

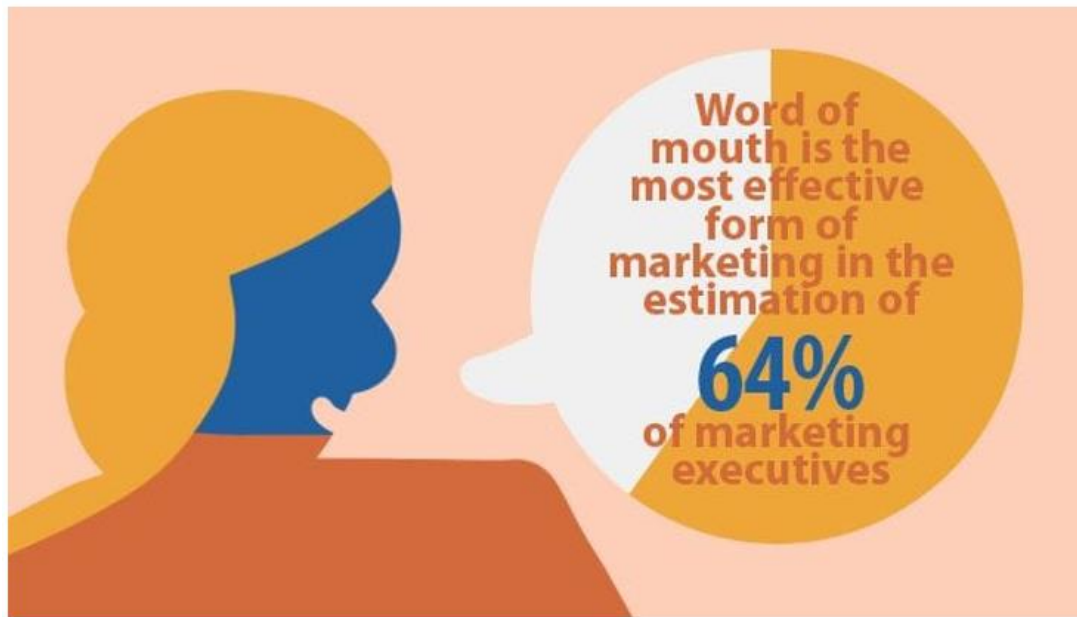
Power Tracker - YTD Nov 2020

mediarisk

&
HELLENIC RESEARCH HOUSE

Recommendations

Recommendations lead to sales. Word of mouth is the [most effective form of marketing](#) in the estimation of 64% of marketing executives.



Recommendations from friends and family are [more trustworthy](#) than all other forms of advertising to 92% of consumers, according to Nielsen.

Among the strongest digital trends in 2021



January 24, 2021

(More) digital trends for 2021: Influencer- and user-generated content

By Jeremy Goldman

Influencer- and user-generated content

In the year ahead, there will be a big pivot to more user-generated content in marketing. There's not a lot of original content being produced by advertising agencies because of the pandemic.

Power Tracker / Profile of the consumer survey

Ongoing survey conducted on monthly basis since October 2020.

Method: Online/CAWI interviews by employing structured questionnaire. Respondents were drawn by HRH's proprietary on line panel consisting of more than 12k panellists.

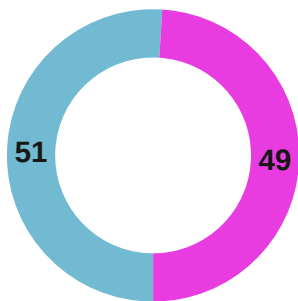
Target group: males & females aged 25-54, category users*, nationwide.

Sample Size YTD Nov20: n=1.430.

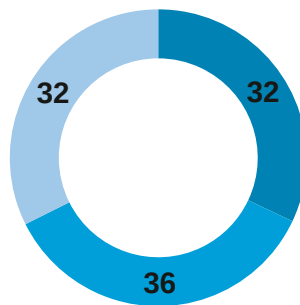
*category users = household decision makers of energy supplier.

Demographics

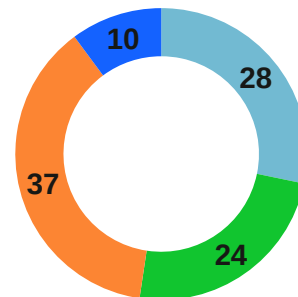
YTD Nov20 n=1.430



Male
Female



25-34
35-44
45-54



Northern Greece
Central Greece
Attiki
Aegean islands/Crete

Power Tracker - Energy Companies / Contents

Basic Measures

Intention to recommend – NPS

Special Analysis (CATA, BEST-WORST)

BASIC MEASURES

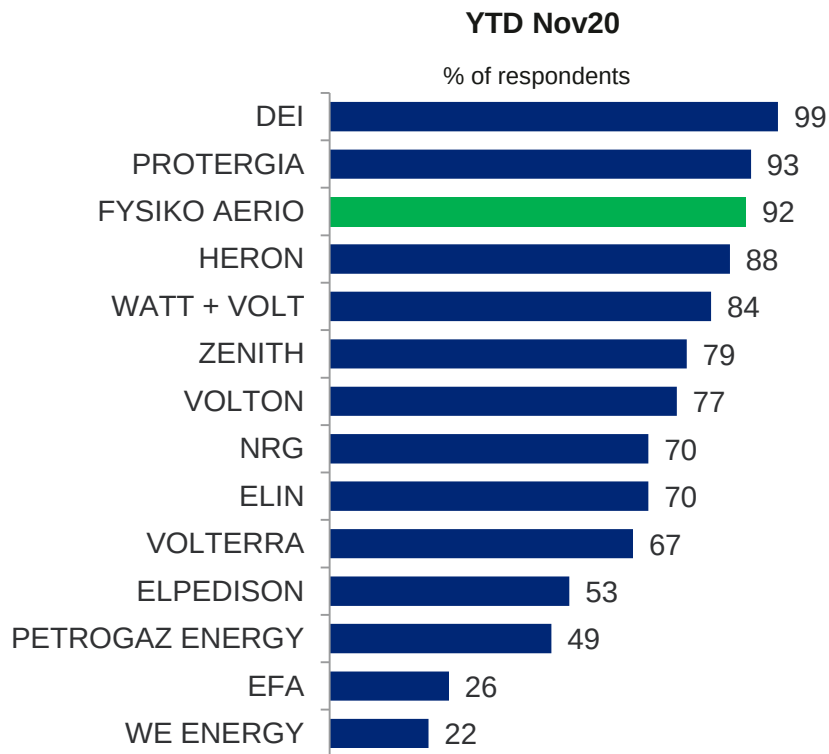
Awareness | Top of Mind, Total spontaneous, Total Awareness

Usage | Current users, Lapsed, Prospects, Rejecters

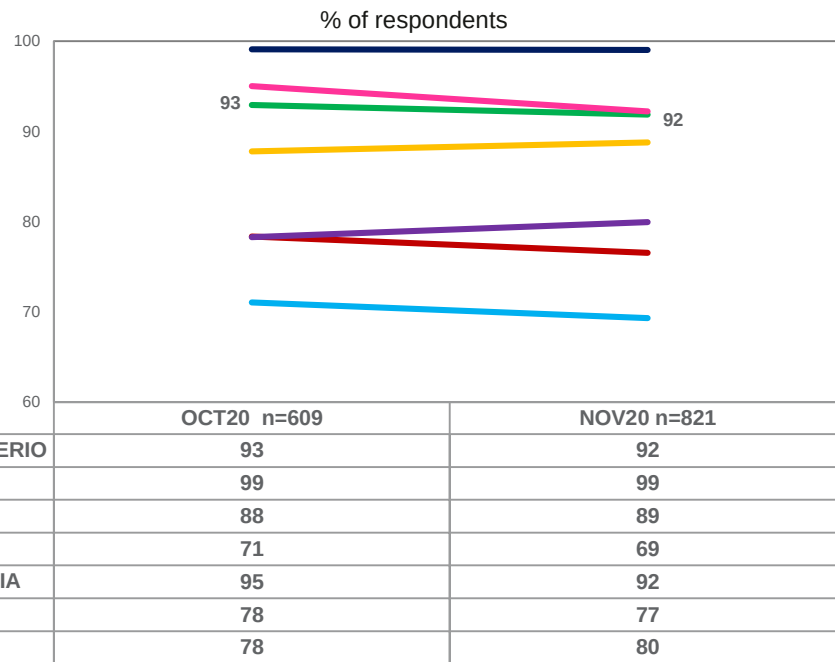
Consideration

Brand Image

Awareness : Total (unaided & prompted)

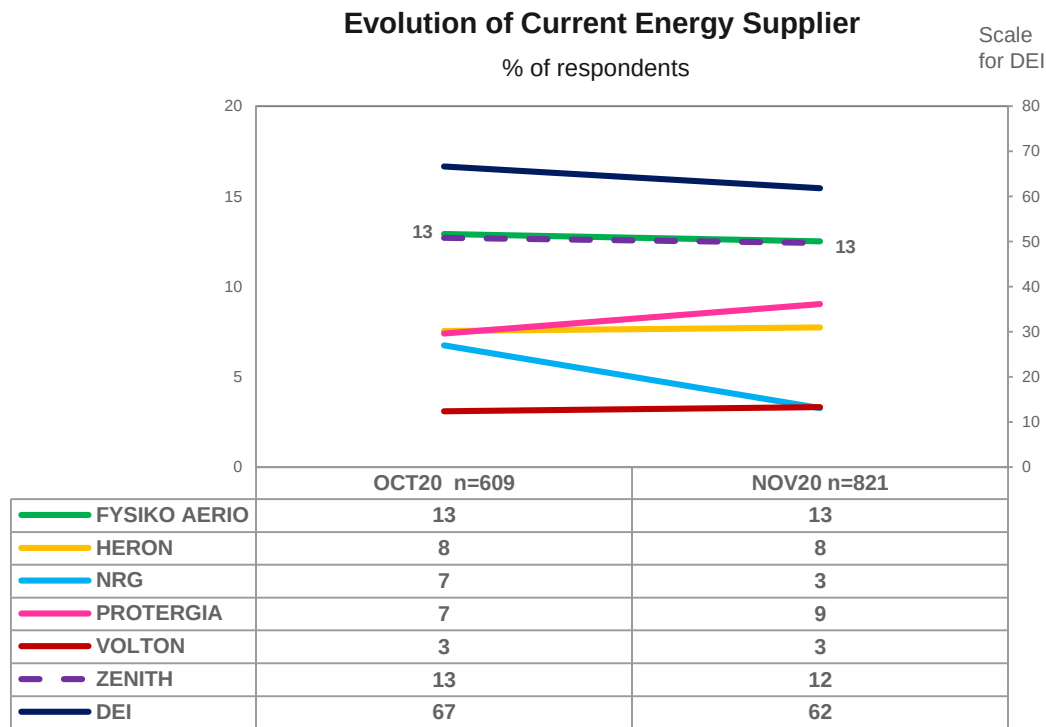
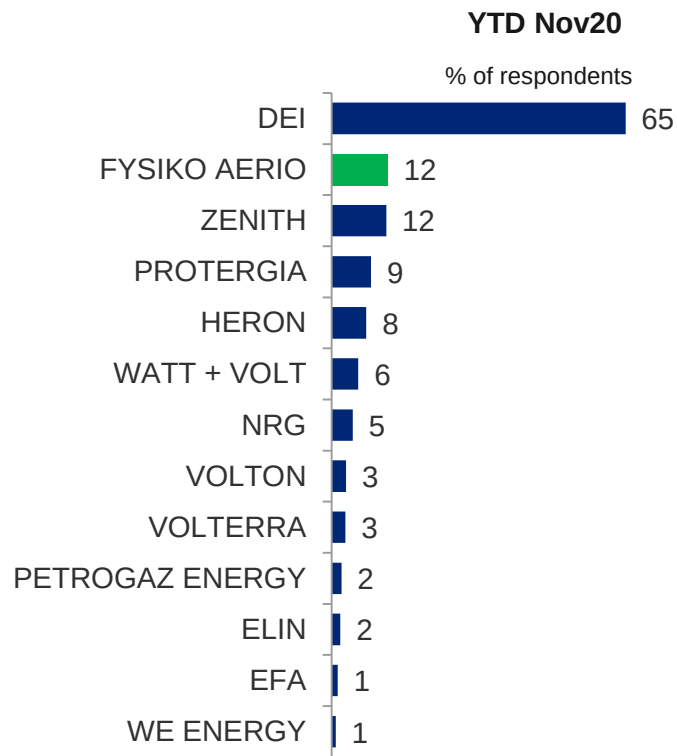


Evolution of Total Awareness



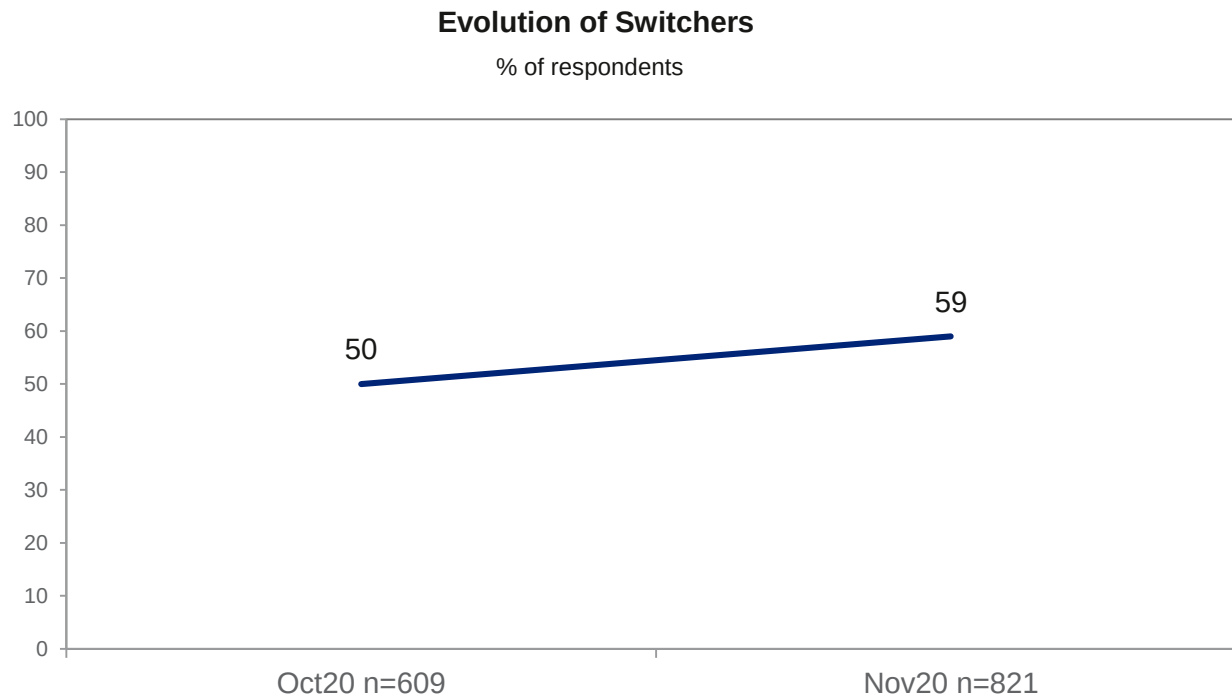
Base: category users, YTD Nov20 n=1.430

Usage : Current energy supplier at home/country house



Base: category users, YTD Nov20 n=1.430

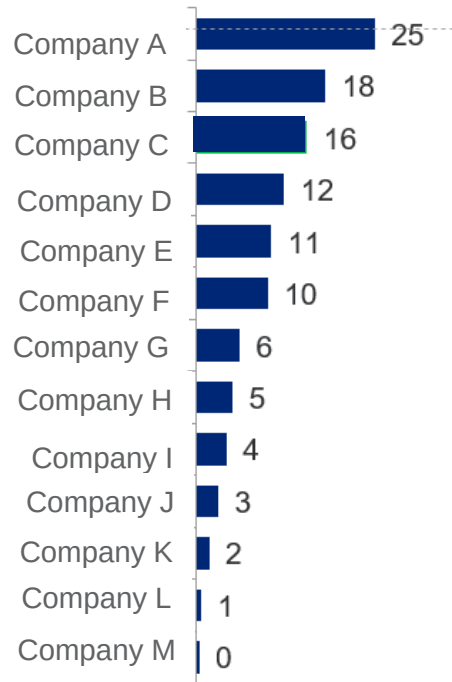
Intention to change energy supplier (very likely/likely)



Consideration : Energy supplier more likely to switch to / would consider switching if they were to

YTD Nov20

% of respondents



Base: category users, YTD Nov20 n=1.430

INTENTION TO RECOMMEND - NET PROMOTER SCORE (NPS)-Energy Companies

What is NPS

Intention to recommend

NPS by Company

NPS by consumer group

Brand image by NPS segment

Net Promoter Score / How it is calculated

The NPS is calculated based on the question:

How possible is it for you to recommend a friend or relative the brand X;»

Not at all possible

Extremely possible



- **Promoters** (grades 9-10) are loyal, advocates, who will continue to buy and recommend the brand, fueling its growth.
- **Passives** (grades 7-8) are satisfied but not enthusiastic customers, vulnerable to price offers.
- **Detractors** (grades 0-6) are dissatisfied customers. who can damage the brand's reputation & hinder growth through negative feedback.

NPS (Net Promoter Score) = % Promoters - % Detractors

Intention to Recommend & NPS

NPS : 3

NPS weighted average: -19.9

YTD Nov20
% of respondents

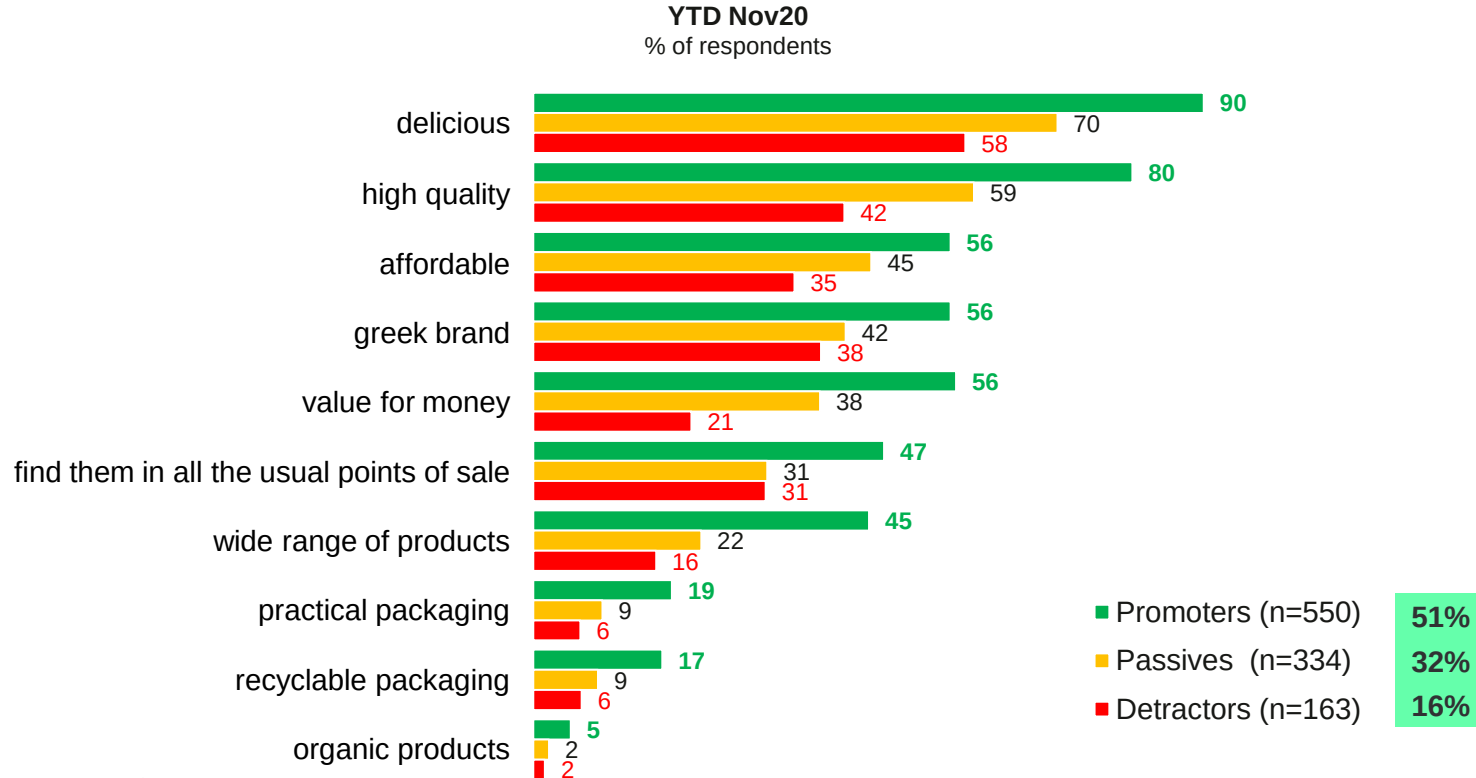


Not at all possible

Extremely possible

Base: Current users or lapsed of Fysiko Aerio n=300

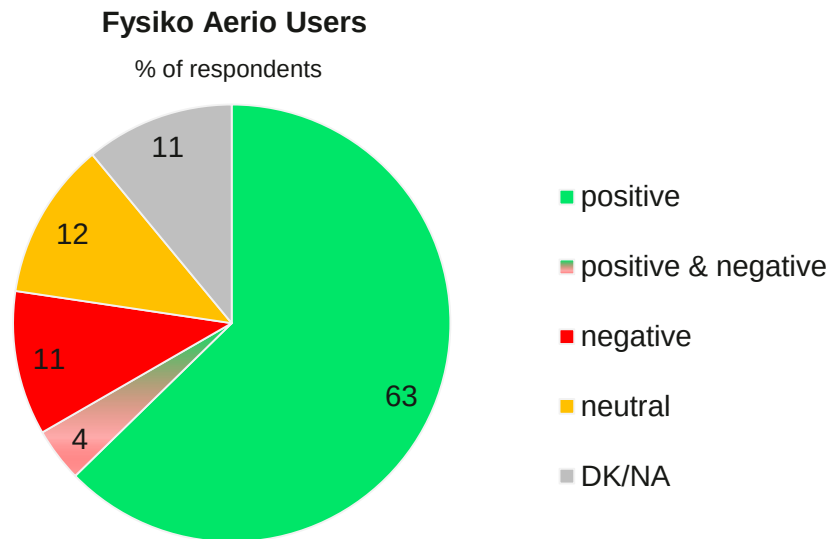
Brand “X” Image : Promoters vs Passives vs Detractors



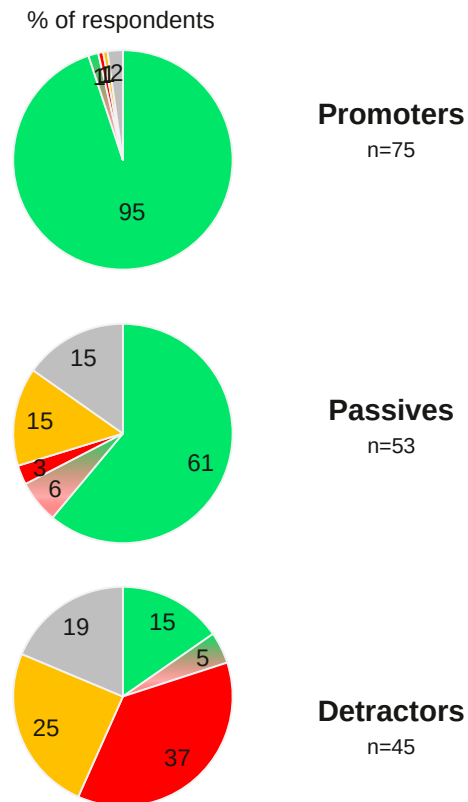
Base: Those having bought the brand in the last year – YTD Nov20

Q. Which of the following attributes do you think fit.....?

Sentiment



Base: Nov20 n=173



Q. What is the main reason you say that for Fysiko Aerio (Likelihood of recommending/ not recommending)?



Είναι φθηνότερη εταιρία παροχής ενέργειας.
Είναι οικονομική και φιλική προς το περιβάλλον.
Έχει πολύ καλή εξυπηρέτηση κοινού.

Promoter

Υπάρχουν πλέον πάροχοι με πολύ ανταγωνιστικές τιμές και συνδυαστικά πακέτα με ρεύμα, πολύ συμφέροντα.

Detractor

Εγκαταστάσεις, Εξυπηρέτηση, τιμολόγιο

Promoter

Έπρεπε να έχουν μεγαλύτερο δίκτυο

Detractor

Μόλις άλλαξα την σύνδεσή μου στην εταιρεία αυτή.
Φαίνεται καλή και από φίλη μου που την έχει, έχει μείνει ικανοποιημένη.

Promoter

ΕΙΜΑΙ ΕΥΧΑΡΙΣΤΗΜΕΝΗ ΑΠΟ ΤΗΝ ΚΑΘΑΡΙΟΤΗΤΑ ΤΟΥ ΠΕΡΙΒΑΛΛΟΝΤΟΣ ΠΟΥ ΕΧΕΙ ΕΠΙΤΕΥΧΘΕΙ ΜΕ ΤΗ ΧΡΗΣΗ ΦΥΣΙΚΟΥ ΑΕΡΙΟΥ ΚΑΙ ΑΠΟ ΤΗΝ ΕΩΣ ΣΤΙΓΜΗ ΠΑΡΟΧΗ. ΘΑ ΗΘΕΛΑ ΝΑ ΓΙΝΕΙ ΣΥΜΦΕΡΟΤΕΡΟ ΑΠΟ ΟΙΚΟΝΟΜΙΚΗ ΠΛΕΥΡΑ ΤΟ ΤΙΜΟΛΟΓΙΟ ΤΟΥΣ

Promoter



Γιατί ενώ είναι καλή και αξιόπιστη, υπάρχουν πιο οικονομικές επιλογές και κυρίως γιατί η εξυπηρέτηση πελατών είναι χάλια, δεν τους βρίσκεις ποτέ, σου λένε θα καλέσουν πίσω όταν έχεις ένα αίτημα/πρόβλημα και δεν καλούν ποτέ, κλπ

Είμαι πελάτης τους, αλλά δεν έχω δει κάποια ουσιαστική μείωση στο λογαριασμό μου.

Έχει και πακέτο για ασφάλεια περιεχομένου στο σπίτι

Ανταγωνιστές τιμές

Είναι πολύ οικονομική

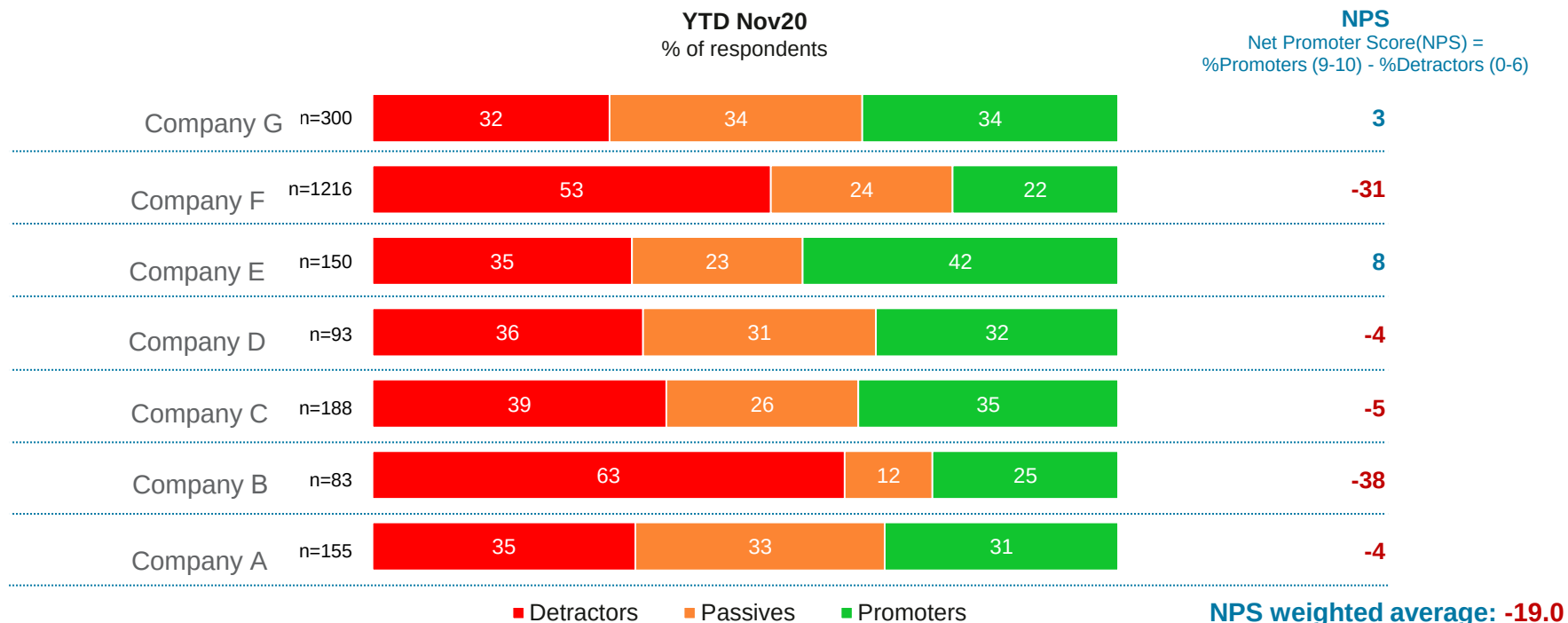
Θα επιθυμούσα μικρότερες χρεώσεις!

Έχει υψηλές τιμές.

Είναι εμπιστοσύνης και η πρώτη εταιρεία που βγήκε στην αγορά

ΚΑΛΗ ΕΤΑΙΡΕΙΑ ΑΛΛΑ ΣΤΗΝ ΕΠΙΚΟΙΝΩΝΙΑ, ΕΙΤΕ ΤΗΛΕΦΩΝΙΚΑ ΕΙΤΕ ΔΙΑ ΖΩΣΗΣ ΧΡΗΣΕΙ ΒΕΛΤΙΩΣΕΩΝ..

Intention to Recommend & NPS



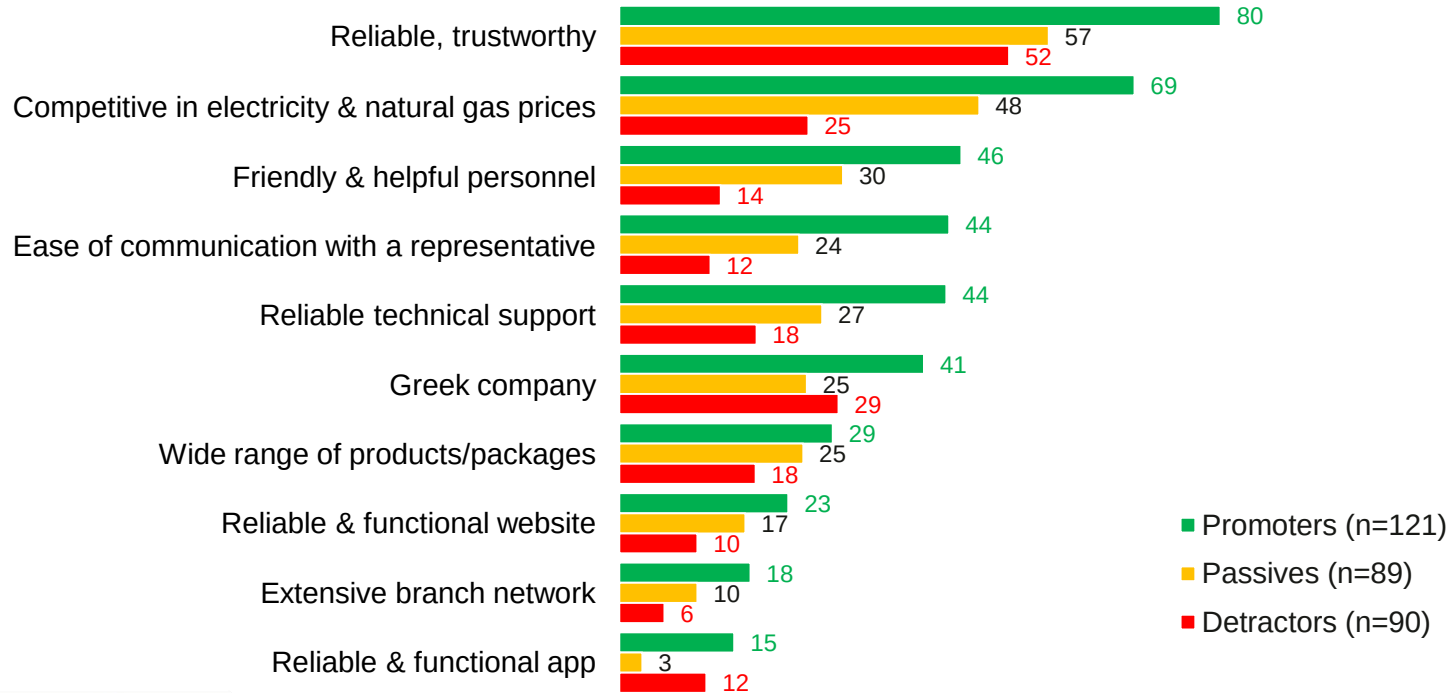
Brand Image

YTD Nov20

	Company A	Company B	Company C	Company D	Company E	Company F
BASE:						
	%	%	%	%	%	%
Reliable, trustworthy	64	62	55	57	64	66
Competitive prices for electricity & natural gas	48	13	64	57	58	50
Greek company	32	42	18	11	23	8
Friendly & helpful personnel	30	11	26	29	33	20
Reliable technical support	30	30	18	15	21	18
Ease of communication with a representative	27	18	32	26	34	23
Wide range of products/packages	24	11	31	18	38	23
Reliable & functional website	17	15	30	20	31	17
Extensive branch network	11	40	10	3	12	15
Reliable & functional mobile app	10	7	18	21	27	11

Brand Image, Company X : Promoters vs Detractors and Passives

YTD Nov20
% of respondents



SPECIAL ANALYSIS – Energy Companies

What is **BEST-WORST** experiment

Results from BW

What is CATA methodology

Results from CATA

BEST- WORST (Max-Diff)/ The experiment

A BWS experiment involves the revealed elicitation of product attributes that drive consumer preference for a product in a way that imitates as realistically as possible the attribute-related trade-off that consumers undergo in their decision making in a retail setting.

Respondents see a number of attributes in combinations and are asked to choose from each combination the 'more' and the 'less' important attribute. The process is repeated so that the attributes are displayed in a specific order & frequency. The BWS' outcome is the ranking of the characteristics from the most to the least preferred. The ranking is done using special software and reveals the characteristics-drivers of the purchasing preference. The important thing in this technique is the choice of attributes and the combinations design.

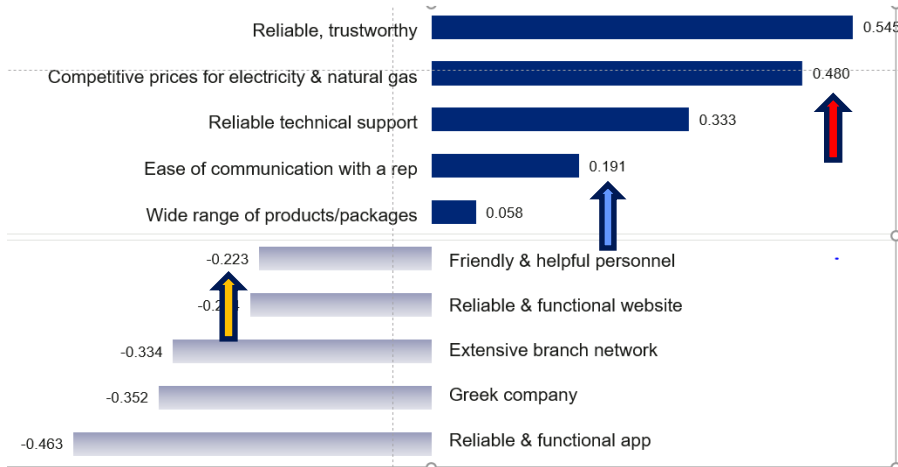
Less important		More important
○	Preferred brand of my company	○
○	Good price	○
○	Nice taste	○

Advantages of BWS over a simple ranking or a traditional rating scale.

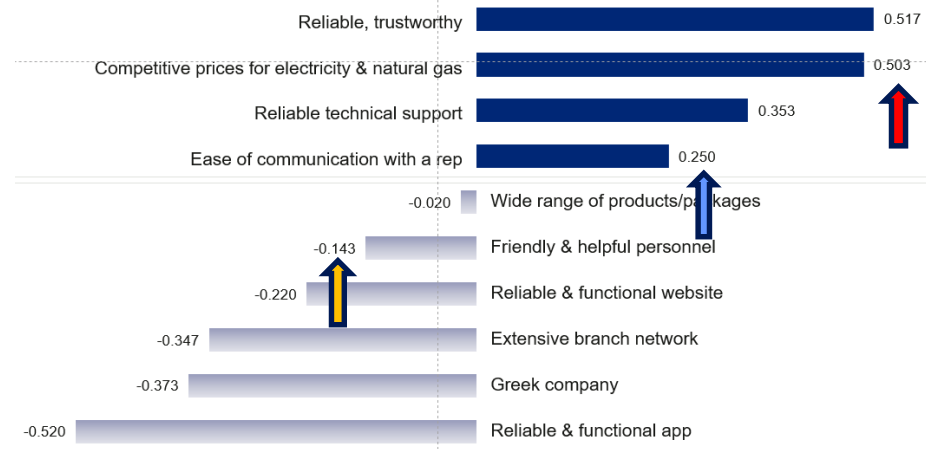
- ✓ Always generates discriminating results by forcing people to choose a Best and a Worst option
- ✓ People are good at identifying extremes but less accurate when evaluating items of similar importance
- ✓ It provides elicited rather than stated attribute ranking
- ✓ BWS questionnaires are relatively easy for most respondents to understand and answer, even with long list of attributes to be evaluated
- ✓ It eliminates scale use bias and the results are not subject to cultural differences.

Purchase Drivers :

Total Category



Brand X promoters



CATA / The methodology

Check-all-that-apply (CATA) questions have widespread use in market research. A typical CATA question asks the respondent to assign a number of characteristics/descriptors to a brand/product and looks something like this, repeated for the number of brands being evaluated:

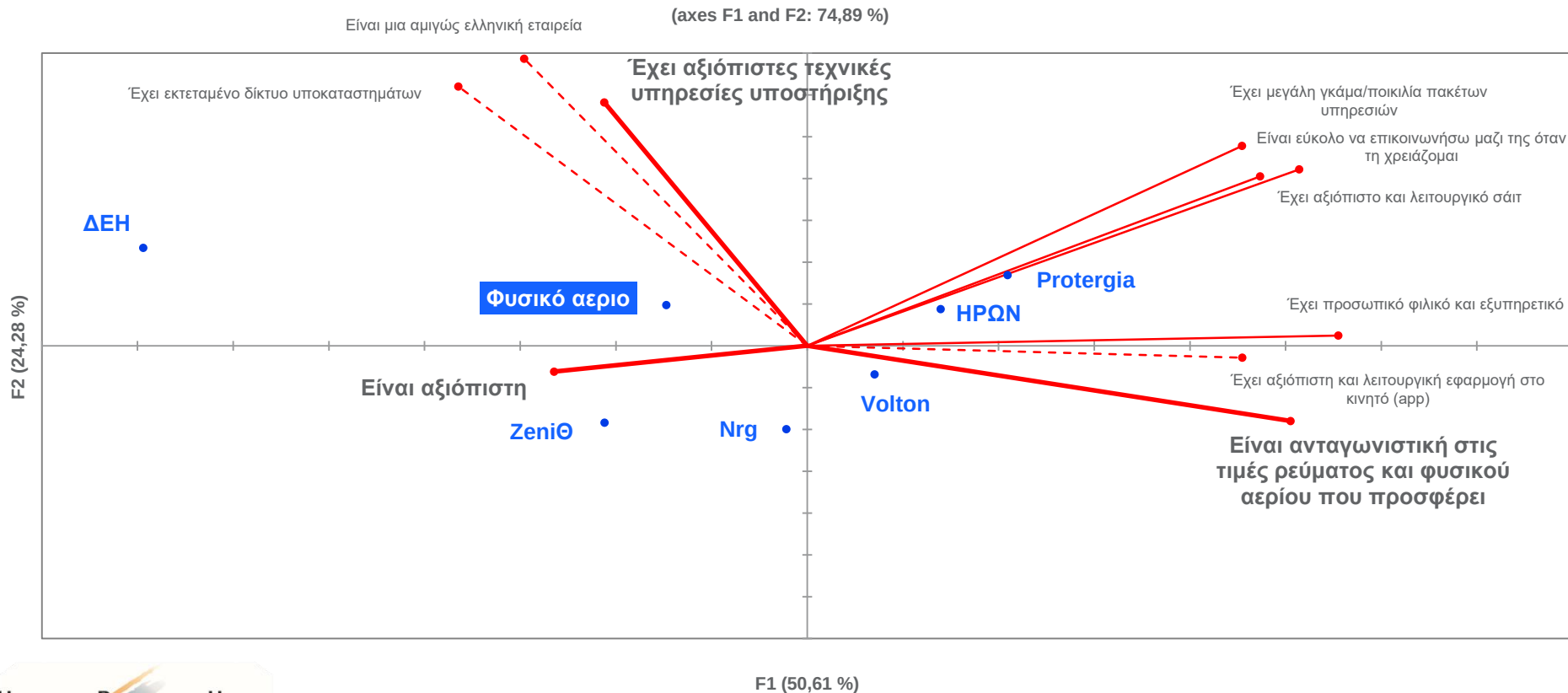
Q: Please check all of the characteristics listed below that you feel apply to Brand 1.

☐ Reliable	☐ Accessible	☐ Specialized	☐ Supportive
☐ Trustworthy	☐ Rare	☐ Available	☐ Friendly
☐ Expensive	☐ Prestigious	☐ Innovative	☐ Responsive

The data obtained can be used to create a perceptual map by first calculating the utility scores (coefficients) of each product for each descriptor. The map is a way to visualize association between brand/product and characteristic/descriptor by showing the relative positions of the different descriptors in a multi-dimensional space. Please note that the axes themselves do not have a literal meaning and all calculations are based on relative distances, rather than absolute positions. The closer any two descriptors are in this space the more related they are in the respondents perception and the closer a brand is to a descriptor the more this descriptor applies to the brand. Typical outputs are shown in the following slides.

CATA analysis

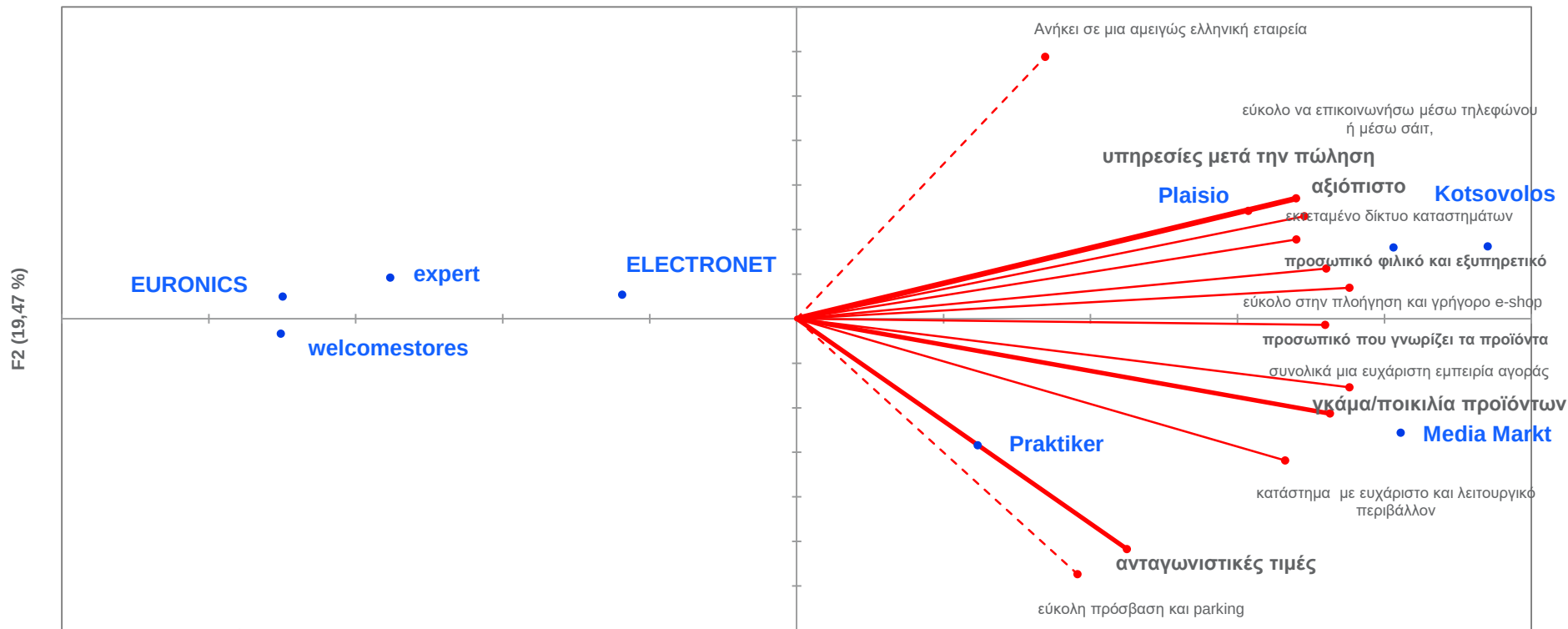
Total, n=1.364



CATA analysis

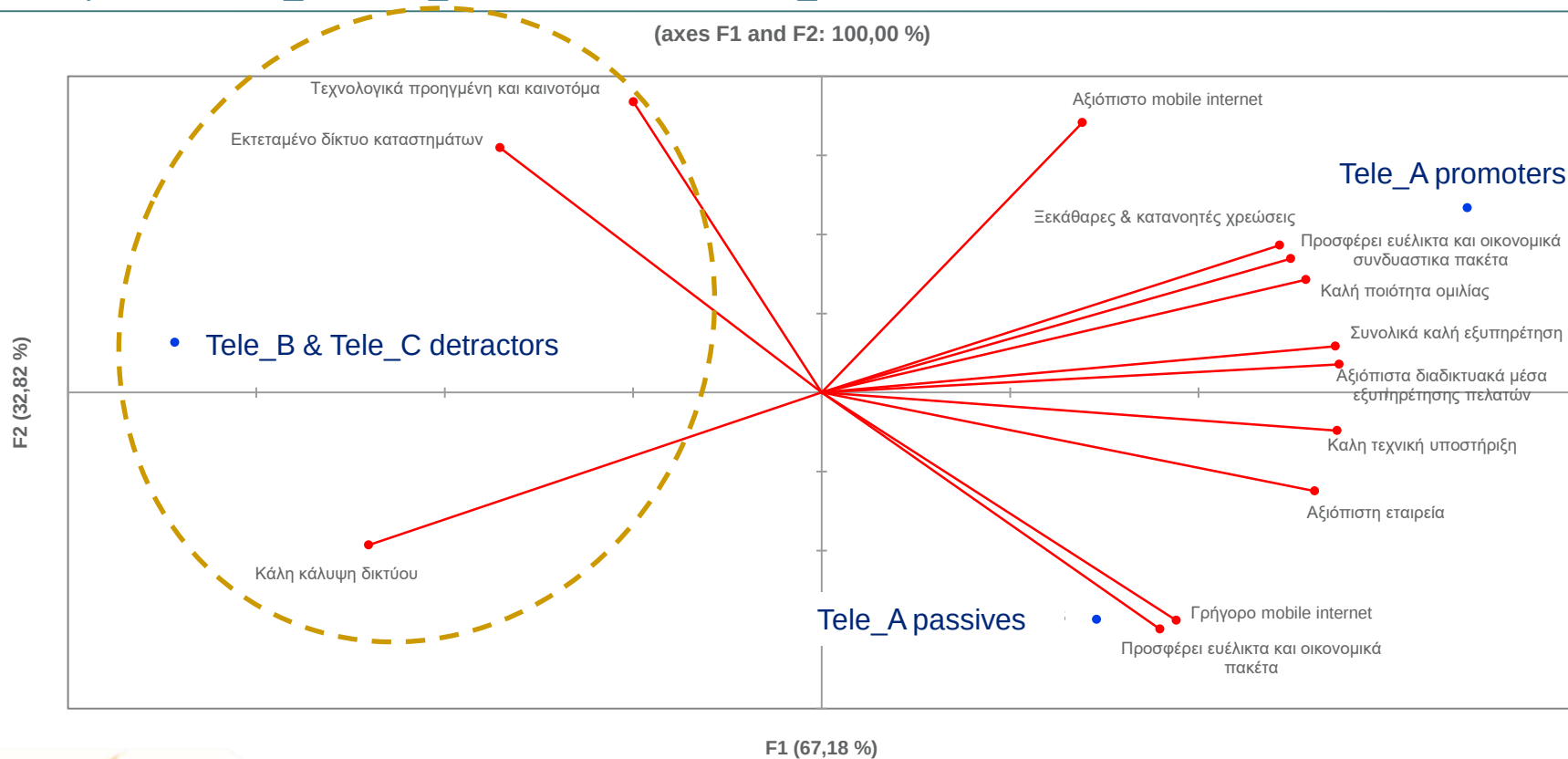
Total, n=1.204

(axes F1 and F2: 87,65 %)



Κινητή τηλεφωνία – Tele_A promoters & passives vs Tele_B & Tele_C detractors

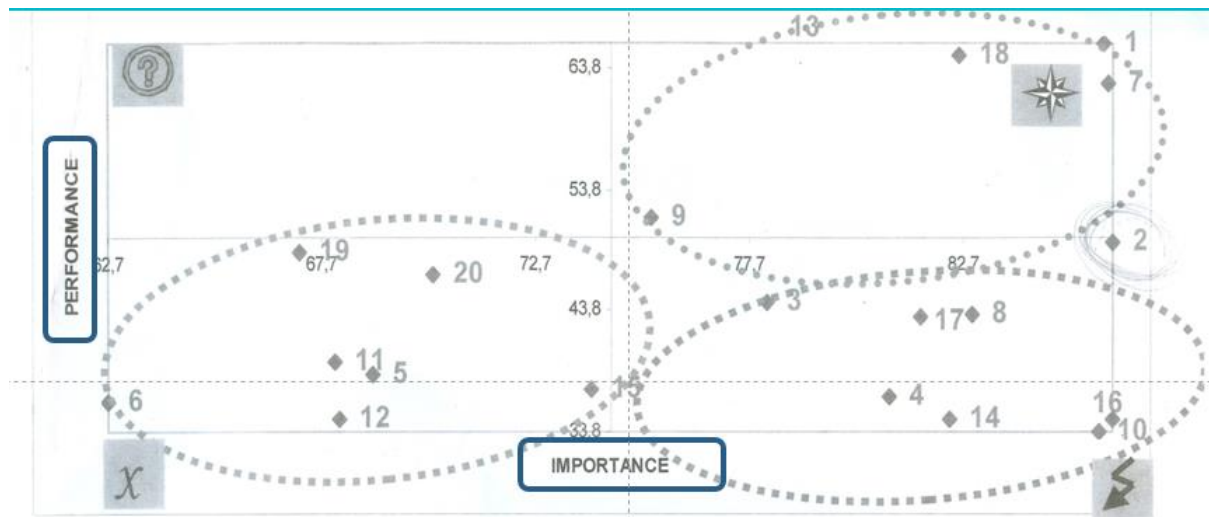
Perceptions of Tele_B & Tele_C detractors about Tele_A



Επανεπίσκεψη

BEST- WORST ATTRIBUTE (Max-Diff)

A Bank's map from the past, example of expected results



1. WIDE BRANCE
2. WELL EDUCATED STAFF
3. ADVICE FOR ALL SERVICES
4. GOOD TERMS
5. GOOD ENVIROMENT
6. CONTEMPORARY WAYS OF TRANSACTION
7. TRUSTWORTHY
8. ADAPT TO CUSTOMER NEEDS
9. WIDE VARIETY OF PRODUCTS
10. FAST SERVICE IN STORES

1. CONSTANTLY LAUNCH NEW PROD.
2. PERSONAL RELATIONSHIP WITH MANAGER
3. GREEK BANK
4. FAST AND EASY PROCEDURES
5. INFORM ME ABOUT NEW PROD.
6. INFORM IN DETAIL ABOUT PROD.
7. FRIENDLY STAFF
8. PRESTIGE
9. GLOBAL COVERAGE
10. LEAD THE MARKET

Θα μπορούσαμε τώρα να τους προσεγγίσουμε?

› Δύο διαδρομές:

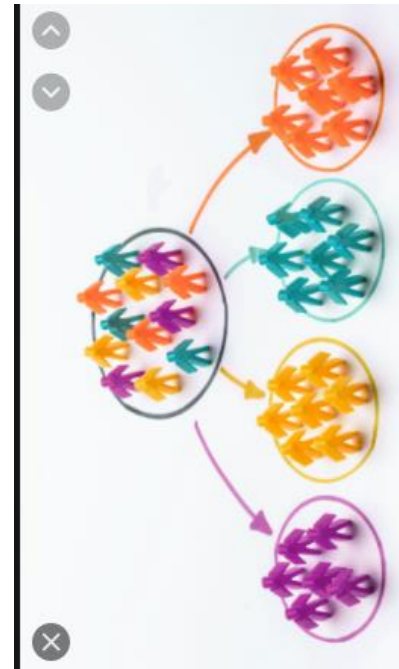
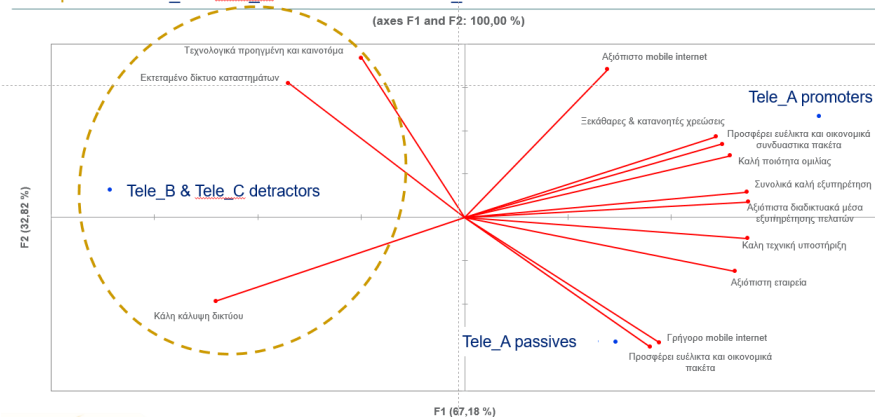
› CONTEXTUAL Targeting

› Στην έρευνα, δείγμα “GDPR compliant”, να εντοπίσουμε patterns συμπεριφορών και να παραχθούν ευρύτερα

Similar audiences

Παράδειγμα: Προσεγγίζοντας τους Passives. Και όσους μη-πελάτες είναι αρνητικοί προς τους τηλε-παρόχους που έχουν σήμερα: Attributes

Κινητή τηλεφωνία – Tele_A promoters & passives vs Tele_B & Tele_C detractors
Perceptions of Tele_B & Tele_C detractors about Tele_A



Άνθρωποι με ίδια δημογραφικά, έχουν πολύ διαφορετικά αξιακά συστήματα. Πχ Εγώ vs. Εμείς

Social Participation

- Contributing
- Social causes
- Helping and healing
- Volunteering
- Affirmation
- Social responsibility
- Taking part

Personal Expression

- I
- Me
- Different
- Unique
- Provocative
- Rejection of constraints
- Protest

Κάθε segmentation γίνεται πιο αποτελεσματικό, όσο περισσότερα διαφοροποιά στοιχεία εντοπίζουμε.

Deliverables:

NPS, CATA & IMPORTANCE MAP



Ορισμός των TGs και attributes/αξιών που θα φέρουν τα καλύτερα.

ΔΙΑΦΗΜΙΣΗ ΣΤΗΝ TV



Μηνιαίος έλεγχος αν τα KPIs κινούνται σωστά. Αν ναι, έχουμε optimum Πίεση, Κάλυψη, Affinity? Δηλ. Media

ΔΙΑΦΗΜΙΣΗ ΣΤΑ DIGITAL



Υποομάδες του TG και πιο εξατομικευμένα μηνύματα (activations).

FUTURELAB

We make customer-centricity happen ... profitably!



Οι συνεργάτες μας απο Βέλγιο που ειδικεύονται σε τέτοια projects.

Ποιοι είναι οι Promoters?

Οι συνεργάτες Futurelab έχουν βρει ότι συνήθως υπάρχουν περισσότερες από μία “Promoter personality”.

Πχ, μία πολύ γνωστή μάρκα αυτοκινήτων στη Γερμανία, έχει τρείς:

- Evangelists
- Experts
- Want to be Influencer

Το ζητούμενο: Πως ενεργοποιείς την κάθε μία.

Συνδέοντας με FUTURELAB expertise:

- Προφίλ των Promoters & Passives ➡ εντοπίζουμε τα κανάλια προσέγγισής τους.
- Να προσδιορίσουμε ποια καταστήματα θα μεγιστοποιήσουν τα give-away promos.
- Ποια από τα καταστήματα μίας αλυσίδας
- Ποια “drivers of recommendation” / ποια προσαρμογή του μηνύματος.
- Σε βάθος ανάλυση για το πραγματικό “value proposition”, το “γιατί μας αγοράζουν” το “σαν τι” μας παρουσιάζουν όταν μιλάνε για εμάς.
- Δεύτερο επίπεδο: Έρευνα NPS και στους λιανεμπόρους. Floor & managers. Η στάση τους έχει κρίσιμη σύνδεση με την τοποθέτηση, την προώθηση και τις πωλήσεις μας.

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Cyprus in Media Auditing