traffic light analysis used by Vocatus

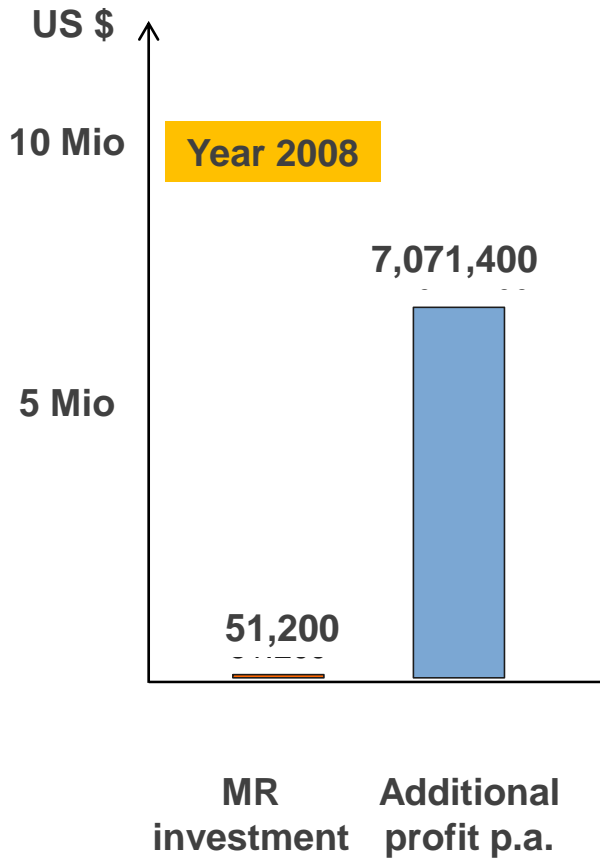


In order to successfully analyse the 'true' price acceptance, one has to combine price relevance, knowledge and assessment on individual basis



The market research investment for price optimization paid for itself within less than 3 days (or even within 1 day in year 2010)

Market research investment and resulting additional profit





Tobias Trevisan, CEO:

“This project was definitely the best investment in market research that the FAZ ever made.”

The “bottom line” in detail:

- **Pricing strategy:** Much higher increases with a higher frequency than ever
- **Marketing approach:** More appropriate approach to subscription marketing
- **Product development:** Side effect was the successful improvement of the title
- **Profits:** Huge, unexpected, and life-saving profit potential

This approach was up to now successfully pursued with about 70 different titles



**Thank you for your
kind attention!**

Q & A



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Coffee break

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Session Chair

Shachar Shaine
Integra, Romania

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Turning Investments Around for Nivea Baby Care

Cristina Craciun, Ipsos Research, Romania

Carmen Cosoi, Beiersdorf, Romania

Parental advisory: Cuteness overload presentation

or

Turning Investments around for Nivea Baby





Being a mother activates
the “cuteness gene”.

But not straight from the
start.

At what point does a mother
become a mother?

Qualitative understanding of the Baby Care products usage among Mothers

Content analysis on the most popular Internet media involving mothers (e.g. sites, forums with mother & child content having the highest traffic)



4 FGs with mothers of kids aged 6-12 months

In-store observation and guerrilla interviews (interceptions of the shoppers browsing at the shelf)

3 moments of truth: from Pregnancy to Motherhood



(To) Pregnancy acknowledgement

(T₁) 3rd month

(T₂) 7th month

(T₃) Fresh mom

Baby care category not yet relevant

Baby care recos, brands & products

Delivery kit. Tipping point for first brand choice

Baby care experiments. Definitive brand choice

Internet inspiration for the delivery kit

Mother's list

Newly-born list

Baby-welcome home list

*“My bag looked
like I was moving
out!”*



Actele necesare in maternitate/spital pregatite in bagajul de maternitate

- > Cartea de identitate/buletin (original si copie);
- > Cametul de sanatate;
- > Cametul de gravida (daca exista);
- > Adeverinta de la serviciu;
- > Dosarul cu toate analizele facute in timpul sarcinii;
- > Urmarele ecografiile facute in timpul sarcinii;
- > Eventual si o lista cu tratamentele si medicamentele din timpul sarcinii;

Bagajul de maternitate pentru aravida Pentru bebe:

Lista pentru Bagajul de maternitate maternitate de stricta necesitate (fil maternitate optional (in functie de c gravide).

Bagaj pentru maternitate de

- Sapun;
- Tampoane;
- Papuci comozii;
- Un halat calduros;
- Ciorapi sau sosete;
- Camasa de noapte;
- 2-3 peruti de chitit;
- Pasta
Eu am pregatit pentru bebe pent
- Prosop
- body cu maneca scurta, inchis
- 2-3 pai
- pantalones cu botosei - 3 buc
- Pieptar
- pieptaras - 2 buc
- Un por
- salopeta bambac cu maneca k
- Telefor
- caculite subtiri bambac - 4 buc
- O carte
- caculite groase - 2 buc
- sosete - 4 buc
- manusi bambac - 2 per
- botosei - 2 per
- costumus fas pentru iesit din n
- paturica subtire - 1 buc

- In plus, i-am mai pus sa iau la m
- Pampers nr 2 - 30 buc
- servetele umede Pampers - 24
- crema de galbenele
- bepanten
- crema corp Sanosan
- sapun Sanosan + savoniera
- bete urechi, aspirator nazal, forfecuta
- comprese sterile, ser fiziologic (5 fiole de 10ml), pipete (5 buc), seringa (1 buc)
- spirit
- baneocin
- prosopel, scutec finet
- jucarie 0-3 luni
- suzete (1 silicon si una latex) mar 1, biberon NUK mar 1

Din ele hainele le-am folosit pe toate, ca in fiecare zi il schimbam de hainute. Si Pampersi au fost cam la limita, bepanten-ul nu l-am folosit, nici crema de corp sanosan, nici pipetele si seringa, nici spiritul, baneocinul, jucaria si suzetele si nici biberonul.

Lucruri pentru ingrijirea bebelusului

Ingrijirea bebelusului presupune o multime de lucruri care sa bunastarea si sanatatea in fiecare zi. Din nicio camera de bi trebuie sa lipseasca urmatoarele produse de ingrijire, de care proaspat parinte are nevoie:

- scutece;
- servetele umede, de unica folosinta;
- unguent sau crema pentru iritatia de scutece;
- vaselina medicinala;

Bagajul pentru ziua travaliului

- Camasa de noapte sau un tricou cu care te vei imbraca in momentul travaliului
- Soiete calduroase (daca in timpul travaliului iti vor fi picioarele reci)
- O oglinda mare, daca vei dori sa-ti vezi bebelusul venind pe lume
- Gustari si bauturi, pentru tine si partenerul tau, daca va avea voie sa asiste la nastere
- Foaie saraciri si data preconizata a nasterii
- Istoricul tau prenatal
- Telefonul mobil, incarcat
- Numerele de telefon de celor dragi
- Aparat foto sau camera video
- Carti, reviste, radio
- Crema sau ulei de masaaj
- Spray racitor pentru fata
- Batiu de buze
- Perle de par, pleptene si agrafe
- Un burete mic

Bagajul pentru perioada in care stai in spital

- Doua-trei camasi de noapte cu deschidere in fata, daca vei alapta
- Trei tufiene speciale pentru zilele de alaptare
- Tampoane pentru care

intru regurgitat;

Bagajul pentru bebe:

Mie la spital mi-au cerut pentru bebe scutece, servetele umede si crema pt fundulet, depinde si de zilele de internare- eu am tot dat.

Scutece - ~10-15 buc (eventual restul la indemana, sa poate fi aduse daca mai este nevoie)

Servetele umede pentru sters la fundulet- pentru acasa am luat cu cutie de plastic pentru ca sunt mai usor de manevrat- o recomand

Crema pentru fundulet- de ex. **Bepanthen** unguent- se gaseste si la tuburi mai mari si merita luata asa sau Weleda (f. buna)

Haine din bambac - depinde de politica spitalului, daca il imbraca si cat timp e internat sau nu, la mine nu a fost cazul si au trebuit aduse doar la externare. Hainele se spala mereu inainte de a le imbraca bebe, chiar daca sunt noi. Teoria spune sa le si calci, eu le-am calcat doar prima data, de atunci nu am mai calcat nimic. De spalat eu le spal la programul pt rufe de bambac si apoi il mai dau clatire o data (ca sa scoata detergentul si balsamul, altfel risca sa faca dermatita). Exista un detergent special de bebe

Dermalin numai in farmaciile Sensiblu, inasa eu am folosit **meru Persil Sensitive** si nu am avut probleme. Ca balsam am folosit **lenor Sensitive**. Ulterior am trecut la detergentii Eco-Friendly si nu au fost probleme. Am nascut in februarie, asa ca am avut:

- un body cu maneca lunga (preferabil genul cu capse in fata, e mai usor de imbracat) si o salopeta cu maneca lunga
- manusi
- caculita: teoria spune ca se pune o caculita de interior (care se leaga sub barbie) si caculita de exterior, mai groasa- eu am renuntat repede la asta, inasa la maternitate asa am dus
- genul acela de costum- sac de dormit din fas
- Atentie! Totul in pungii noi

Scaun de copil pentru masina- e cel mai sigur pentru bebe

Considering Nivea Baby activation in maternities,

We've asked ourselves:

Why would mothers need all this before getting to the hospital?

- Pampers nr 2 - 30 buc
- servetele umede Pampers - 2i
- crema de galbenele
- bepanthen
- crema de **Canosan**
- sapun Canosan - 1 buc
- bete urechi, aspirator nazal, forfecuta
- comprese sterile, ser fiziologic (5 folie de 10ml), pipete (5 buc), siringa (1 buc)
- spirit
- baneocin
- prosopel, scutech finet
- jucarie 0-3 luni
- suzete (1 silicon si una latex) mar 1, biberon NUK mar 1

- Pampers, pentru masina din spital
- *Atentie! Atat botezul cat si paterica pentru bebe trebuie compuse din timp si spalate si calcate la cald!* Asta nu e demult de contact pentru bebe de toate fructurile. *Lina de superstitii si preparate ce cum trebuie si din timp pentru bebuzul tau!* Pentru botez, iti recomand doua tipuri de detergent special pentru bebe: **BERMALIN** gasesti numai in farmacie **SENSIBLU** si **PERSIL SENSITIVE** la orice hipermarket.
- Costeaza, in care sa-l pu pe bebe confortabil cand tei din spital

- **Persil** numai in farmaciile Sensiblu, insa eu am folosit mereu Persil Sensitive si nu am avut probleme. Ca balsam am folosit **Lenor Sensitive**
- Uterior am trecut la detergenti Eco-Friendly si nu au fost probleme. Am nascut in februarie, asa ca am avut:
 - un body cu maneca lunga (preferabil genul cu capse in fata, e mai usor de imbracat) si o salopeta cu maneca lunga
 - manusi
 - cacuilita: teoria spune ca se pune o cacuilita de interior (care se leaga sub barbute) si cacuilita de exterior, mai groasa- eu am renuntat repede la asta, insa la maternitate asa am dus
 - genul acela de costum- sac de dormit din fas
 - Atentie! Totul in pungi noi
- **Scaun de copil pentru masina**- e cel mai sigur pentru bebe

Din ele hanele le-am folosit pe toate, ca in fiecare zi il schimbam de hanute. Si Pampersii au fost cam la limita, bepanthen-ul nu l-am folosit, nia crema de corp sanosan, nia pipetele si siringa, nia spiritul, baneocinul, jucaria si suzetele si nia biberonul.

Rumor has it (overall verified) that hospitals are not equipped with baby care products.

Not receiving brands & products after birth, but when leaving the hospital



Mothers know they wouldn't rely on any help or support with products in the hospital.

WOM disseminates quickly. From one mother to the other, the distance is one click away.

What should we do then?

**HOW and WHEN should we connect with
the mothers in a professional
environment?**

NEW NIVEA Baby Strategy:

Switch from **invisibility** in maternities to targeted & meaningful contact with the moms in their moment of truth.

... and all in a professional environment



Baby & Mom Kit
for delivery
& more

BEFORE BIRTH

- Information and brand contact

“Welcome baby
kit” directly
offered to moms

IMMEDIATELY AFTER BIRTH

- Product trial in the maternity

Recommendation
programs for
doctors

AFTER

- Gain further expertise and credibility

ESOMARLIVE

On our way to convince more mothers about
the mildest care & protection



from



Q & A



Cristina Craciun

Cristina.Craciun@Ipsos.com

Carmen Cosoi

Carmen.Cosoi@Beiersdorf.com

ESOMAR LIVE

From Insights to Foresights

Going beyond understanding today

Marina Udroi, GfK, Romania

Daniela Moldoveanu, Friesland Campina, Romania

Our today's story

Theme:

Future and Innovating in the Future

Story architecture:

- approaching innovation
- assessing innovation performance
- learning from successes and failures



The new normal

- Change
- Crisis



Companies' commitment towards innovation



- Increased

Why

Source: <http://www.accenture.com/us-en/Pages/insight-low-risk-innovation-costly.aspx>

A survey of executives conducted by Accenture in November 2012 amongst 519 executives from large organizations revealed **the state of innovation.**



Are you **formally evaluated** on your innovation-related activities?

87%

Yes

67%

Very/ extremely dependent

70%

Top 5 priorities

To what extent is your organization's **strategy dependent** on innovation for its long term success?

Where is **innovation** ranked among your company's **strategic priorities**?

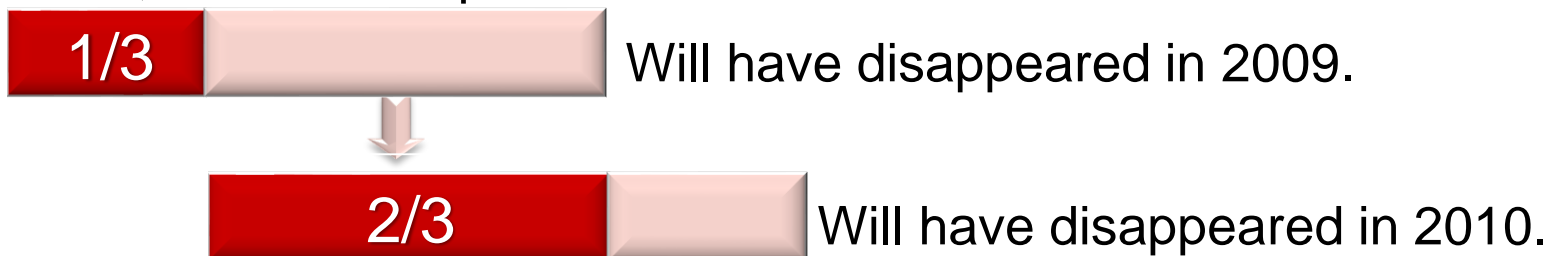


Winners continue to innovate in a crisis



However, **innovation failure rate** remains **HIGH**.

Thus, for 100 new product launches in 2008:



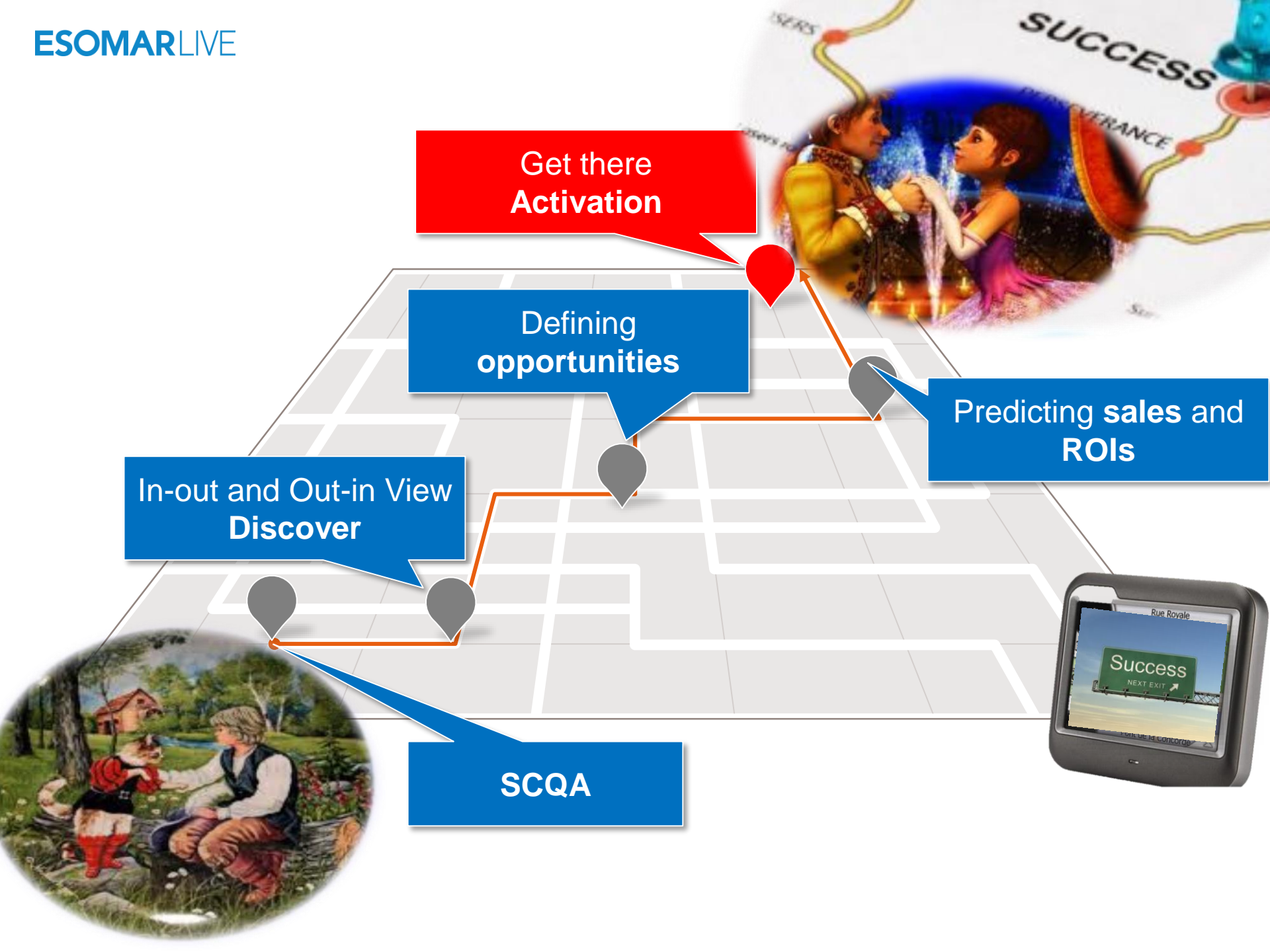
Why together?

Once upon a time a brief calling for a **Future GPS**, able to indicate:

- ⚙️ where we are today
- ⚙️ what lies around and ahead of us
- ⚙️ which path is the best to take

Growth business opportunities
identification and sizing





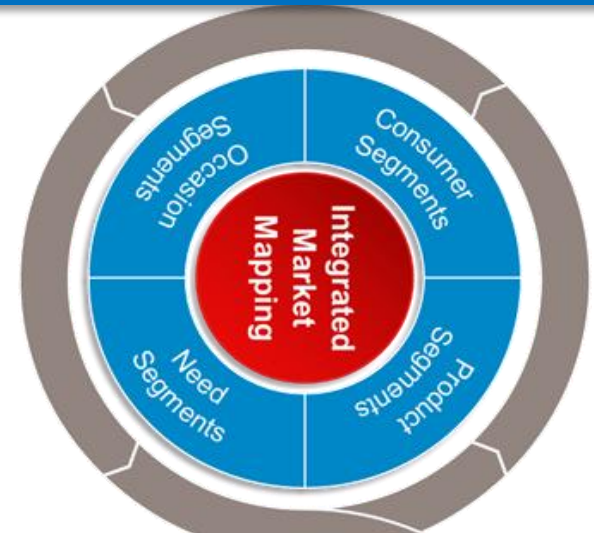
Discovery



1

Deep view

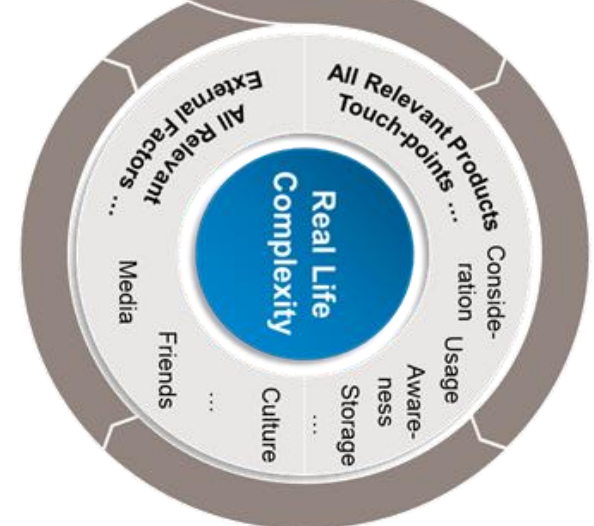
How category evolved in terms of benefits



2

Broad view

How consumers' make sense of the marketplace



Product as bundle of benefits

At the intersection...



... between SD and Food

Lack of clarity and familiarity

Beauty from within



Defining opportunities

Profiling

→ the most important future consumer targets for category

Foreseeing

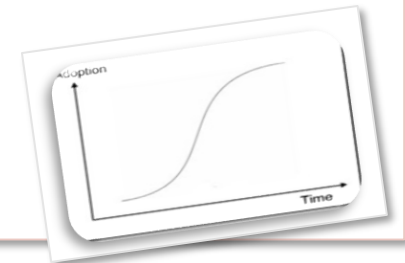
→ future benefit spaces (emotional and functional) which apply to target segments, need states, occasions

Building

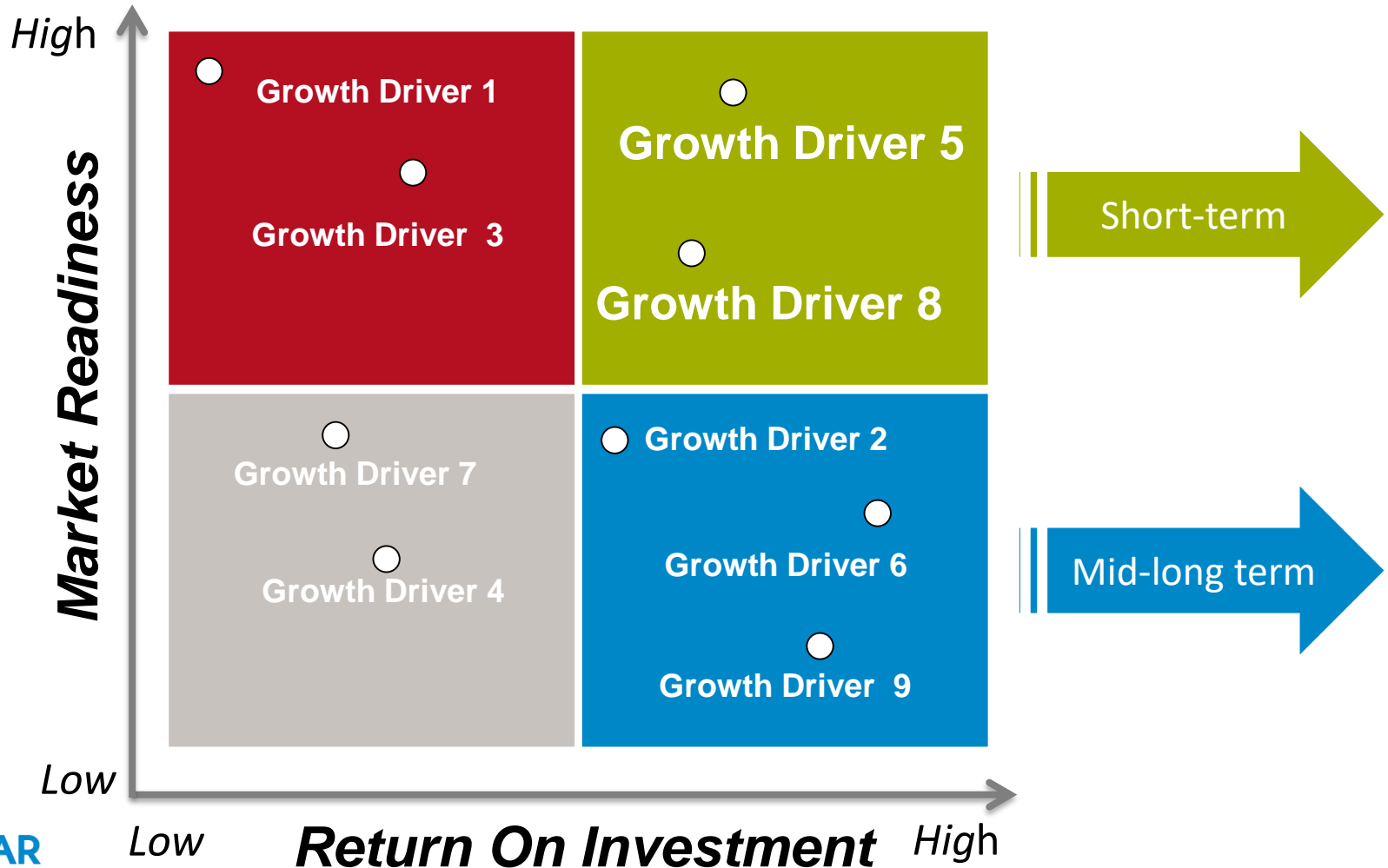
→ draw the strategic innovation platform and assess its future relevance

Sizing

→ \int (consumer segments, occasions, frequencies, quantities, price)



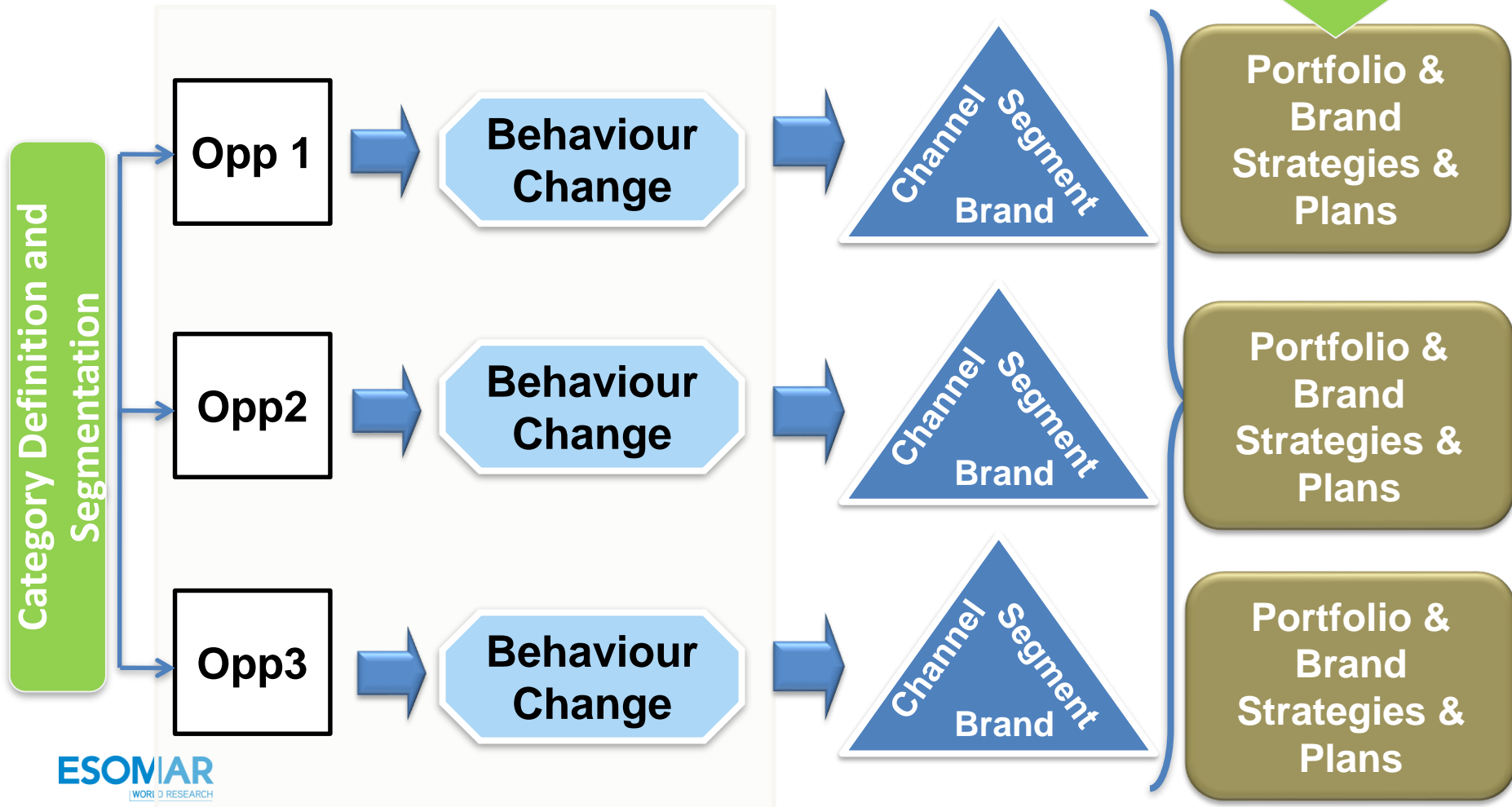
Predicting sales and ROIs



Activation

Developing Strategic options for each Opportunity

Category Growth Initiatives



Activation

Bridging the Gap at the POP



<http://www.mirror.co.uk/money/city-news/sainsburys-to-create-6000-jobs-with-150-393987>

<http://www.marketingmagazine.co.uk/article/1074570/jamie-oliver-backs-sainsburys-alternative-fish-campaign?HAYILC=RELATED>



Take aways

Lack of foresight,
the biggest barrier
against innovation
Too many "me, too" or too
early

Consumers do not
buy products/
services but bundle
of benefits



Innovation is not
about random
inspiration

When success
happens it is if not
game changing at
least break through



*“The real voyage of discovery consists not in seeking
new landscapes...
but in having new eyes”*

Marcel Proust

Thank you!

ESOMARLIVE

A Better Way than <Build and Pray>

The benefits of disaster-checks

Alice Mihai, ISRA Center, Romania

Oana Lungu, BAT, Romania



A BETTER WAY THAN <BUILD AND PRAY> THE BENEFITS OF DISASTER CHECKS

ISRA Center & British American Tobacco
June 2013

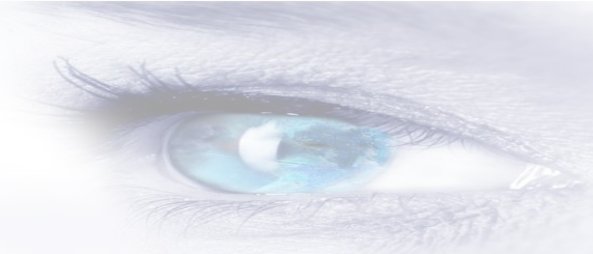
THE CONTEXT

THE GUIDELINES

THE SOLUTION

THE PERKS BEHIND

THE OUTCOME






THE CONTEXT

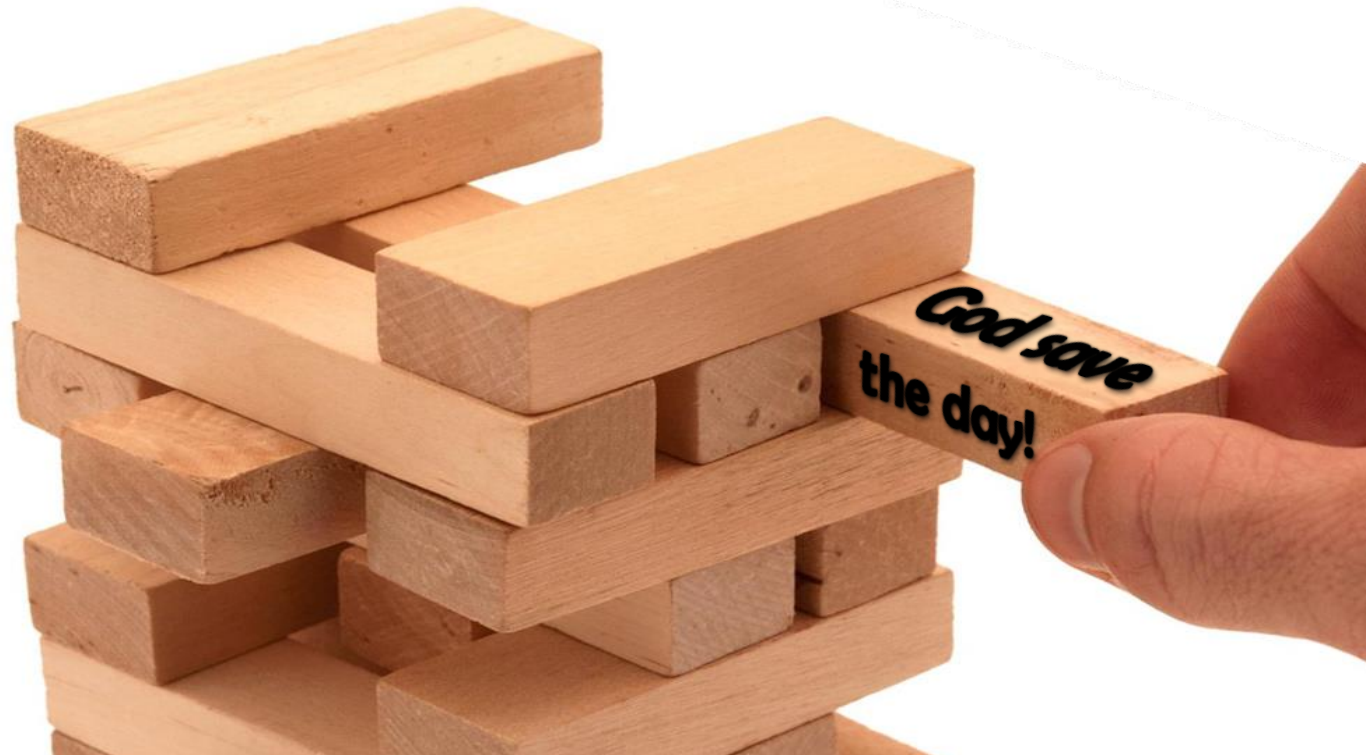




Quick decisions are needed today more than ever in the race for success.



**But often lacks the “big” insight...
So what are the alternatives?**




1


Decide by simply
trusting guts feeling
and keep your fingers crossed!

2

**Surf the wave of big data
but is not easy job
and could prove little relevant...**



3 Run a standardized research that could prove valuable and is anything but timely.



**Now stop and ask again:
What is a success getter
if not a disaster/ risk avoider?**



HERE & NOW

0

The <quick & relevant> way
to see what's around the corner:
<reality (disaster) checks>!

aspirations

wishes

expectations

needs

**All you have to do is just listen to and
really understand the empowered
consumers!**

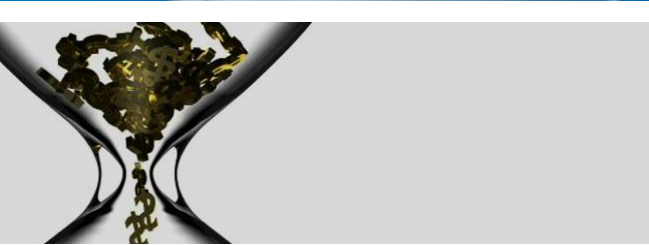
THE GUIDELINES



1. think **PROBLEM DRIVEN**,
not project driven



2. use **SIMPLE**, but
NOT SIMPLER research tools



3. keep **COST EFFICIENCY**
and **TIME TO MARKET**




4. cross the **FINE LINE** between
QUAL and **QUANT**



5. ensure **FLEXIBLE** and **TRUSTING**
COOPERATION



THE SOLUTION



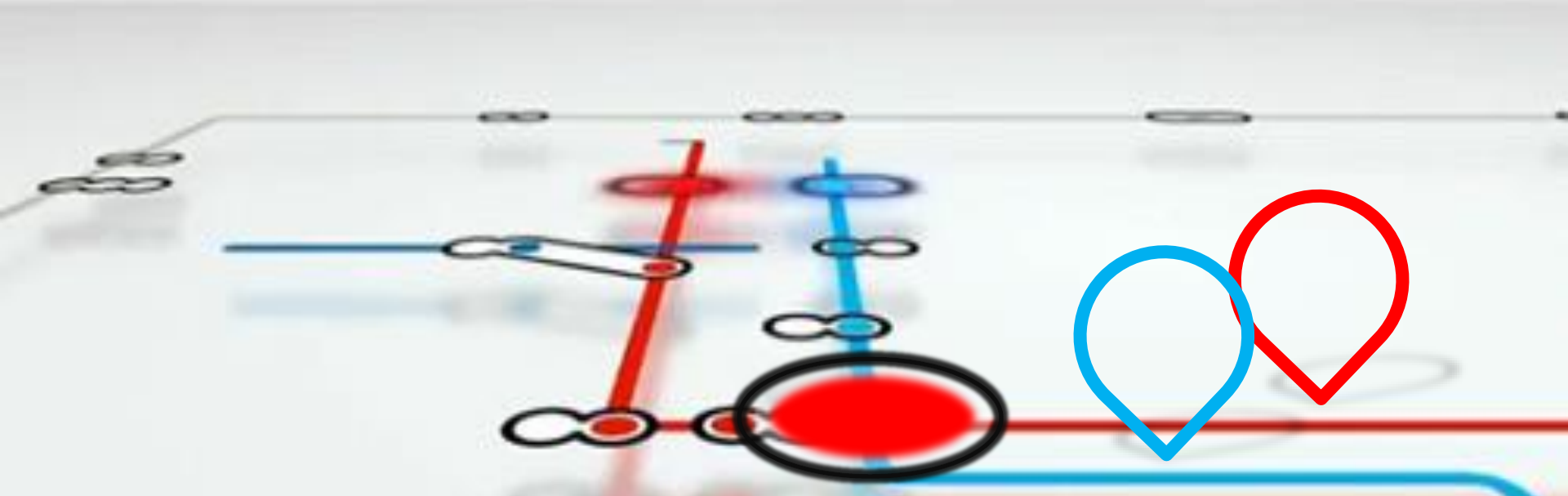
If placed at the **start-ups**,
the disaster (reality) check is
STRAIGHTFORWARD,
EFFICIENT and **RELEVANT**



CASE STUDY #1

<FIND THE BEDROCK>

packaging direction before further design tuning



OUR CHALLENGE WAS

What is the **right packaging track** out of two opposite routes (full color vs white), each opening the door to countless executions and alternatives?

authenticity
versatility
competition
fun
reward



amplification
anticipation
unbiased
insightful
diversity

DISCLOSURE

Reinventing focus groups: Predictive Groups

When ONE can count for SO MANY



RESEARCH ADDED VALUE

Paradigm inversion gives decision makers direct access to a multiplied number of opinions in real time, **effectively widening the net for no price increase.**



CASE STUDY #2

<SPOT THE TRUE HOOKS>

consumer engagement platform development

fun
creativity
stream of ideas
WHAT IF style
“experts” in action

DISCLOSURE

Converting in-depth interviews: Hot Shops

Get MINDS together to CO-CREATE



RESEARCH ADDED VALUE

Inspiration space for the prosumers means decision makers fast opening to grow from “seeds” of ideas big “trees” of **refined insights with zero extra fees.**



CASE STUDY #3

<POINT INNOVATION LANDMARKS>

depict progress far from Silicon Valley

OUR CHALLENGE WAS

In what way **innovation** makes sense inside the category and moreover, does innovation stands against all odds considering the context?

opinions challenge

PROs & CONs

deliberation

deeper understanding

trigger points

solutions



DISCLOSURE

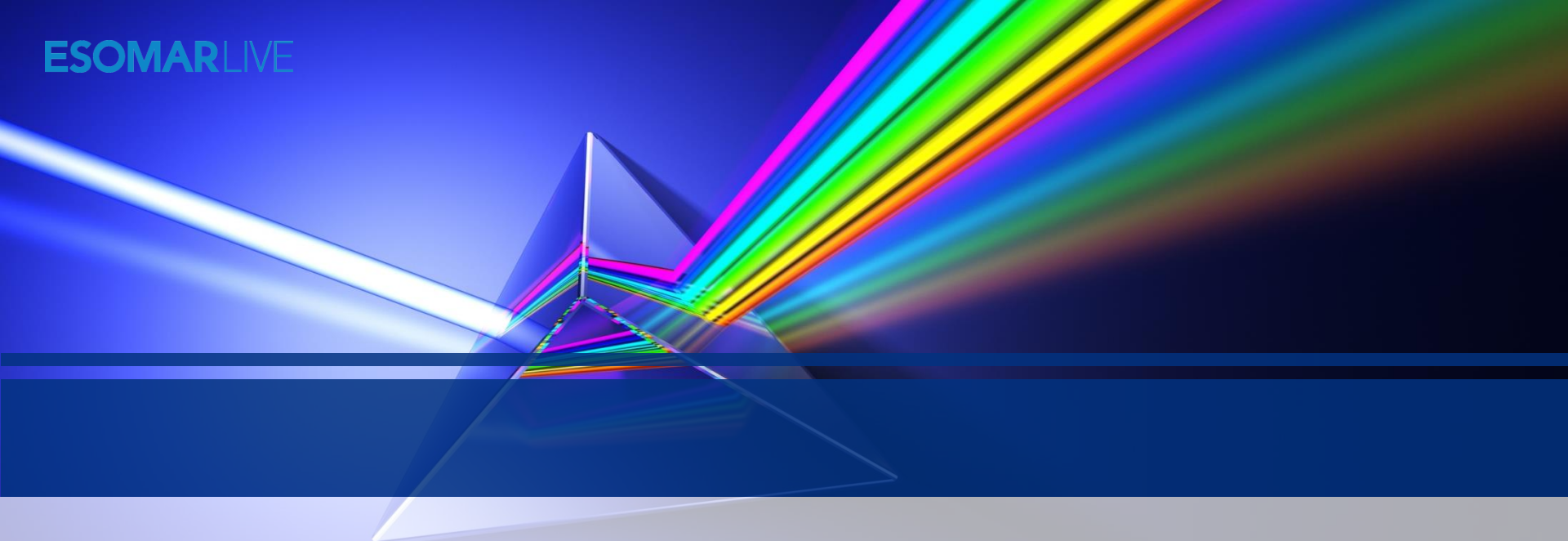
Taking debate to the next level: BI-Polar Groups

PUSH the limits up via CONFLICT



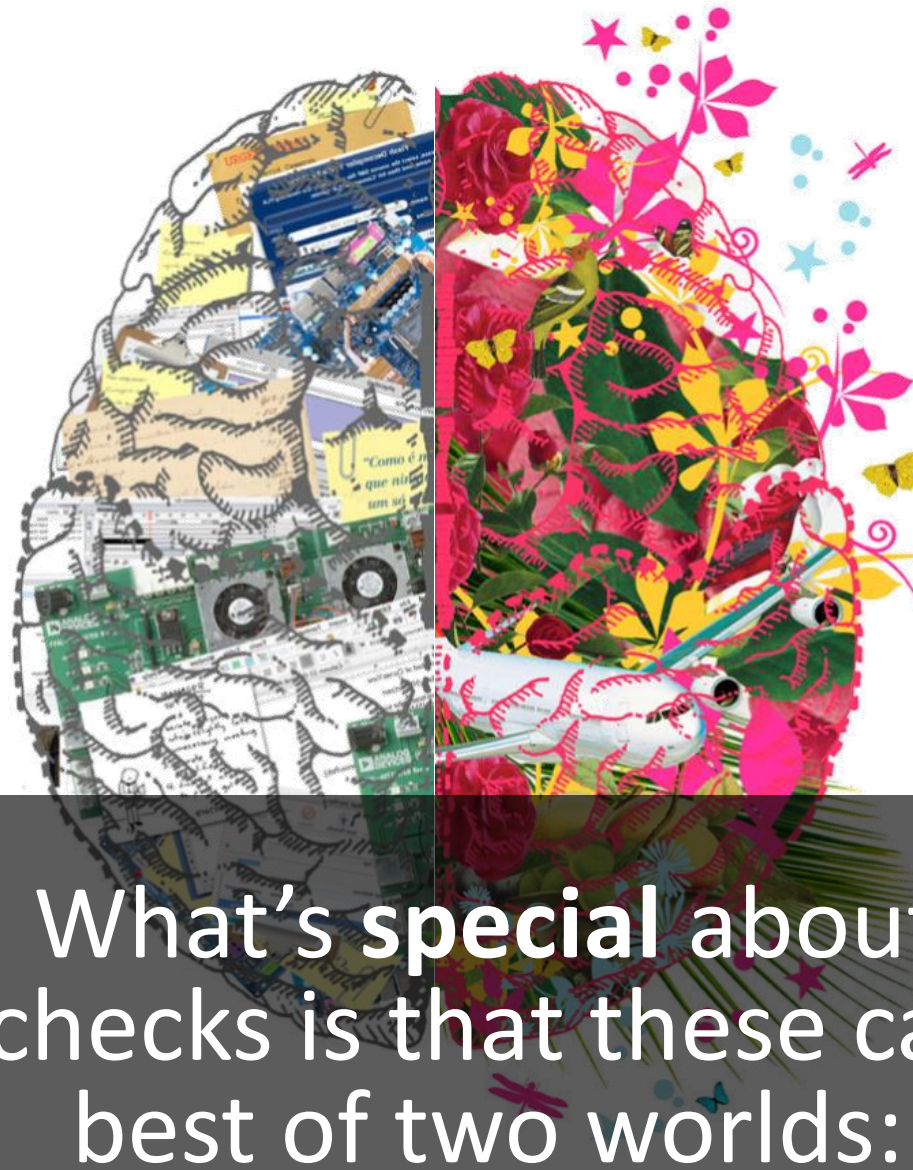
RESEARCH ADDED VALUE

Divergence of the consumers views provide decision makers with **full range of perspectives** (worst & best case scenarios as well) **without additional cost.**



THE PERKS BEHIND

it has the
RESEARCH
rigor
and skills



it feels
natural
and
at hand,
like
INTUITION
in action

What's special about
disaster checks is that these capture the
best of two worlds:

clear focus and
problem targeted

with rational sparkle

timely

cost-effective

with the commitment
of all decision makers



creative and insights
generator

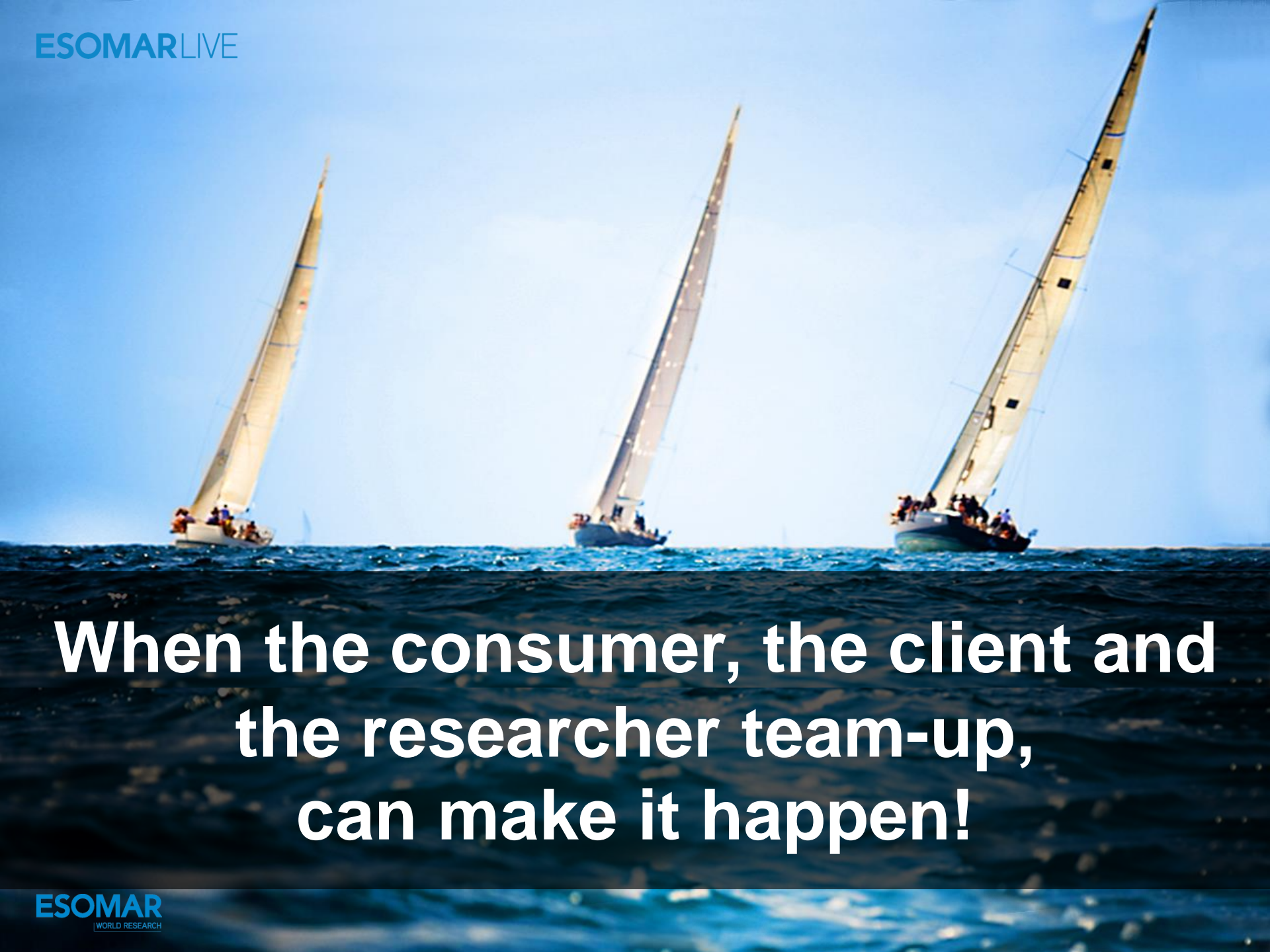
multipurpose

surprisingly versatile

with anticipation
power

enlightening, as not to
shoot in the dark

THE OUTCOME

A photograph of three sailboats racing on the ocean. The boats are white with tall, light-colored sails. The water is a deep blue, and the sky is a clear, bright blue. The boats are positioned in a line from left to right, with the rightmost boat being the largest and most prominent. The overall scene is dynamic and energetic.

**When the consumer, the client and
the researcher team-up,
can make it happen!**

Enjoy your Jenga!



Alice Mihai
BD Director
ISRA Center



Oana Lungu
Insights Manager
British American
Tobacco



THANK YOU!

www.isracenter.com

Q & A



ESOMAR LIVE

Lunch break

ESOMAR LIVE

MEETUP
ROMANIA
2013

Bucharest/ 11 June

Market Research: Spender or Saver?

(An extension of the “Best Of ESOMAR”)

In partnership with the Marketing Faculty of the
Bucharest University of Economic Studies

ESOMAR
WORLD RESEARCH

ESOMAR LIVE

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Uniunea
Studentilor
Academiei de Studii Economice
din Bucuresti

ESOMAR^{LIVE}

Thank you to our partner:



ESOMAR LIVE

Session Chair

Ingrid Lambru

Mercury Research, Romania

ESOMAR LIVE

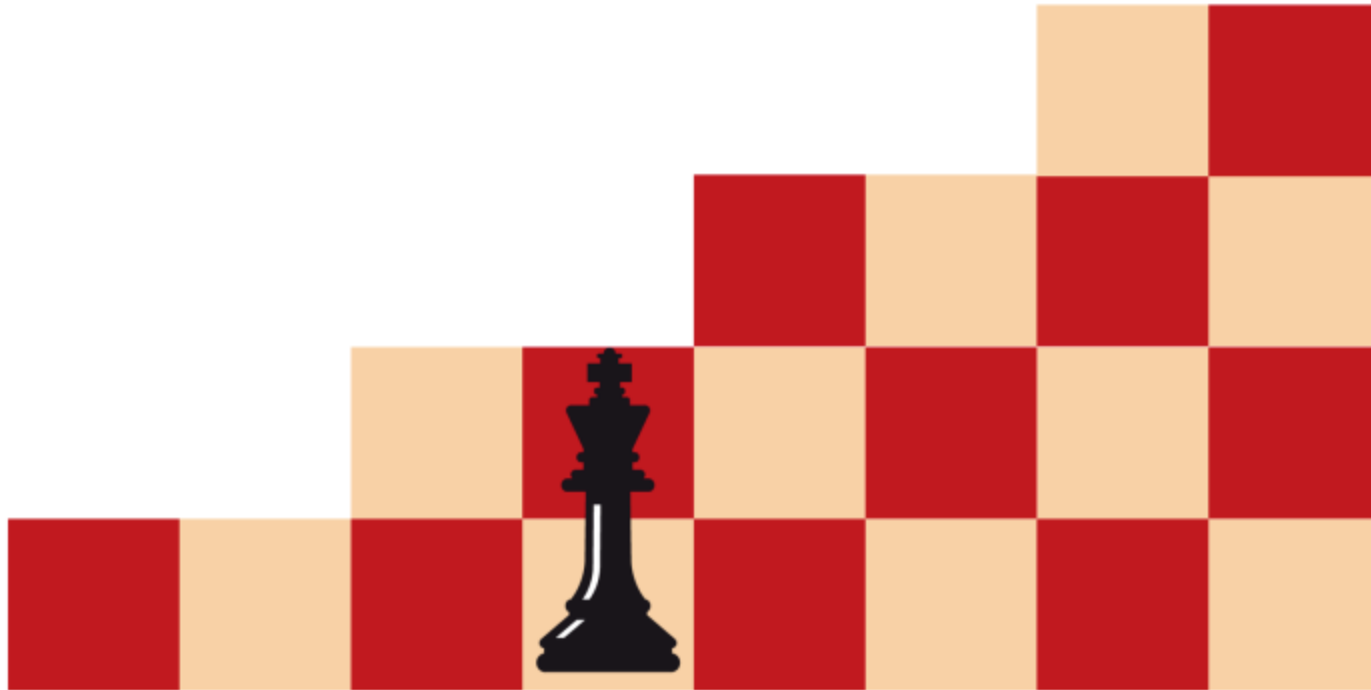
Customer Experience Evaluation

Expenses saver and growth source (or, how to lose weight and gain muscles in a few simple steps)

Alexandru Chivu

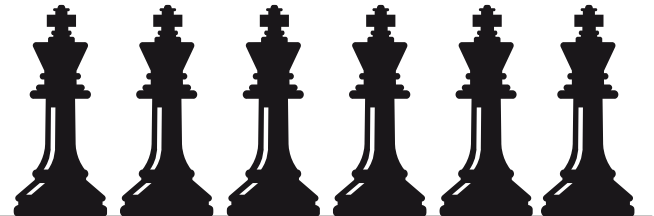
TNS CSOP, Romania

Loyal customers are essential for growth

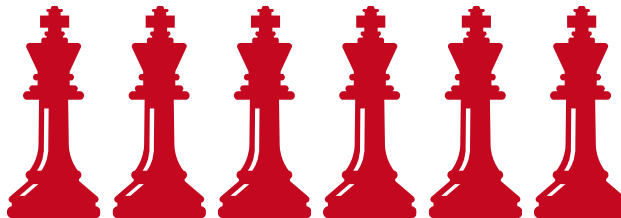


Customer retention: gaining more customers than the company loses

Gain



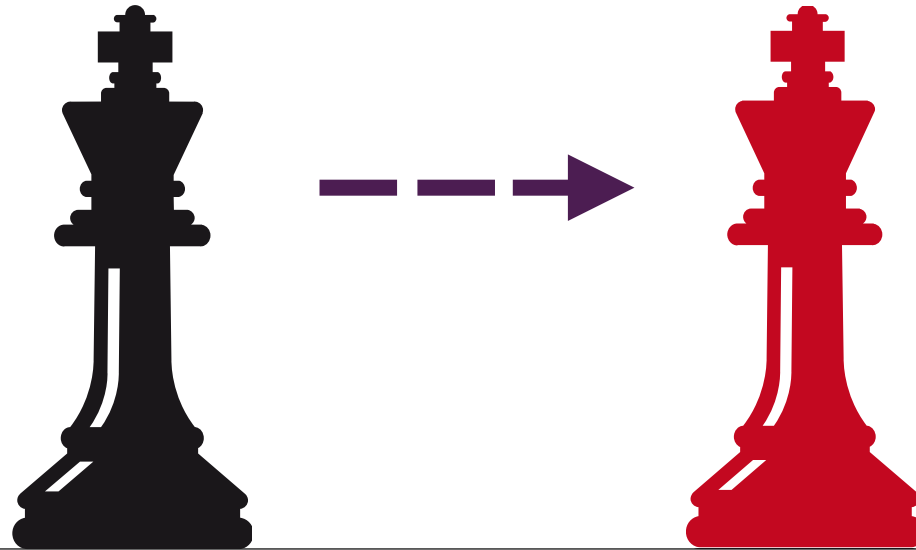
Loss



Customer loyalty: customers spending more with the company



Customer advocacy: customers attracting new customers



Three ways loyal customers are essential for growth



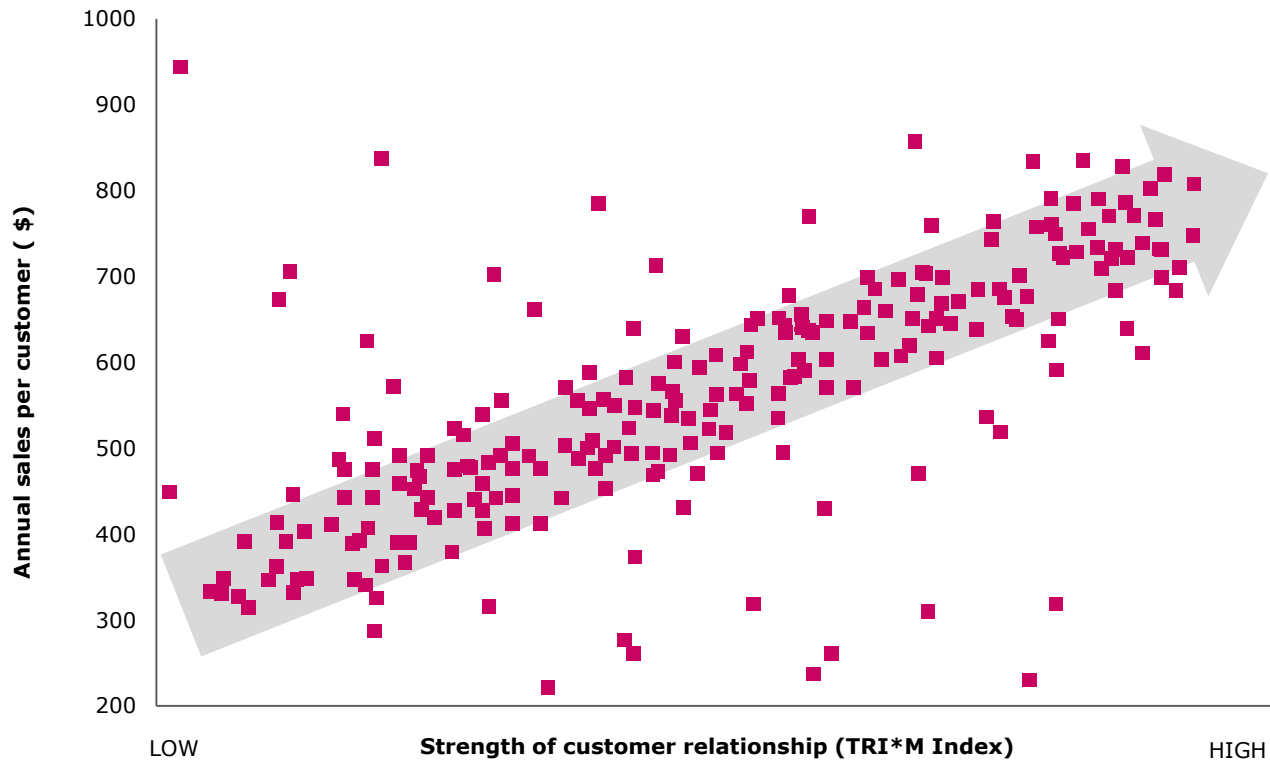
Step 1. Get a fitness trainer (aka MR agency)



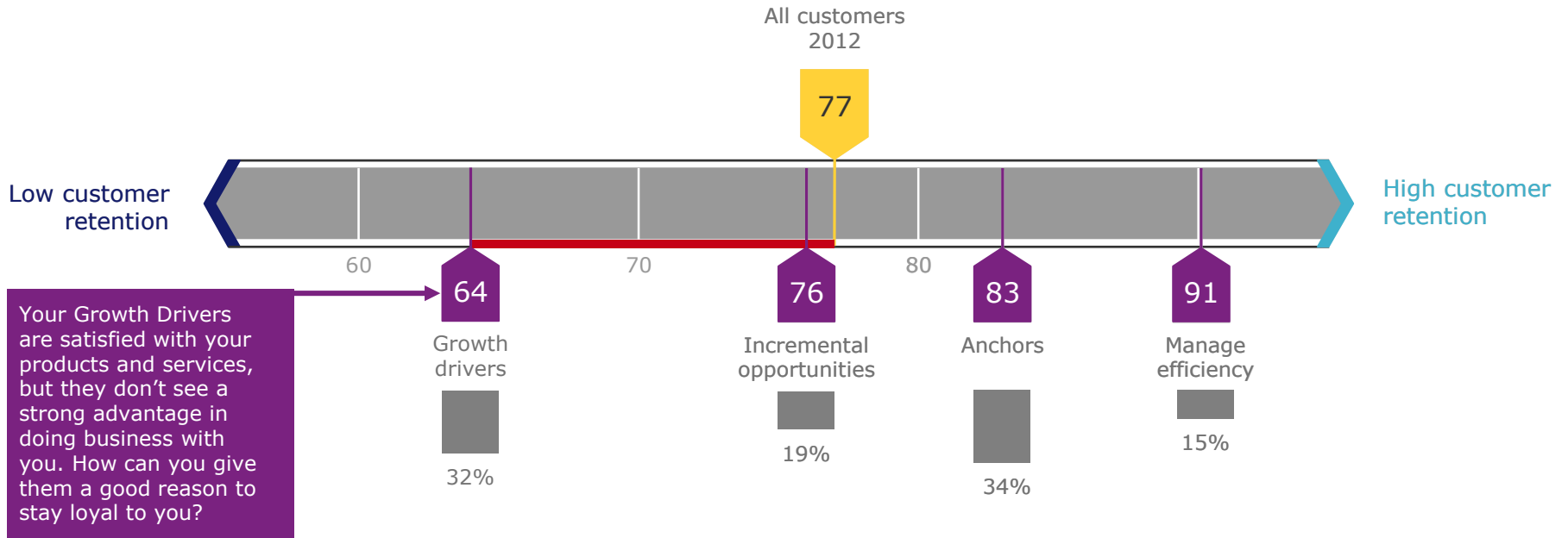
Step 2. Watch out for Intensity of Customer Retention



Proven links to growth: higher customer retention levels lead to higher profit



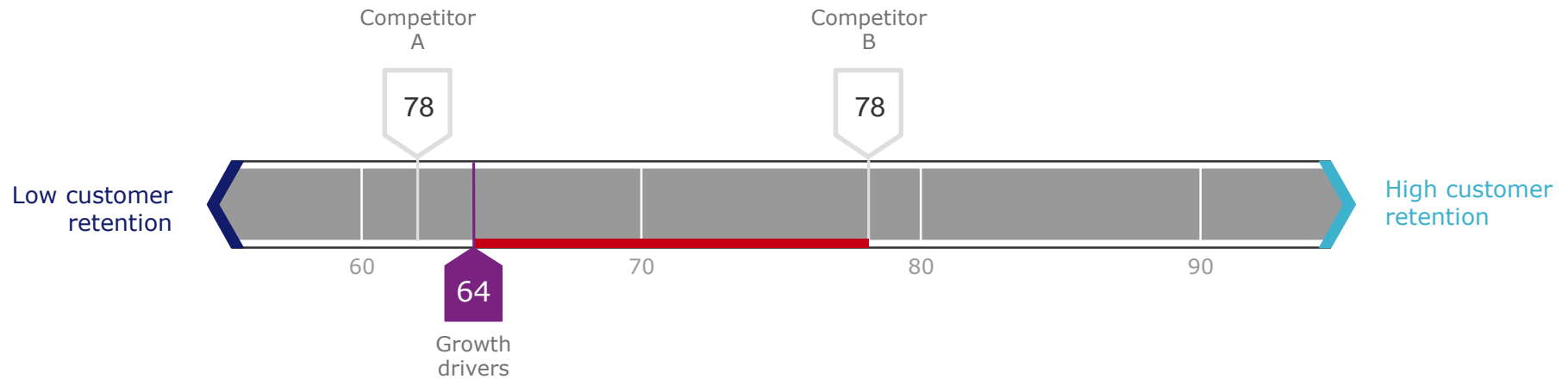
Understanding the strength of your most valuable customer relationships



■ TRI*M Index – All customers
 ■ Growth segments
 ■ Percentage of entire customer base

SOURCE: 4 TRI*M Index questions & Loyalty Growth segments

It's critical to understand the competitive environment



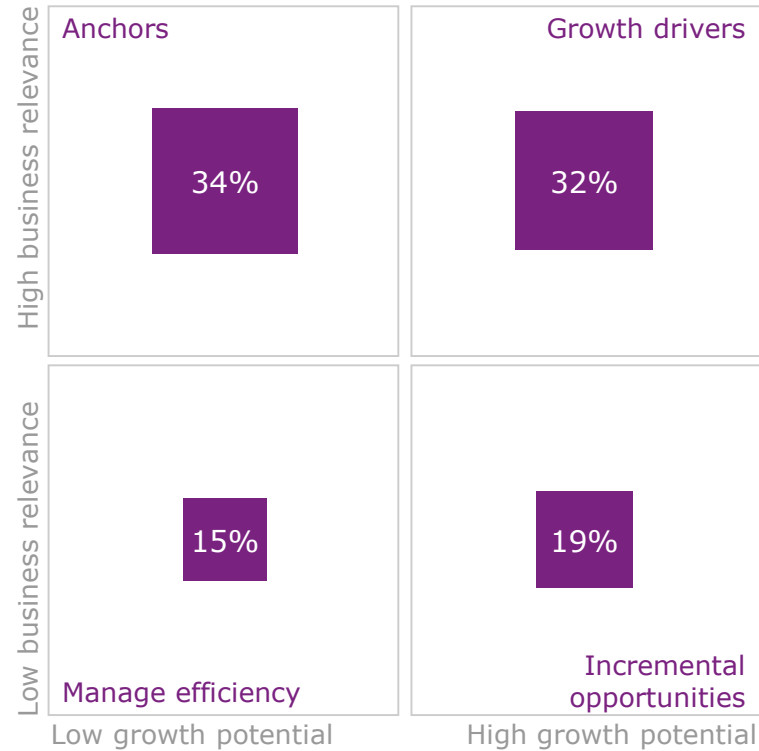
■ TRI*M Index – Growth drivers □ TRI*M Index – Competitors ■ Positive ■ Negative

SOURCE: 4 TRI*M Index questions & loyalty growth matrix segments

Step 2. Word-of-Mouth Management Customers Typology



Identify growth opportunities and how to leverage them



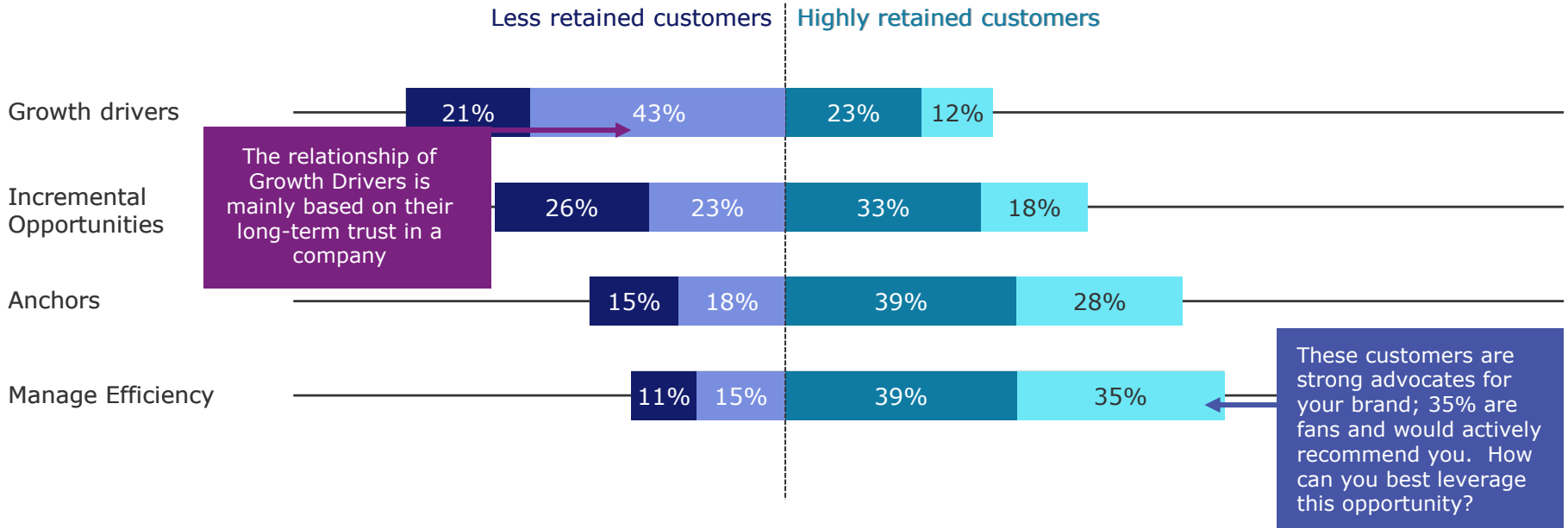
77

TRI*M Index

■ Percentage of each segment

SOURCE: Existing company segmentation & claimed behaviour (e.g. share-of-wallet, future purchase intention)

Understanding the emotional connections with the most valuable customers

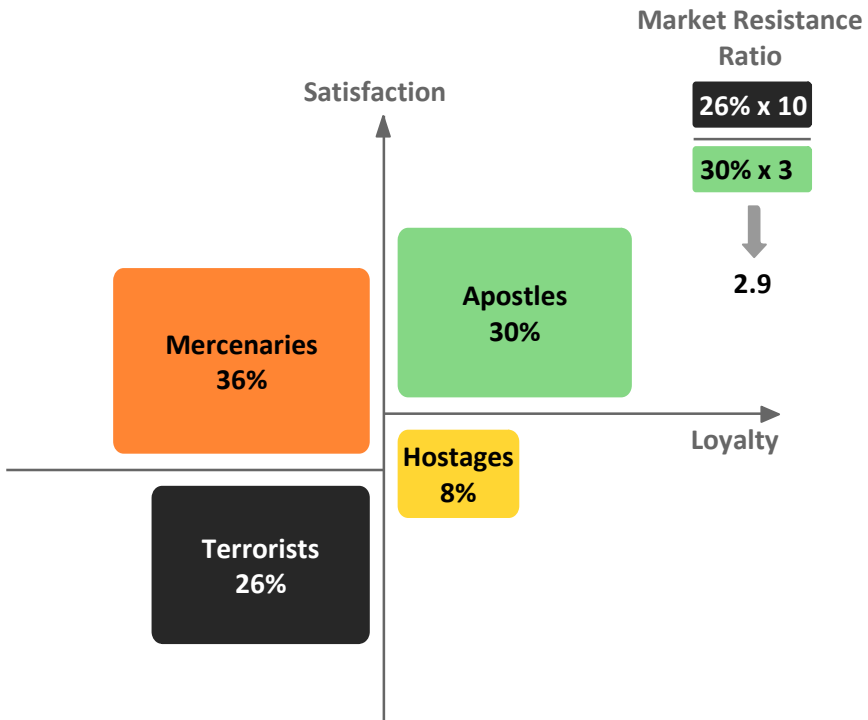


TRI*M Index

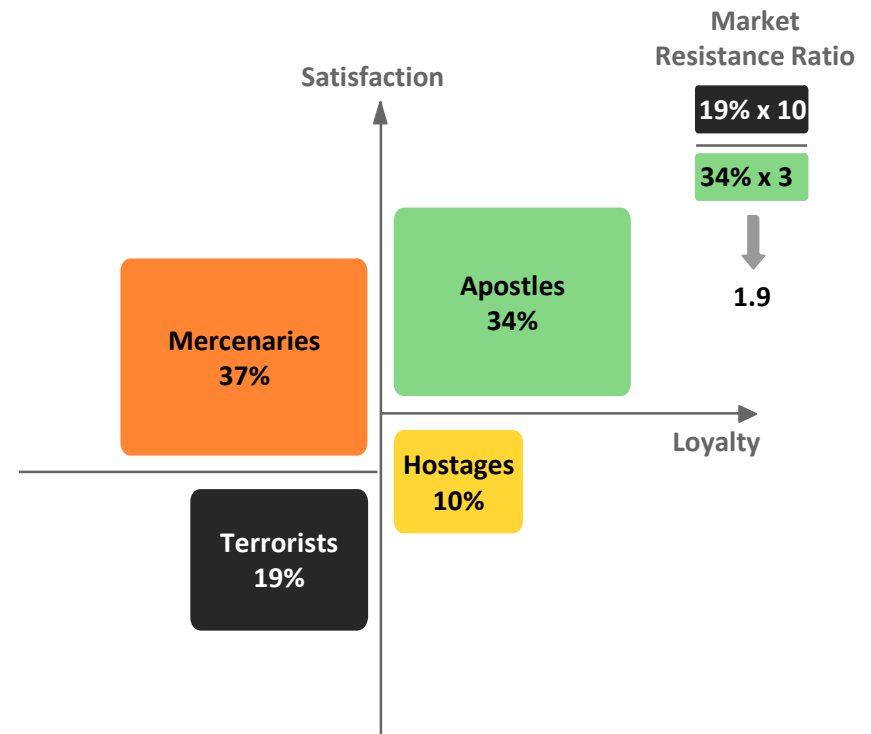
■ Non Connected Relationship
 ■ Trusting Relationship
 ■ Active Partnership
 ■ Fandom

Understanding risk of most vulnerable customers segments

Segment A



Segment B



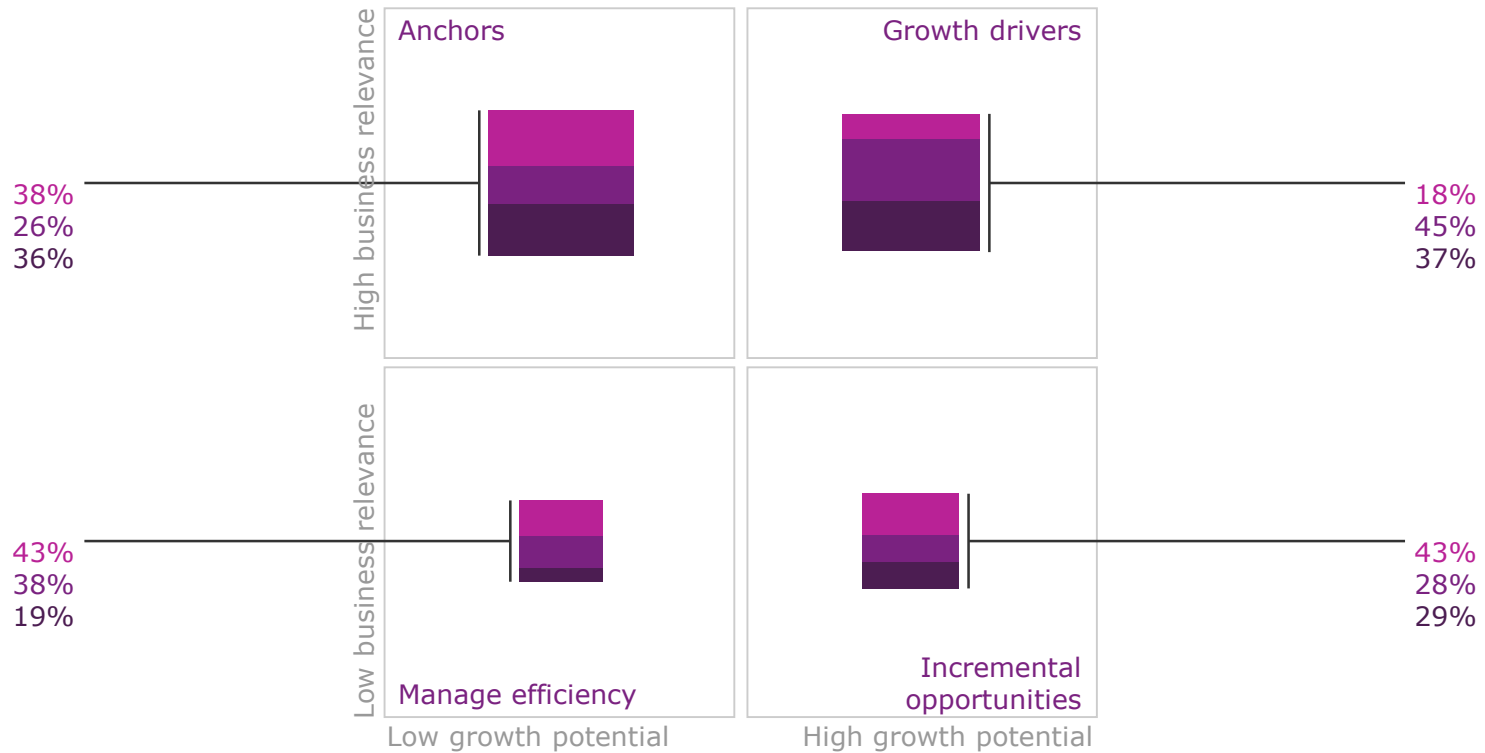
49

TRI*M Index

59

TRI*M Index

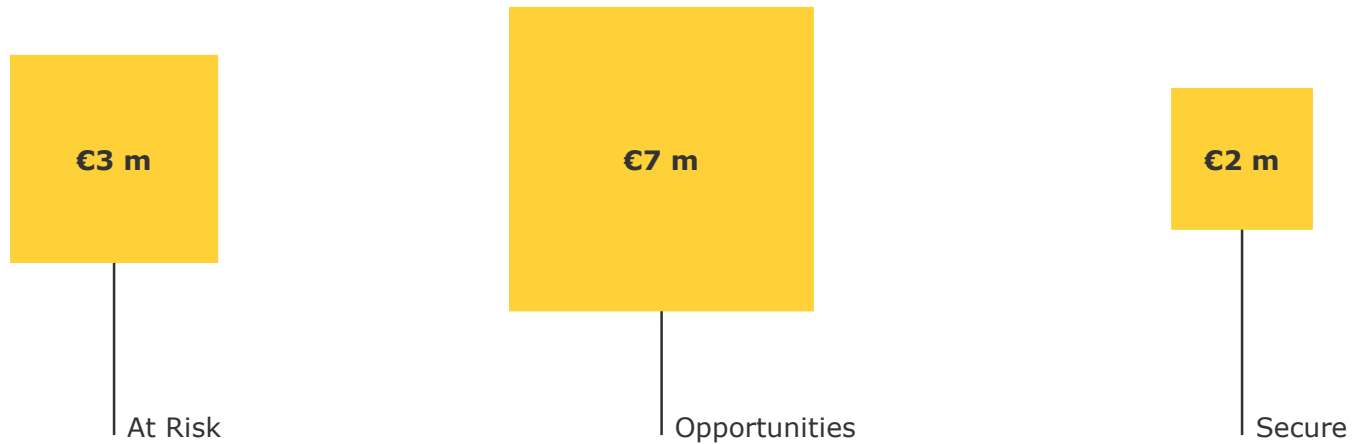
Pinpoint opportunity and risk in your most valuable customer segments



TRI*M Index

At risk
 Opportunities
 Secure

Profiling opportunity and risk amongst the customers



In terms of the value they represent



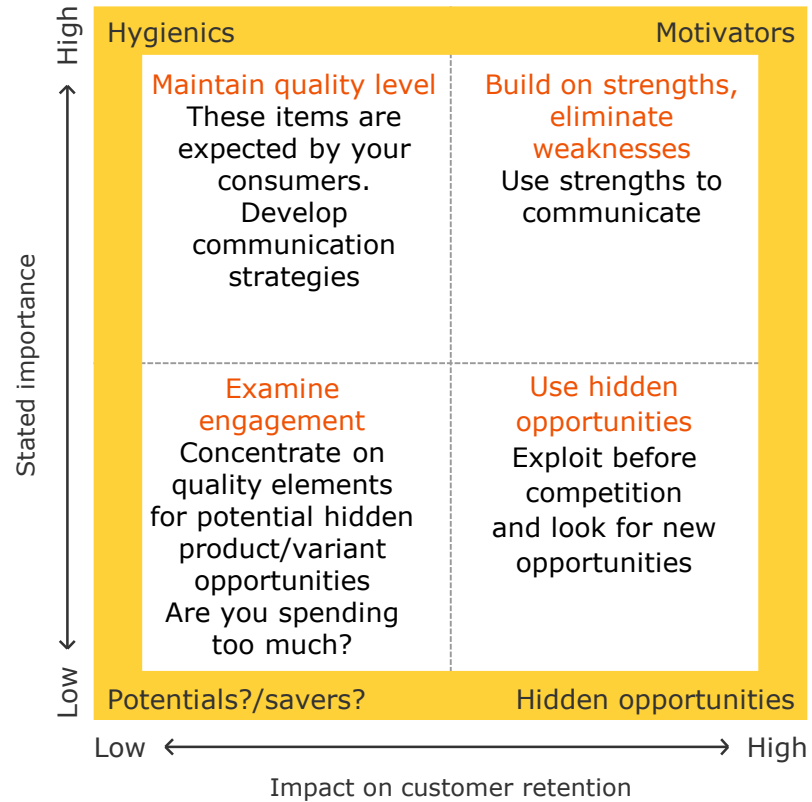
TRI*M Index

Percentage of current customers

Step 3. Relevance and Strengths/Weaknesses Analysis



Focusing the spending efforts and setting priorities



Prioritising actions and investments to retain and grow the most valuable customer segments

TRI*M Index 55

PRICE

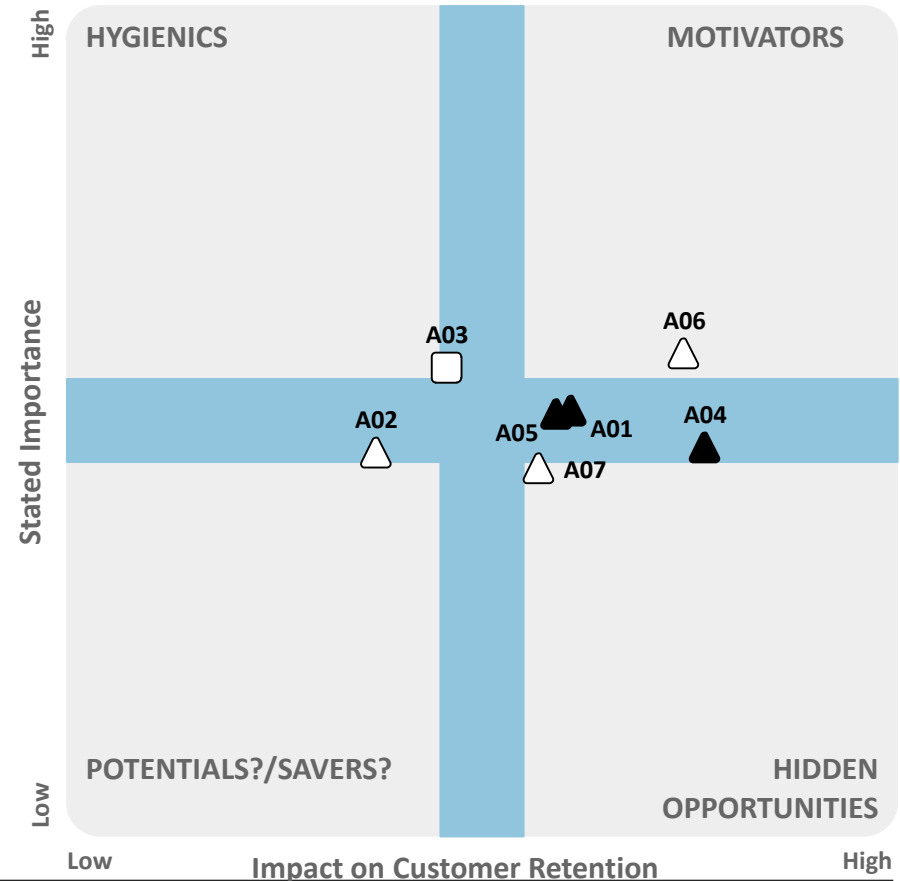
- A01 ▲ The bank has small interest rates for credits, compared to other banks
- A02 △ The bank takes up fixed interest rates for credits
- A03 □ The bank offers the possibility of collecting the public gratification for deposits
- A04 ▲ The bank perceives appropriate taxes
- A05 ▲ The bank offers good interest rates for savings
- A06 △ The taxes and conditions are transparent
- A07 △ The bank assures me a small rate for my credit, which is equal to the monthly saved amount

Performance

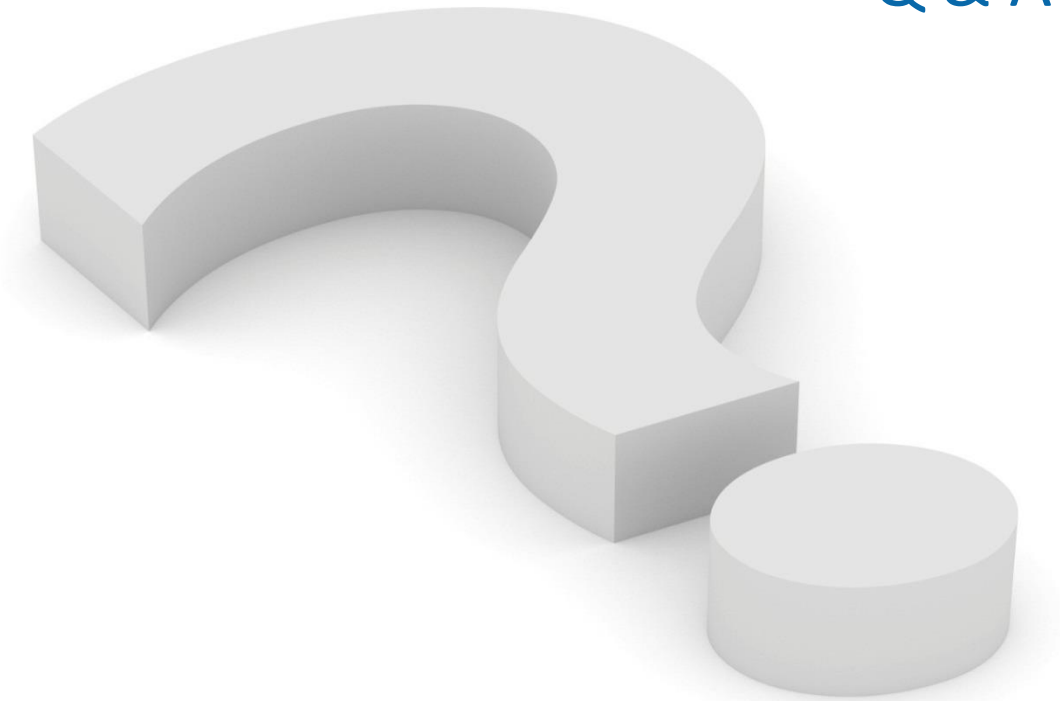
- Far above average
- Above average

- Average
- △ Below average
- ▲ Far below average

Base 1006 (weighted 1006)



Q & A



ESOMAR LIVE

Research Challenges

Open Debate

Lacramioara Loghin, Exact Research & Consultancy, Romania

Stefan Andrei, Exact Research & Consultancy, Romania

We will talk about...

- A. What is the impact of research data under usage?
- B. How many Romanian research companies, local or subsidiaries, invest in tools development?
- C. Business/ marketing: Hunch or Science?

Spender or Saver?

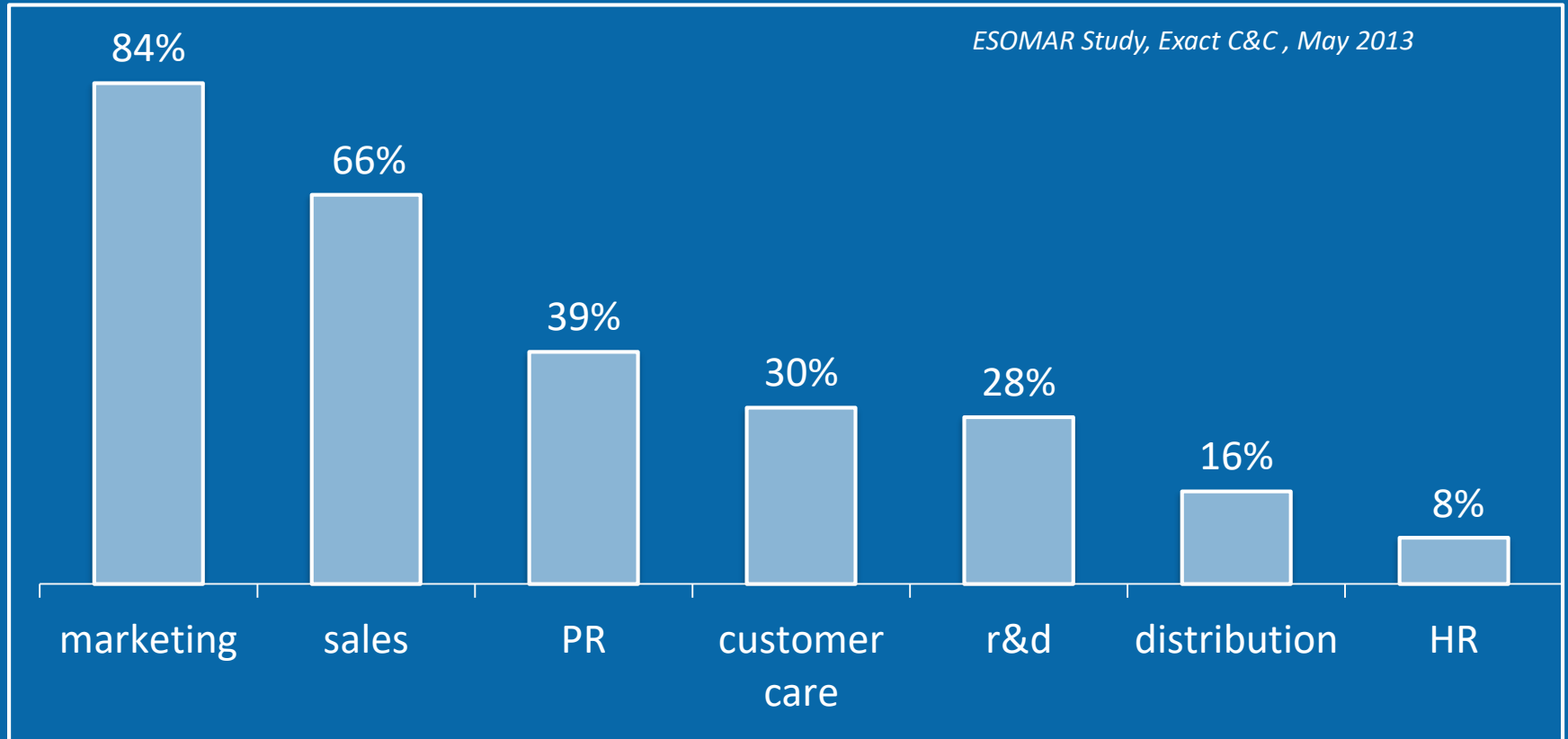
**A. What is the impact of
research data under
usage?**

Research data not used by all interested parties/
departments

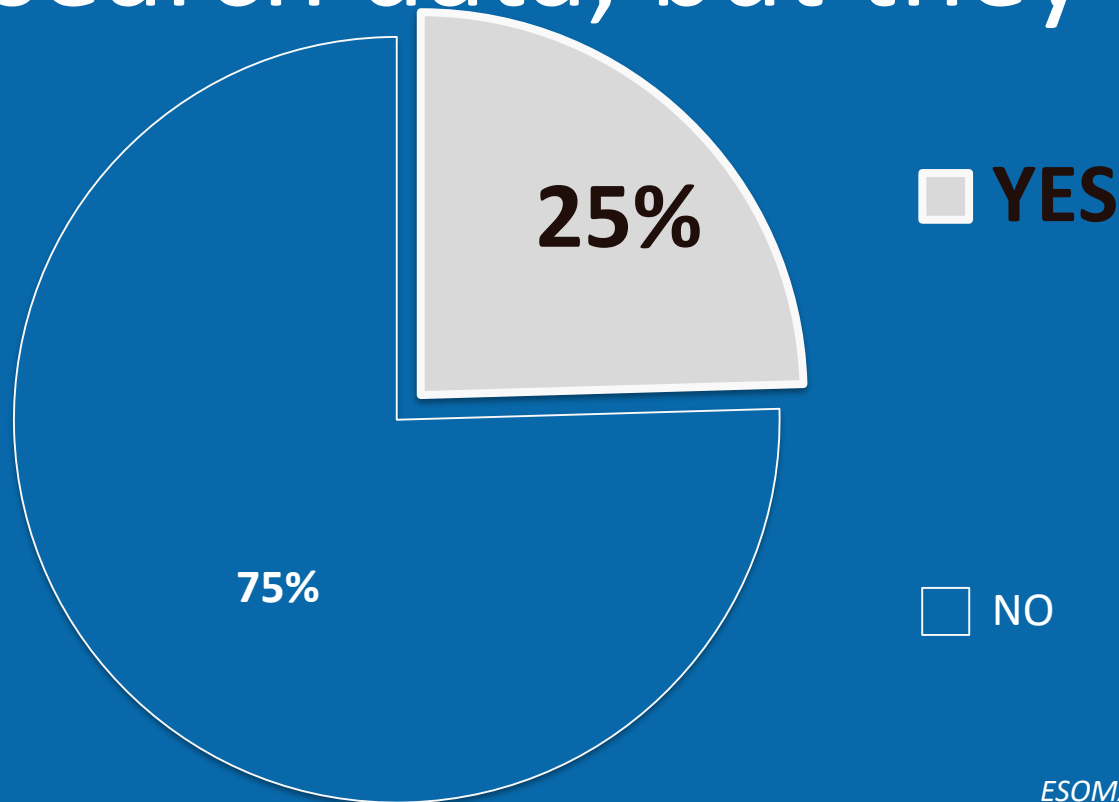
Same research data
purchased by 2 different
departments from 2 different
suppliers

Data purchased by another
department the Research

Who should sit at the round table?



Potential for usage: are there departments that should use research data, but they don't?



If you don't use it you value it less!

Does research bring benefits and increase company profitability?

64%

Departments that
use research

54%

Departments that
DO NOT use research

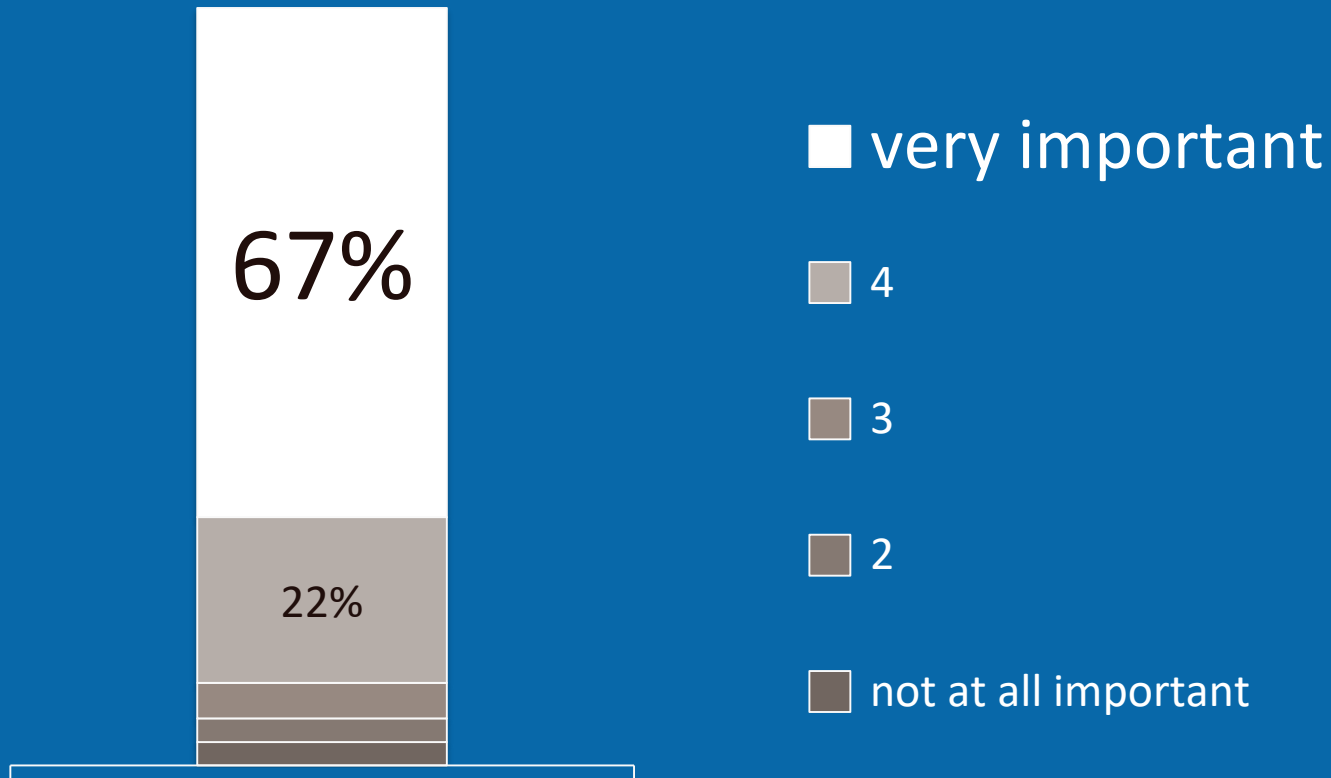
Spender or saver?

Under usage
makes market
research a
spender!

Spender or Saver?

B. How many Romanian research companies, local or subsidiaries, invest in tools development?

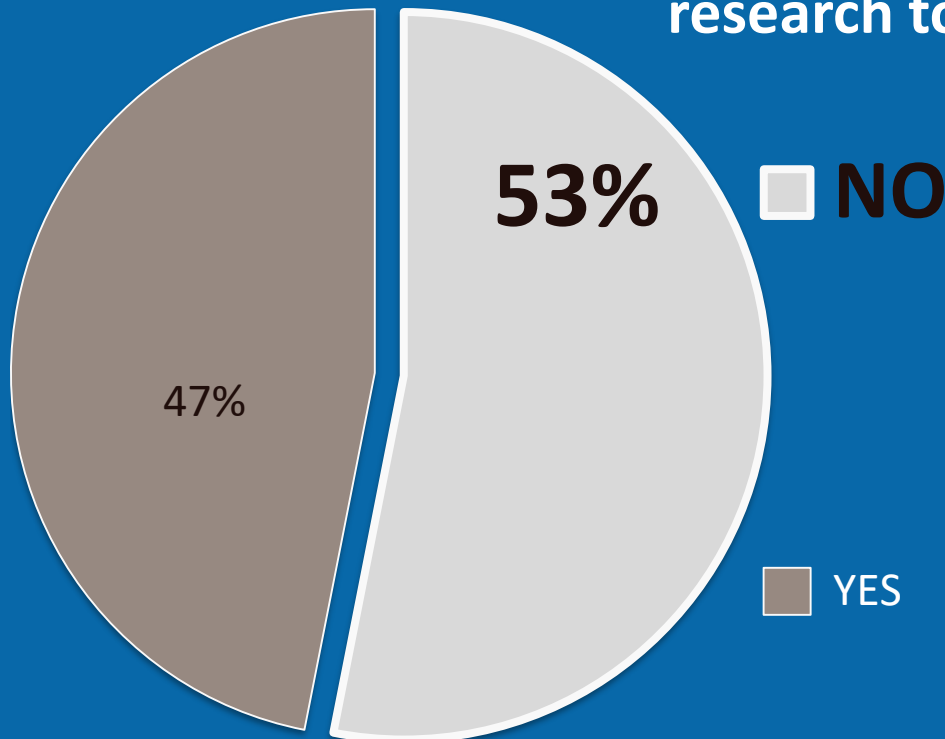
How important is this?



**Which among the
research
companies
present here have**

What is the perception in the market?

Do you know market research companies that invests locally, in Romania in market research tools?



**We did it,
and we even had
fun 😊**



LEGO[®] SERIOUS PLAY[®]

What is LEGO® SERIOUS PLAY®?

a concept

a tool

a methodology for efficient
results

a set of LEGO® bricks



What advantages does it have as a qualitative tool?

discuss the **un-discussable**
discover the **un-conscious**
accelerate **innovation**
support **group cohesion**
sustain **individual**
opinions



How Does it Work?

LEGO® SERIOUS PLAY®
workshop takes three or four
hours.

Phase 1: The
Challenge

Phase 2: Building



Spender or Saver?

**C. Business/ marketing:
Hunch or Science?**

Who says is hunch?

Managers that
succeeded in the past
with no research

Entrepreneurs

Who says is science?

Managers that succeeded
in the past but failed
recently

Entrepreneurs confronted
with the Crisis

Professionals say Strategic Decisions in the company should be based on...

53%

on manager's
experience

**Business
Decisions**

47%

on marketing
research results

FIGHT!!!

**Mathematicians vs.
Radio Dj's**

Business/ marketing: Hunch or Science?

vs.

Mathematicians	Radio Dj's
Complex equations	

Business/ marketing: Hunch or Science?

VS.

Mathematicians	Radio Dj's
Complex equations	
	Entertainment

Business/ marketing: Hunch or Science?

VS.

Mathematicians	Radio Dj's
Complex equations	
	Entertainment

Business/ marketing: Hunch or Science?

VS.

Mathematicians	Radio Dj's
Complex equations	
	Entertainment
Differential analysis with partial derivatives	

Business/ marketing: Hunch or Science?

VS.

Mathematicians	Radio Dj's
Complex equations	
	Entertainment
Differential analysis with partial derivatives	
Radio playlist	

Business/ marketing: Hunch or Science?

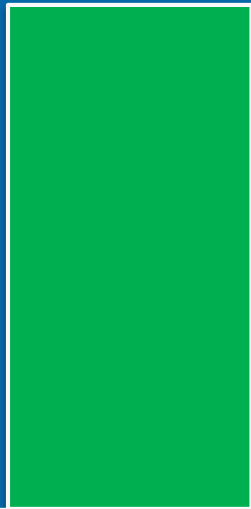
VS.

Mathematicians	Radio Dj's
Complex equations	
	Entertainment
Differential analysis with partial derivatives	
Radio playlist	

This is science

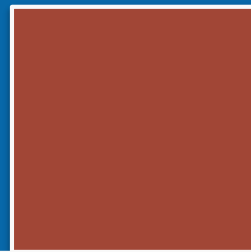
Is research a safety net in marketing and business?

58%



knowledgeable decisions in the company

28%



validate decisions already taken

14%



measurement and comparative data at multinational level, asked by HQ

Is research a safety net in marketing and business?

In 42% of the cases market research has little or no influence in company decisions

25% of companies are potential under-users of research data

Perception that not enough companies invest locally in tools' development

In 42% of the cases market research has little or no

A row of smooth, dark, rounded stones is arranged diagonally across the frame, set against a deep blue background with subtle ripples. The stones are dark brown or black and have a glossy, smooth texture. The lighting creates highlights on the top surfaces of the stones, giving them a three-dimensional appearance.

D. Marketing myths challenged by Research

One of many
reasons for which
research is a
saver

Marketers:

**“we already know
what our consumers
think, research will
only tell us the same**

thing.”

Let's put it to
the test!

Expenditures in Romania 2012:

**ATL media 298 million
euro**

**Research industry 45
million euro**

Here are some myths:

Marketers believe: **“Online banners/ commercials are intrusive for consumers”** – 52% top 2 boxes

Consumers say: **“not really”** – only 28% agree

Here are some myths:

Marketers believe: “SMS’s from a company/ brand are intrusive for consumers” – 55% top 2 boxes

Consumers say: “wrong again” – 34% agree, 43% disagree

Here are some myths:

Marketers believe: “TV commercials are safe, not intrusive” – 53%

Consumers say: “well, not always” – only 35% agree, guess what... 43% consider them intrusive

*Paid Owned Earned Quantitative Survey
conducted by Exact C&C, December 2012, 607
consumers and 101 marketers.*

Here are some myths:

Marketers believe: “Consumers feel special when a brand answers them on social media” – 86% agree

Consumers say: “yes but, not so much” - 57% agree

Here are some myths:

Marketers believe that
**“Brands are forced to be
more responsible due to
social media” – 74% agree**

Consumers say **“yes but, not
necessarily” - 56% agree**

Here are some myths:

Marketers strongly believe that “Consumers look for information and commercials about a brand ,when they are passionate about it” – 94% agree

Consumers say “we do, but

Spender or saver?

Let's see!
A. Myths busted

B. 5% efficiency
improvement of ATL
media expenditures
translates into...

Definitely

**33% of the annual
research expenditures in
Romania can be justified only
by communication budgets
optimisation**

ESOMARLIVE

THANK YOU!

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ESOMAR LIVE

The G-Local Shopper

Different markets, common needs

Sharon Hodgson
Shoppercentric, UK



The G-Local Shopper: Different markets - common needs

Sharon Hodgson
Director
June 2013



Why shoppers anywhere need to be understood



Are CEE shoppers any different



Why we need to think G-local



**No matter where they live,
shoppers generate sales**

If shoppers can't find it, they can't buy it



1 category
4 locations

“I’d have given up by now. I haven’t got the patience”

“If it’s not there I’d probably think they don’t stock it”

“I honestly didn’t realise there were that many (solutions) at all”

Visibility in-store is critical

Visibility is relative



"I'm bald – NOT ILL!!"

**Marginalised
position =
marginalised
shopper**



Choice can overwhelm



**Is time well spent at
fixture – or wasted?**



More time at the fixture does not always mean more sales

Category	Dwell time (seconds)	% purchasing
Cakes (Tesco)	57	89
Cakes (Asda)	91	89
Hair styling	65	75
Allergy Relief	59	99
Nicotine Replacement	90	75



Bleach
Dishwash

13

Washing powder
Detergents

Dog food
Pet Insurance

TO LET

Sainsbury's
Landlord Insurance

cleaners

fresheners

10%

Tablets

Powders

Borrow
£5,000
for less than
£88
per month

7.9
APR

Sainsbury's
Loans

£5,000
for less than
£88
per month

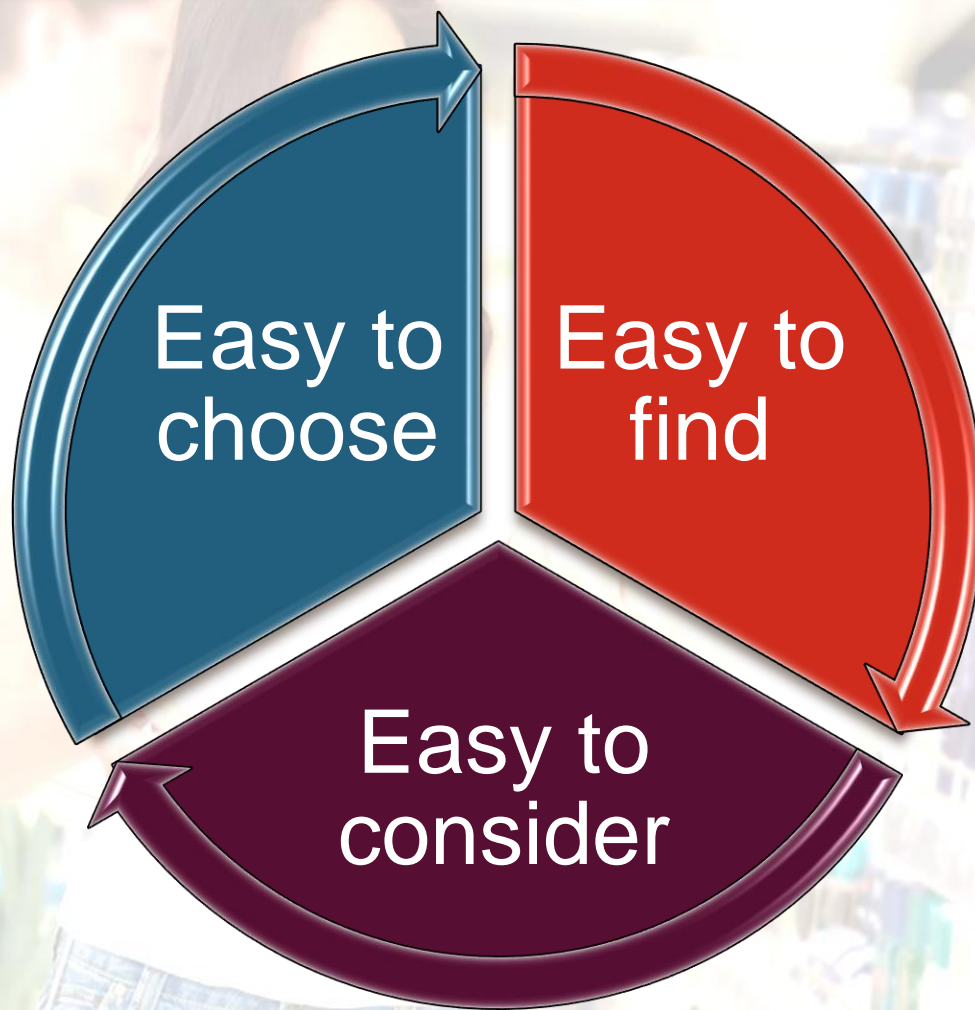
Laundry aids

12
9

Switch and
save

**Can POP cut
through the noise?**

Retail everywhere needs to deliver ease of shop



SPECIAL OFFERS
(all stores)



NO NAVIGATION



EMPTY SHELVES
(all stores)



NARROW AISLES
(all stores)



**Different markets,
common issues**



Same principles,
local application



**Same principles,
local application**



	Russia	Poland	Sweden
Practical Deal-seekers	22%	22%	19%
Convenience-driven Timesavers	20%	13%	14%
Impulsive Spoilers	10%	20%	26%
Specialist Bulk Shoppers	10%	13%	20%
Little & Often Enthusiasts	31%	17%	3%
Bulk Bargain Hunters	7%	16%	18%

**Same principles,
local application**

Top 3 Benefits of online shopping



Delivery 35

15

40

32

Easy to buy bulky items 32

8

9

11

Lower prices 26

15

49

27

Convenient 24

18

9

15

Shop any time 17

15

20

17

Order any time 15

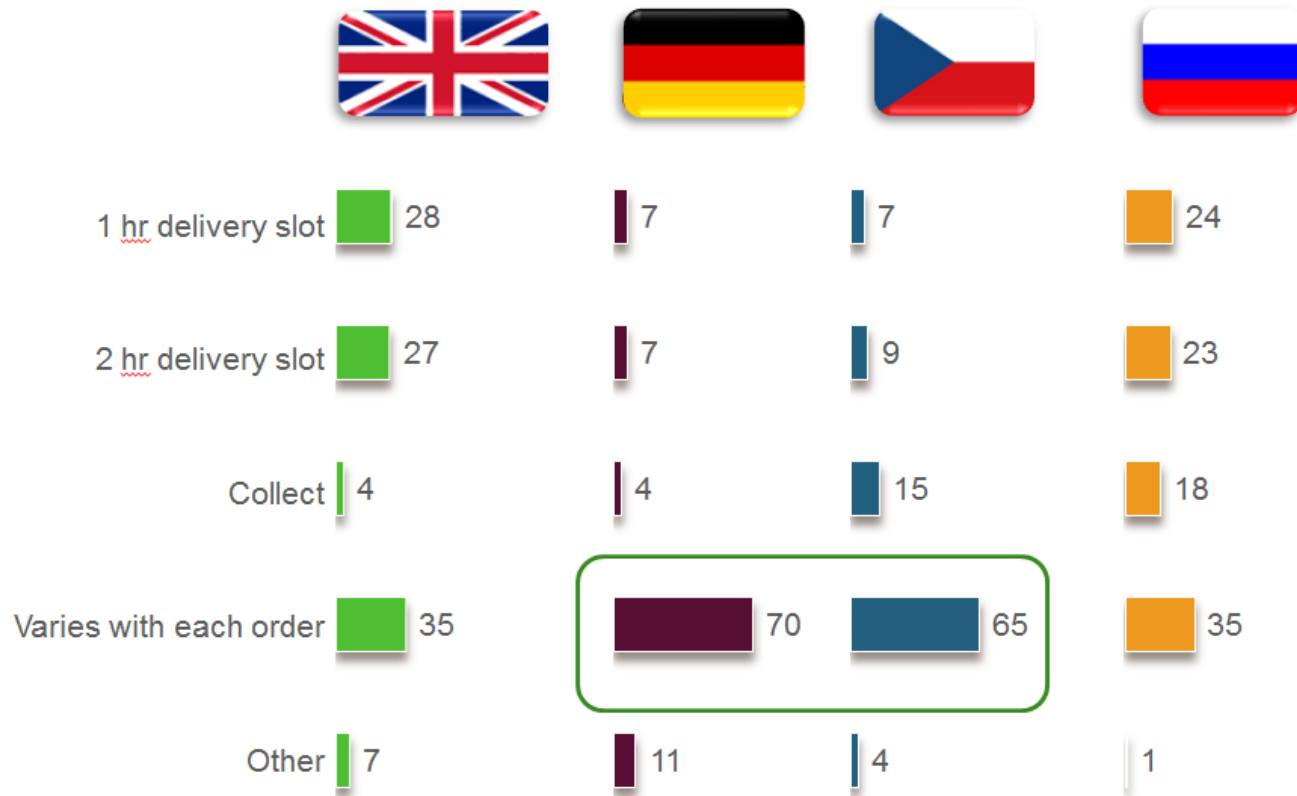
11

19

18

Same principles...

Online delivery preference



...local application



Choice is key



Avoidance

- Avoiding temptation
- Avoiding expensive shops



Prudence

- Cutting back on waste
- Making money go further
- Making purchases go further



Economising

- More price aware
- Buying into deals
- Switching to Own Label



Active (store hopping)

- Using new stores
- Going where the deals are

Shoppers adopting multiple strategies



**Retailers everywhere have
to work hard to stand still**

Navigate

- Enabling shoppers to find what they want
- Logical layouts



-
-



-
-



Navigate

- Enabling shoppers to find what they want
- Logical layouts



Attract

- Encouraging shoppers to consider the options available
- Triggering consideration



-
-



Navigate

- Enabling shoppers to find what they want
- Logical layouts



Attract

- Encouraging shoppers to consider the options available
- Triggering consideration



Persuade

- Enabling shoppers to understand the differences between the products on shelf
- Empowering decisions



Navigate

- The features which allow shoppers to identify where in-store / on-shelf to start their search



Attract

- The features which encourage shoppers to engage with the choices on-shelf



Persuade

- The features which encourage shoppers to actively consider the alternatives



IMPORTANT!

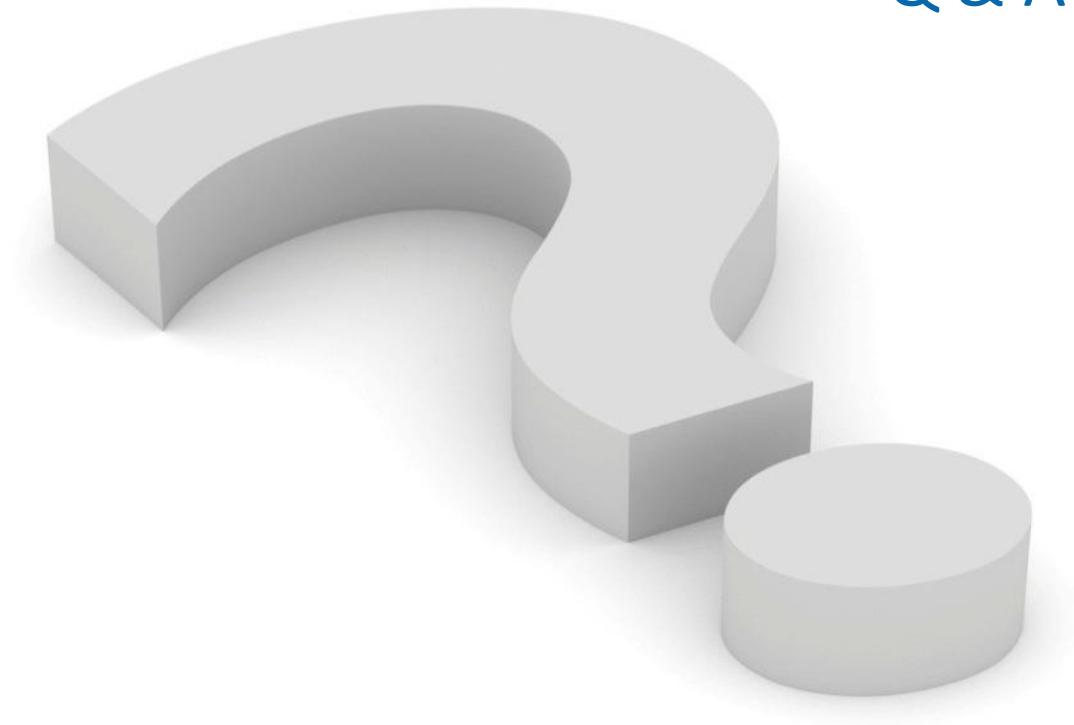
1. Shoppers everywhere want ease of shop
2. General principles are often common, but need a local application
3. You can learn a lot from a little research among shoppers
4. Shopper research should be about what to do; action orientated; based on the shopper perspective



The G-Local Shopper: Different markets - common needs

Sharon Hodgson
Director
June 2013

Q & A



ESOMAR LIVE

Coffee break

ESOMAR LIVE

MEETUP
ROMANIA
2013

Bucharest/ 11 June

Market Research: Spender or Saver?

(An extension of the “Best Of ESOMAR”)

In partnership with the Marketing Faculty of the
Bucharest University of Economic Studies

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din București

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Session Chair

Alina Serbanica

ESOMAR Representative for Romania

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Reducing Uncertainty Using Research

How the game is changing and why the song remains the same!

John Griffiths

Spring Research, UK

ESOMAR LIVE

Protect against uncertainty

Are we in the investment business
Or in insurance?

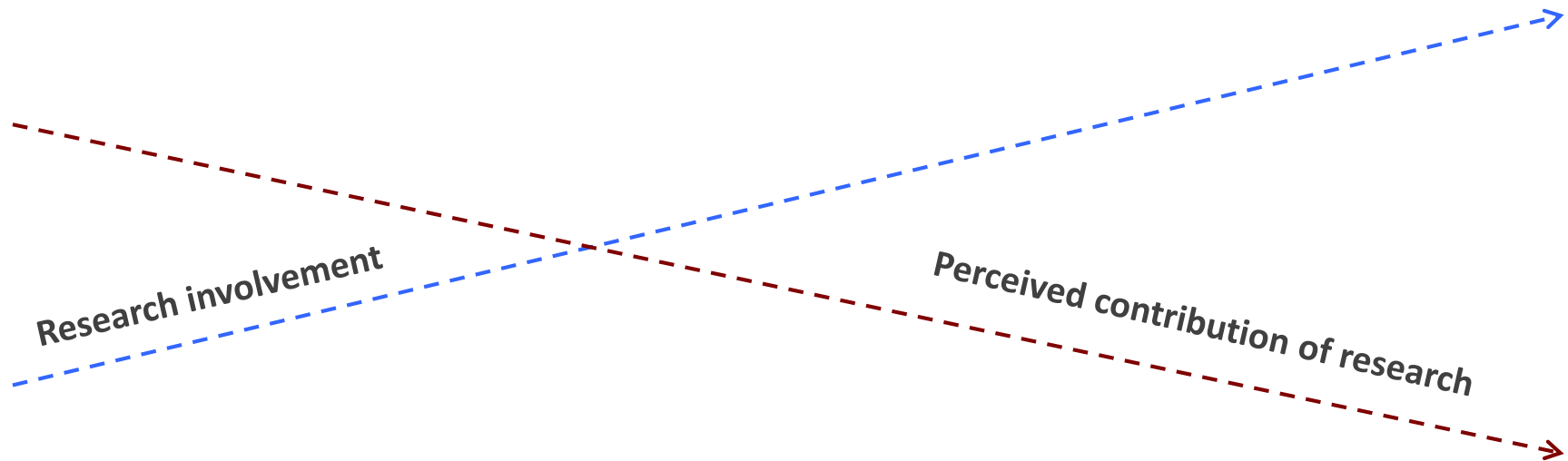


How research findings are used drives the kind of research we do and how we do it

EXPLORATION/
INSPIRATION

DEVELOPMENT

(PRE)TESTING/
VALIDATING



A window into research today

2 products launched in 2012/13

Demonstrate the extremes of
Finding new insights and
Protecting what you have



ESOMAR LIVE

Why research is building a bad name for itself –stuck in 'old ways'



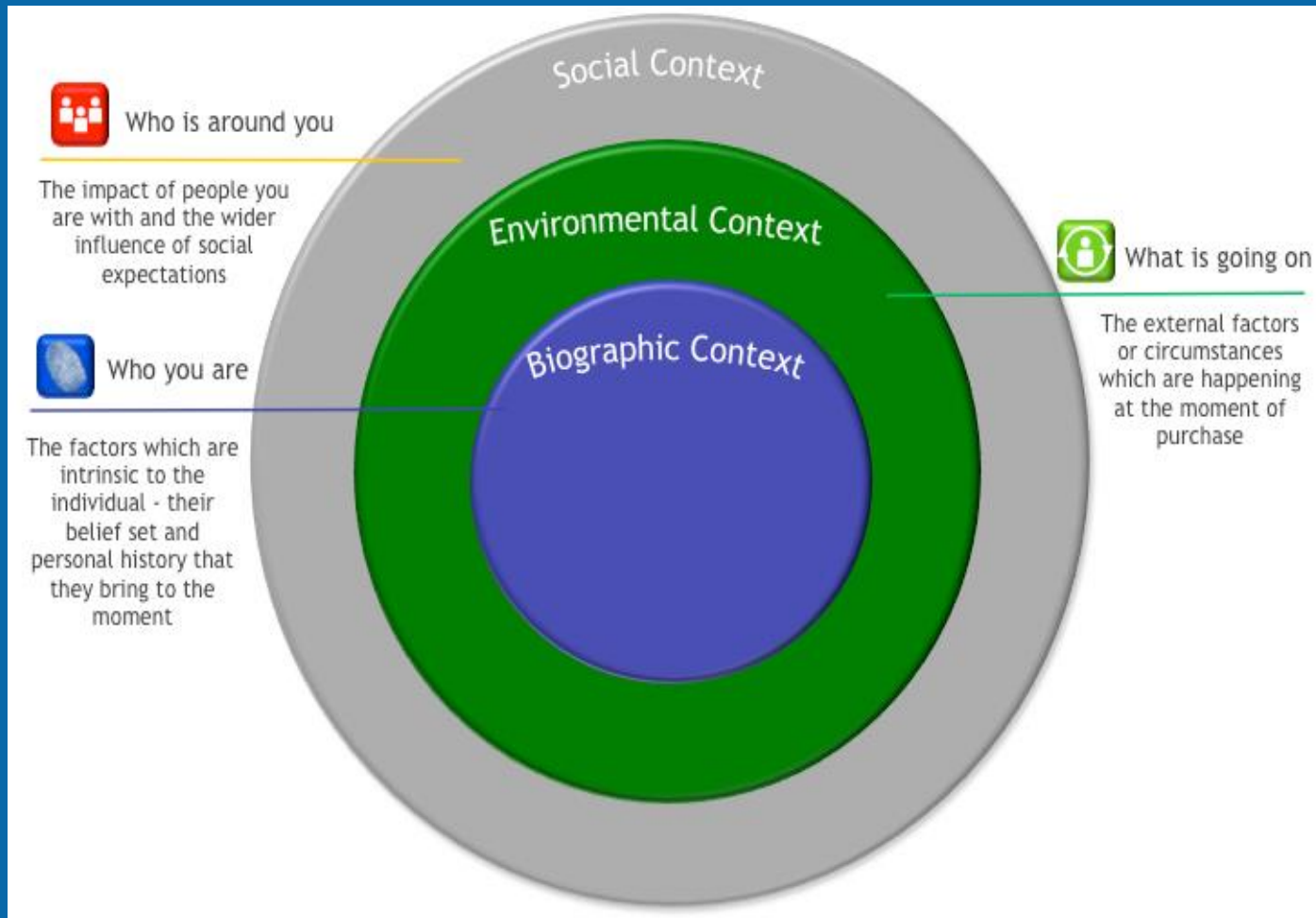


We need to understand decisions in context

Identity and therefore experience is fluid and changing



Communications Strategy: Neither consumers or buyers, but people



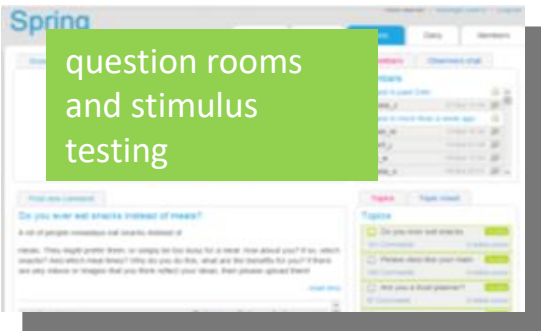


Moments – Context based research by Spring

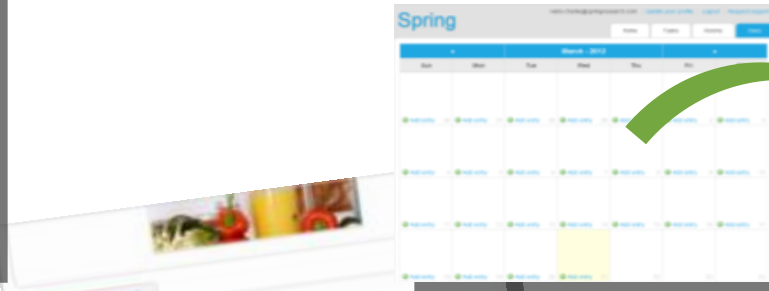
The online platform allows for a range of interactions



home page



question rooms and stimulus testing

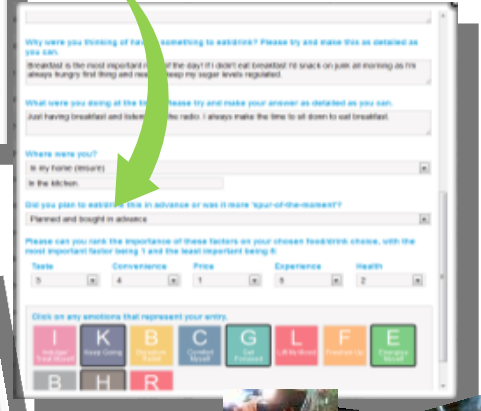


diary entries



Condition deep-dive

mobile moments



multimedia output

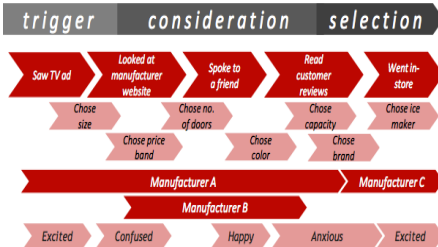
Business issues we have already looked at



Consumer deep dive



Touchpoint interactions



Purchase journeys



What do usage moments look like



Mindset in store



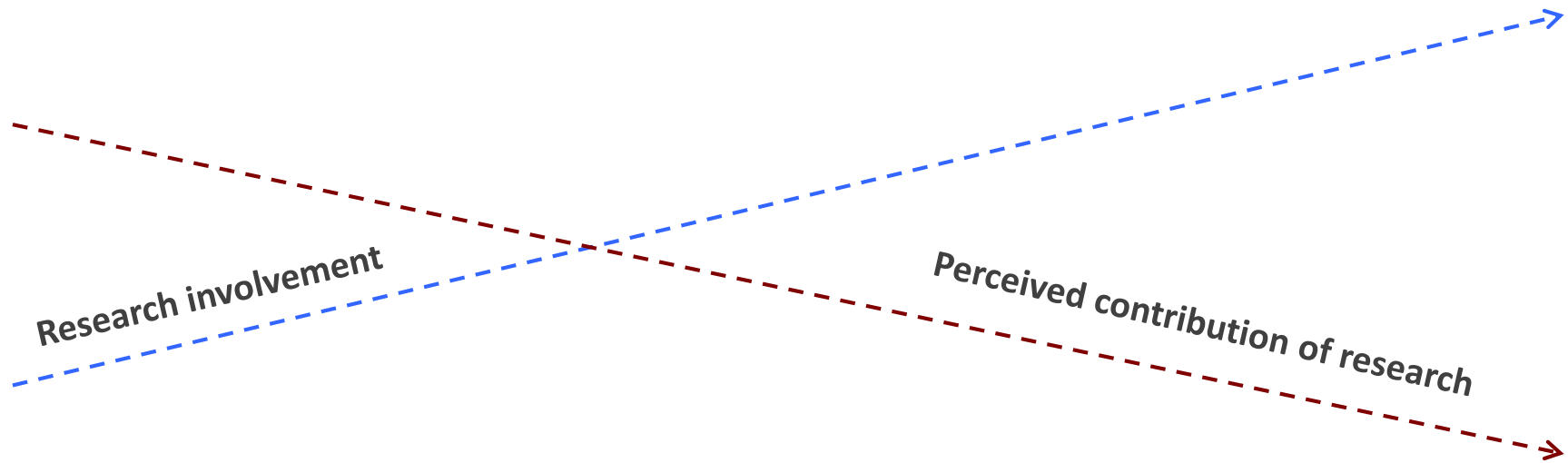
Packaging effectiveness

How research findings are used drives the kind of research we do and how we do it

EXPLORATION/
INSPIRATION

DEVELOPMENT

(PRE)TESTING/
VALIDATING



DO-IT-YOURSELF

Cheap / Free
No expertise
Hassle
Risky

\$500
2 days to results

FULL SERVICE

Expensive
Professional
Proven
Outsourced

\$30,000
3-4 weeks results

2013

IKEA®

THE PRICES IN THIS CATALOG CAN ONLY GET LOWER UNTIL JUNE 2013, NEVER HIGHER.

EIVOR cushion
\$9.99
See p. 2.

**BRING
NEW LIFE
TO YOUR
HOME.**



AN IKEA ARMCHAIR FROM 1951.
RENEWED WITH A CUSHION FROM TODAY.



Market research and insights from consumers around the world



1

Tell us what you want to test



2

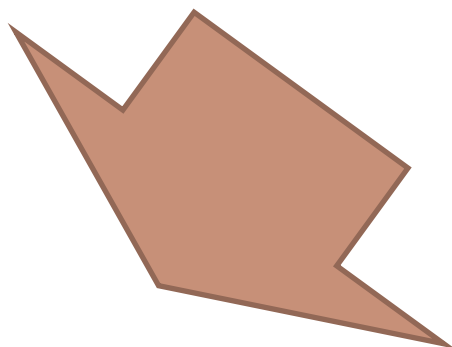
Select your target audience



3

Receive interactive reports in as little as 3 hours

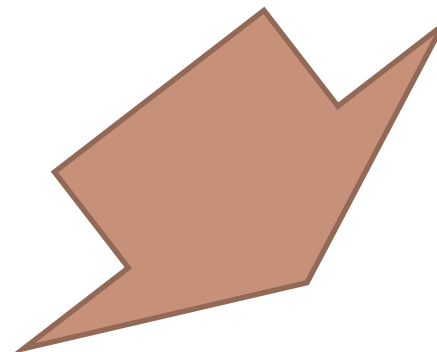
Research is changing!



Investment research
is going deep

More emphasis on the real

Analysis is becoming critical
as data collection costs fall



Insurance research
is commoditising

Remove the human element
Automate!

Acceleration towards real time
cost becomes negligible – always on

Beware of the shallows!

DIY research that reduces
Rigour while increasing
workload

Analytics that aggregates
without thinking about how
the data has been collected


Thank you!



Appendix

Spring Research Credentials

Our approach is simple

A circular image showing a traditional tea ceremony. In the center is a dark ceramic teapot with a textured surface. To its left is a dark ceramic cup filled with tea. In the foreground, a wooden tray holds a pile of loose-leaf tea and a small purple orchid. The background is a light-colored, textured surface.

*Use whatever method
provides the best
solution*

Go deep, fast

*Get up close and
personal*

the conversation

We aim to inject insight directly into the 'bloodstream'

Michael is 54, divorced with 2 grown-up children
 • Founder of a manufacturing company
 • Lives in a small village in Hampshire in a 19thc detached cottage
 • A slow, safe, affordable and energy conscious
 • Plays a big part in the village (chairman of the local investment club)
 • Optimistic about the future
 • Believes in improving his life, being something a success if possible
 • Not by anything else

What I know and think about climate change
 • Climate change is inevitable - it's important to stop now
 • Will only be solved by technology otherwise it will be the
 • downfall of the human race. It's a good thing to save energy
 • but there are currently no incentives by the government to
 • encourage you to do so

What are you doing about it?
 • I am 100% on the overall position of all. When it comes
 • to saving energy I am doing what is cost effective - I've
 • changed my energy saving light bulbs. I don't know what
 • I bought a car that does double the miles per gallon than my
 • previous car. Analysis of other small things

How much of a priority is it?
 • Having my solar panels was a priority but I don't think
 • that my individual contribution towards climate change will
 • make any difference

Energy efficiency options

Michael's carbon footprint
 • 10,141.14 tonnes per year (Household: 2.42,
 • Appliances: 8.66, Transport: 8.7)



“Spring used inventive, less conventional methods to bring ideas to life.

Their fresh approach forced deeper consideration of each route and its possibilities.

The energy projected made the whole day more engaging and the information stayed with us for longer.”

- Paul Burch, Worldwide Creative Director, Publicis

This has led to us winning a range of awards



We work with some of the world's best known brands



Our projects span across the world and across industries

Assisted clients in various industries in developing brand and creative strategies in UK and Western Europe

Helped a major beverage company understand consumption and behaviour patterns across 'new-Europe' and Asia

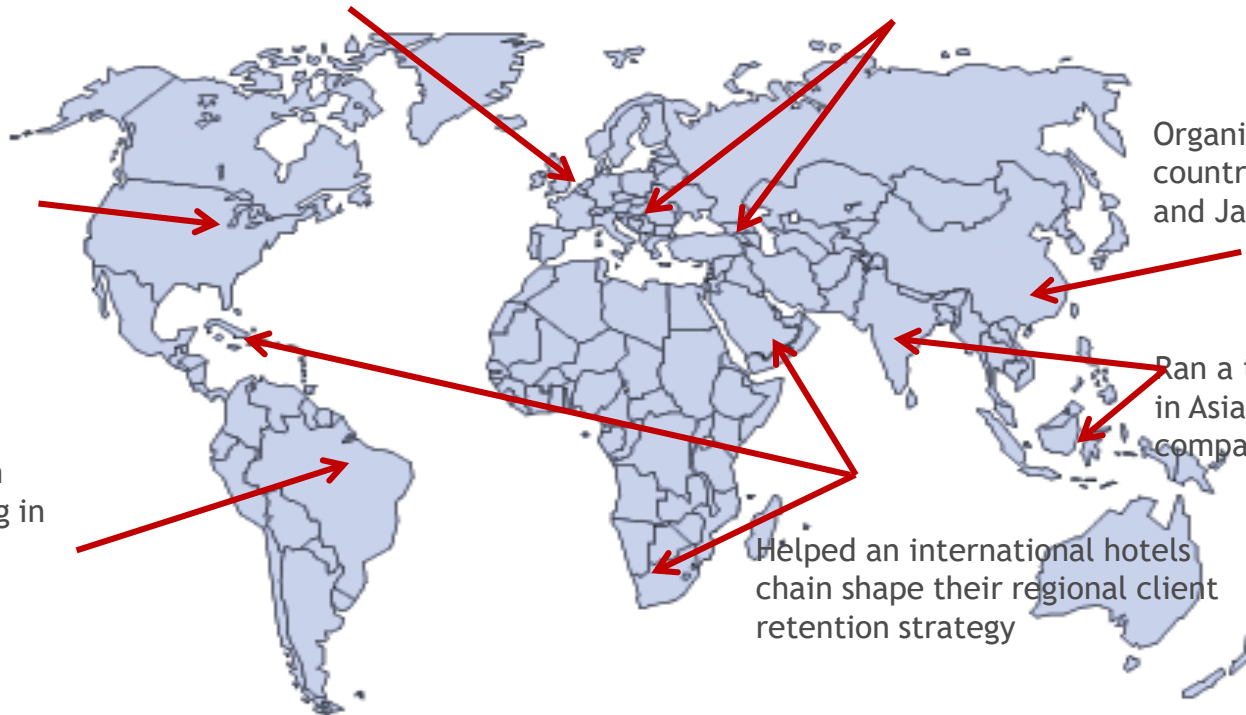
Electronics - ran a complex Advocacy project aiming to address the issues of brand apathy

Organized Car Clinics in 5 countries, including China and Japan

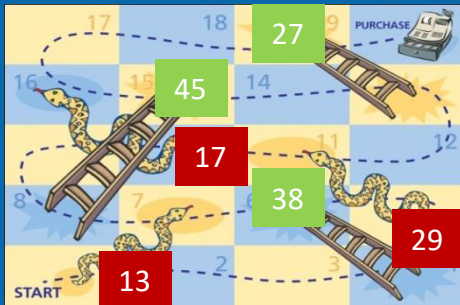
Assisted clients in FMCG and banking in designing market entry strategies

Ran a trend spotting study in Asia for a telecom company

Helped an international hotels chain shape their regional client retention strategy



ESOMAR LIVE Proprietary and orthodox approaches to marketing issues



Snakes & Ladders

Decision making process is not as linear as the AIDA model suggests; we unearth the real journey when choosing a product



Moments

Capturing experiences in real-time for real behaviours, attitudes, and context



Auto-Ethnography

Catalysing insights by getting respondents engaged; analysing social clusters and their impact on individual choice



Qualitative:

Groups Workshops
Depths Semiotics
Diaries Co-creation

Quantitative

Face to face

Telephone
Online

Q & A



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Closing

Alina Serbanica, ESOMAR Representative for Romania

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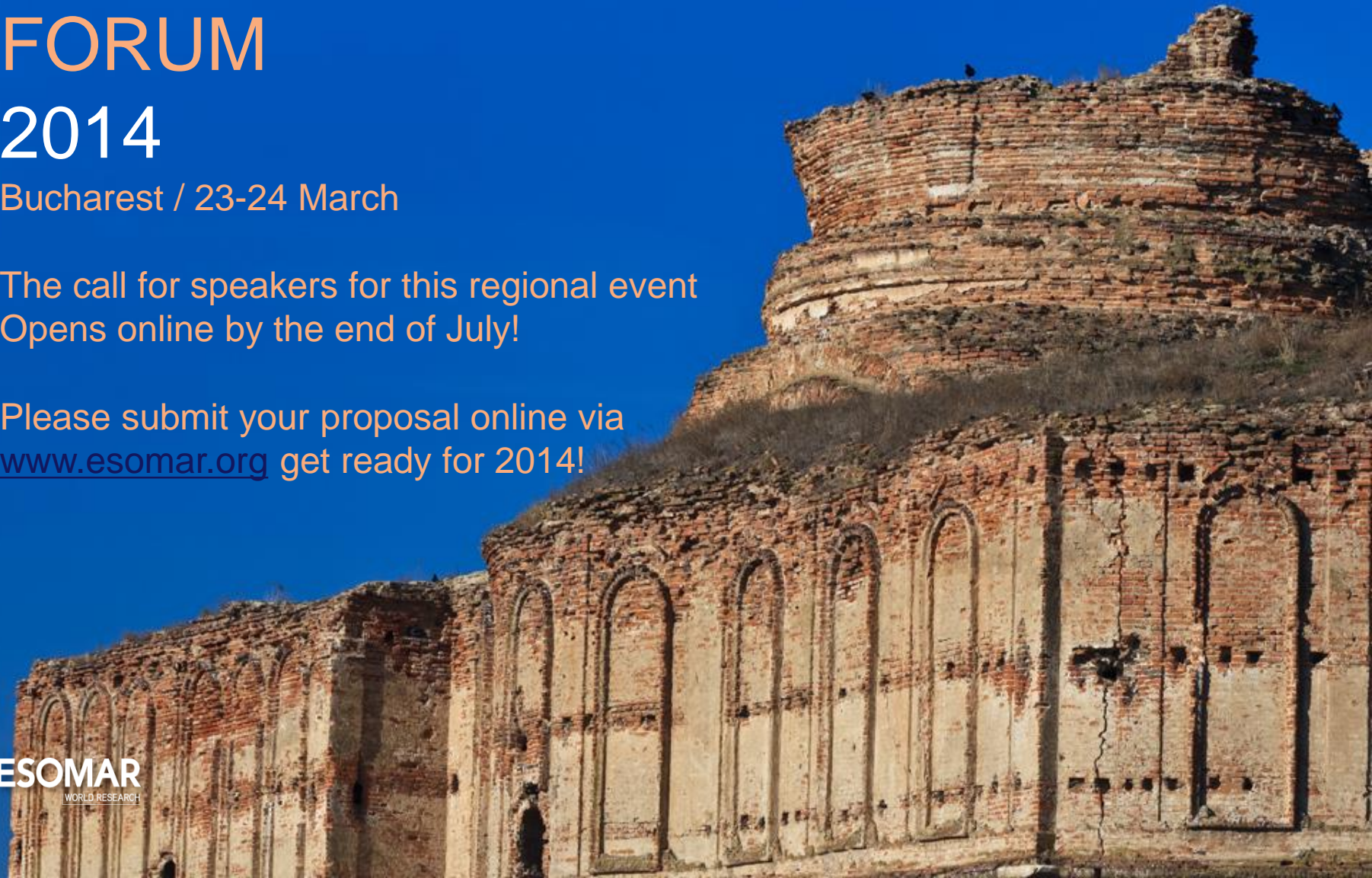
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Bucharest / 23-24 March

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www.esomar.org get ready for 2014!

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