



Cercetarea de piata/consumator in Brand Valuation

PREPARED FOR: ...

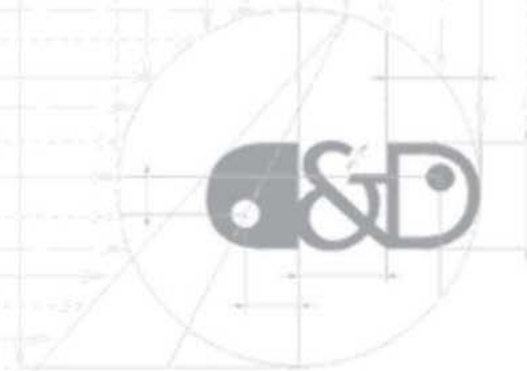
& Demersul de Brand Valuation

- Demers pe mai multe dimensiuni, pentru o evaluare profesionista este OBLIGATORIE combinarea lor.
 - Financiar (predictie asupra veniturilor pe care le poate asigura proprietarului)
 - Legal (protectie legala)
 - Marketing / cercetare (durabilitatea in mintea/sufletul consumatorilor)
- nu poate fi facut cu mijloace exclusiv arondate nici uneia dintre aceste dimensiuni
 - exclusiv financiar (existenta unor venituri nu este o asigurare a puterii brandului)
 - exclusiv legal/juridic (o "marca inregistrata" nu inseamna un "brand")
 - exclusiv cercetare (nu ofera o vedere asupra profiturilor posibil a fi obtinute, nici o siguranta privind obtinerea lor)



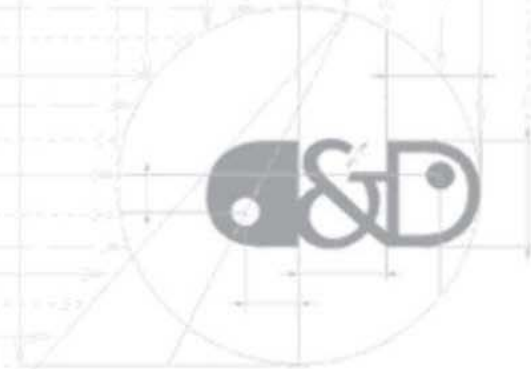
& Cercetarea de marketing pentru BrandValuation

- De cele mai multe ori se face uni-dimensional
 - exista modele care se concentreaza exclusiv pe o singura dimensiuni, ori pe un numar limitat de dimensiuni usor masurabile
 - de obicei se realizeaza pe baza indicatorilor de awareness sau preference
 - abordare simplista, care are mai degraba un rol publicistic
- De fapt trebuie facuta multi-dimensional,
 - avand in vedere un numar mare de dimensiuni majore subiective / perceptive ale brandului
 - avand in vedere masurari alternative pentru anumite dimensiuni
 - avand in vedere cum anume pot fi ele armonizate intr-un model compozit
 - avand in vedere pe cat posibil valori numerice ale dimensiunilor evaluate (=masurare)



& Dimensiuni importante in cercetarea pentru BrandValuation

- Dimensiunile cele mai importante (desi nu singurele) evaluate, sunt:
 - Awareness
 - Advertising awareness
 - Slogan / logo / packaging recall
 - Favorability
 - Quality (perceived) + growth (signal)
 - Risk (perceived)
 - Usage / objective
 - Usage / subjective (how frequent)
 - Loyalty & Satisfaction
 - Prestige
 - Innovation
 - Positioning
 - Price Elasticity
 - Extensibility
 - Brand Associations / Brand Knowledge / Brand Personality

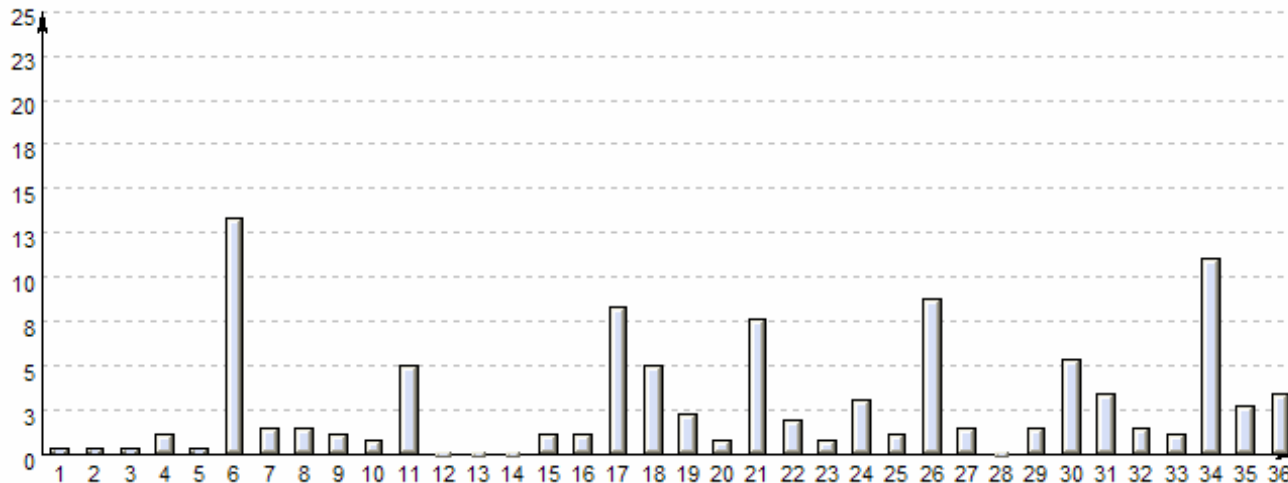


& Awareness

- Se masoara in cel puțin trei ipostaze, fiecare din ele aduce alt input in ecuație
 - Top of Mind
 - Unprompted / Unaided / Spontaneous
 - Prompted / Aided / List



Awareness. Top of mind

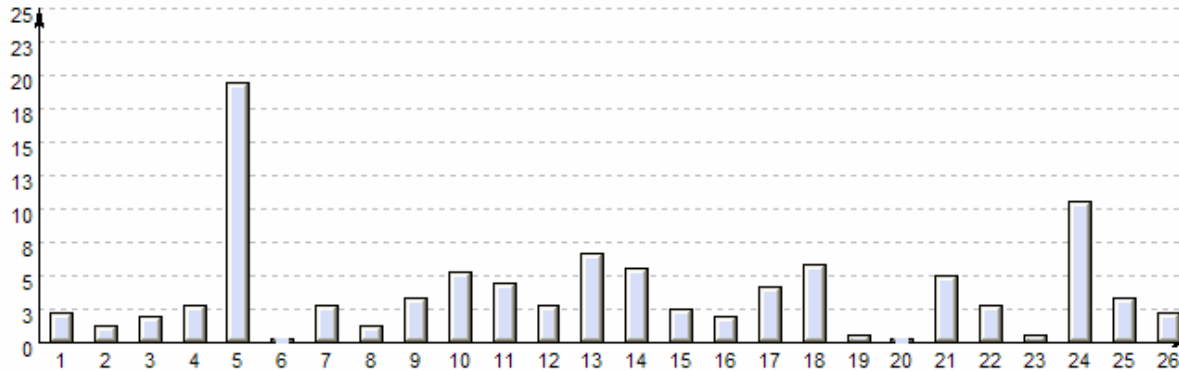


1	ADDV EURO RSCG (.4%)	21	Leo Burnett & Target (7.7%)
2	Agency One Marketing Communications (.4%)	22	Lowe & Partners (1.9%)
3	Baas Mediaplus (.4%)	23	Mercury Promotions (.8%)
4	Babel Communications (1.1%)	24	NextCap (3.1%)
5	Brands & Bears (.4%)	25	Notorious Advertising (1.1%)
6	BV McCann Erickson Advertising (13.4%)	26	Ogilvy & Mather Advertising (8.8%)
7	Cohn & Jansen (1.5%)	27	Prospero (1.5%)
8	DDB Bucharest (1.5%)	28	Proximity Bucharest (.0%)
9	D'Arcy [DMB&B] (1.1%)	29	Red Cell Advertising Romania (1.5%)
10	FCB Bucharest (.8%)	30	Saatchi & Saatchi Romania (5.4%)
11	Focus Advertising (5.0%)	31	Scala Thompson (3.4%)
12	Foss Advertising (.0%)	32	Spotlight (1.5%)
13	Gavrila & Asociatii (.0%)	33	TBWA Bucuresti (1.1%)
14	Generic AV (.0%)	34	Tempo Advertising (11.1%)
15	Genius Advertising Serv (1.1%)	35	Young & Rubicam / Team Advertising (2.7%)
16	GMP Advertising (1.1%)	36	Others (3.4%)
17	Graffiti BBDO (8.4%)		
18	Grey Worldwide Romania (5.0%)		
19	Headvertising (2.3%)		
20	ID Studio (.8%)		

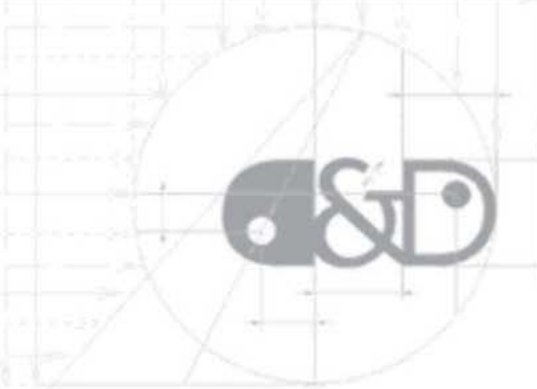


Awareness. Top of mind

Efectul "round-up". Comparatie 2003-2004

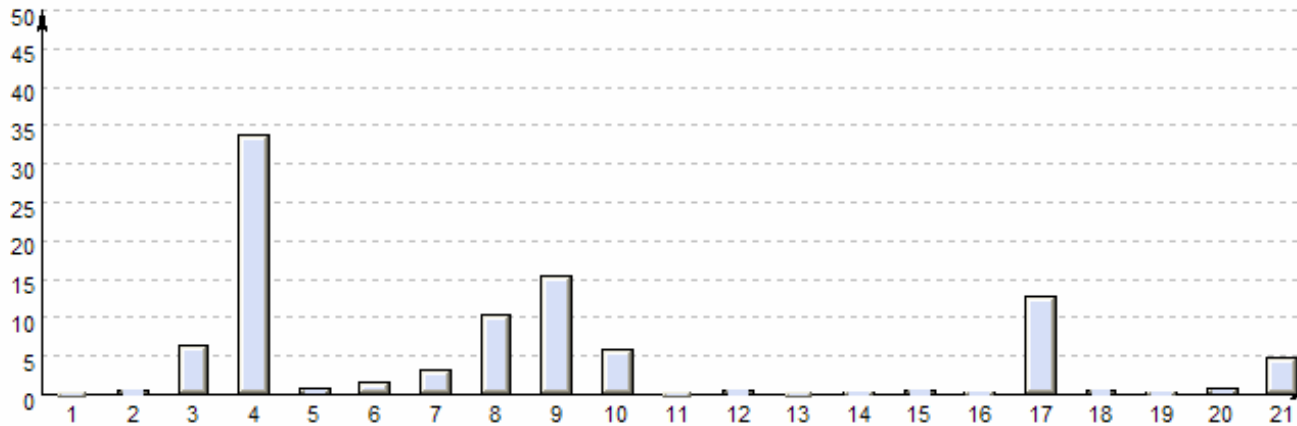


		Frequency	Percent
1	ADDV / Euro RSCG	7	2.2
2	Agency One	4	1.3
3	Babel Communications	6	1.9
4	Bates Romania	9	2.8
5	McCann Erickson	62	19.4
6	Cap	1	.3
7	D'Arcy (DMB&B)	9	2.8
8	FCB Bucharest	4	1.3
9	Focus Advertising	11	3.4
10	Graffiti BBDO	17	5.3
11	Grey Bucuresti	14	4.4
12	Headvertising	9	2.8
13	Leo Burnett & Target	21	6.6
14	Lowe Lintas GGK	18	5.6
15	Mercury Promotions	8	2.5
16	Next Advertising	6	1.9
17	Notorious	13	4.1
18	Ogilvy & Mather Advertising	19	5.9
19	Olympic DDB Romania	2	.6
20	Prospero	1	.3
21	Saatchi & Saatchi Romania	16	5.0
22	Scala Thompson Communications	9	2.8
23	Spotlight	2	.6
24	Tempo Advertising	34	10.6
25	Young & Rubicam / Team Advertising	11	3.4
26	Others	7	2.2
Total expressed opinions		320	100.0



Awareness. Top of mind

Efectul pietei. Piata mediu aglomerata (~20 players)

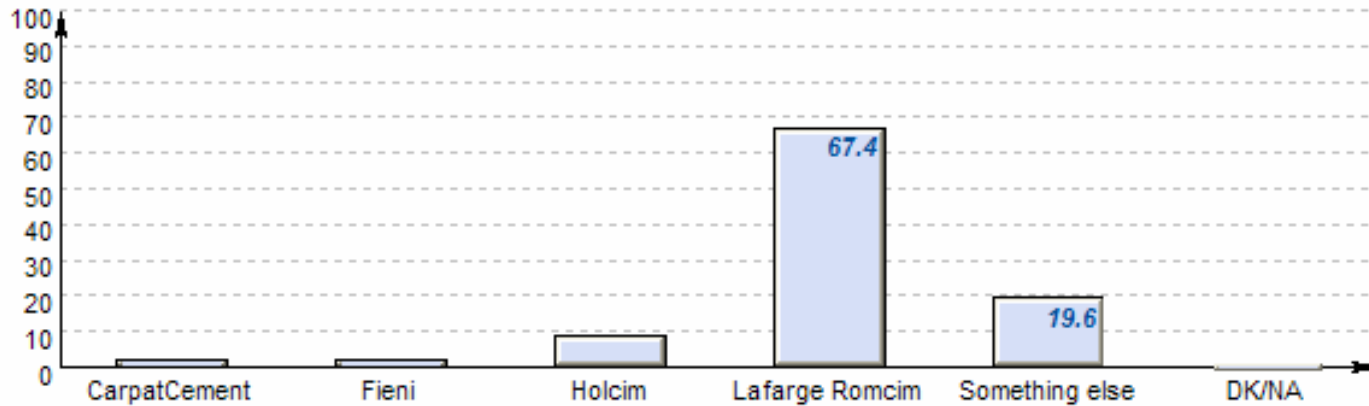


		Frecventa	Procent
1	ABN AMRO	0	.0
2	Alpha Bank	5	.5
3	Banca Comerciala Ion Tiriac	67	6.4
4	BCR	360	34.1
5	Libra Bank	8	.8
6	Banca Romaneasca	18	1.7
7	Banca Transilvania	33	3.1
8	BancPost	110	10.4
9	BRD	163	15.5
10	CEC	63	6.0
11	Citibank	1	.1
12	Credisson	5	.5
13	EUROM	1	.1
14	Finansbank	4	.4
15	HVB	6	.6
16	ING	4	.4
17	Raiffeisen	136	12.9
18	UniCredit	5	.5
19	Volksbank	4	.4
20	Altele	10	.9
21	DK/NA	52	4.9
Total opinii exprimate (N=1055)		1055	100.0



Awareness. Top of mind

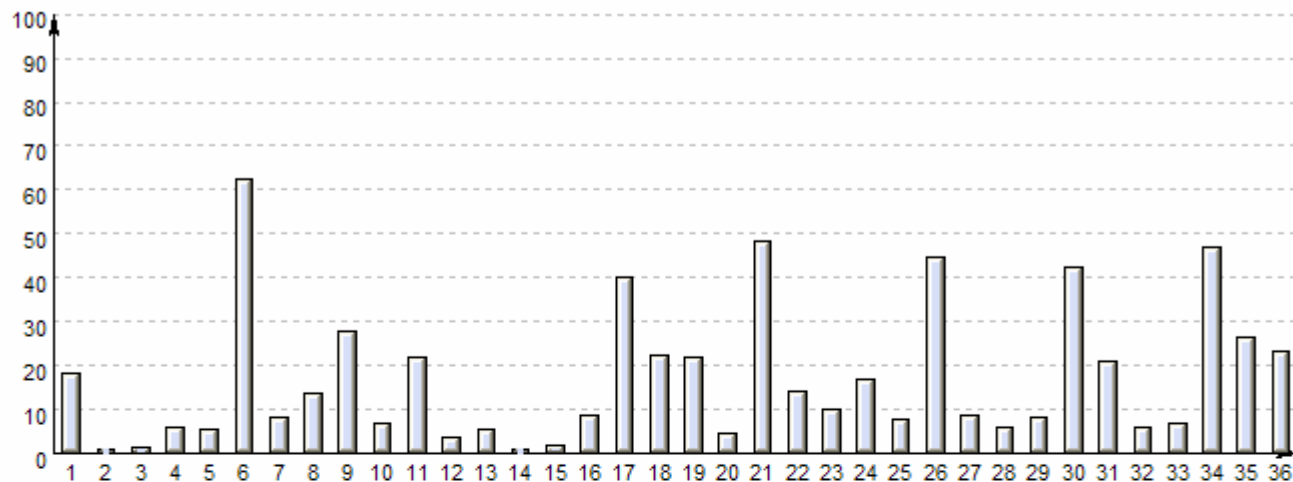
Efectul pietei. Piata ne-aglomerata (~6-7 players)



	Frequency	Percent
1 CarpatCement	11	2.3
2 Fieni	9	2.1
3 Holcim	38	8.5
4 Lafarge Romcim	311	67.4
5 Something else	91	19.6
6 DK/NA	0	.0
Total expressed opinions	460	100.0



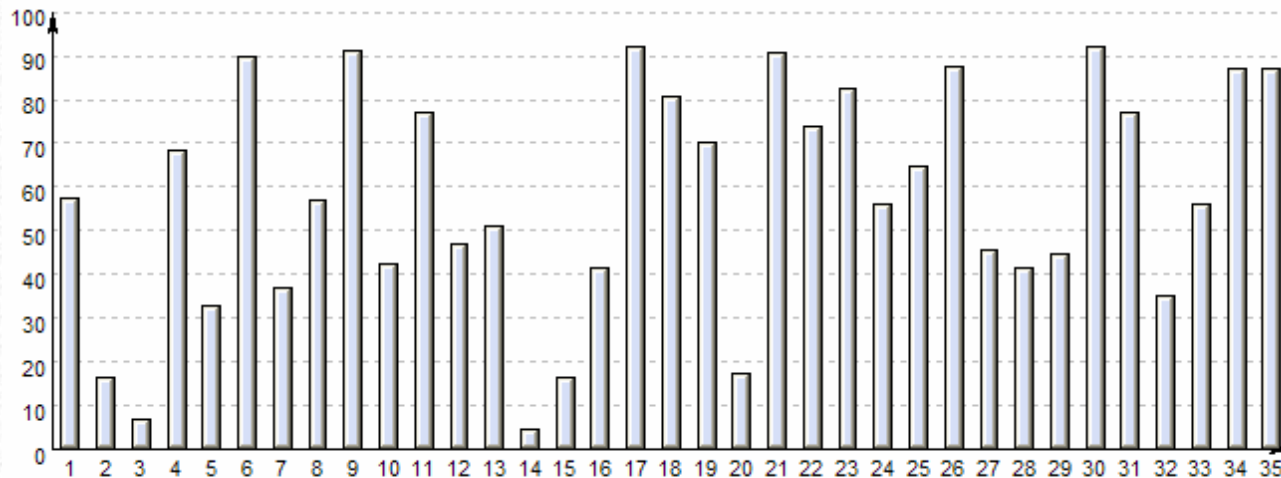
Awareness. Unprompted



1	ADDV EURO RSCG (18.0%)	21	Leo Burnett & Target (48.3%)
2	Agency One Marketing Communications (1.1%)	22	Lowe & Partners (14.2%)
3	Baas Mediaplus (1.5%)	23	Mercury Promotions (10.0%)
4	Babel Communications (6.1%)	24	NextCap (16.9%)
5	Brands & Bears (5.4%)	25	Notorious Advertising (7.7%)
6	BV McCann Erickson Advertising (62.5%)	26	Ogilvy & Mather Advertising (44.4%)
7	Cohn & Jansen (8.0%)	27	Prospero (8.8%)
8	DDB Bucharest (13.8%)	28	Proximity Bucharest (5.7%)
9	D'Arcy (DMB&B) (27.6%)	29	Red Cell Advertising Romania (8.4%)
10	FCB Bucharest (6.9%)	30	Saatchi & Saatchi Romania (42.5%)
11	Focus Advertising (21.8%)	31	Scala Thompson (20.7%)
12	Foss Advertising (3.8%)	32	Spotlight (6.1%)
13	Gavrila & Asociatii (5.4%)	33	TBWA Bucuresti (6.9%)
14	Generic AV (8%)	34	Tempo Advertising (46.7%)
15	Genius Advertising Serv (1.9%)	35	Young & Rubicam / Team Advertising (26.4%)
16	GMP Advertising (8.8%)	36	Others (23.0%)
17	Graffiti BBDO (39.8%)		
18	Grey Worldwide Romania (22.2%)		
19	Headvertising (21.8%)		
20	ID Studio (4.6%)		



Awareness. Prompted

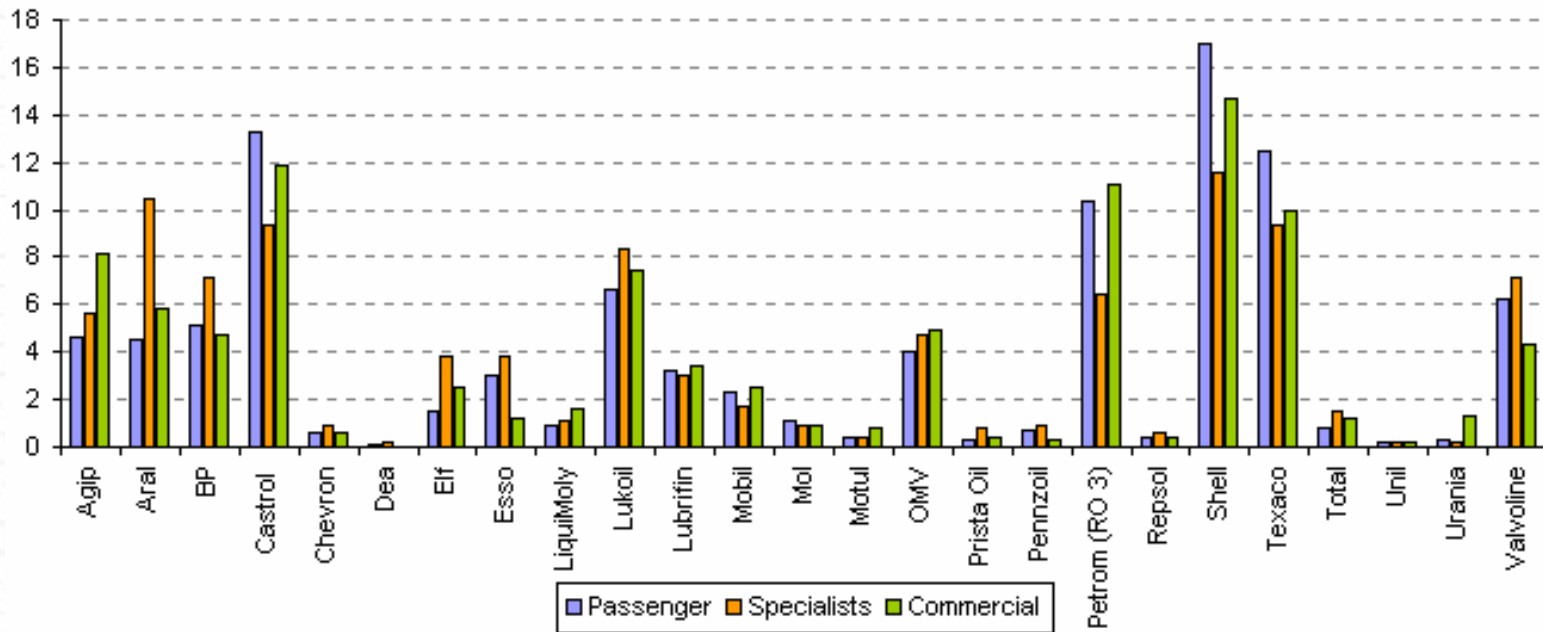


1	ADDV EURO RSCG (57.5%)	21	Leo Burnett & Target (90.4%)
2	Agency One Marketing Communications (16.5%)	22	Lowe & Partners (73.6%)
3	Baas Mediaplus (6.9%)	23	Mercury Promotions (82.4%)
4	Babel Communications (68.2%)	24	NextCap (55.9%)
5	Brands & Bears (32.6%)	25	Notorious Advertising (64.4%)
6	BV McCann Erickson Advertising (89.7%)	26	Ogilvy & Mather Advertising (87.4%)
7	Cohn & Jansen (36.8%)	27	Prospero (45.6%)
8	DDB Bucharest (56.7%)	28	Proximity Bucharest (41.4%)
9	D'Arcy (DMB&B) (90.8%)	29	Red Cell Advertising Romania (44.4%)
10	FCB Bucharest (42.5%)	30	Saatchi & Saatchi Romania (91.6%)
11	Focus Advertising (77.0%)	31	Scala Thompson (77.0%)
12	Foss Advertising (46.7%)	32	Spotlight (35.2%)
13	Gavrila & Asociatii (51.0%)	33	TBWA Bucuresti (55.9%)
14	Generic AV (4.6%)	34	Tempo Advertising (86.6%)
15	Genius Advertising Serv (16.5%)	35	Young & Rubicam / Team Advertising (86.6%)
16	GMP Advertising (41.4%)		
17	Graffiti BBDO (92.0%)		
18	Grey Worldwide Romania (80.5%)		
19	Headvertising (70.1%)		
20	ID Studio (17.2%)		



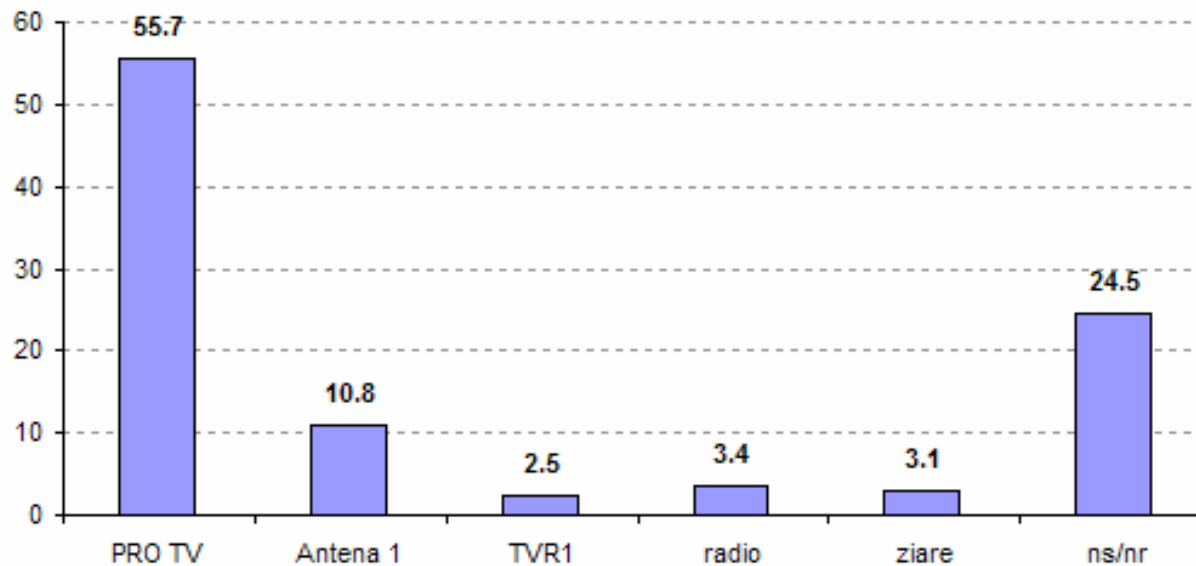
Advertising awareness, unprompted

- target-group-uri diferite au awareness diferit asupra aceluiasi brand



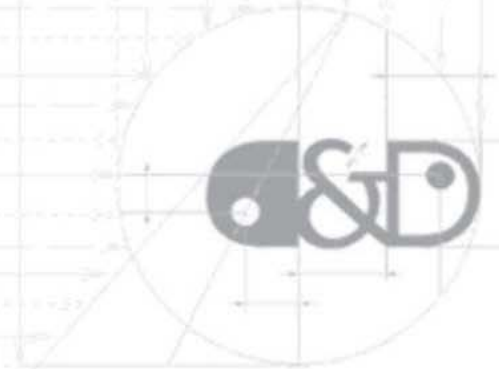
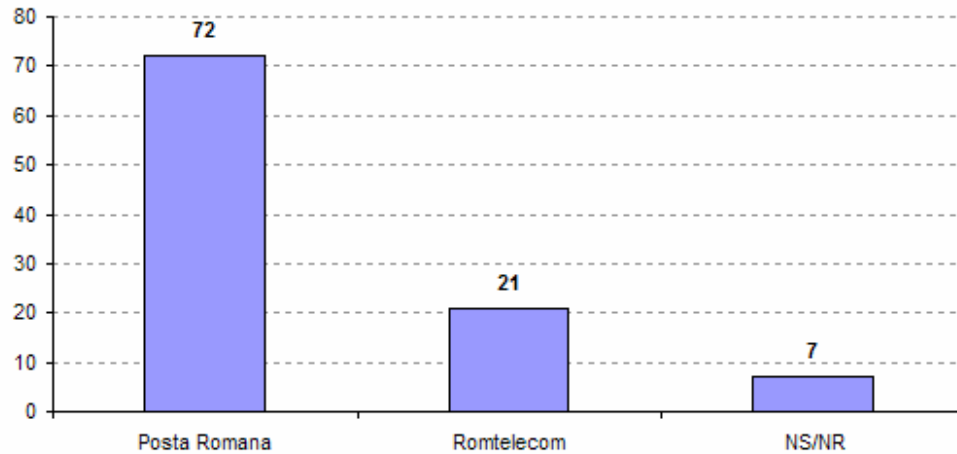
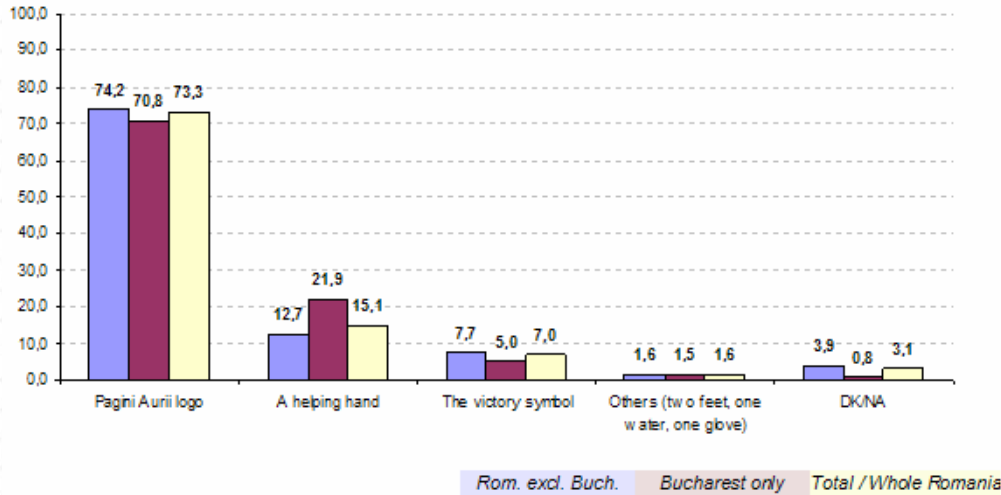
& Advertising awareness, unprompted

- Efect de remanenta / selective exposure
- "Unde ati vazut reclame la Alexandrion", ianuarie 2000 (nu se difuza DECAT pe ProTV)



& Logo, packaging, slogan recall

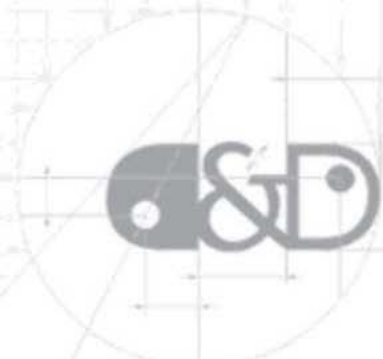
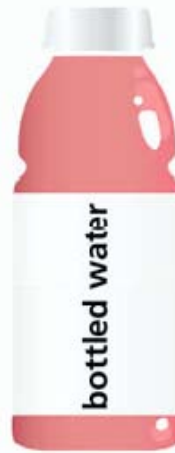
Prompted vs. unprompted





Logo, packaging, slogan recall

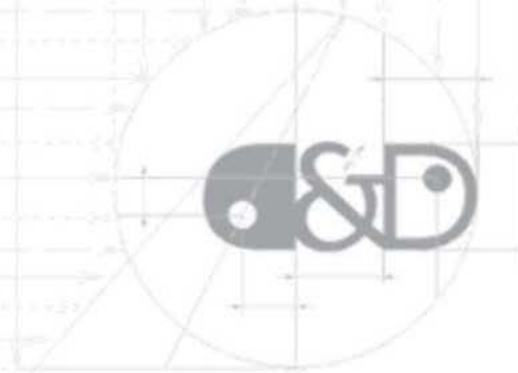
Why? Because the brand is an icon (1)





Logo, packaging, slogan recall

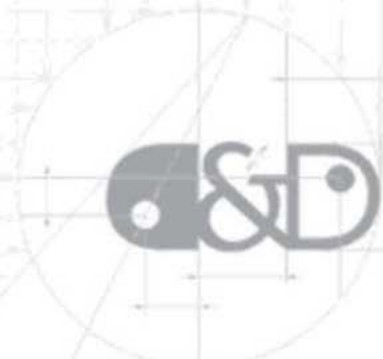
Why? Because the brand is an icon (2)





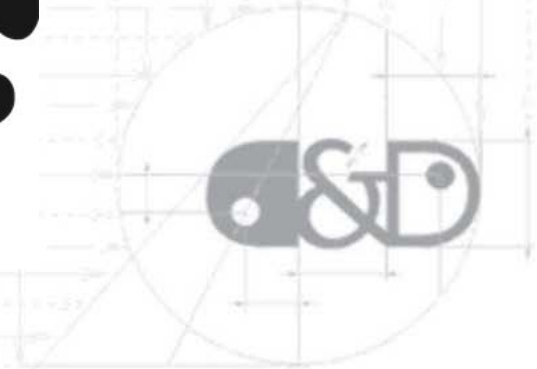
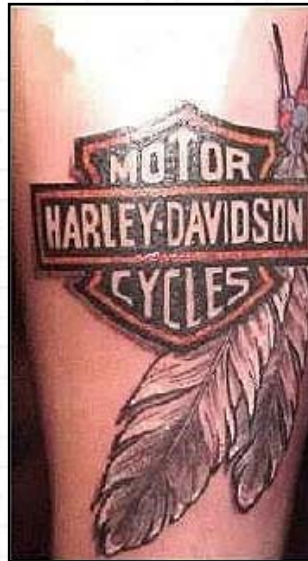
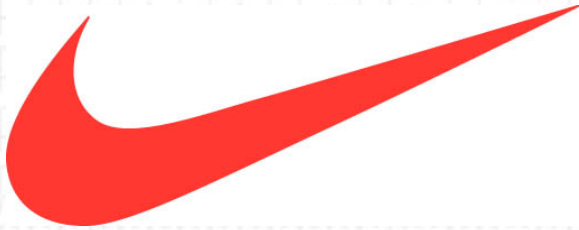
Logo, packaging, slogan recall

Why? Because the brand is an icon (3)



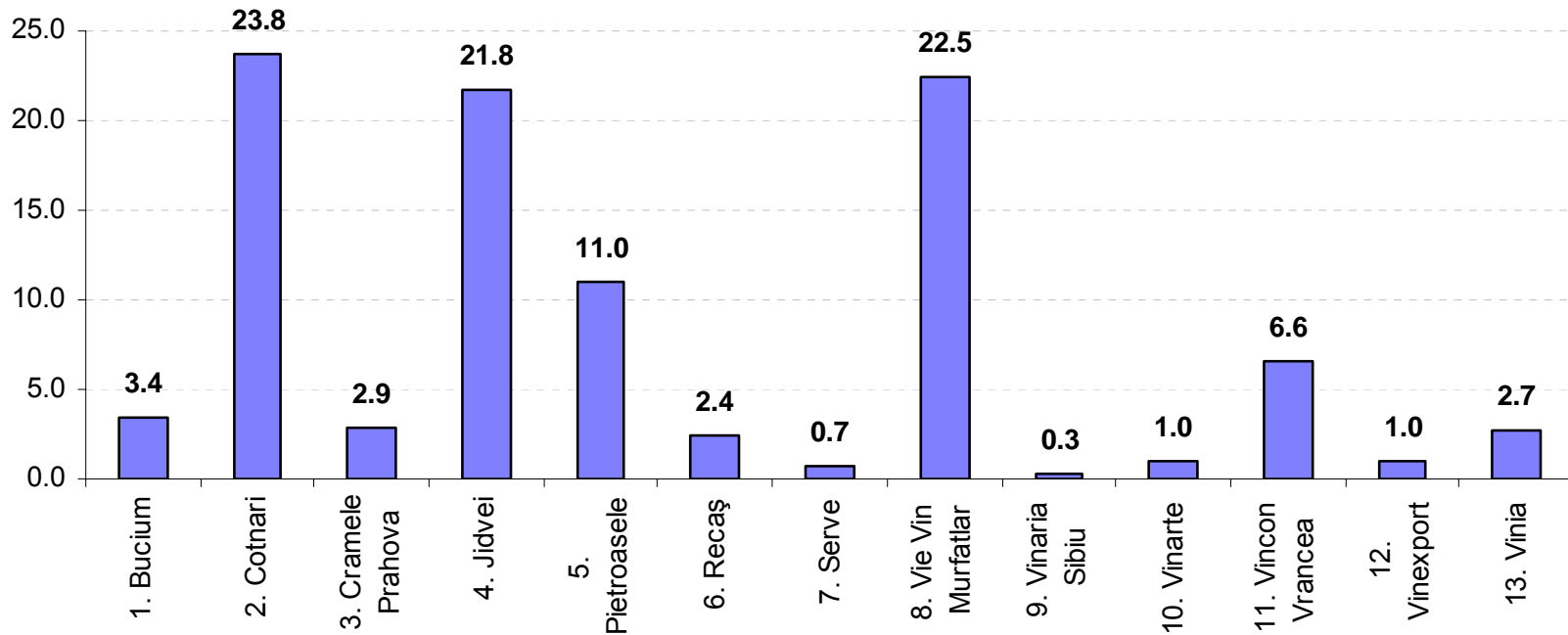
& Logo, packaging, slogan recall

Why? Because the brand is an icon (4)



Favorability

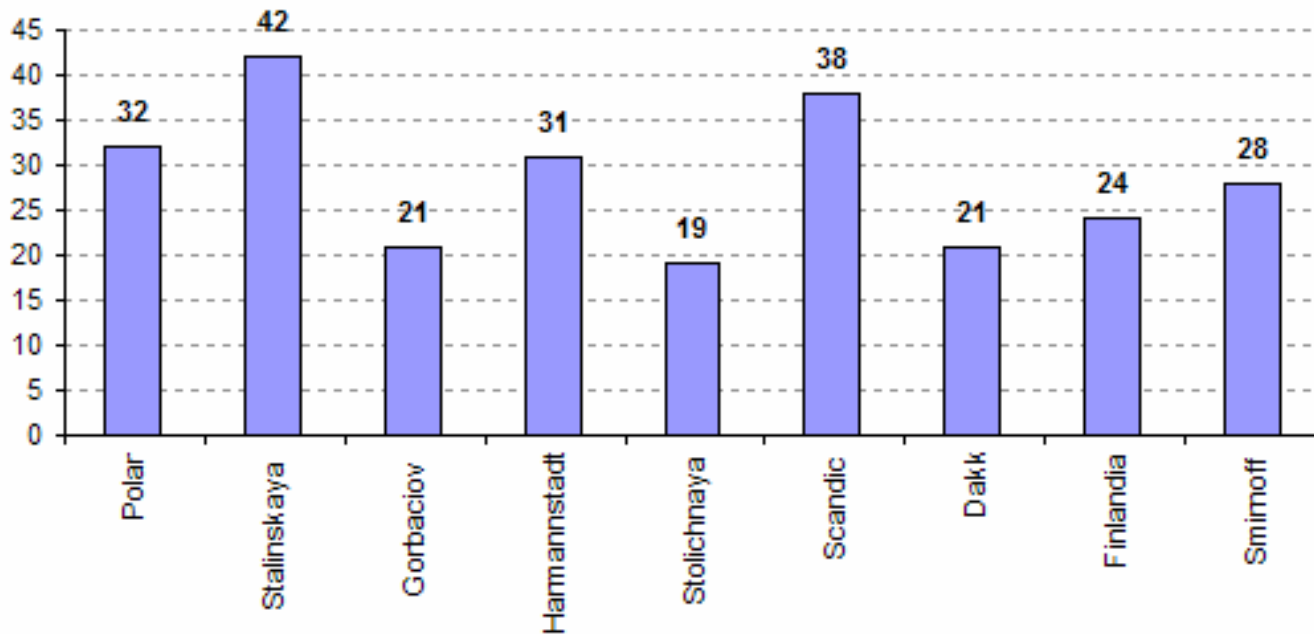
"Pe cine ai alege acum?"



- Indicator important al performantelor brandului
- Cel mai coerent predictor al influenței comportamentale a brandului
- Aduce ceva foarte important în plus față de awareness: intenția de cumpărare



Perceived quality



- "Calitatea" este un concept eluziv, este imposibil de izolat calitatea unei subdimensiuni de calitatea ansamblului de brand.
- Intotdeauna consumatorul va considera ca ceea ce cumpara el este de calitate - de cea mai inalta calitate
 - mecanisme de rationalizare
 - Ex.: bautorii de vodca ieftina nu enumera in primele 3 branduri ca si calitate nimic din vodca premium



& Perceived risk of buying

- Are 2 dimensiuni care trebuiesc luate in considerare simultan
- Risk of brand purchase
 - Brandul X, comparat cu alte branduri din clasa respectiva de produse,
 - este mai sigur (perceput in general)
 - a dezamagit mai putin decat altele
 - confera siguranta si inainte de a ajunge sa folosesti produsul
- Risk in product class
 - costuri legate de alegerea gresita in clasa de produse
 - costuri financiare (e scump, deci eroarea e costisitoare)
 - masini, bunuri de folosinta indelungata
 - costuri emotionale
 - este enervant si neplacut sa faci o alegere gresita in lasa de produse
 - parfumuri, haine, in general produse care cer ego-involvement
 - costuri cognitive
 - costuri reale la nivel de knowledge/skill
 - alegerea universitatii pentru studiu, alegerea programului de training
 - costuri in statut / relationare sociala
 - pub-ul frecventat, revista de business, MBA-ul, consultantul ☺



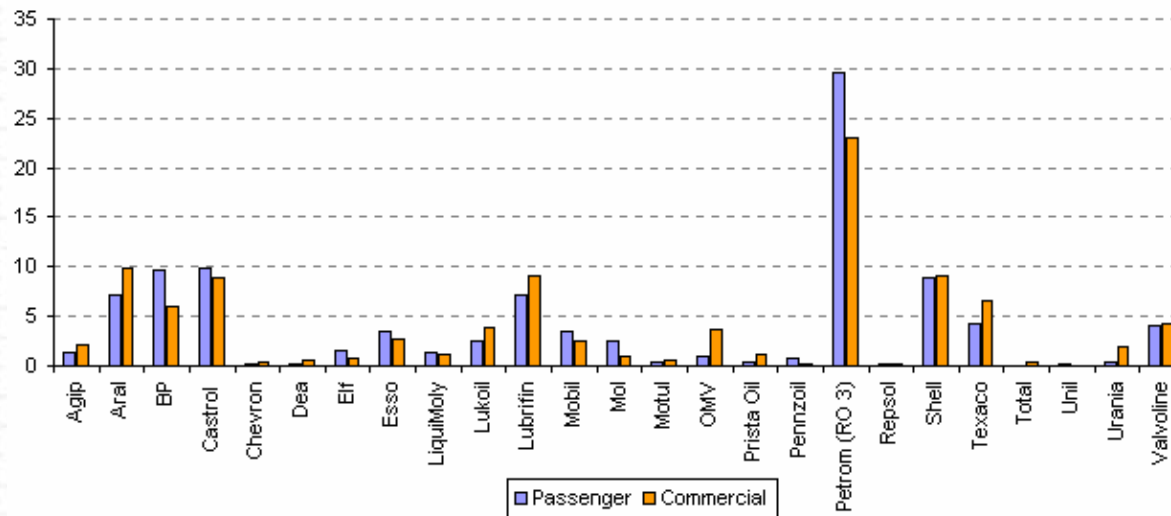
& Usage

- Este important care anume dimensiune este luata in considerare:
- Objective usage
 - "de 2 ori in ultima saptamana", "de cinci ori in ultimele 10 zile" – greu de adus la numitor comun
 - Objective on limit (last coherent interval)
 - Ever used (penetration)
 - Used in last 12 month
 - Used in last month
 - Current used (unde se aplica)
- Subjective usage
 - rar / uneori / destul de des / frecvent / foarte des



Usage

Objective, current usage



- Usage este considerat de unii ca fiind cel mai important indicator al puterii brandului
- Este cu siguranta cel mai bun predictor financiar pe termen scurt
- Dar este foarte sensibil la actiuni de sustinere care **erodeaza** brandul (promotii), si poate fi prezent si pentru non-branduri
- Cazuri-scoala: European Drinks & Foods (American Cola vs. Coca Cola, Viva vs. Nesquik)



& Loyalty & Satisfaction

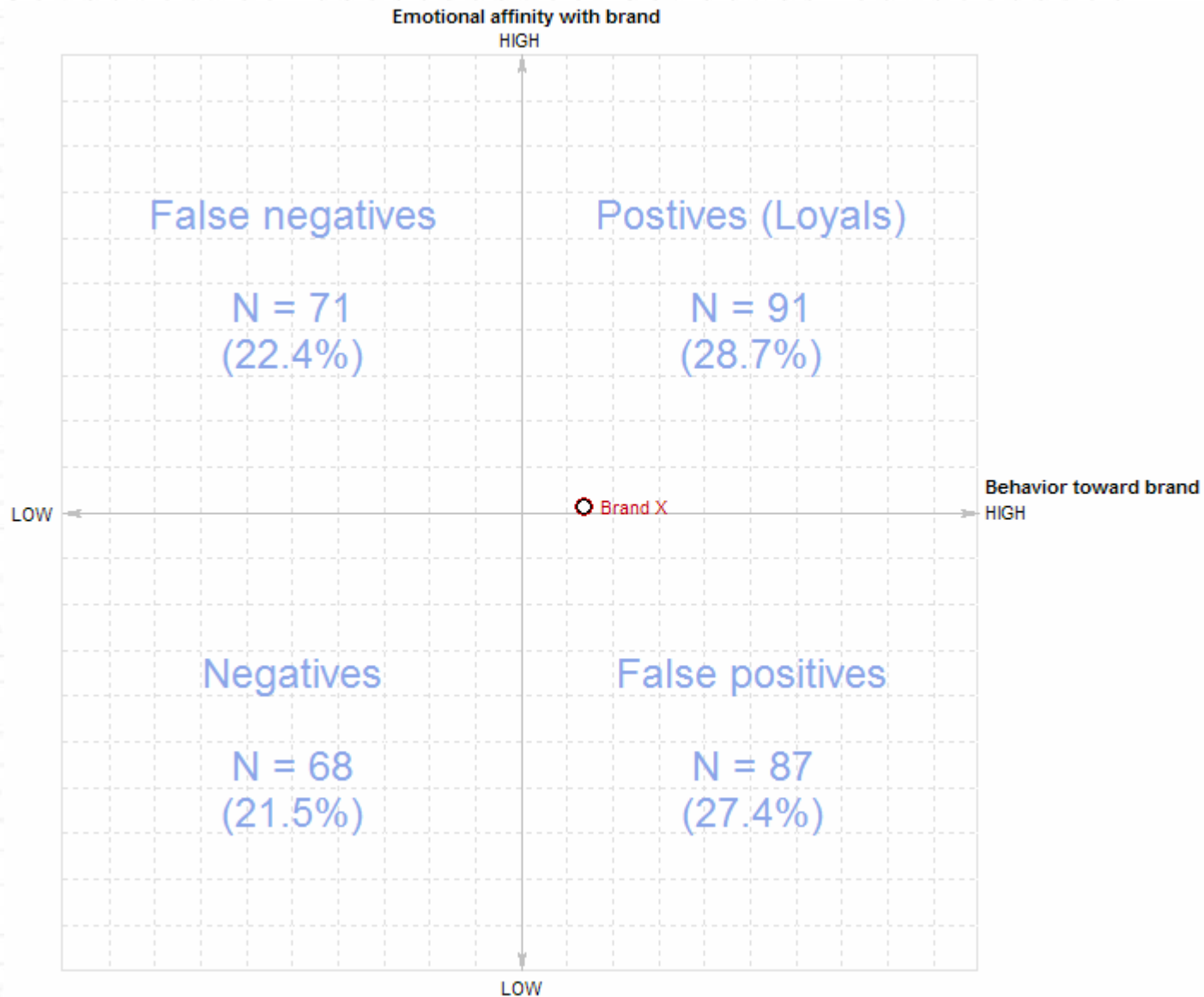
- Satisfactia consumatorului
 - ar putea fi un indicator al puterii **brandului**, dar este considerata totusi a fi legata mai degraba de partea functionala, a experientei directe cu **produsul** (functional benefit).
 - in plus este foarte greu masurabila, fiind eminentemente procesuala (cea mai coerenta explicatie la ora actuala este cea a confirmarii/infirmarii expectatiilor)
 - in mod cert insa satisfactia duce la loialitate
- Loialitatea pote fi masurata mai usor, fiind un construct static
 - trebuie masurata pe doua dimensiuni
 - dimensiune comportamentala
 - cat de mare este interactiunea cu brandul
 - daca este cumparat des sau mai rar etc.
 - ce comportamente sunt adoptate in interactiunea cu el (exclusivity, brand repertoire etc.)
 - dimensiune emotionala (brand affinity)
 - o scala unidimensionala de la acceptare, la sharing si pana la brand advocacy





Loyalty & Satisfaction

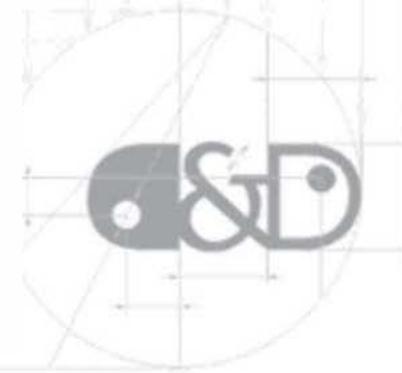
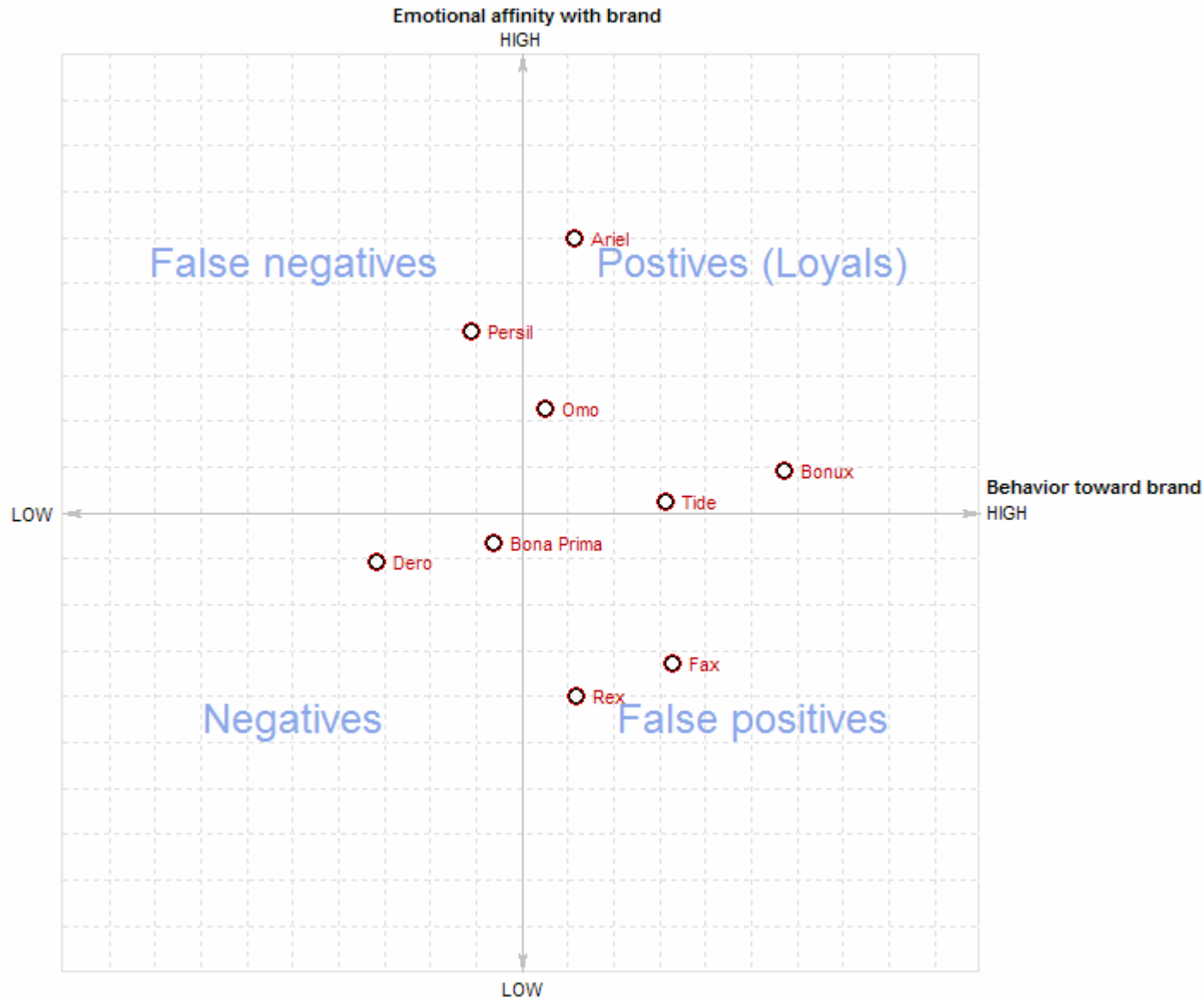
One Brand





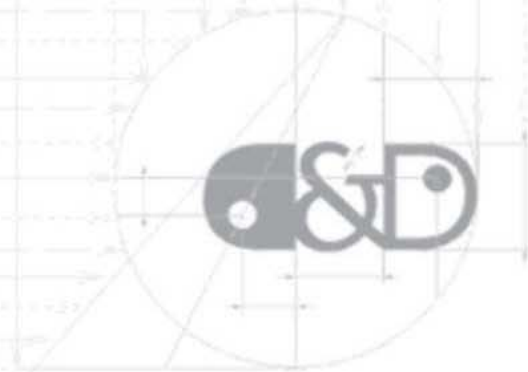
Loyalty & Satisfaction

Multiple Brands



& Prestigiu

- Prestigiul este, pe langa perceptia calitatii, motivul pentru care brandul este eficient financiar (price premium)
- Prestigiul este strans le gat de perceptia calitatii, dar nu exclusiv
- Se genereaza pe baza jocului dintre doua dimensiuni:
 - functional
 - emotional
- Prestigiul functional
 - calitate (perfectiune tehnica)
- Prestigiul emotional
 - vizibilitate
 - moda (bandwagon) / presiune sociala
 - hedonism

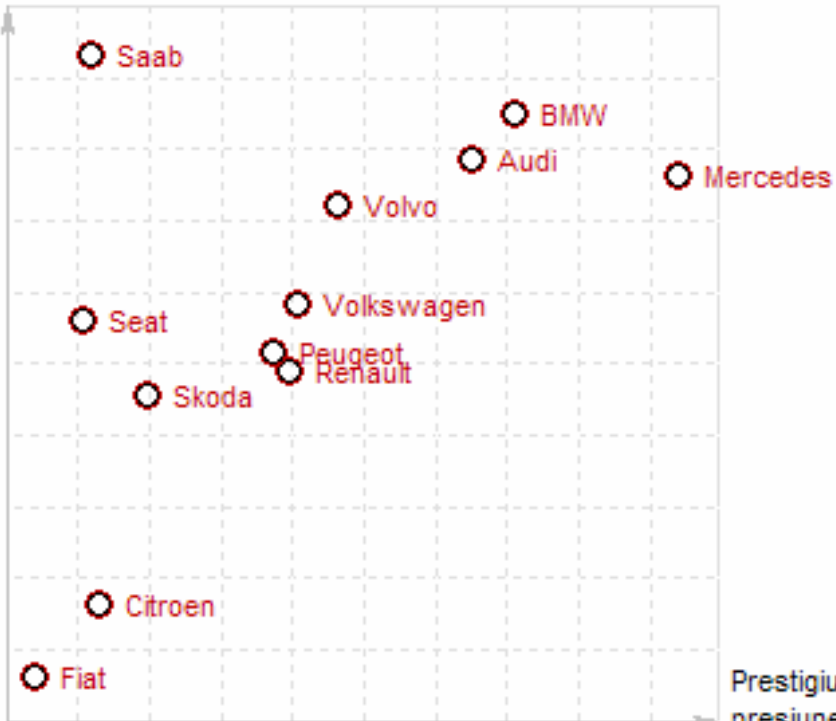




Prestigiu

Exemplu

Prestigiu rezultat din calitate (functional)



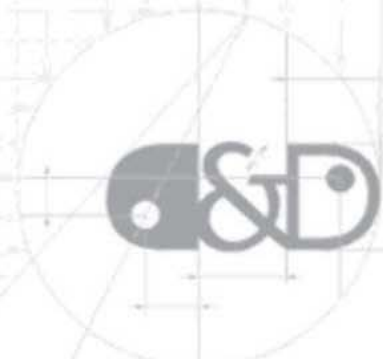
Prestigiu rezultat din presiune sociala & vizibilitate sociala





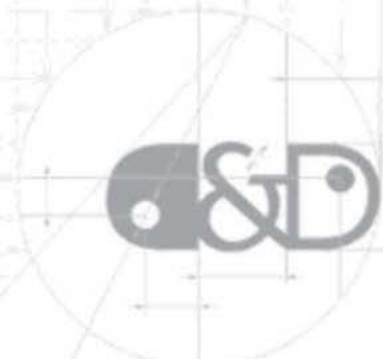
Innovation (perception)

- Perceptia privind inovatia este o garantie a faptului ca brandul va ramane si in continuare in avangarda
 - Brandurile se afirma in mod constant prin aceea ca sunt pionieri, sunt in avangarda
 - Nike
 - Kent
 - intregi industrii (IT, comunicatii etc.)
 - Exista insa si exceptii, branduri profund conservatoare, la care chiar brand promise este conservatorismul
 - Jack Daniels
 - Marlboro



& Brand positioning / associations

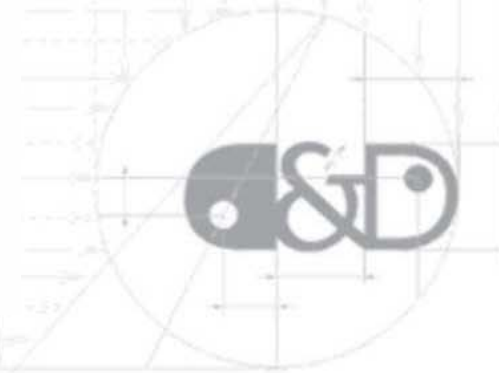
- Evaluarea pozitionarii
 - standardizat
 - prin asocieri libere
- Evaluarea prin asocieri libere
 - nu asigura comparabilitate
 - nu asigura nici chiar genul proximitate comune intre itemii numiti
 - nu asigura o intensitate a asocierii (poate fi rezolvata intr-o etapa ulterioara)
- Evaluarea standardizata
 - cere aportul/cenzura cercetatorului
 - cere statistici complicate
- Oricare tip de evaluare a pozitionarii cere in ultima instanta judecata specialistului in a hotari daca se constituie in punct puternic sau punct slab
- Se adauga la toate acestea brand knowledge (inclusiv incidentele critice) o dimensiune direct scalabila, dar fara cut-off-uri clare





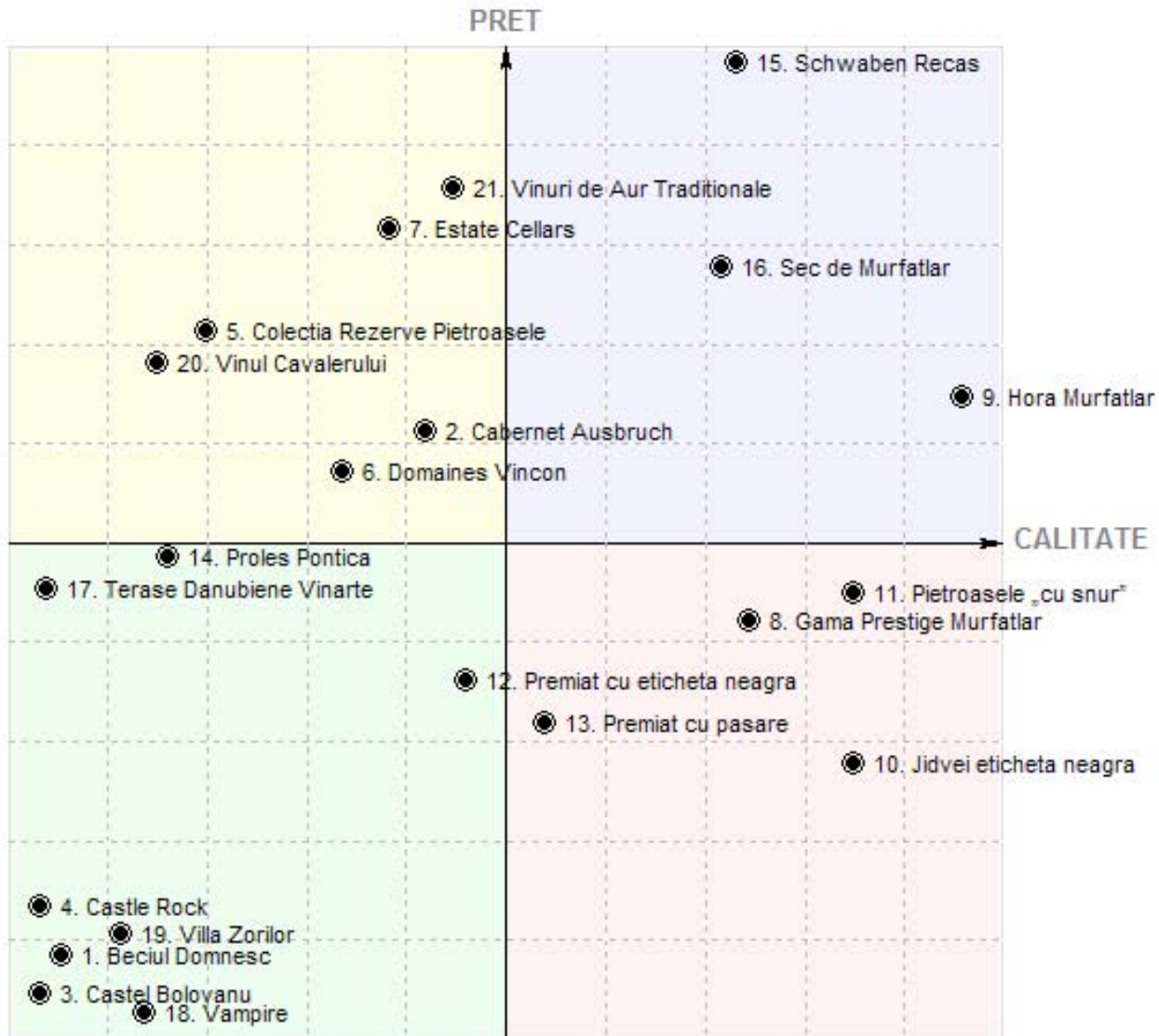
Brand positioning

Free associations + cognitive mapping



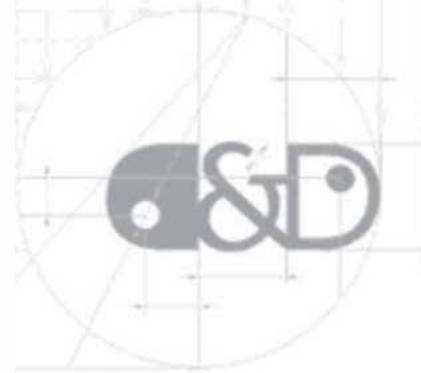
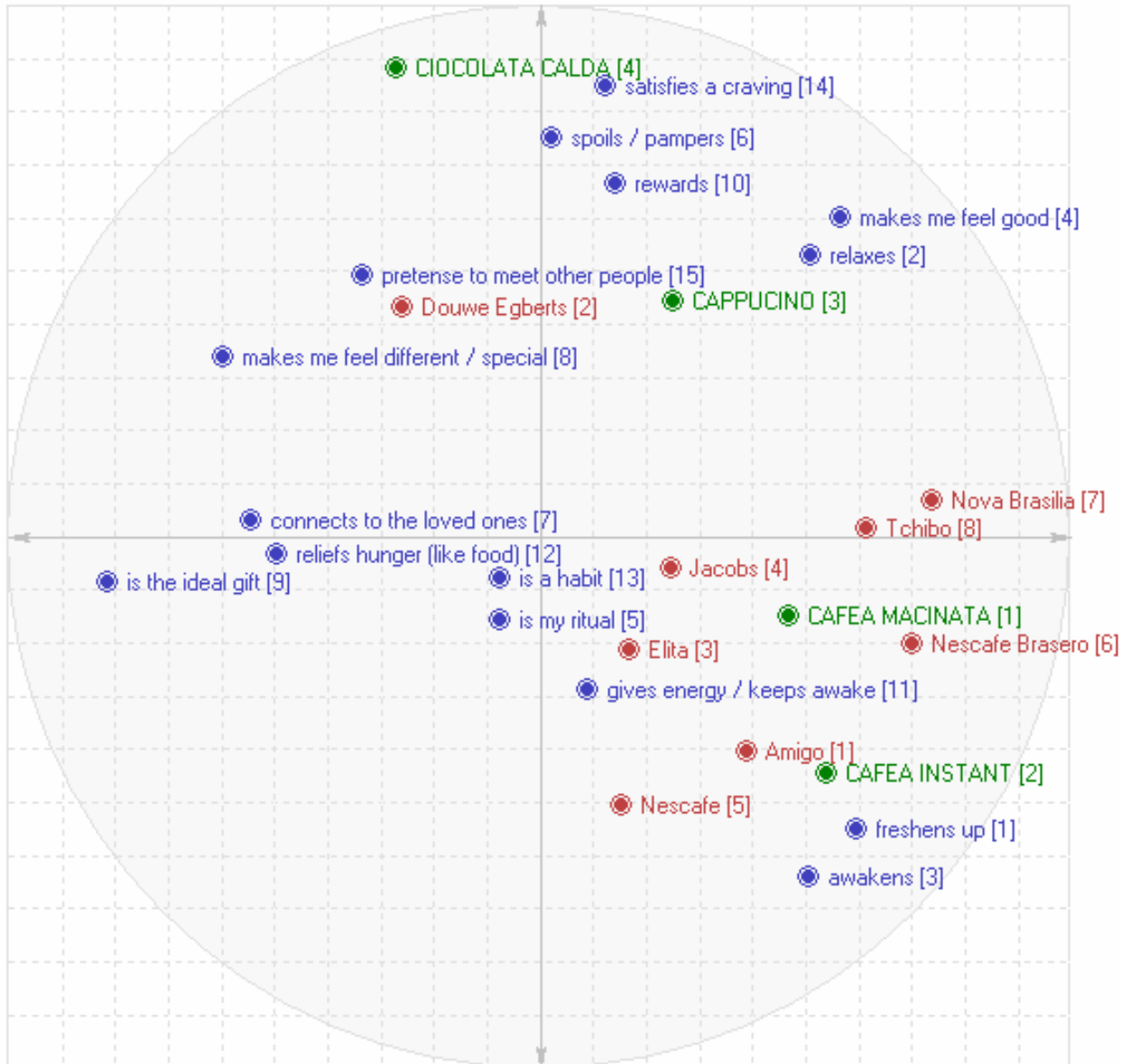
Brand positioning

Standardized, quantitative evaluation + bi-dimensional scaling



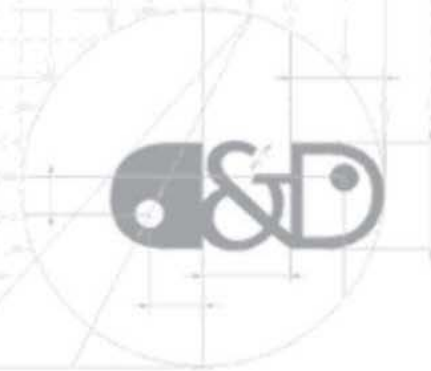
& Brand positioning

Standardized, quantitative evaluation + multi-dimensional scaling



& Price elasticity

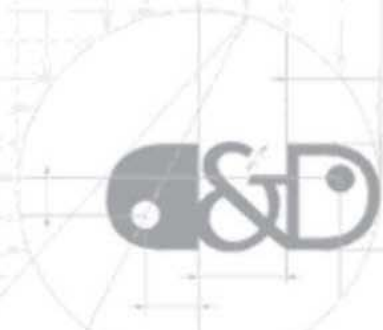
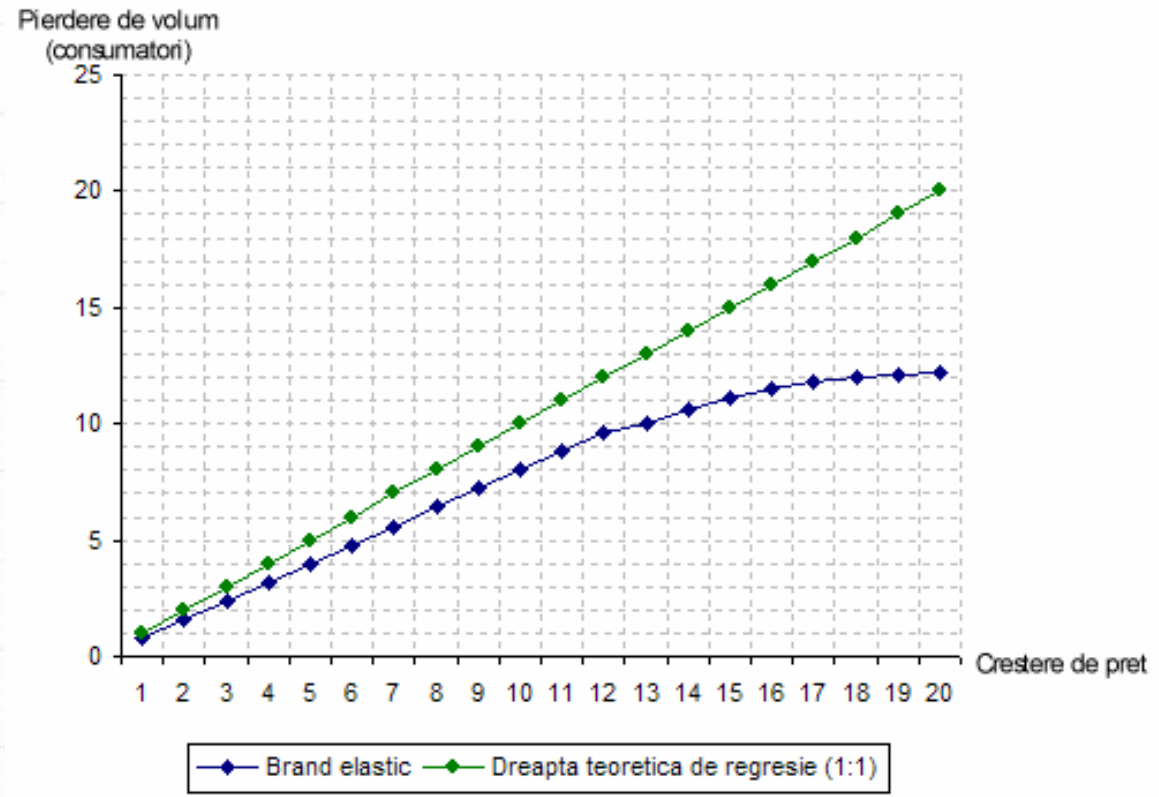
- Elasticitatea unui brand este o masura compozita (price premium + loyalty + usage), dar din pacate predictiva si auto-raportata ("ce as face daca...")
- Un brand elastic este un brand care sta sub (mai bine) linia medie teoretica de regresie in raportul pret/volum de vanzari
- Linia medie de regresie: cresterea pretului cu un punct scade volumul vanzarilor cu un punct
- Un brand slab suporta slab cresterea de pret, pierzand mai mult decat un punct de volum (demonstrand astfel ca vanzarile se datorau exclusiv pretului si deci nu isi poate enforsa un price premium)
- Un brand elastic suporta bine cresterea, demonstrand astfel ca isi permite price premium si ca decizia de cumparare a sa se ia pe alte considerente decat pretul (exista o relatie cu consumatorul)
- Elasticitatea cere un research dedicat, cu un design special





Price elasticity

Exemplu



& Extensibility

- Un brand puternic este o garantie generala a calitatii
 - de cele mai multe ori pentru o categorie
 - uneori pentru anumite dimensiuni (ce tin de pozitionarea sa), care pot fi folosite pentru a endorsa noi produse, in alte categorii
 - computerele Ferrari (rapiditate)
 - ceasurile Bulgari (eleganta)
 - hainele Porsche (lifestyle)
 - cursa Volvo (endurance)
- Puterea de extensie a unui brand se poate masura, insa foarte dificil:
 - extensii prin asocieri spontane
 - evaluare cantitativa pe acestea
- Un brand cu extensibilitate mare
 - genereaza un numar mare de extensii posibile (greu de fixat standarde)
 - genereaza extensii in categorii cat mai indepartate de categoria sa bazala (aproape imposibil de evaluat "departarea")
- Evaluare predictiva
 - probabilitate de succes a extensiei in alta clasa
 - probabilitate de esec si recul asupra brandului propriu (Renault/Logan)

