

Brand Health Check Report

Prepared for: **Company Category**
2012 - 2015

Training Document

April 2015

Contents

- Background With Context And Sample
- Brand Performance Metrics
- Brand Commitment & Advocacy
- Brand Equity
- Overview Mapping
- Brand Pulse Score
- Summary And Further Information

Background

- Over 150 Irish food and drink companies are part of the Bord Bia Brand Forum to help develop and grow their brands through inspiring speakers, practical workshops, bespoke branding advice.
- In 2012 the syndicated Brand Health Check was introduced as part of this programme and is now in its fourth successful year running.
- This large scale on-line survey of grocery shoppers, across an extensive range of categories is designed to collect and analyse important information to help you as a brand owner in the following areas:

Unaided & Aided
Brand Awareness

Brand Experience/
Usage

Brand
Consideration

Brand Loyalty

Recommendation/
NPS

Equity & Brand
Image

How We Did It



- **Approach:** Online survey with fieldwork taking place February – March 2015
- **Sample Definition:** Nationally representative, main or joint household grocery shopper aged 18+, Frequent (Monthly/3 Monthly+) category buyers
- **Quota Controls:** Age, gender, social grade and region to ensure a representative sample of grocery shoppers was achieved
- **Total Sample Size:** n= 5,625
- **Sample Per Category:** n= 500 approx.
- **Brands Included:** n= 356 listed/ prompted member and competitor brands
- **Number of Categories:** n= 45 grocery categories
- **Survey Length:** 20 mins per respondent answering in relation to 4 categories that they buy regularly
- **Coverage:** Republic of Ireland
- **Research Partners:**



What is included in the Survey?

Unaided & Aided Brand Awareness

- Q. When you think of ... , please type the first brand that comes to mind?
- Q. And please use the space below to record any other brands of ... ?
- Q. Which of the following brands of ... have you heard of, if any?

Brand Experience/ Usage

- Q. And which of these brands of ... have you ever bought, if any?
- Q. And which of these is your preferred brand or is the brand you buy most often?

Brand Consideration

- Q. Which of these brands of ... would you consider using in the future whether or not you have ever bought them before?

Brand Loyalty

- Q. For each of these ... brands, please choose the statement that best describes your attitude to that brand?

It's the only brand I would consider buying	It's one of my favourites along with others	It's a brand I would consider	It's a brand I am interested in but I don't know much about	It's a brand that I would never consider buying	I have never heard of this brand
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Recommendation/ NPS

- Q. How likely are you to recommend each of the following brands of ... that you have tried on a scale of 0 to 10, where 0 means you definitely would not recommend it and 10 means that you definitely would?

Equity & Brand Image

- Q. Here are some things other people like you have said about brands of For each of these can you please select the brand(s) to which you feel each of these statements applies, if any?

It's a brand for people like me	Offers a real advantage over other brands	Is a high quality brand	Is worth paying more for	Is not a brand I would consider	+3 Elective category specific
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2015 Participating Categories



Bottled Water (e.g. 500ml up to 2 litre)



Crisps



Frozen Fish



Convenience Porridge/ Hot Cereals



Milk



Sliced Bread



Carbonated Soft Drinks



Brown Sauce



Rice Cakes



Dry Cooking Sauces



Frozen Pizza



Packed Strawberries



Speciality Tea (e.g. green tea etc)



Fresh Cream



Burger Buns and Soft Rolls



Fresh Chicken



Frozen Vegetables



Pasta Sauce



Standard Porridge Oats / Hot Cereals



Honey



Fresh Soup Chilled from Fridge



Frozen Breaded Chicken



Butters and Spreads



Fresh Coffee (e.g. roast, ground beans)



Gluten Free Bread



Premium Crisps



Take Home Bulk Water (e.g 5ltr)



Prepacked Cooked Sliced Ham



Wholesome Cereals (e.g. Muesli, Granola)



Cheddar Cheese



Fresh Eggs



Jams and Marmalades



Rapeseed Oil



Traditional Tea (e.g. black or breakfast tea etc)



Ketchup



Mayonnaise



Savoury corn, rice or maize snacks e.g. puff crisps



Chilled Ready Meals



Frozen Beef Burgers



Luxury Boxed Chocolates



Sausages



Yogurts



Tinned Beans, Tinned Baked Beans, Peas & Pulses

BRAND FORUM

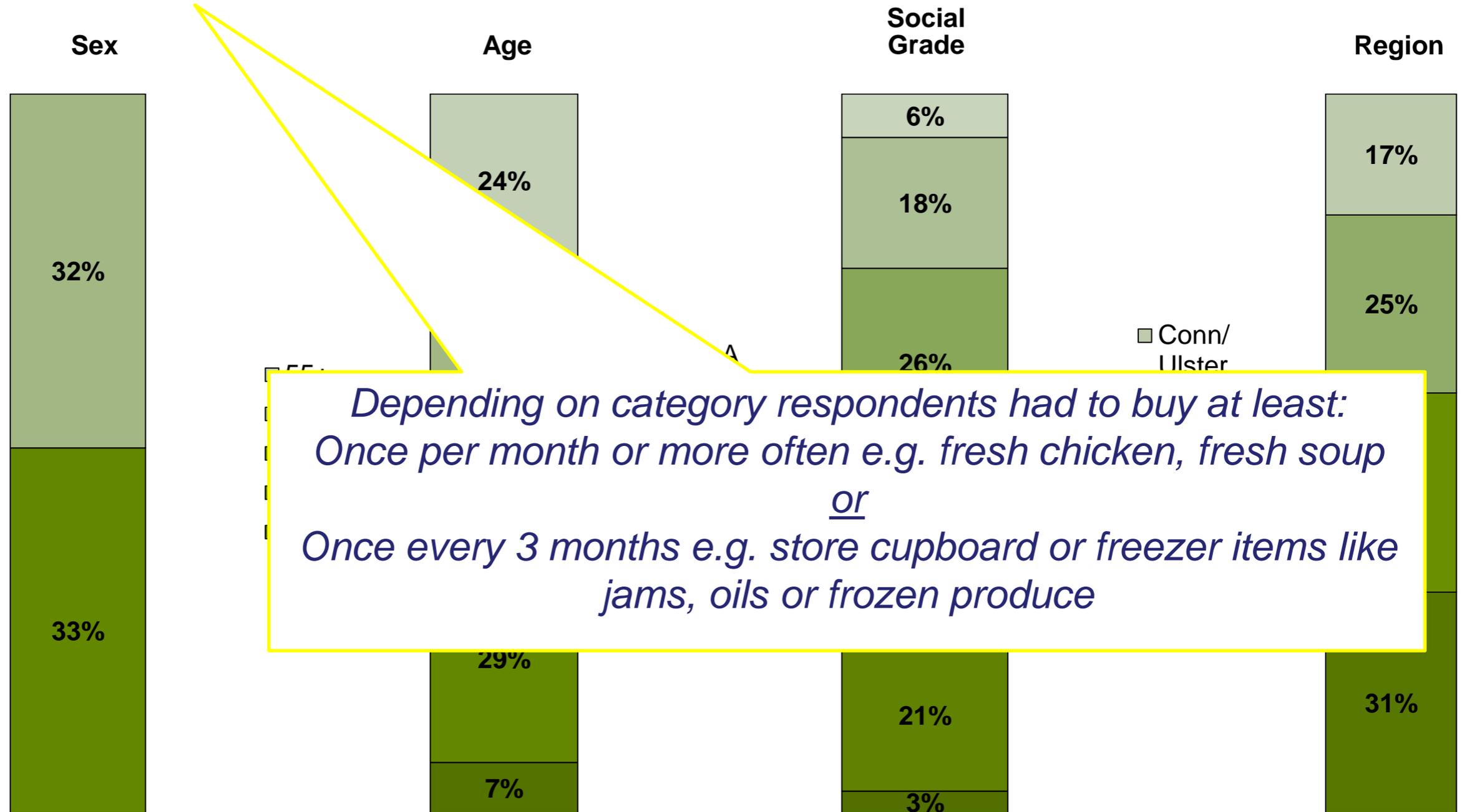
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CONTEXT & SAMPLE

Sample Profile

(Base: All Regular Category Buyers n = 468)



(Q.1)

The Following Brands Are Included In This Category

This table shows what brands we had listed each year in our category

Brand Name	2012	2013	2014	2015
Brand 1	√	√	√	√
Brand 2	√	√	√	√
Brand 3	√	√		
Brand 4	√	√		
Brand 5			√	√
Brand 6			√	√

√ = Brand took part that year

Please note: If a change to brand listings was made the comparability of scores year on year is compromised

BRAND FORUM

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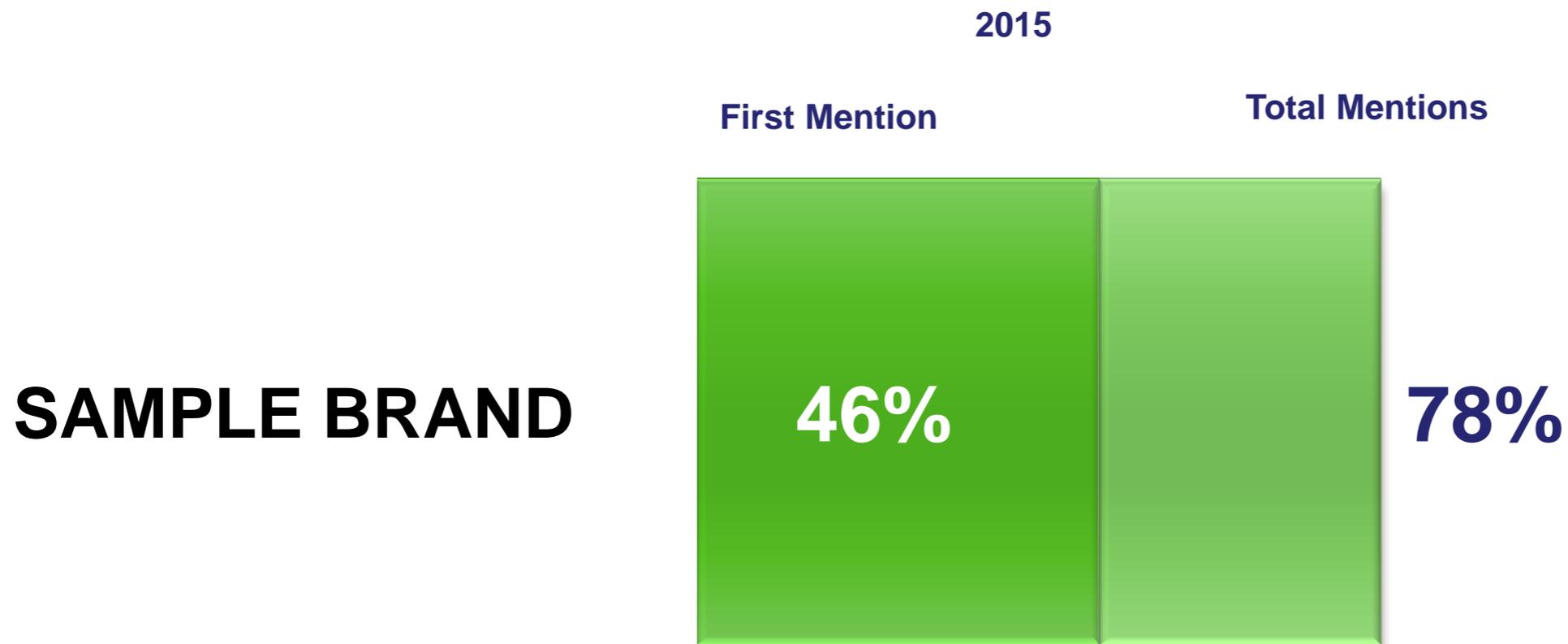
BRAND PERFORMANCE METRICS

Total Unprompted Mention – Set Up

(Base: All Regular Category Buyers n = 468)

Q.2 When you think of _____, please type the first brand that comes to mind?

Q.3 And please use the space below to record any other brands of _____ that come to mind?

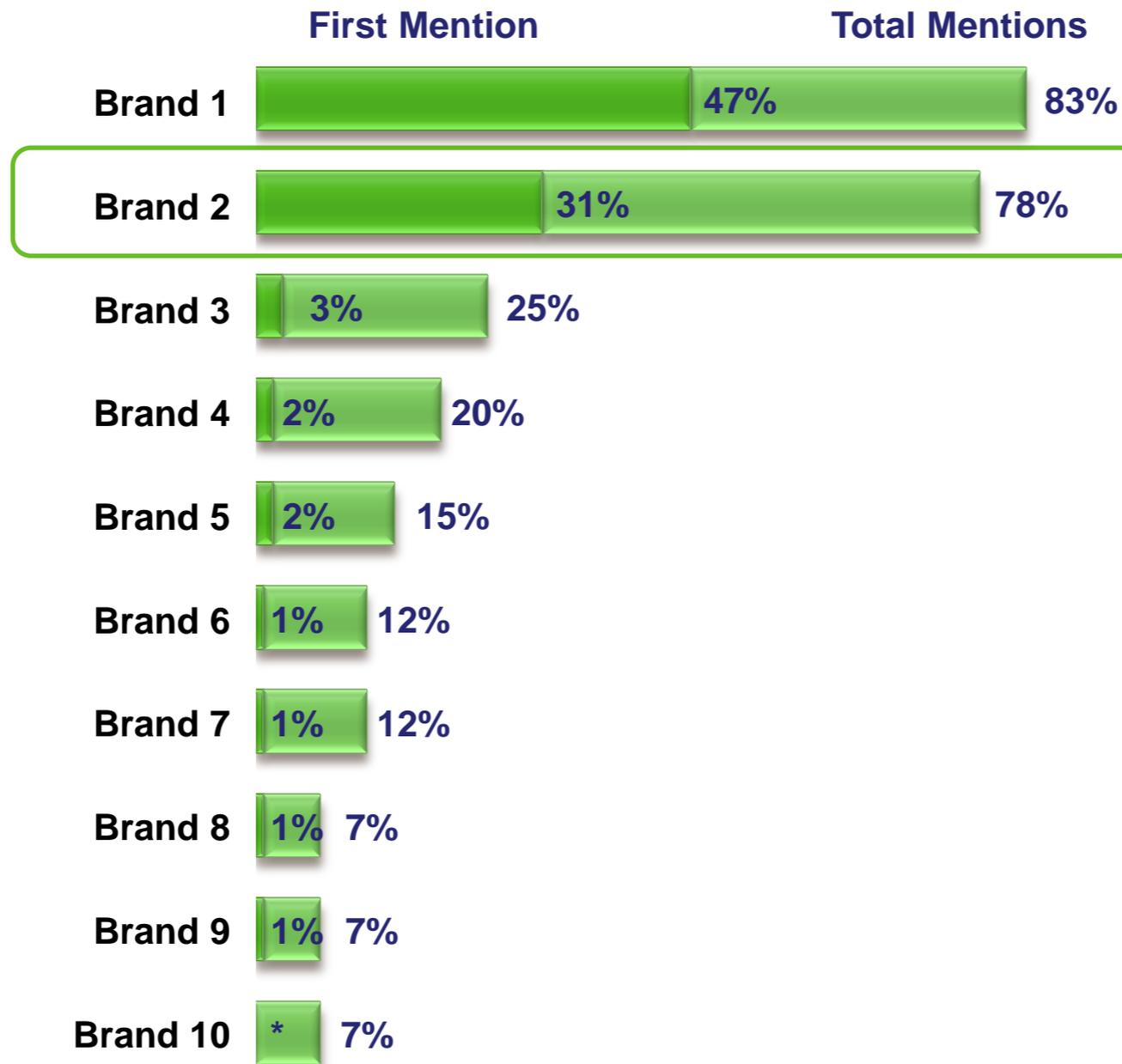


Total Unprompted Mention – Example Output

(Base: All Regular Category Buyers n = 468)

Q.2 When you think of _____, please type the first brand that comes to mind?
 Q.3 And please use the space below to record any other brands of _____ that come to mind?

2015



Reading the Charts

The bars show the % **achieved** on this metric by each brand. In other words the % of respondents who endorsed the brand at this question

These show the brands relative score versus the average. If they are lower than the average then they are **negative (red)** if they are higher than average they **score positive (green)**



These scores show the brands **2015** ranked position relative to **all of the brands across all of the grocery categories in 2015**

NORM/AVERAGE →

This score shows the average level of endorsement achieved for **all the listed brands in this category**

This score shows the average level of endorsement achieved for **all of the brands across all grocery categories in 2015**

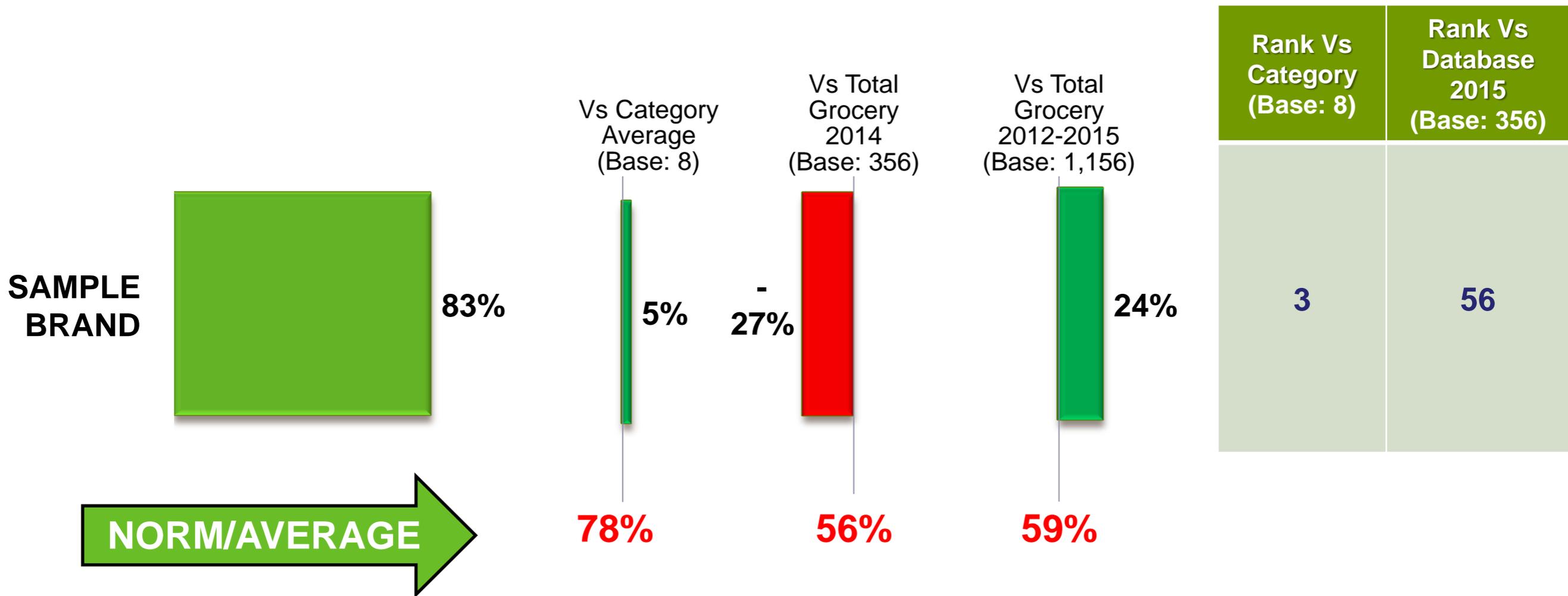
This score shows the average level of endorsement achieved for **all brands across all of the grocery categories from the 2012 - 2015 surveys**

These scores show the brands ranked position relative **all of the brands in its own category**

Brand Awareness – Set Up

(Base: All Regular Category Buyers n = 468)

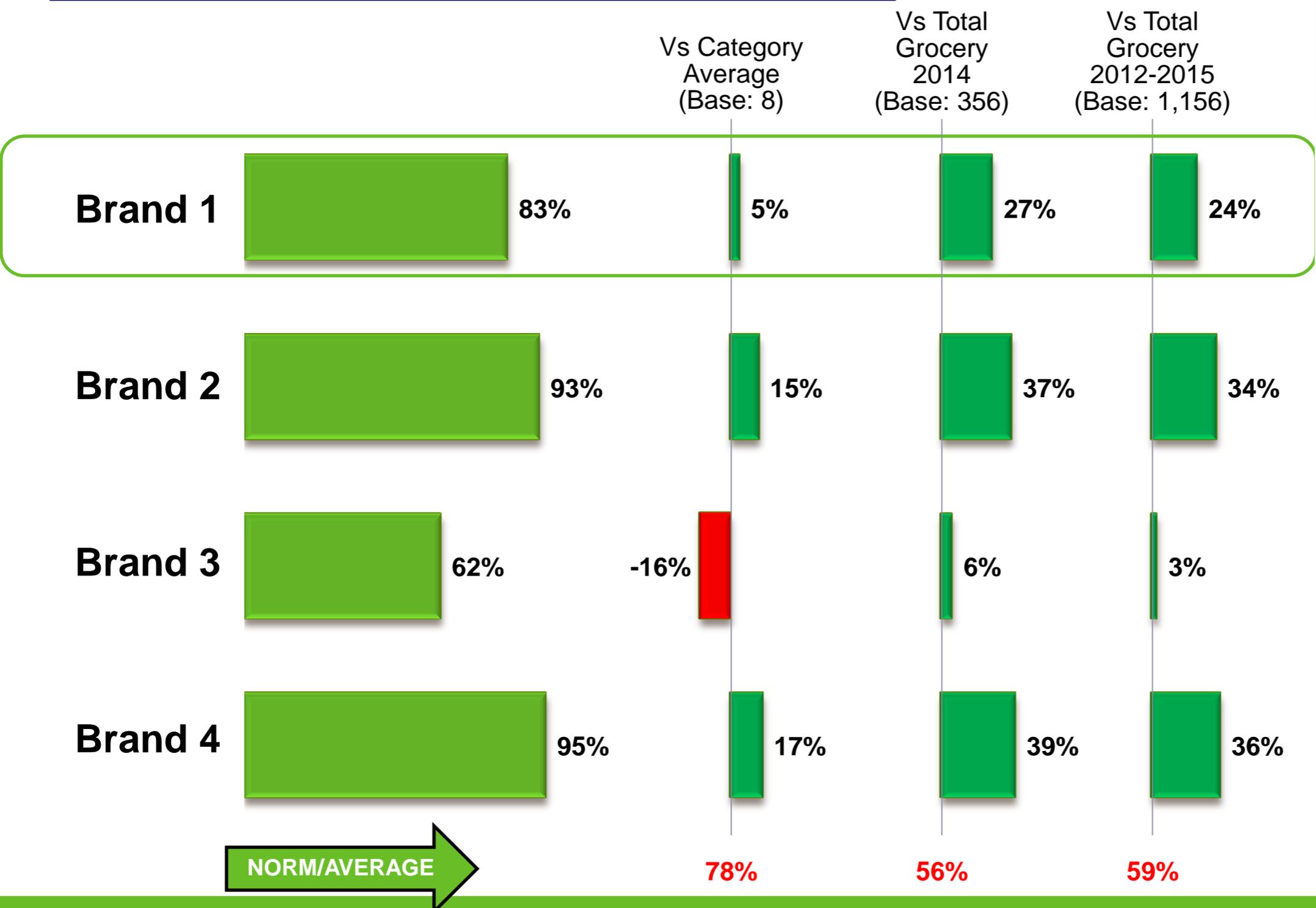
Q.4 Which of the following brands of _____ have you heard of, if any?



Brand Awareness - Example Output 1

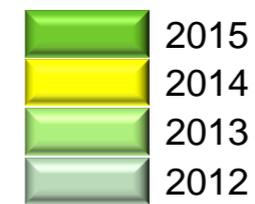
(Base: All Regular Category Buyers n = 468)

Q.4 Which of the following brands of _____ have you heard of, if any?



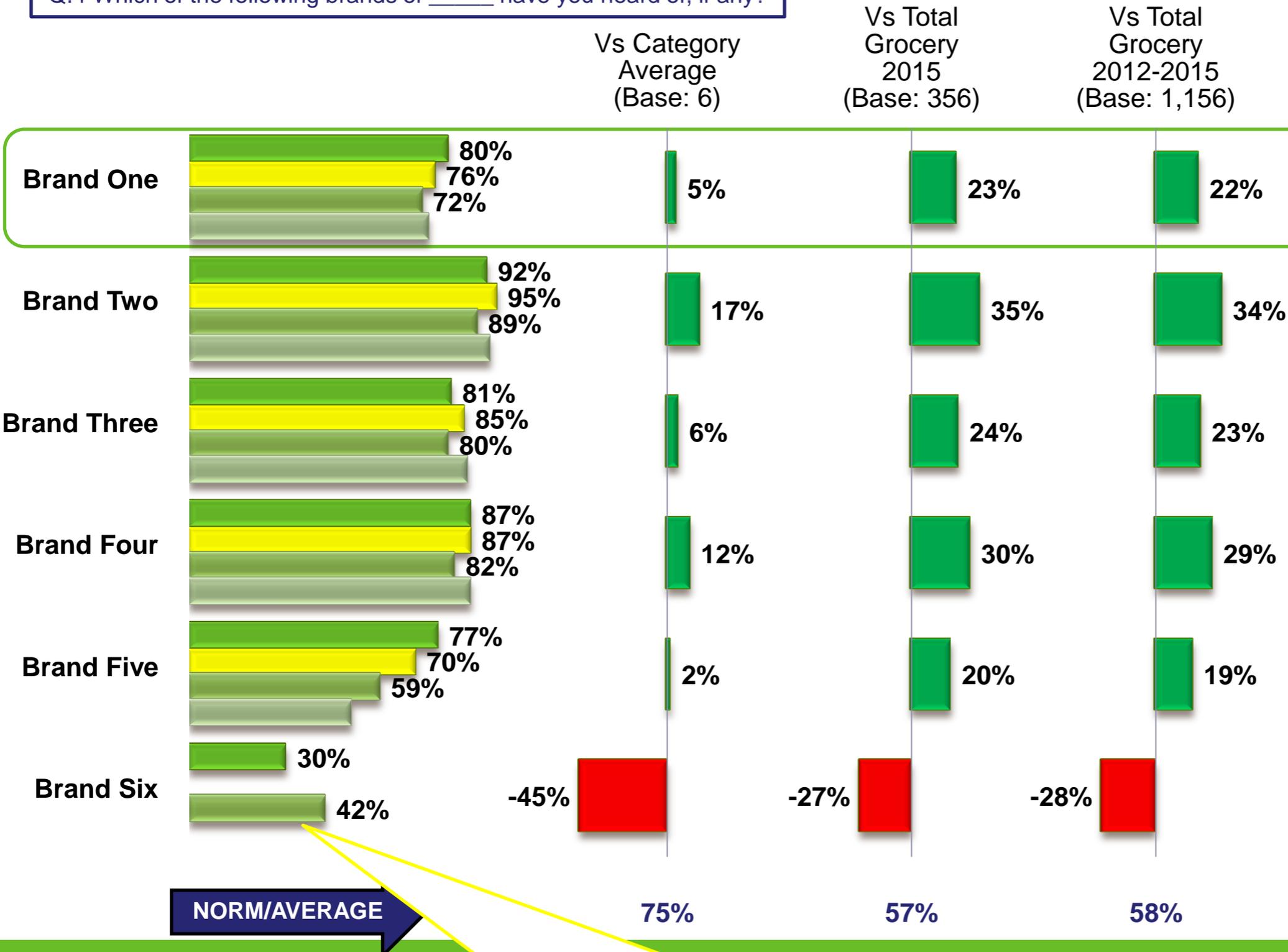
Rank Vs Category (Base: 8)	Rank Vs Total Grocery (Base: 356)
3	56
2	9
7	136
1	2

Brand Awareness - Example Output 2



(Base: All Regular Category Buyers n = 477)

Q.4 Which of the following brands of _____ have you heard of, if any?



Rank Vs Category (Base: 6)	Rank Vs Total Grocery (Base: 356)
4	80
1	19
3	74
2	44
5	90
6	247

Growing the

Comparability of scores is compromised when there are different in brand listings

Some Issues to Consider in drawing Comparisons Between Years

Change to the brand list

This can affect all other brand scores

Prompt reminders and limited clicks

Category Definition Change

“Better for you Cereals” to “Wholesome Cereals”

Will affect qualification to answer and question context

Significant Market Development

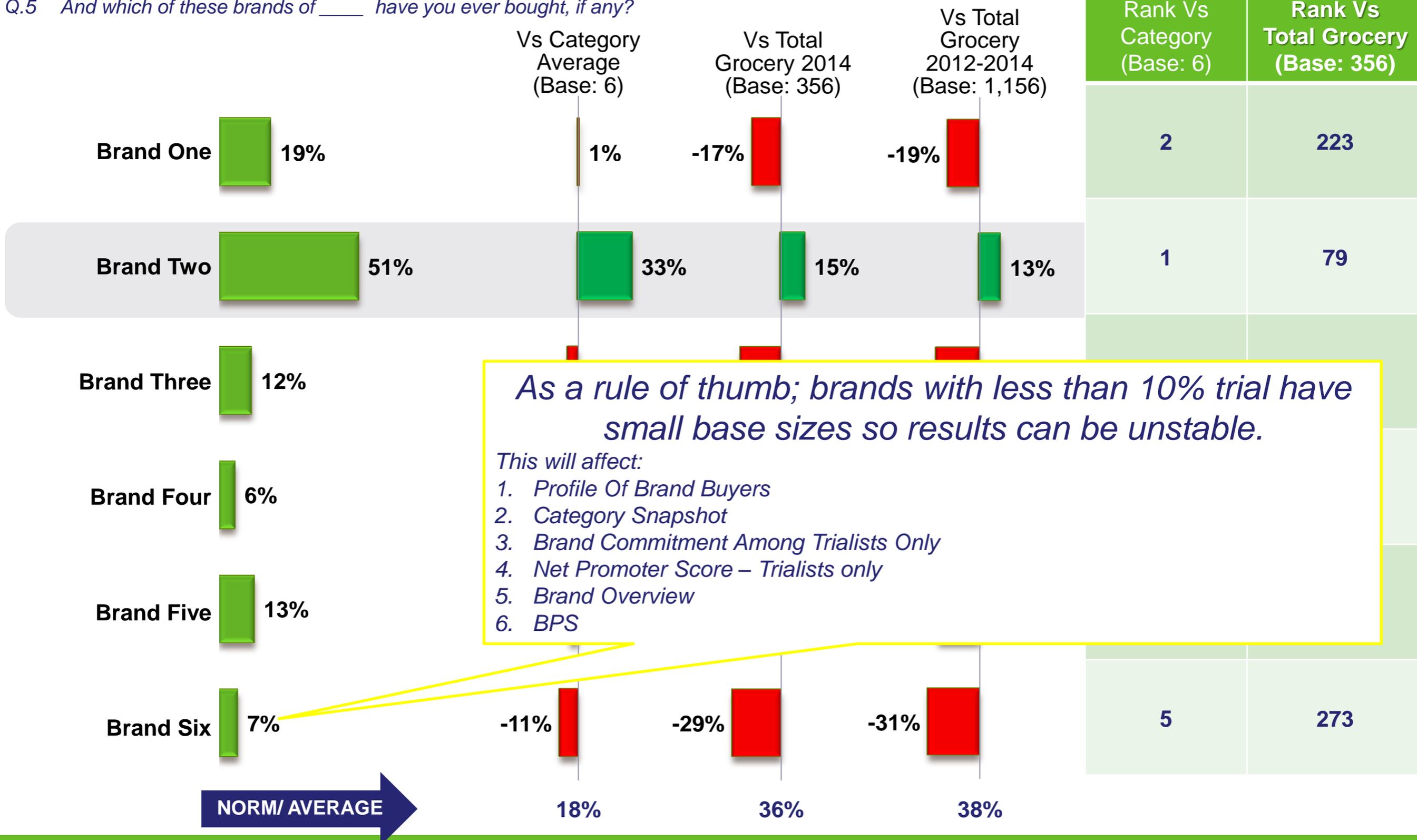
Major new brand launch on market

Removal of a major player or rise of PL

Brand Experience – Ever Bought

(Base: All Regular Category Buyers n = 458)

Q.5 And which of these brands of _____ have you ever bought, if any?



Profile Of Brand Buyers

(Base: All Regular Category Buyers n = 468)

		TOTAL	Brand 1 (n=163)	Brand 2 (n=353)	Brand 3 (n=73)	Brand 4 (n=390)	Brand 5 (n=76)	Brand 6 (n=126)	Brand 7 (n=127)	Brand 8 (n=36*)
SEX	Male	32%	30%	34%	28%	33%	28%	28%	28%	27%
	Female	68%	70%	66%	72%	67%	72%	72%	72%	73%
AGE	18-24	7%	6%	7%	3%	7%	4%	6%	3%	7%
	25-34	29%	24%	26%	20%	30%	13%	23%	31%	31%
	35-44	21%	20%	21%	24%	20%	33%	25%	26%	19%
	45-54	19%								21%
	55+	24%								22%
REGION	Dublin	31%								24%
	Rest of Leinster	28%								30%
	Munster	25%								27%
	Conn./ Ulster	17%								19%
SEG	NET ABC1	50%	52%	51%	51%	50%	50%	51%	60%	51%
	NET C2DEF	49%	47%	47%	38%	50%	50%	49%	40%	49%
KIDS	Yes	45%	54%	47%	45%	45%	58%	55%	58%	49%
	No	54%	46%	53%	55%	55%	42%	45%	42%	51%

KIDS	Yes	46%	54%	47%
	No	54%	46%	53%

(Q.1)

***CAUTION: Brand 8 small base size. Results indicative only**

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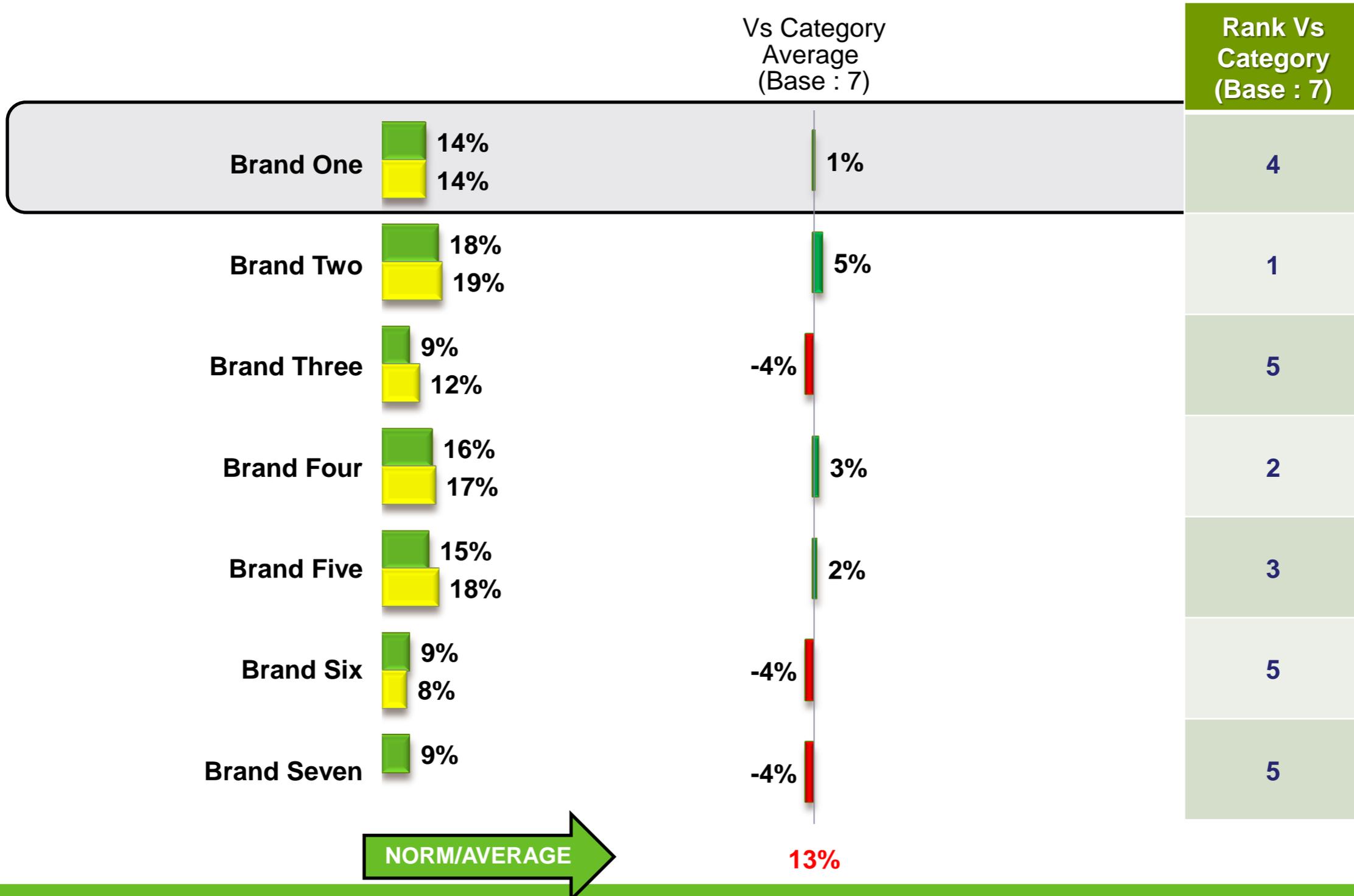
Brand Experience: Bought Most Often

(Base: All Regular Category Buyers n = 499)

2015
2014



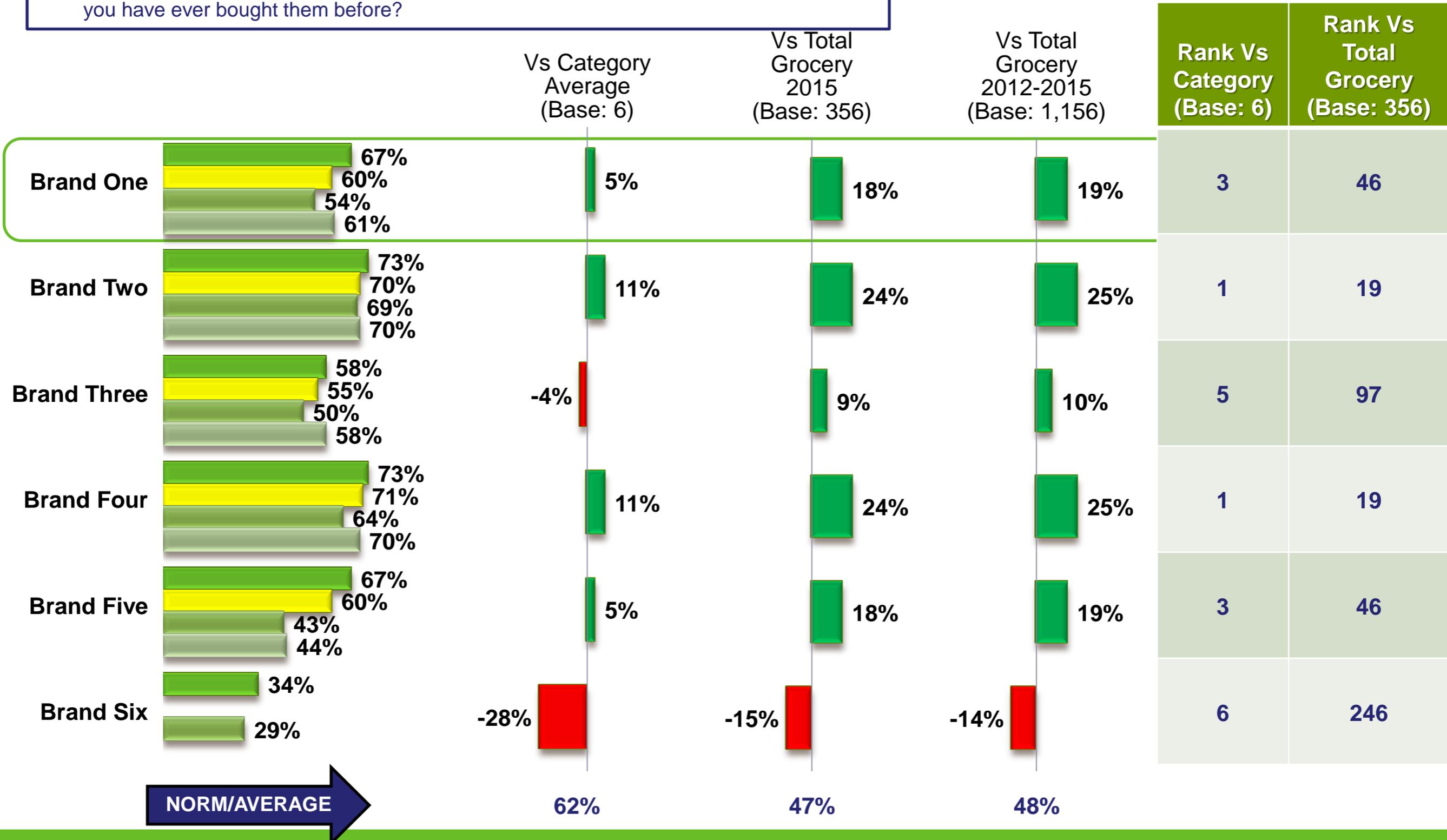
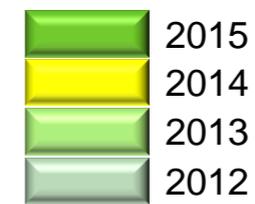
Q.6 And which of these is your preferred brand or is the brand you buy most often?



Would Consider Buying

(Base: All Regular Category Buyers n = 477)

Q.7 Which of these brands of _____ would you consider using in the future whether or not you have ever bought them before?



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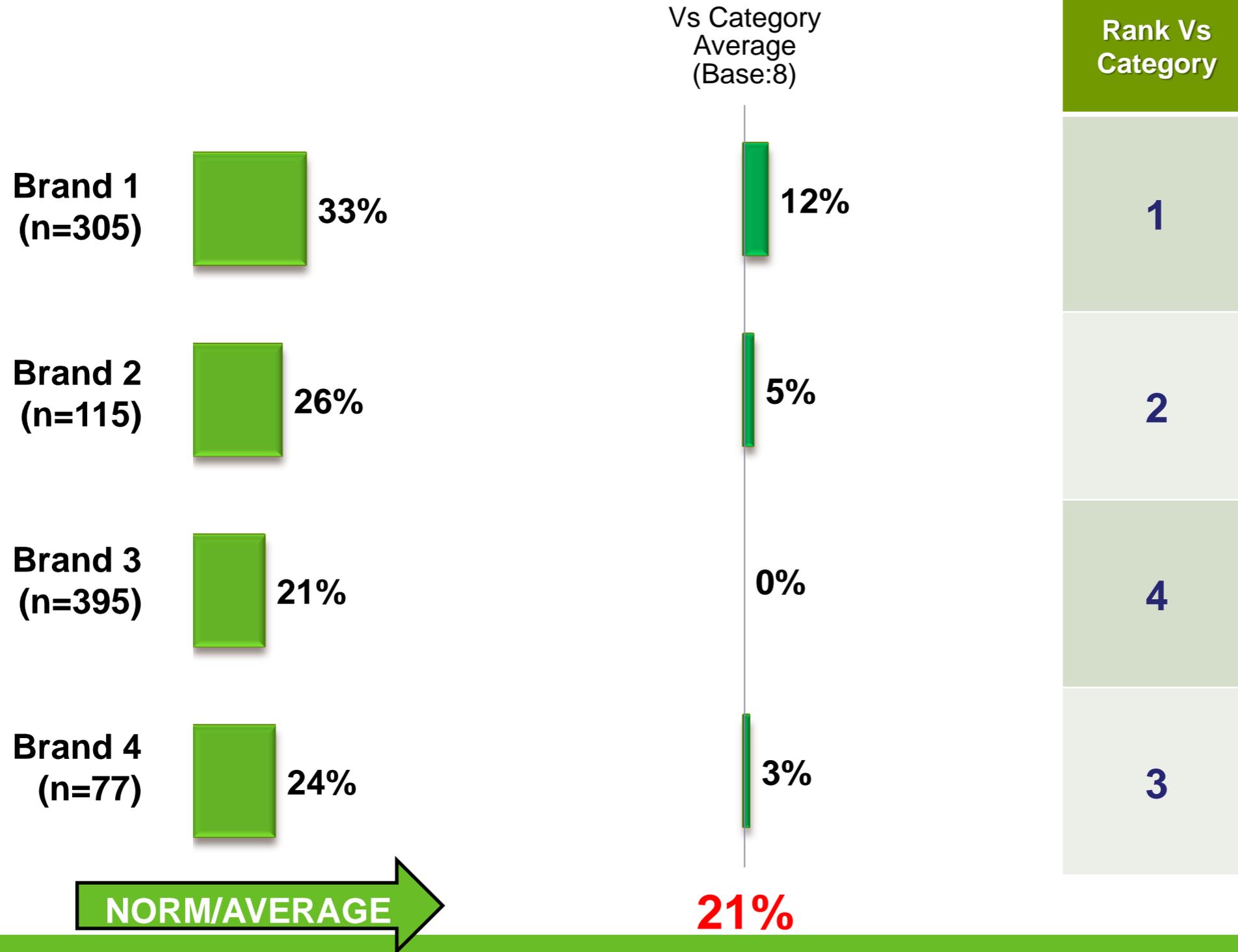


Growth Potential

(Base: All Regular Category Buyers n = 468)

What's this?

The % of people who haven't yet tried your brand but would consider buying in future



Brand Momentum Pyramids Explained..

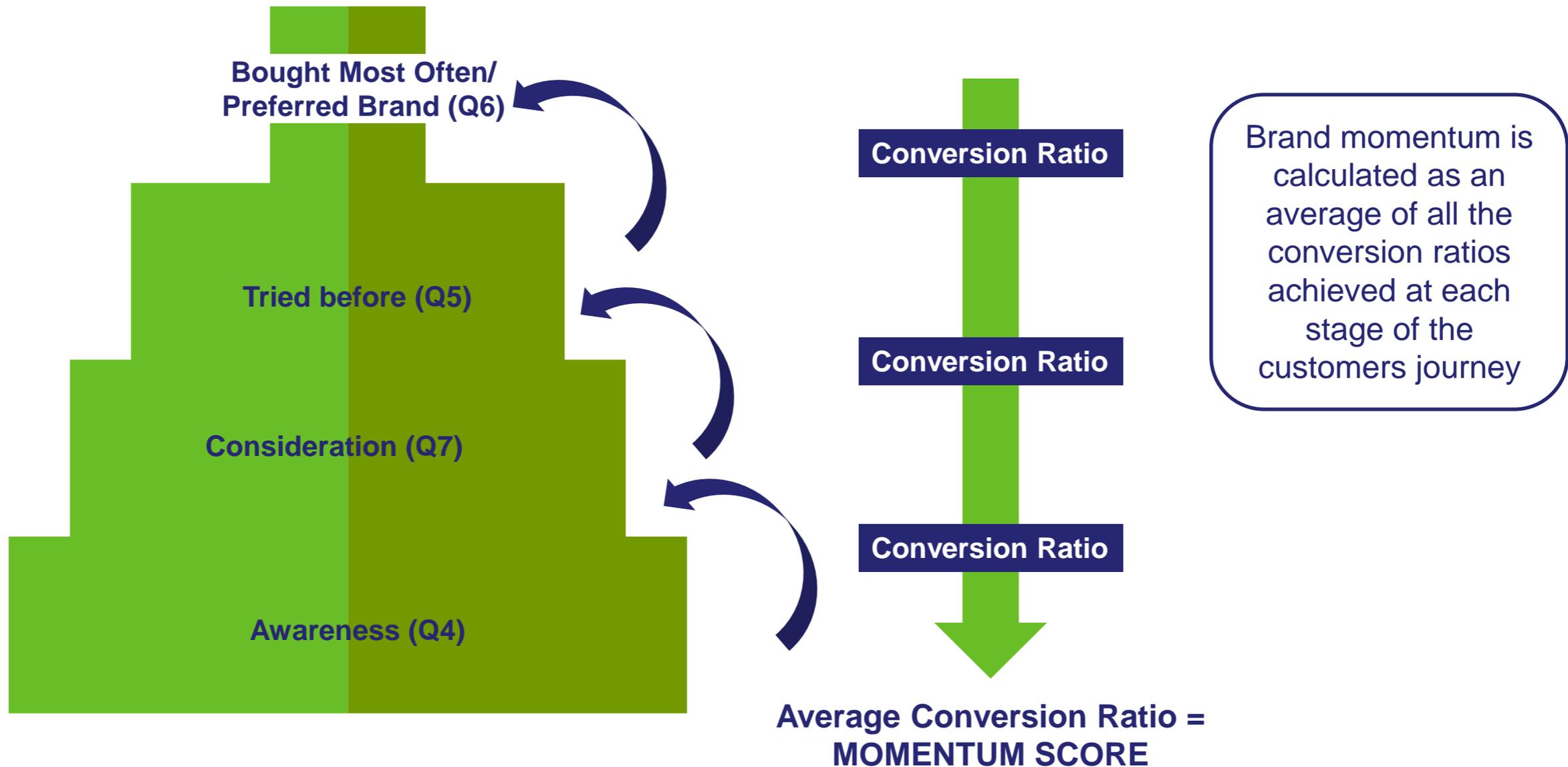
What's this? Brand momentum can be described as the success in bringing customers through the journey from brand awareness to becoming their preferred brand

Q.4 Which of the following brands of _____ have you heard of, if any?

Q.5 And which of these brands of _____ have you ever bought, if any?

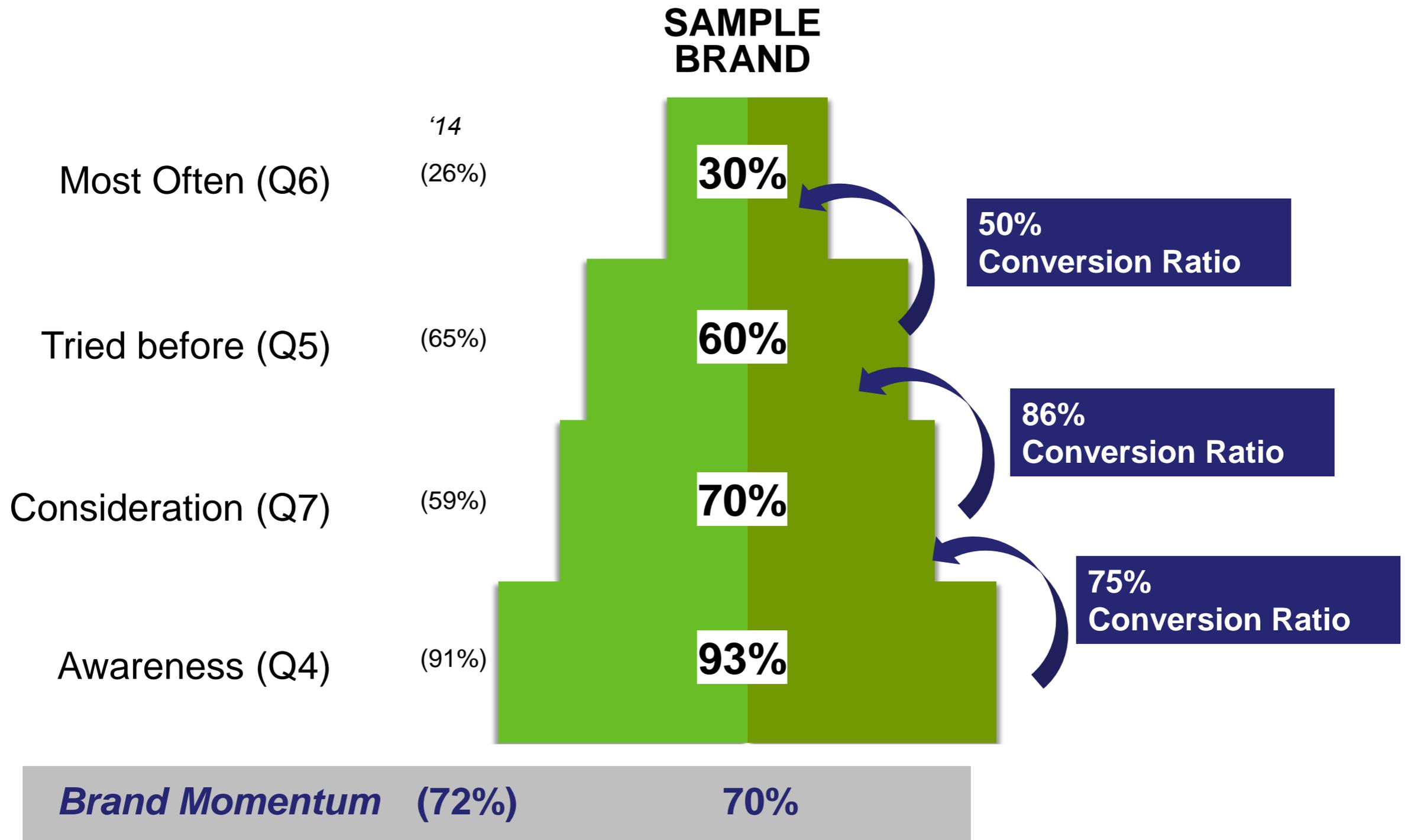
Q.6 And which of these is your preferred brand or is the brand you buy most often?

Q.7 Which of these brands of _____ would you consider using in the future whether or not you have ever bought them before?



Sample Pyramid - Example Output

(Base: All Regular Category Buyers n = 468)

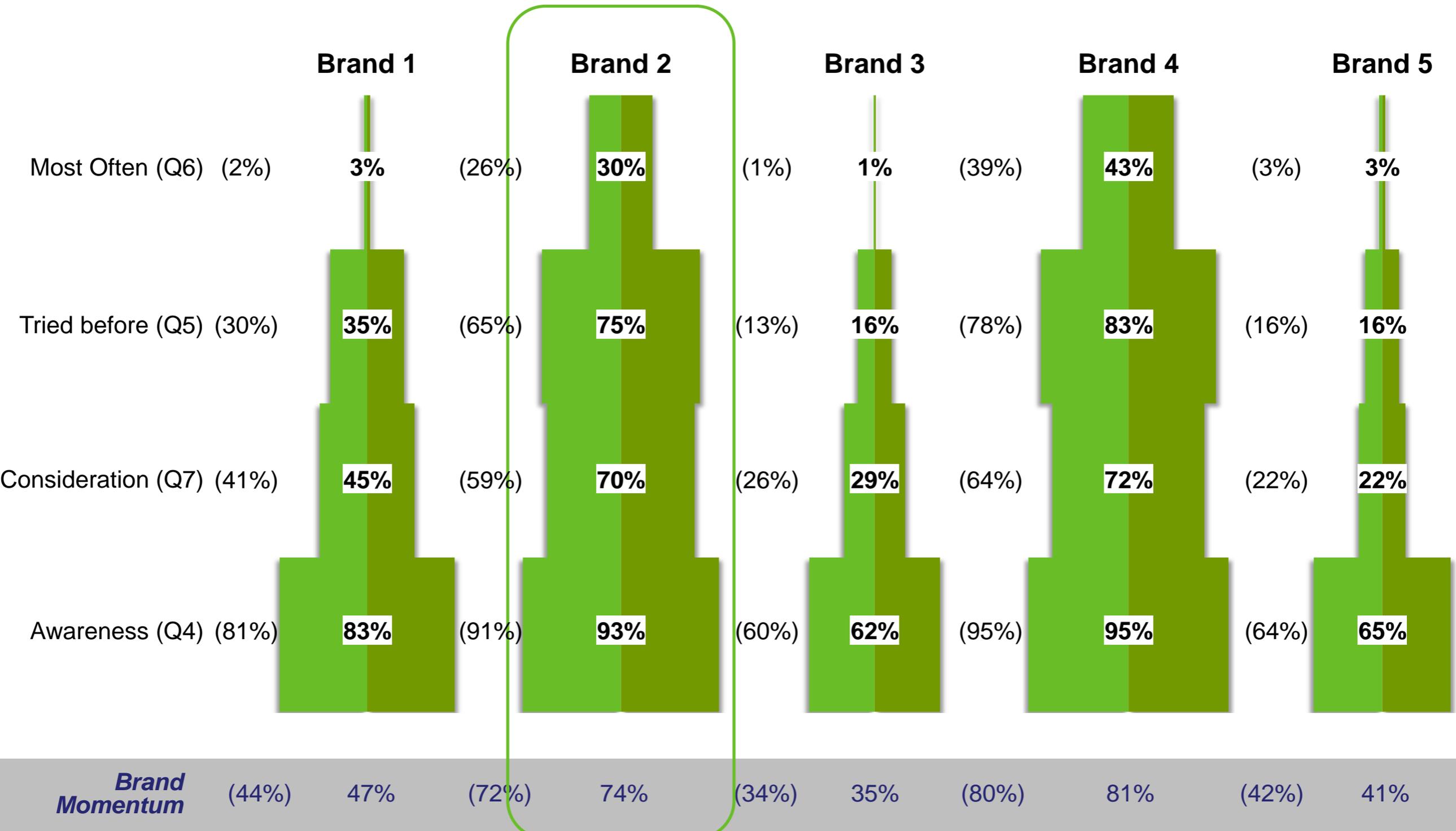


() = 2014 Figures

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Category Snapshot

(Base: All Regular Category Buyers n = 468)



() = 2014 Figures

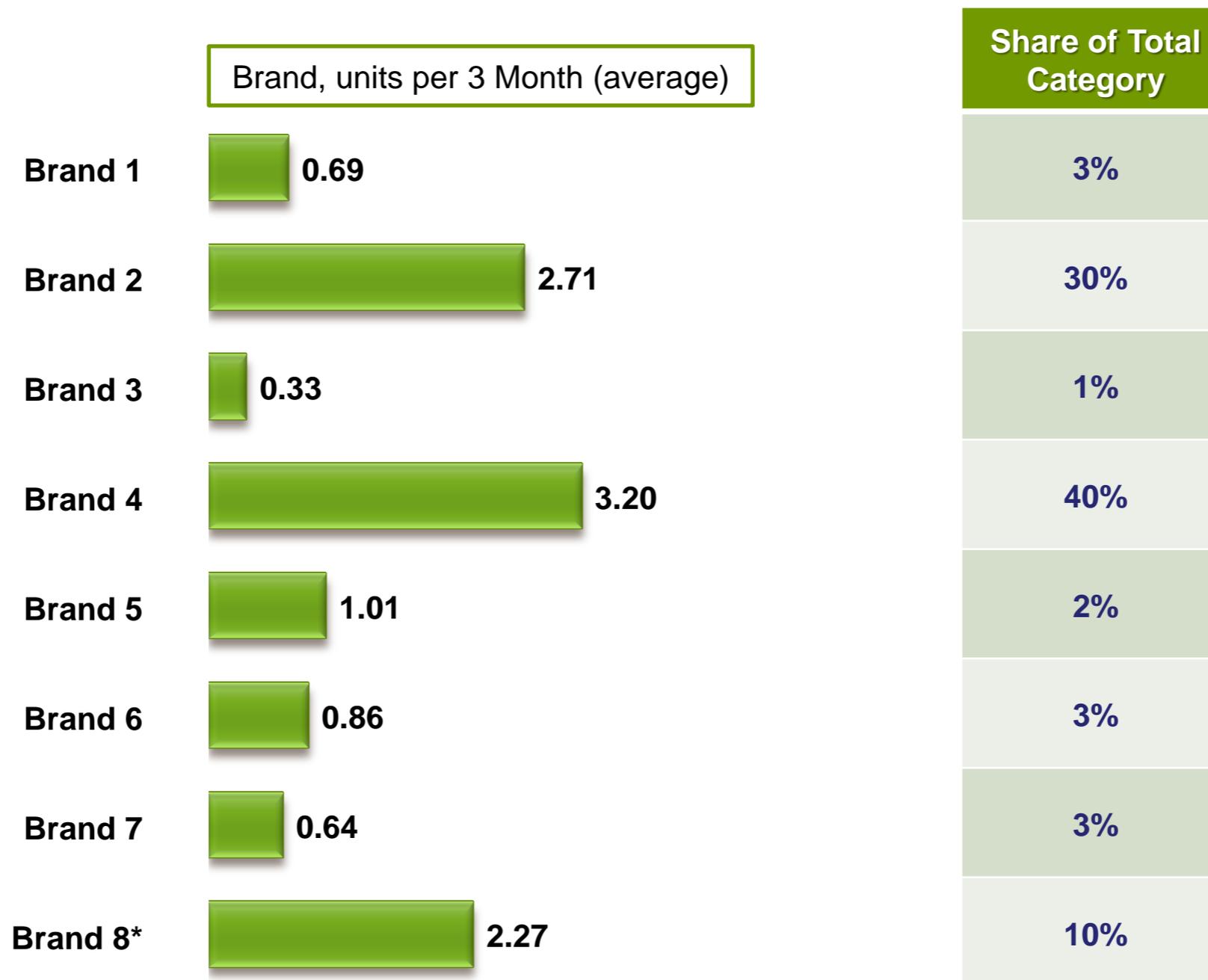
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Volume Share Over Past Three Months

(Base: All Regular Category Buyers n = 468)



Q.8 And approximately how many packs or units of _____ do you buy on average per month?
 Q.9 And of these packs or units of _____, approximately how many of each of the following brands do you buy on an average month?



***CAUTION: Brand 8** small base size. Results indicative only

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BRAND COMMITMENT AND ADVOCACY

Measurement of Brand Loyalty - Description

What's this? An indication of how committed shoppers are to your brand based on their attitudes.

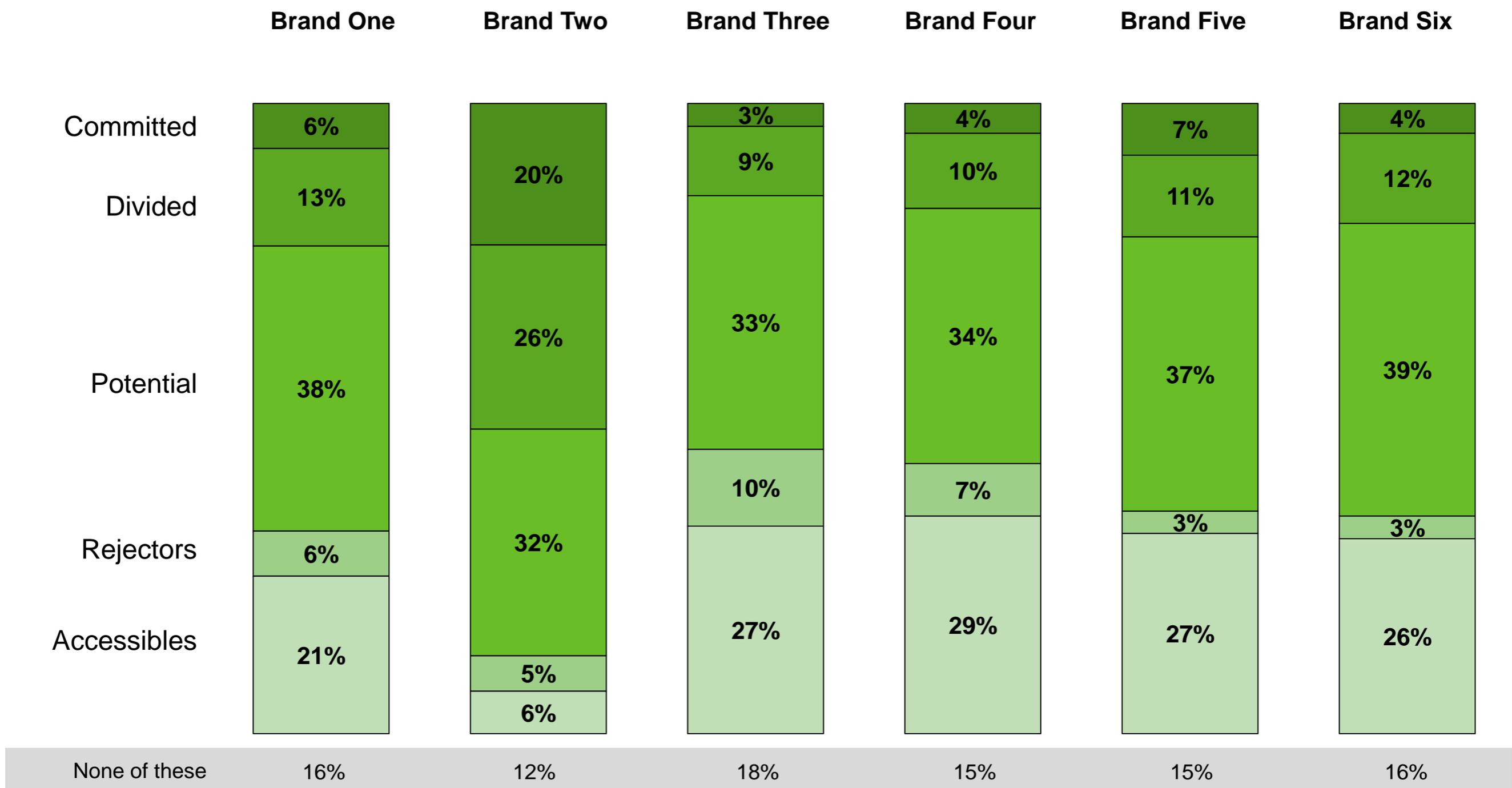
Q.10 For each of these ____ brands, please choose the statement that best describes your attitude to that brand?

It's the only brand I would consider buying	COMMITTED
It's one of my favourites along with others	DIVIDED
It's a brand I would consider <u>OR</u> It's a brand I am interested in but I don't know much about	POTENTIAL
It's a brand that I would never consider buying	REJECTORS
I have never heard of this brand	ACCESSIBLES

Brand Commitment

(Base: All Regular Category Buyers n = 458)

What's this?
An indication of how committed shoppers are to your brand based on their attitudes.



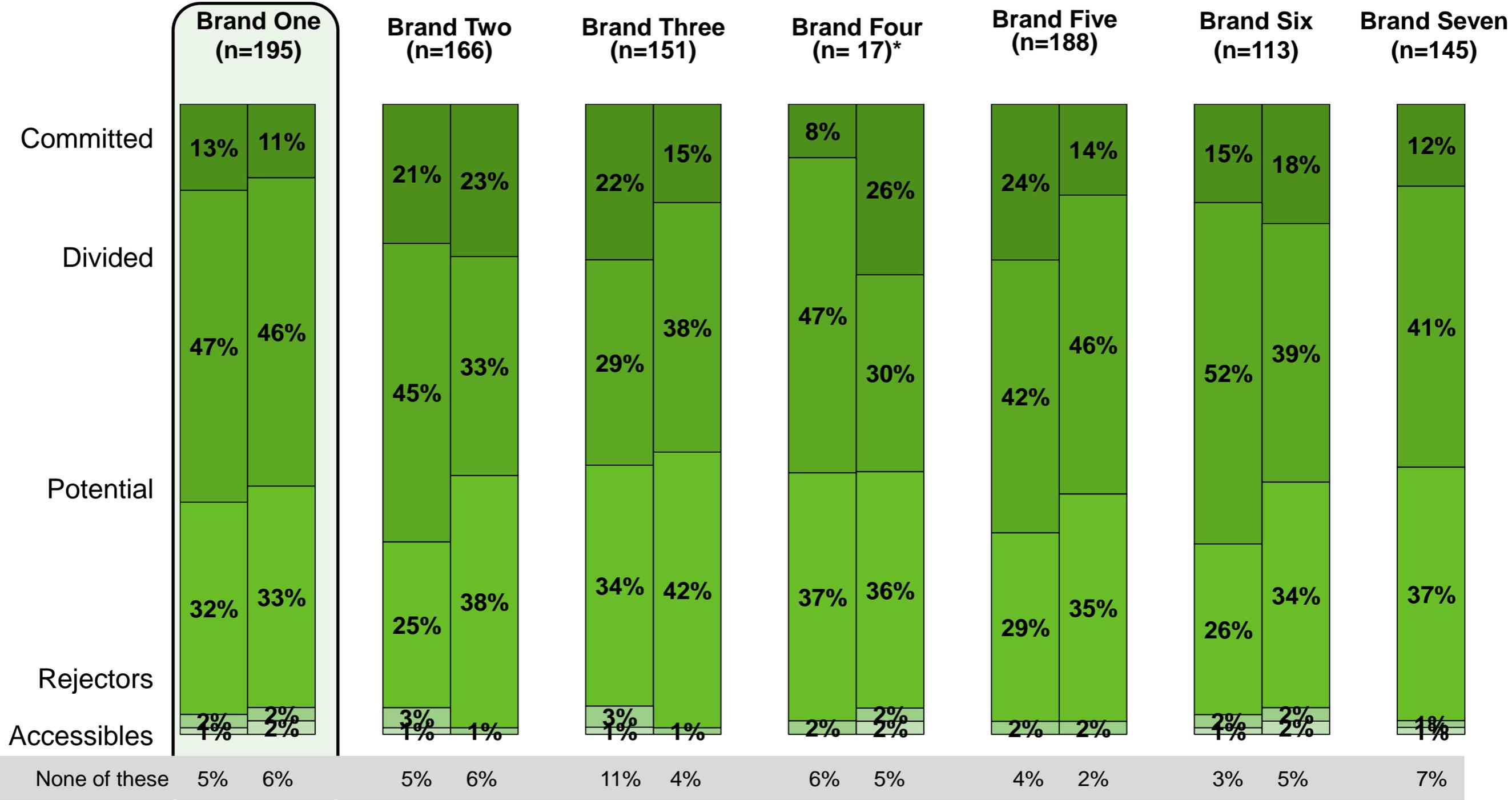
Brand Commitment Among Trialists Only

(Base: All Regular Category Buyers who tried brand)



2014 2015

What's this?
An indication of how committed shoppers are to your brand based on their attitudes.



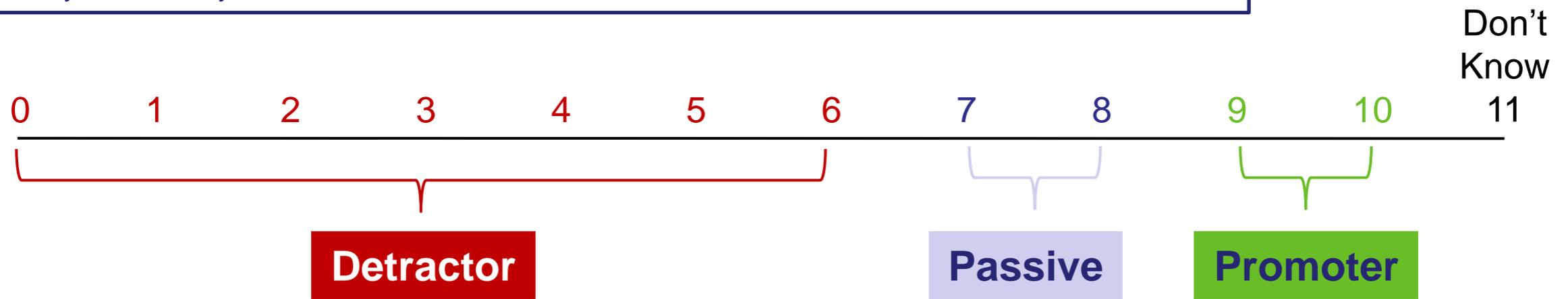
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*CAUTION: Brand 4 small base size. Results indicative only

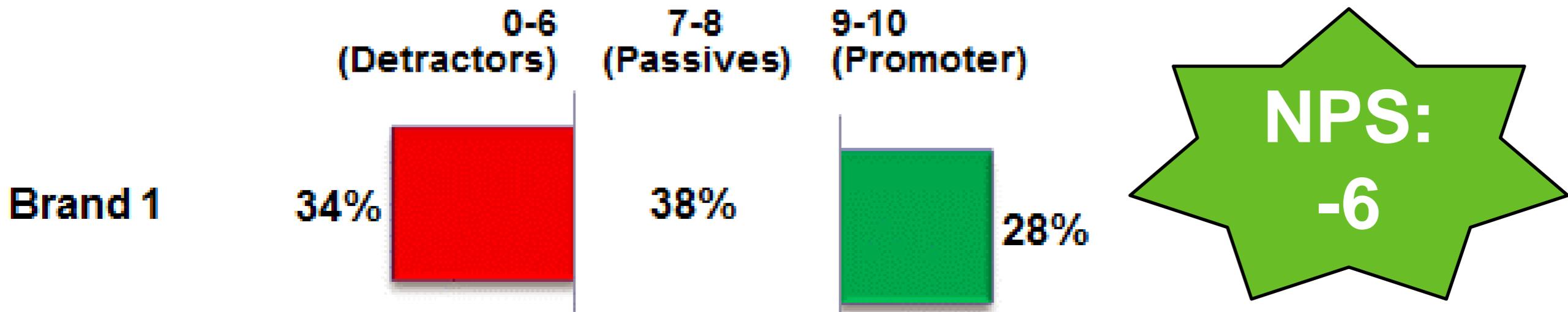
Comparability of data is compromised with the difference in brand listings and change of category definition

Net Promoter Score (NPS)

Q.12 And finally, how likely are you to recommend each of the following brands of ___ that you have tried on a scale of 0 to 10, where 0 means you definitely would not recommend it and 10 means that you definitely would?



$$\text{Net Promoter Score (NPS)} = \text{Promoter} - \text{Detractor}$$

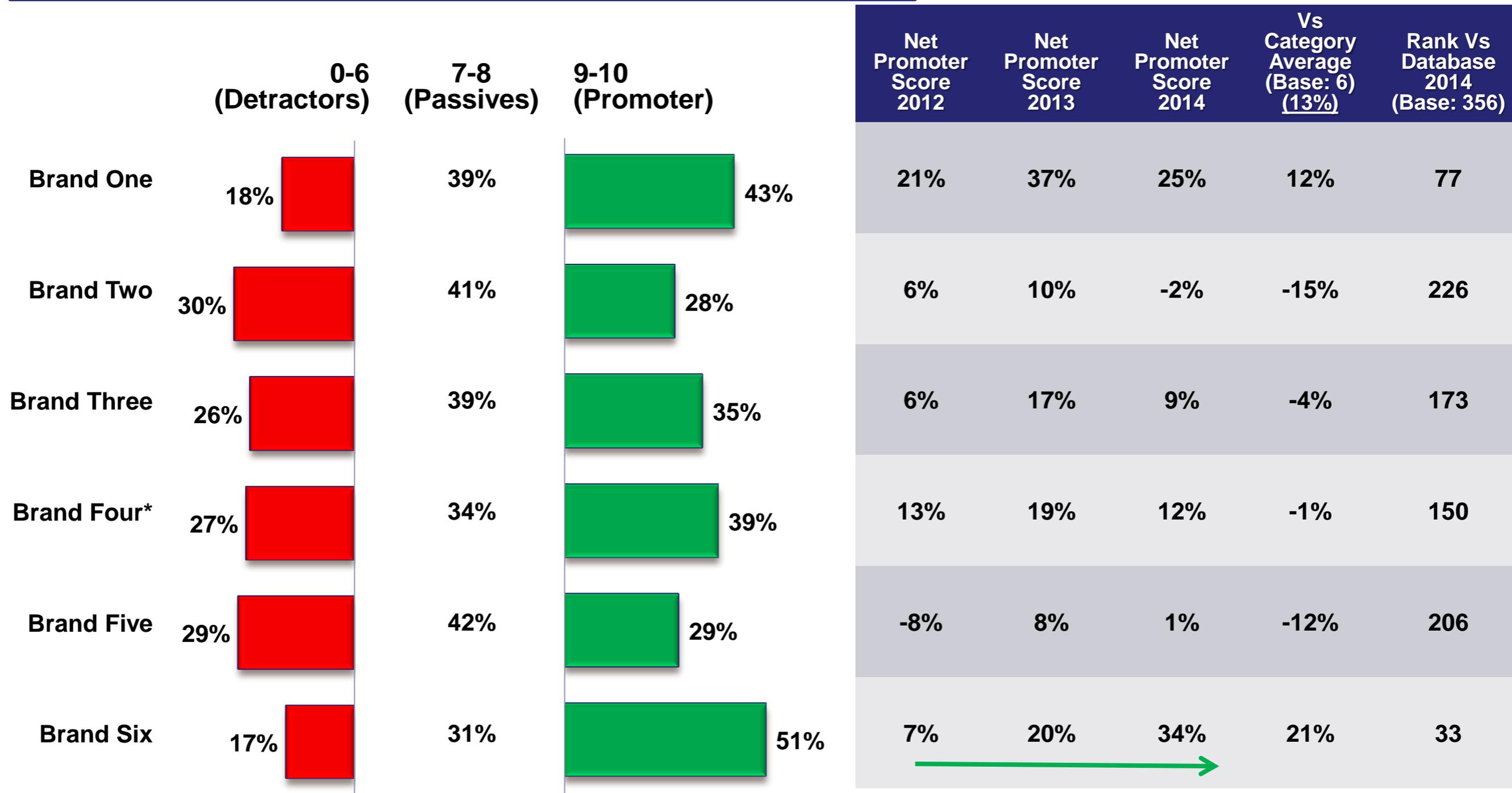


Net Promoter Score – Trialists only



(Base: All Regular Category Buyers n = 500)

Q.12 And finally, how likely are you to recommend each of the following brands of _____ that you have tried on a scale of 0 to 10, where 0 means you definitely would not recommend it and 10 means that you definitely would?



Note: Some small brands with <20% trial out of total grocery sample are included in overall total grocery NPS

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*CAUTION: Brand 4 small base size. Results indicative only

2015 Top Brand Recommendations Within Category

What's this? These are the brands which users are **most willing to recommend** within the brand's respective category based on the **Net Promoter Score (NPS)**.

Brand Name and Category	Score	Rank
Flahavans Quick Oats range - Convenience Porridge/ Hot Cereals	53%	1
Flahavans Progress Oatlets - Standard Porridge Oats/ Hot Cereals	52%	2
Hellmann's – Mayonnaise	51%	3
Wexford - Packed Strawberries	51%	3
Keelings - Packed Strawberries	47%	5
Heinz – Ketchup	46%	6
Donegal - Rapeseed Oil	46%	6
Bonne Maman – Jams	44%	8
Twinings - Speciality Tea	43%	9
Follain – Jams	43%	10

Private Label Name and Category	Score	Rank
SuperQuinn – Sausages	44%	1
Mark & Spencers - Chilled Ready Meals	37%	2
Aldi “Kavanaghs” - Standard Porridge Oats/ Hot Cereals	30%	3
Supermarket Own Label – Milk	29%	4
Aldi “Specially Selected” – Honey	27%	5

**Note: Some small brands with <10% trial out of total grocery sample are omitted due to limited numbers of users*

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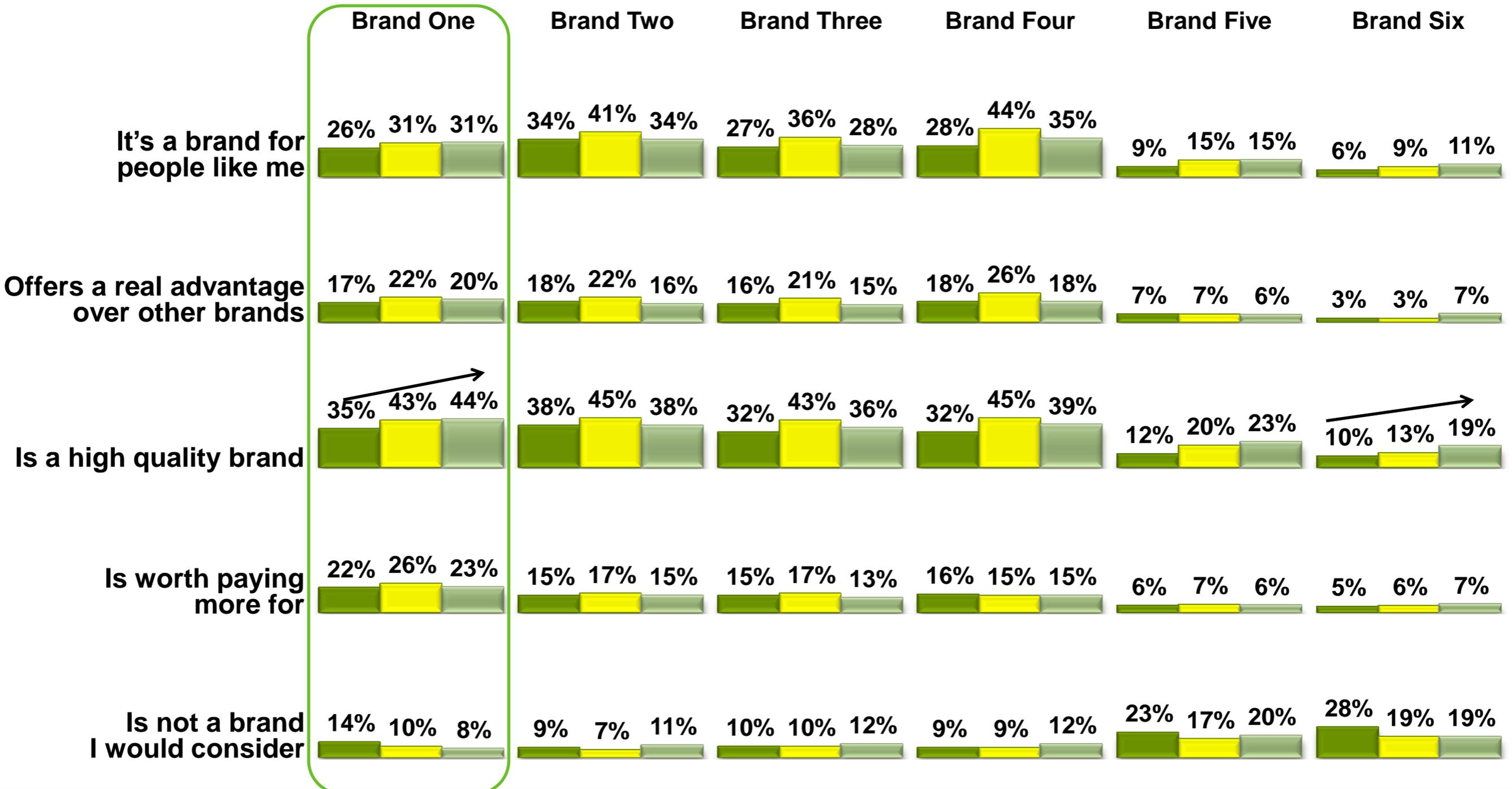
OVERVIEW MAPPING

Brand Equity Snapshot – Core Statements

(Base: All Regular Category Buyers n = 500)



2014

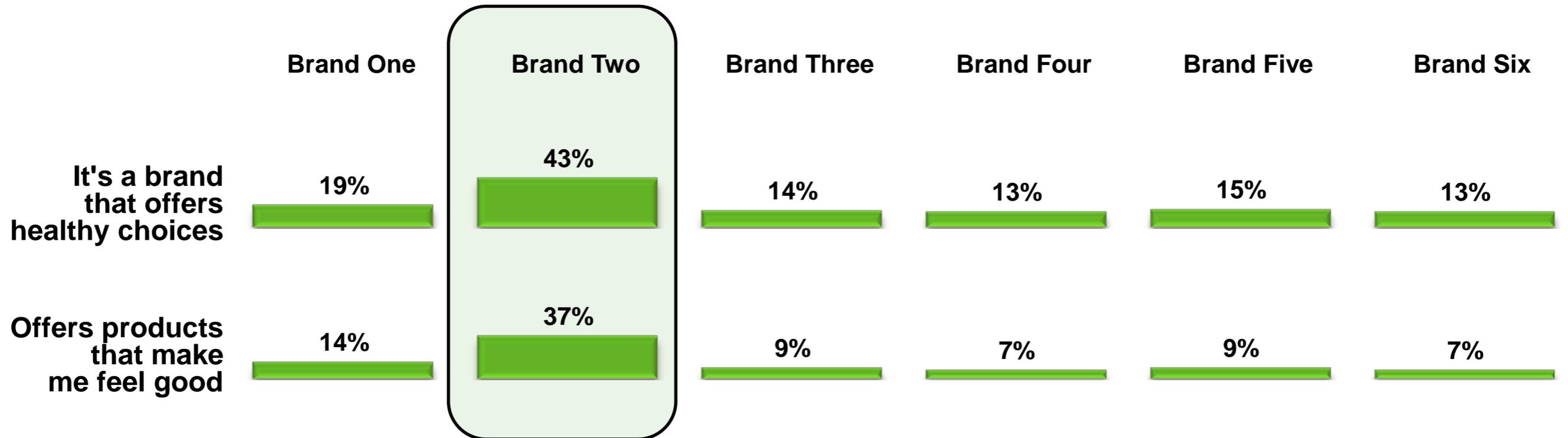


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Brand Equity Snapshot

– Elective Statements

(Base: All Regular Category Buyers n = 458)



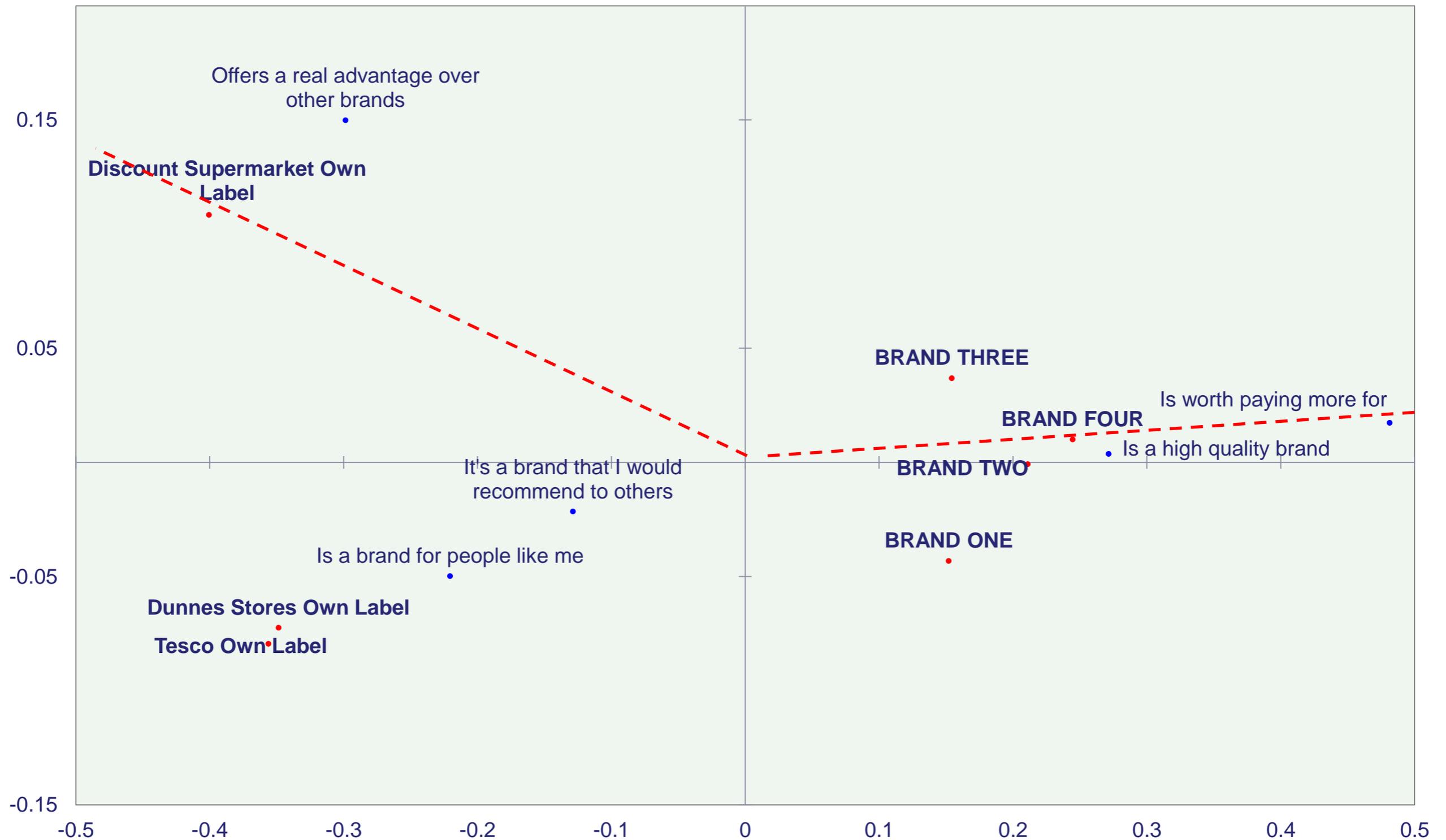
Correspondence Mapping Explained...

What's this? Correspondence mapping is a visual representation of relative associations of brands based on a number of defined attributes or image statements

- ✓ The map overleaf allows us to visually assess how strongly the brands are associated to key equity measures
- ✓ Taking information from a crosstab table profiling the level of endorsements for each brand on each equity measures, the map allows us to plot both the brands and equity measures in a way that one can easily see their defining attributes compared to others
- ✓ By plotting a line from the centre of the grid through the location of the brands, equity measures located close to the line represent a relative equity strength for that brand compared to others – a defining feature
- ✓ Equity measures clustered around the centre of the grid shows it to be non-differentiating across the brands. Hence, the more discriminating an attribute is, the further it will lie from the centre of the map
- ✓ Likewise brand further from the centre are more “distinctive” on this particular set of attributes/image ratings

Correspondence Map

(Base: All Regular Category Buyers n = 499)



Note: 'Is not a brand I would consider' is excluded

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Example 1: Chocolate Bars



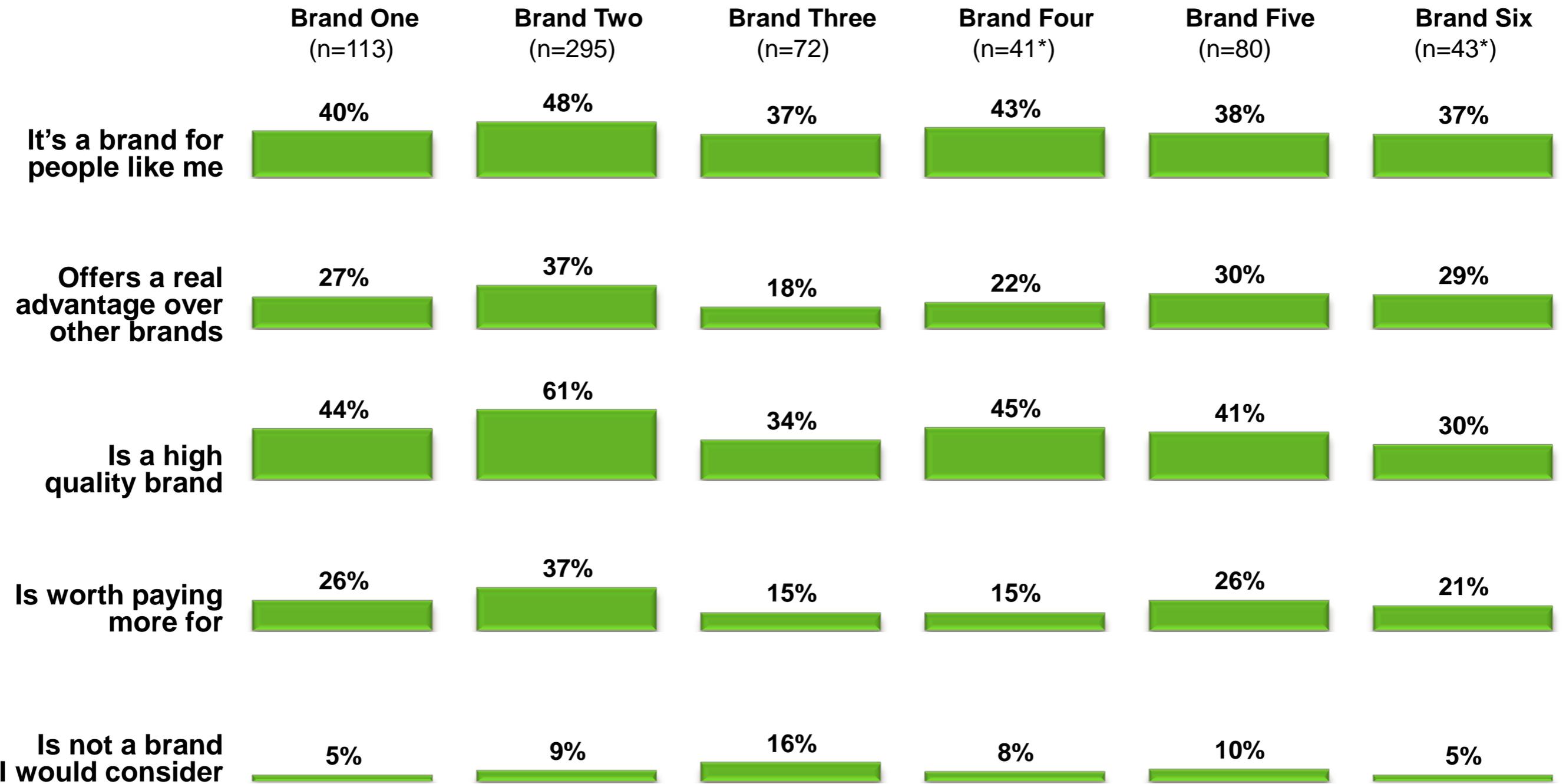
Note: 'Is not a brand I would consider' is excluded

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Brand Equity Snapshot – Core Statements

– Aware Of Brand Only

(Base: All Aware of Brands)



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*CAUTION: Brand Four and Brand Six Small base size results indicative only

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OVERVIEW MAPPING

Brand Maps Explained

- These maps provide a snapshot of a brand's relative performance based on a number of key measures:
 - **Loyalty:** Displayed on the vertical axis this shows the % of consumers of a brand that would only consider that brand & who consider the brand one of their favourites along with others – the top section of the map is the ideal position
 - **Awareness:** Plotted on the horizontal axis this shows the brands level of overall awareness in the market
 - **Growth Potential:** The bubble size depicts the relative level of consideration/willingness to buy a particular brand among those who have not bought that brand before

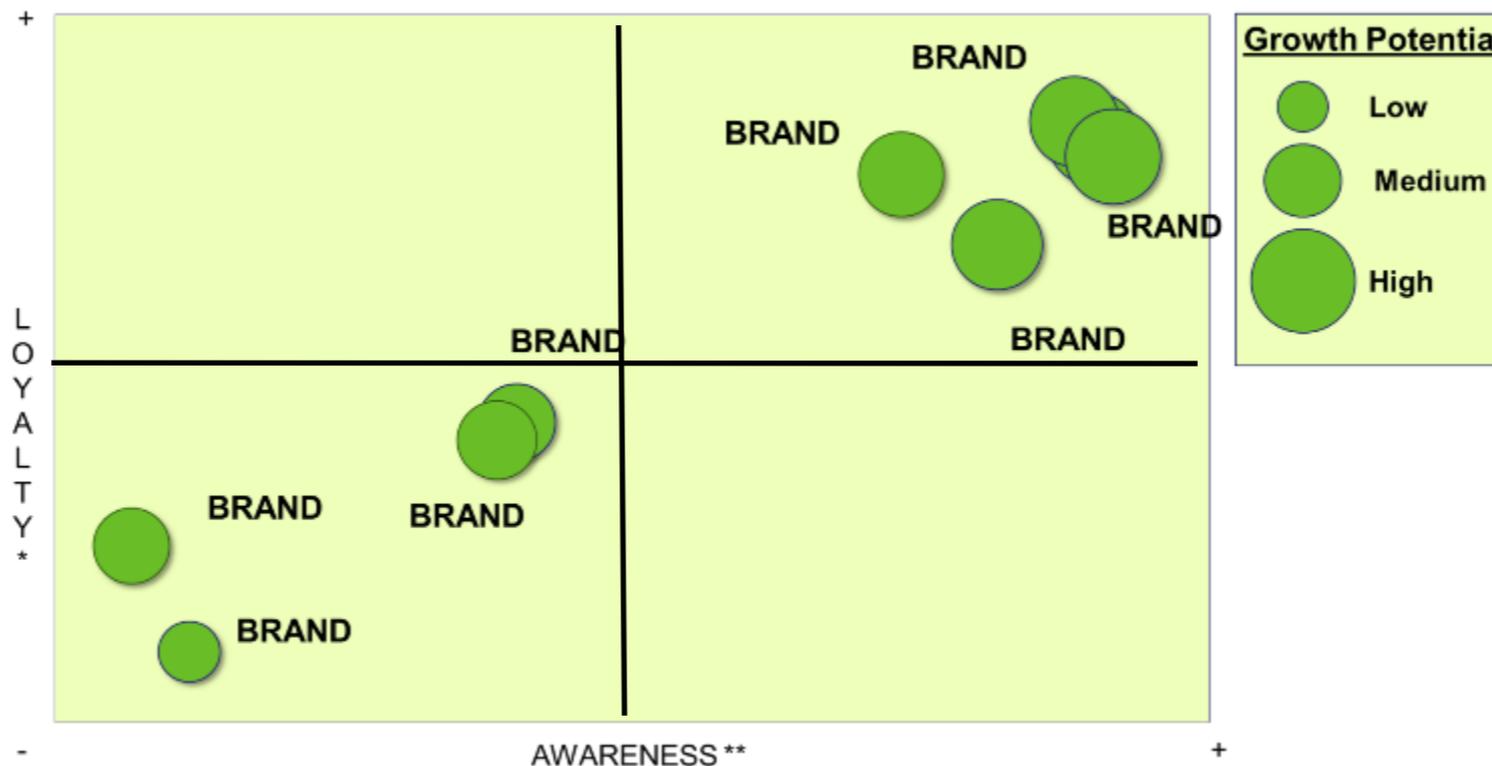
TOP LEFT:

- A small brand with a loyal consumer base
- A strong position particularly if growth potential is good
- Focus on distribution and trial driving

BOTTOM LEFT:

- Brands that have limited presence or loyalty among users
- Consider substantial investment and product development particularly if growth potential is low

Some Interpretive Guidelines



TOP RIGHT:

- An ideal position – well known favourites with strong loyalty
- Consider brand extension and product development if growth potential is limited

BOTTOM RIGHT:

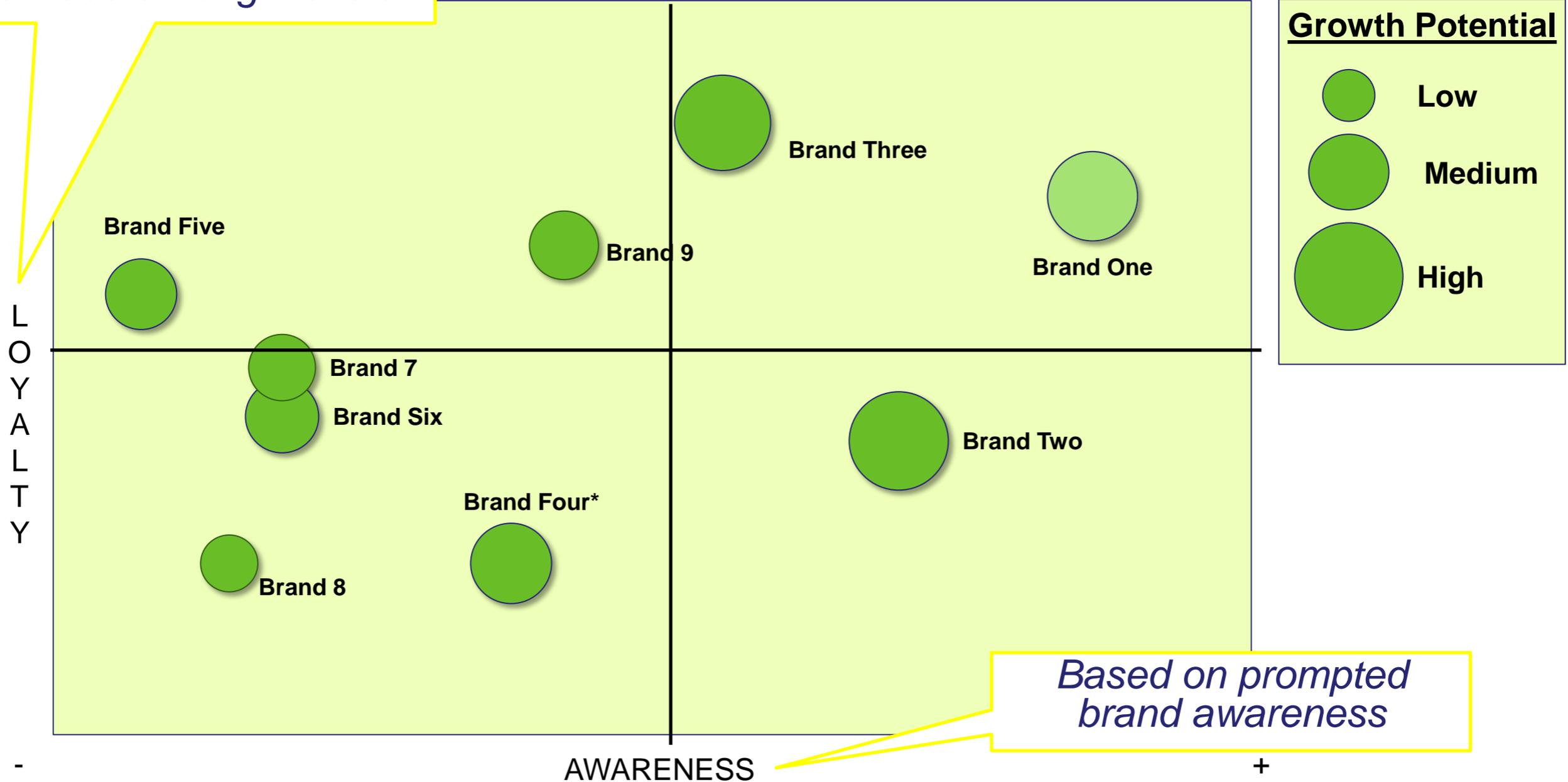
- Well known brands but with low loyalty
- Focus on added value and loyalty driving
- If Growth Potential is high focus on increased marketing support/brand building

*Based on % adorers & divided among trialists
** Based on prompted brand awareness

Brand Overview: - Example Output

(Base: All Regular Category Buyers n = 484)

Based on % adorers / divided among trialists



Based on prompted brand awareness

*CAUTION: Brand Four and Brand Six Small base size results indicative only

2015 Top Committed Consumers

What's this? These are the brands with the most committed consumers

- This is based on the percentage of **brand buyers** who ever bought the brand saying **it is the only brand or one of the only brands they would consider within their category**. As such all scores are in the context of the category to which the brand belongs.
- For example 86% of Mayonnaise consumers when buying Mayonnaise say Hellmann's is the only/one of the brands they would consider

Brand Name and Category	Adore/ Adopt	Rank
Hellmann's – Mayonnaise	86%	1
Flahavans Quick Oats range - Convenience Porridge/ Hot Cereals	82%	2
Heinz – Ketchup	80%	3
Twinnings - Speciality Tea	79%	4
Knorr - Dry Cooking Sauces	79%	5
Flahavans Progress Oatlets - Standard Porridge Oats/ Hot Cereals	79%	6
Chef - Brown Sauce	72%	6
Bonne Maman – Jams	78%	8
Keelings - Packed Strawberries	77%	9
Kelkin - Rice Cakes	77%	10
Lakeshore - Rapeseed Oil	77%	10
Donegal - Rapeseed Oil	77%	10

Private Label Name and Category	Adore/ Adopt	Rank
Mark & Spencers - Chilled Ready Meals	77%	1
Aldi "Oakhurst" - Frozen Beef Burgers	75%	2
Aldi "Glenfell" - Frozen Breaded Chicken	74%	3
Aldi Specially Selected – Honey	74%	3
SuperQuinn - Sausages	74%	3

**Note: Some small brands with <20% trial out of total grocery sample are omitted due to limited numbers of users*

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ELECTIVE QUESTIONS

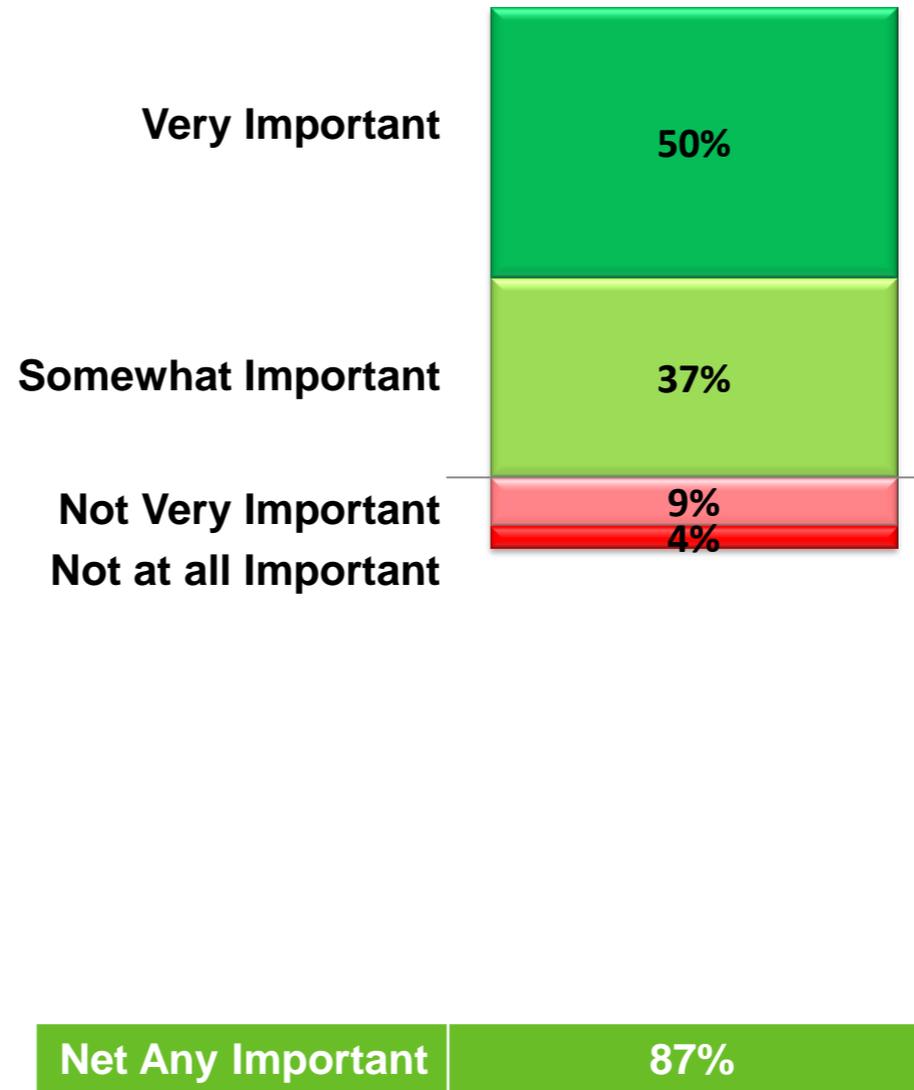
Bord Bia Quality Mark Importance- Example



Output 1

(Base: All Regular Category Buyers)

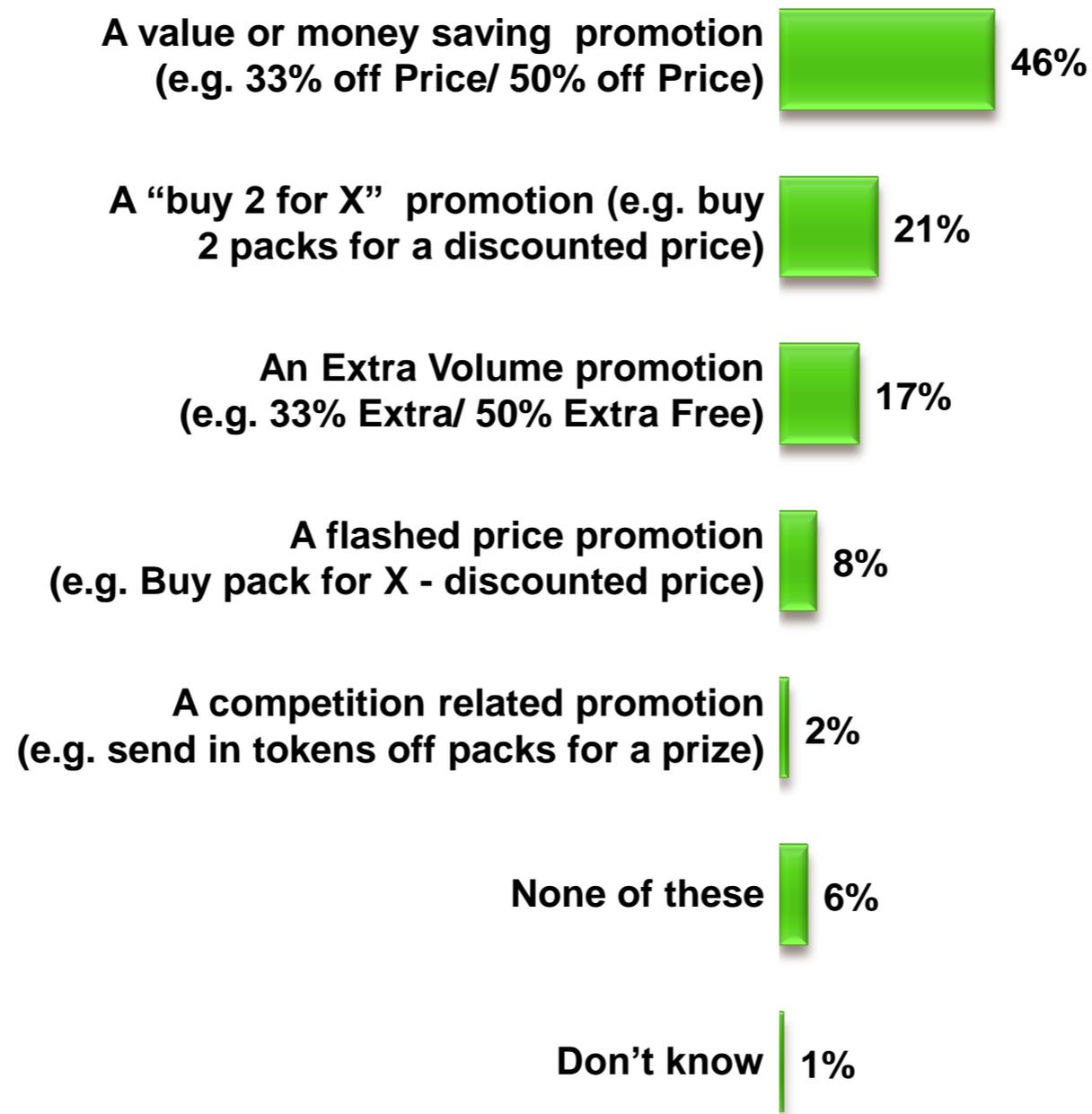
Q.13A When choosing brands of ____ how important, if at all, is it that the brand carries the Bord Bia Quality Mark assurance?



Elective Question – Example Output 2

(Base: All Regular Category Buyers n = 468)

Q.13 Which of the following promotions would be most likely to influence your purchasing decision when buying _____?



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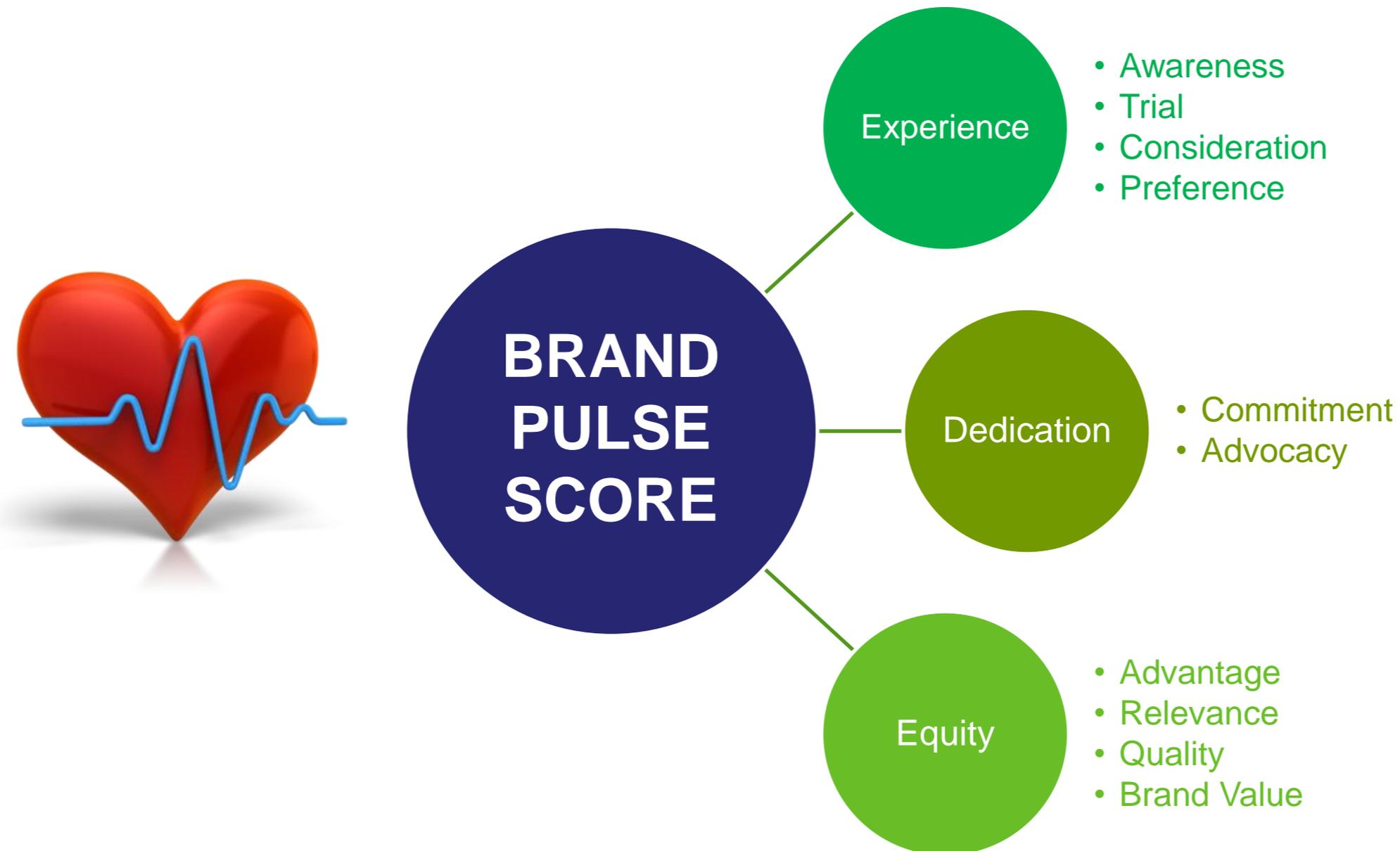
BRAND PULSE SCORE



A Composite View of Brand Health
Within its Category

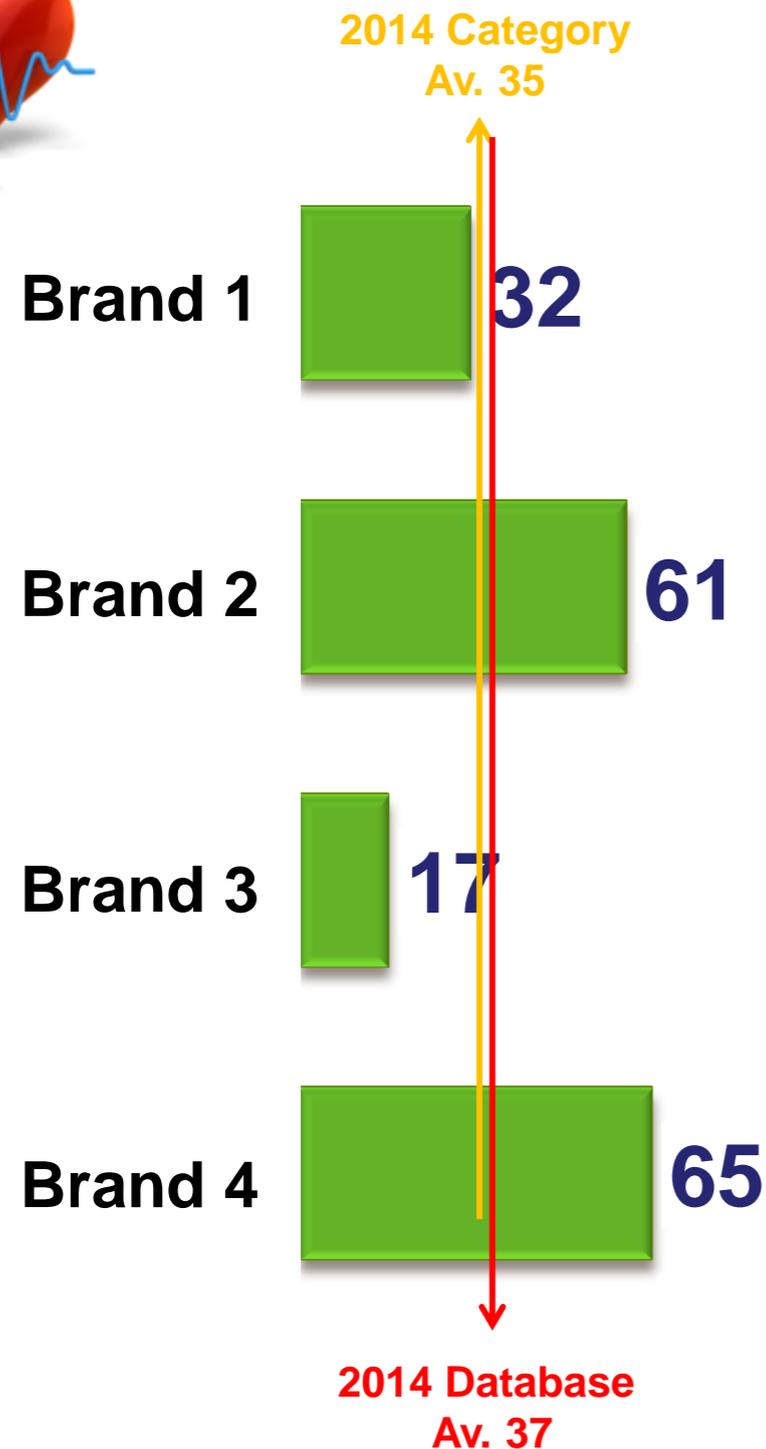
Brand Pulse Score (BPS)

- The **Brand Pulse Score** is a composite measure of a brand's health within its category. It is based on a weighting algorithm that emphasises metrics identified as being most impactful on a brand's performance using the following building blocks:



Brand Pulse Score

(Base: All Regular Category Buyers n = approx 500)



Rank Vs Category (Base: 8)	Rank Vs Database 2015) (Base:303)
3	175
2	18
8	286
1	9

2015 Top BPS



What's this? These are the brands with the strongest BPS scores reflecting their **strength within their categories**

Brand Name and Category	BPS Score	Rank
Hellmann's - Mayonnaise	77	1
Heinz - Ketchup	71	2
Flahavans Progress Oatlets - Standard Porridge Oats/ Hot Cereals	70	3
Flahavans Quick Oats range - Convenience Porridge/ Hot Cereals	69	4
Kelkin Rice Cakes Rice Cakes	68	5
Knorr - Dry Cooking Sauces	68	5
Dolmio - Pasta Sauce	67	7
Goodfella's - Frozen Pizza	66	8
Keelings - Packed Strawberries	65	9
Snax - Savoury corn, rice or maize snacks	65	10

Private Label Name and Category	BPS Score	RANK
Supermarket Own Label - Milk	59	1
Supermarket Own Label - Fresh Cream	53	2
Mark & Spencers - Chilled Ready Meals	52	3
Supermarket Own Label - Traditional Tea	50	4
Lidl - Frozen Vegetables	50	4

**Note: Some small brands with <20% trial out of total grocery sample are omitted due to limited numbers of users*

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SUMMARY AND FURTHER INFORMATION

Key Findings

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The Bottom Line:
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For Further Information:

Bord Bia's Brand Forum www.bordbia.ie/brandforum
or email: niamh.machale@bordbia.ie

Bord Bia's Published Consumer Insight & Market Research
<http://www.bordbia.ie/industryservices/information/publications/Pages/PublicationSearch.aspx>

Submit a Market Research Query, or for Access to Bord Bia's In-House Library of Market Research email Mairead.cassidy@bordbia.ie

Join our LinkedIn Group to receive automatic updates of Bord Bia's new research
http://www.linkedin.com/groups?gid=2191770&trk=myg_ugrp_ovr





ANY QUESTIONS?