

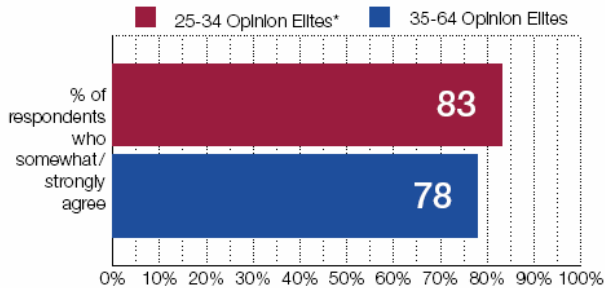
FUTURELAB

Net Promoter Score® Romania – Benchmark studies

July, 2009

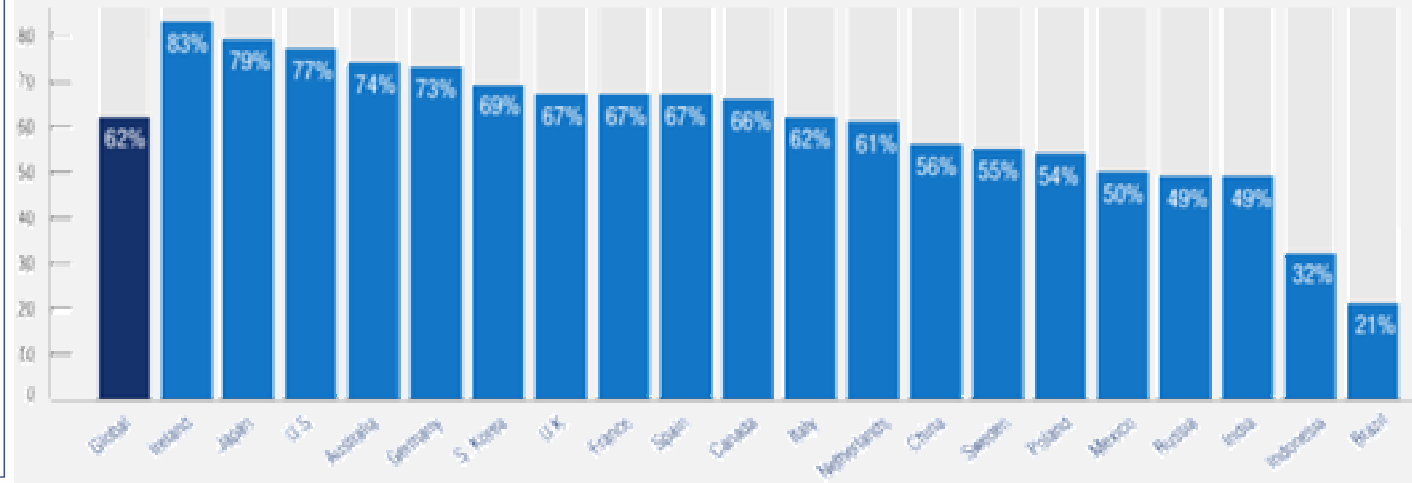
All Ages Trust Word of Mouth

You are much more likely to believe what you see, read, or hear about a company if someone you know has already mentioned it to you. Do you agree or disagree?



* Statistically higher than comparable age group at the 95% confidence level
 Source: Edelman Trust Barometer, 2009

% of people who trust companies less in 2009 than in 2008



When it comes to company information, a “peer” is as credible as an industry analyst and only preceded by an “expert”

Source: Edelman Trust Barometer, 2009

Word-of-Mouth is the #1 influence on business-to-business buying decisions

Source: Keller Fay, 2006

Nearly 70% of consumers surveyed thought that pharmaceutical information from peers was credible and believable, even if the peers were not experts.

Source: Keller Fay, July 2008

The Power of Recommendation



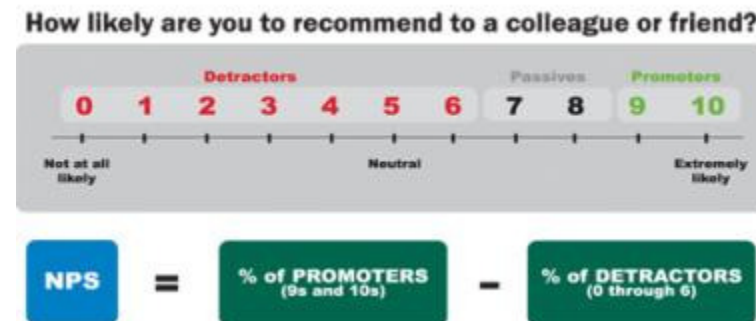
How can we measure the value of recommendation?

What is the Net Promoter Score (NPS)?

The Net Promoter[®] score allows you to categorize customers into three groups based on their willingness to recommend your company or product to a friend or colleague:

- **Promoters** (score 9–10) are loyal enthusiasts who will keep buying and refer others, fueling growth.
- **Passives** (score 7–8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- **Detractors** (score 0–6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

Calculating Your Net Promoter Score



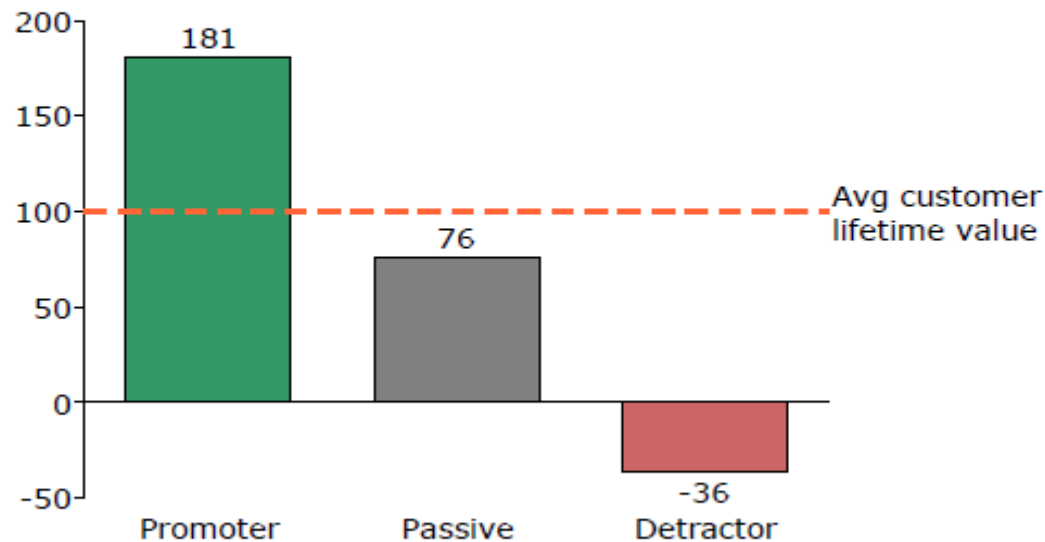
One question provides the best predictor of customer loyalty for the vast majority of businesses: How likely is it that you would recommend (Company/Product X) to a friend or colleague? Using a 0 to 10 scale, you can calculate your Net Promoter Score (NPS) by taking the percentage of Promoters, and subtracting the percentage of Detractors.

NPS is a straightforward metric that holds companies and employees accountable for how they treat customers. When combined with appropriate diagnostics and follow-up actions, it drives improvements in customer loyalty and enables profitable growth.

The Power of Recommendation

TurboTax: Economics of Promoters, Passives, and Detractors

Lifetime customer value (NPV)



BOS WOMMA Handout 31

This information is confidential and was prepared by Bain & Company solely for the use of our client; it is not to be relied on by any 3rd party without Bain's prior written consent.

Net Promoter Score™ is a registered trademark of Bain & Company, Satmetrix and Fred Reichheld.

Promoters make you more money

- They spend more
- They negotiate less
- They stay longer
- They are easier to service
- They upgrade quicker

-...

Slide: Bain & Company, official NPS(tm) presentation Fred Reichheld.

The Power of Recommendation

What is ?

The Idea

- A simple but robust solution for communication efficiency evaluation
- Fast answer, diagnostic design
- Allows the pre & post evaluation approach after the campaign has been started
- Client can buy as much waves as needed
- Syndicated tool – great value for money

Most Appropriate When

- Time pressure/quick results
- Rapid evaluation of a certain situation/movement in the market
- Past evolution assessment
- Needed benchmarks (not available yet)
- Low budgets/smaller brands

Monitored Markets

- Plain Yogurt
- Fruit Yogurt
- Margarine
- Chocolate bars or chocolate wafers
- Chocolate (tablets)
- Coffee (R&G)
- Processed meat
- Cooking oil
- Still water
- Sparkling water (carbonated water)
- Nectar and Natural Juice 100%
- Still drinks
- Tooth Paste
- Shower Gel
- Shampoo
- Dishwashing
- Detergent
- Gas station
- Banks
- Analgesics

Methodology

- Telephone interviews, random sample
- Monthly collection
- **1,000 contacts for each market**, only category users selected
- Urban, 14-65 (except alcohol, insurance and banking which is 18-65)

Output

- Category Incidence
- Consumer Profile
- **KPI's:** Awareness (TOM, Spontaneous), Trial, Usage, Preference, Heard of, Intention to Buy
- Conversion Rates
- Targeting Evaluation

Net Promoter Score Benchmarking

Industry: Consumer Products

Country: Romania

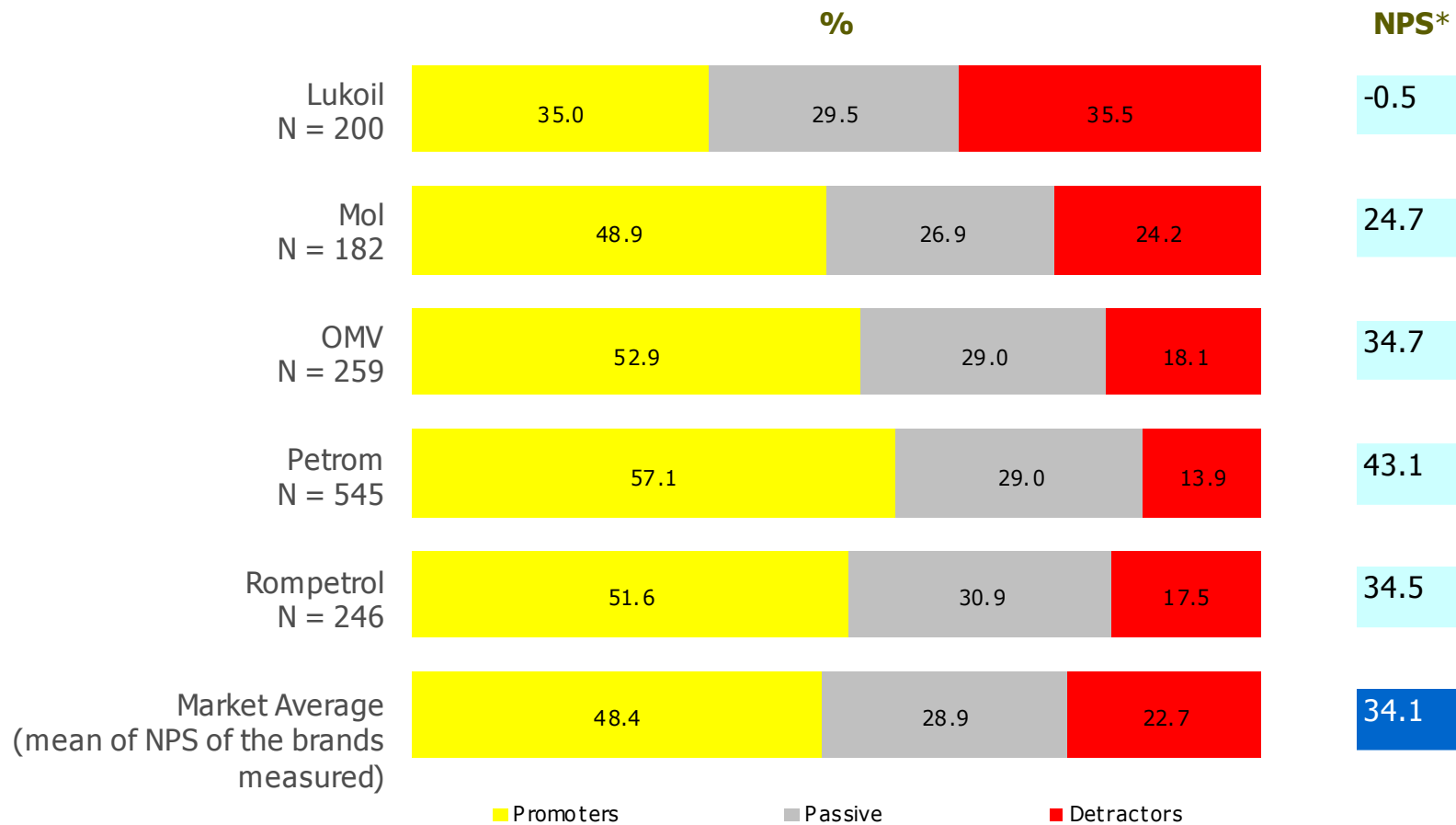
Net Promoter Score

Conducted by:



The Net Promoter (tm) Score is a registered trademark of Fred Reichheld, Satmetrix and Bain & Company

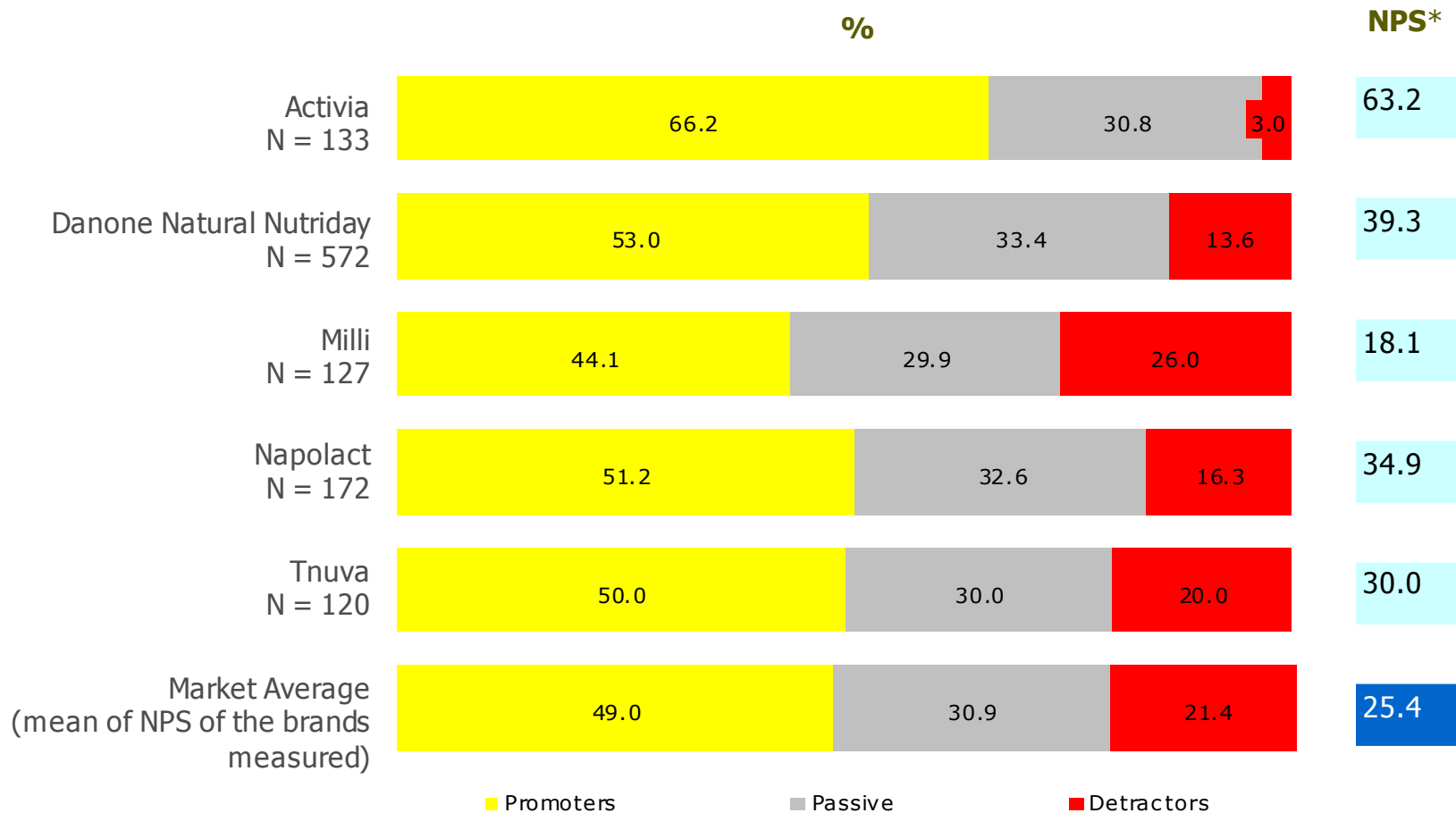
Gas Station: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

Plain Yoghurt: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

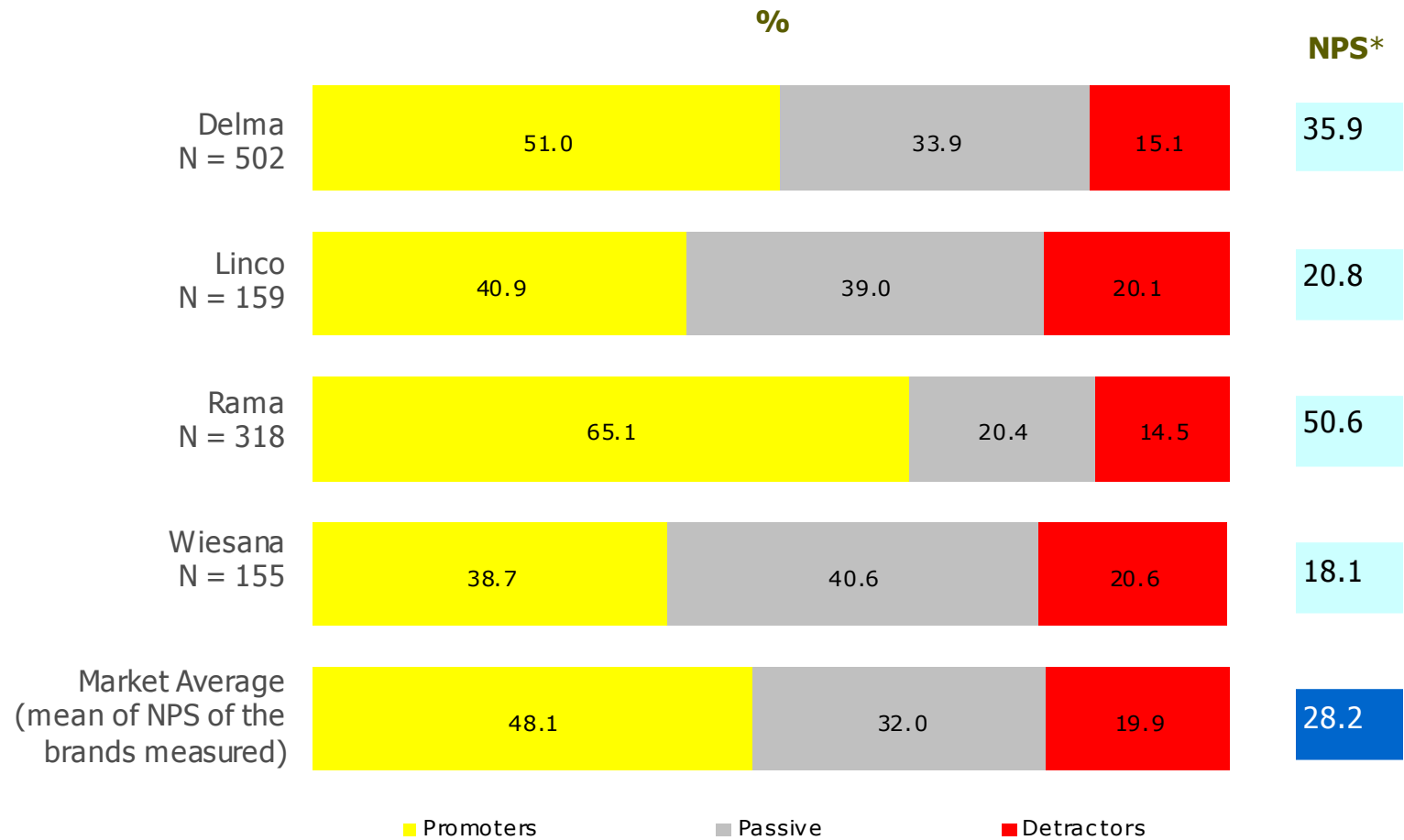
Fruit Yoghurt: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

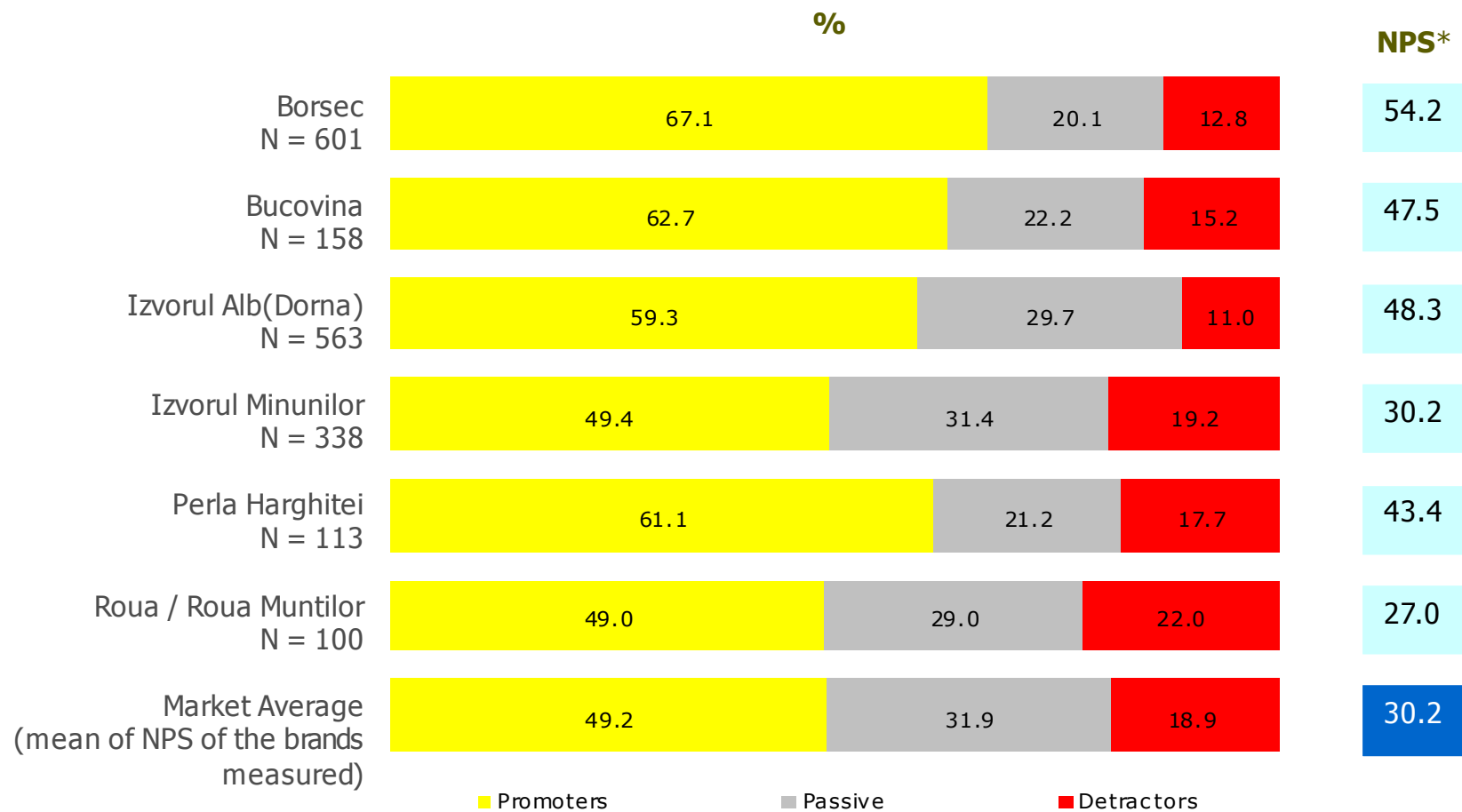
Margarine: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

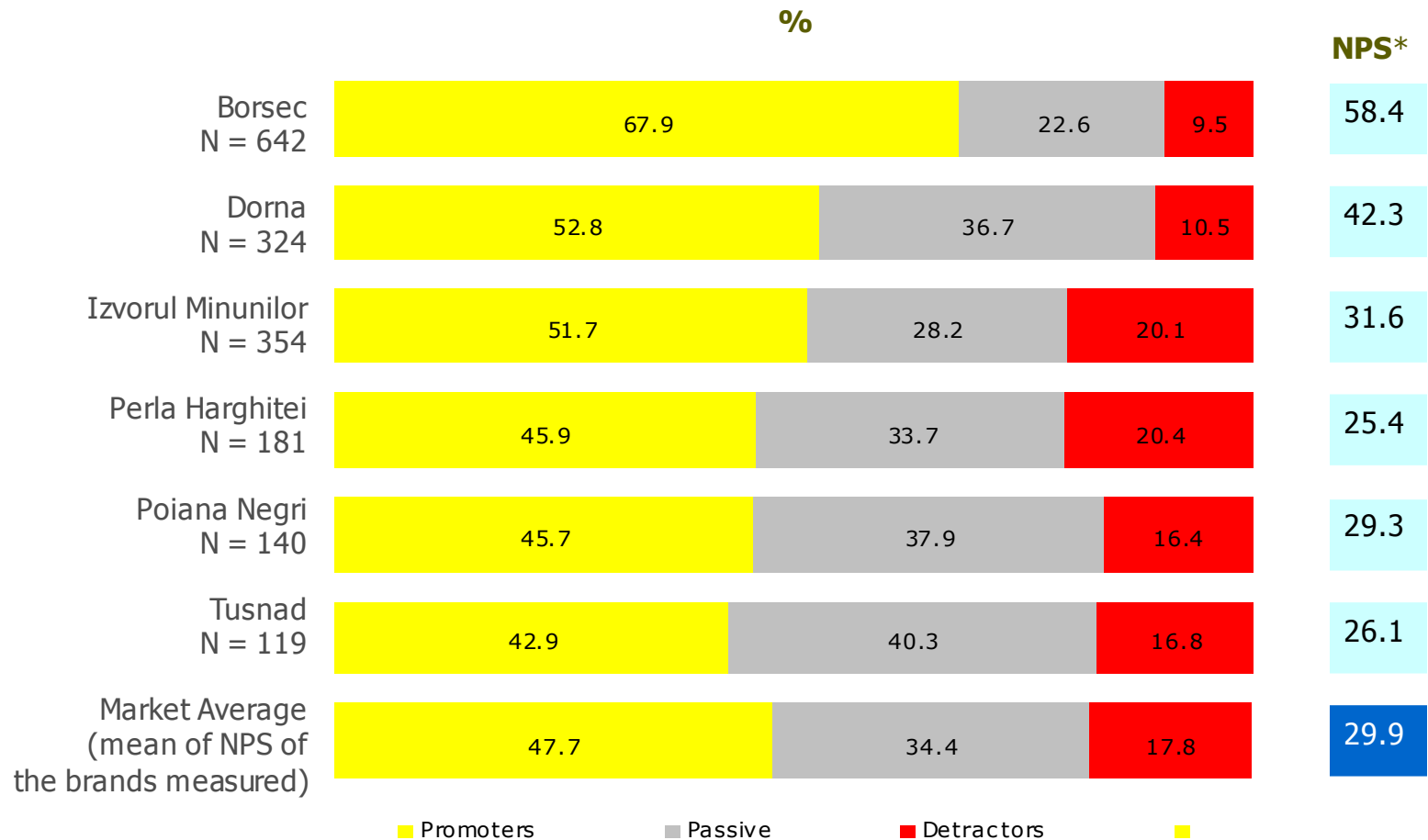
Still Water: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

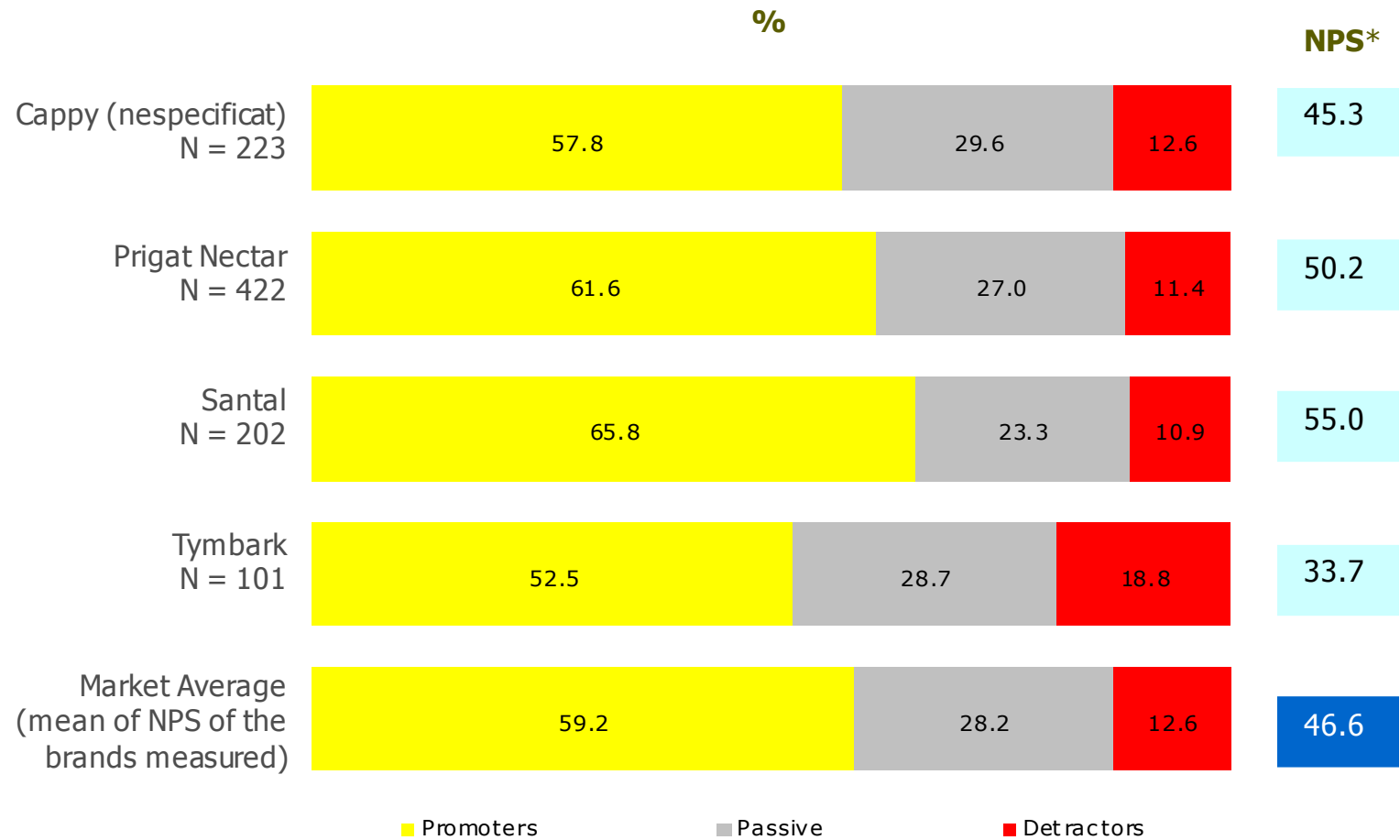
Sparkling Water: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

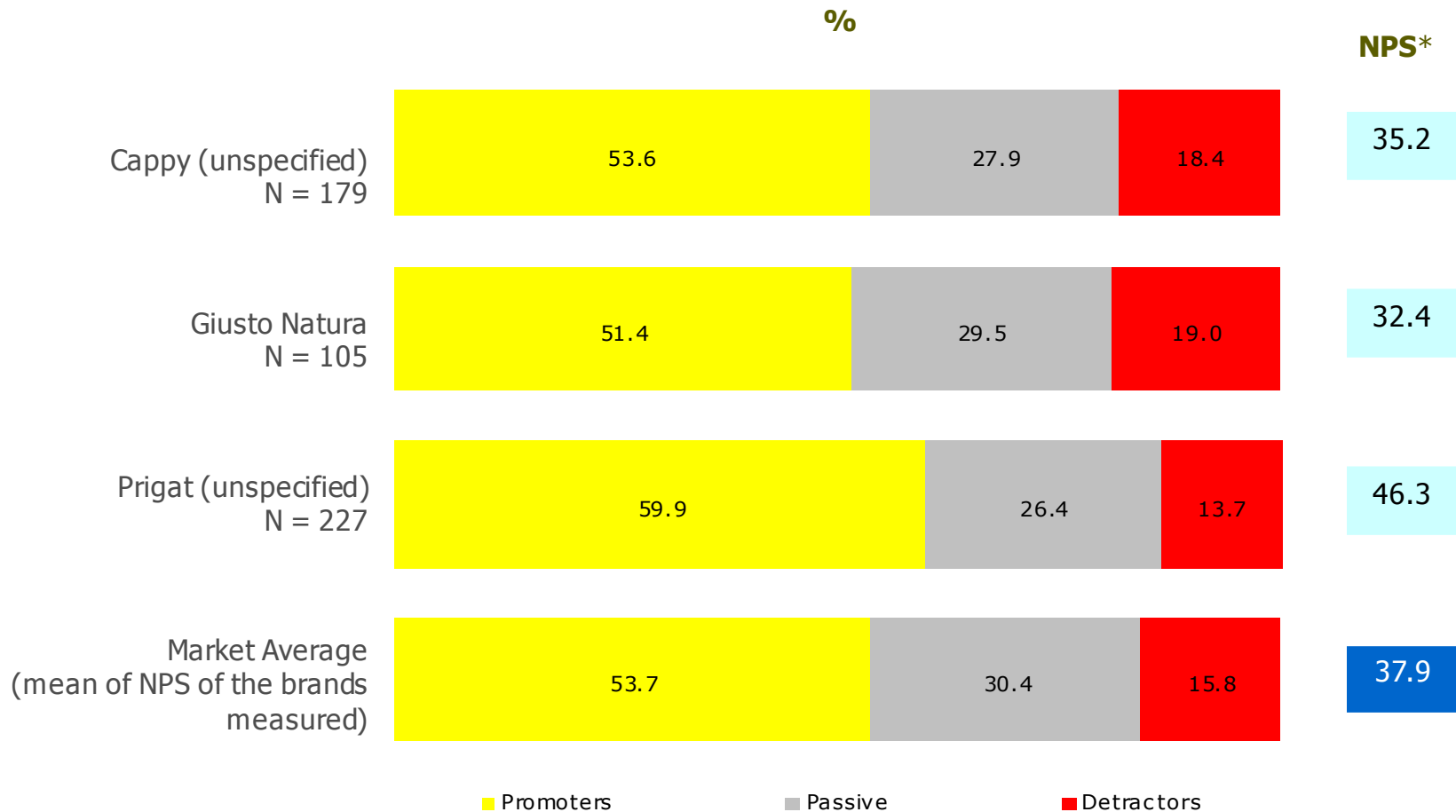
Nectar and Natural Juice 100%: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

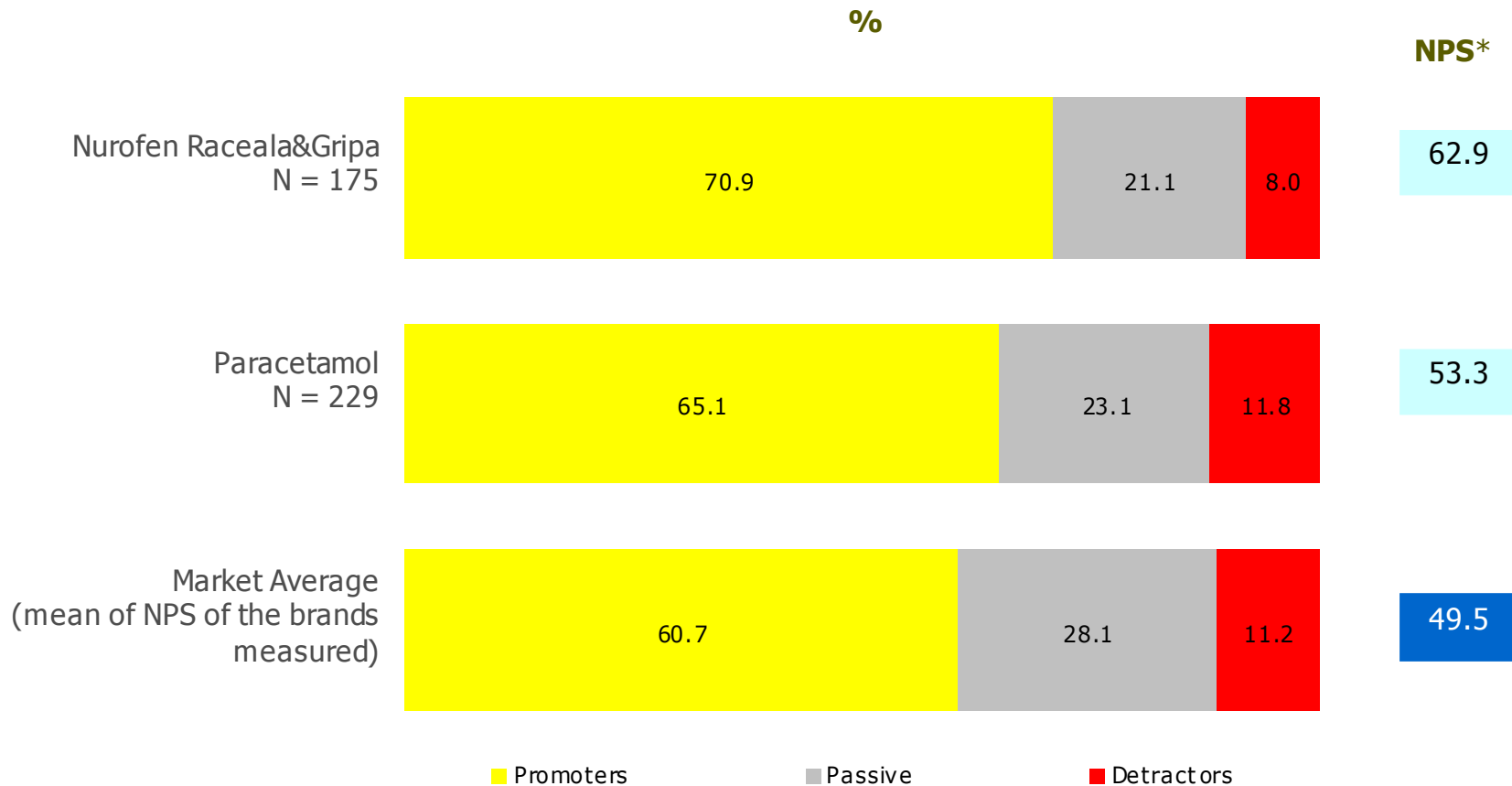
Still Drink: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

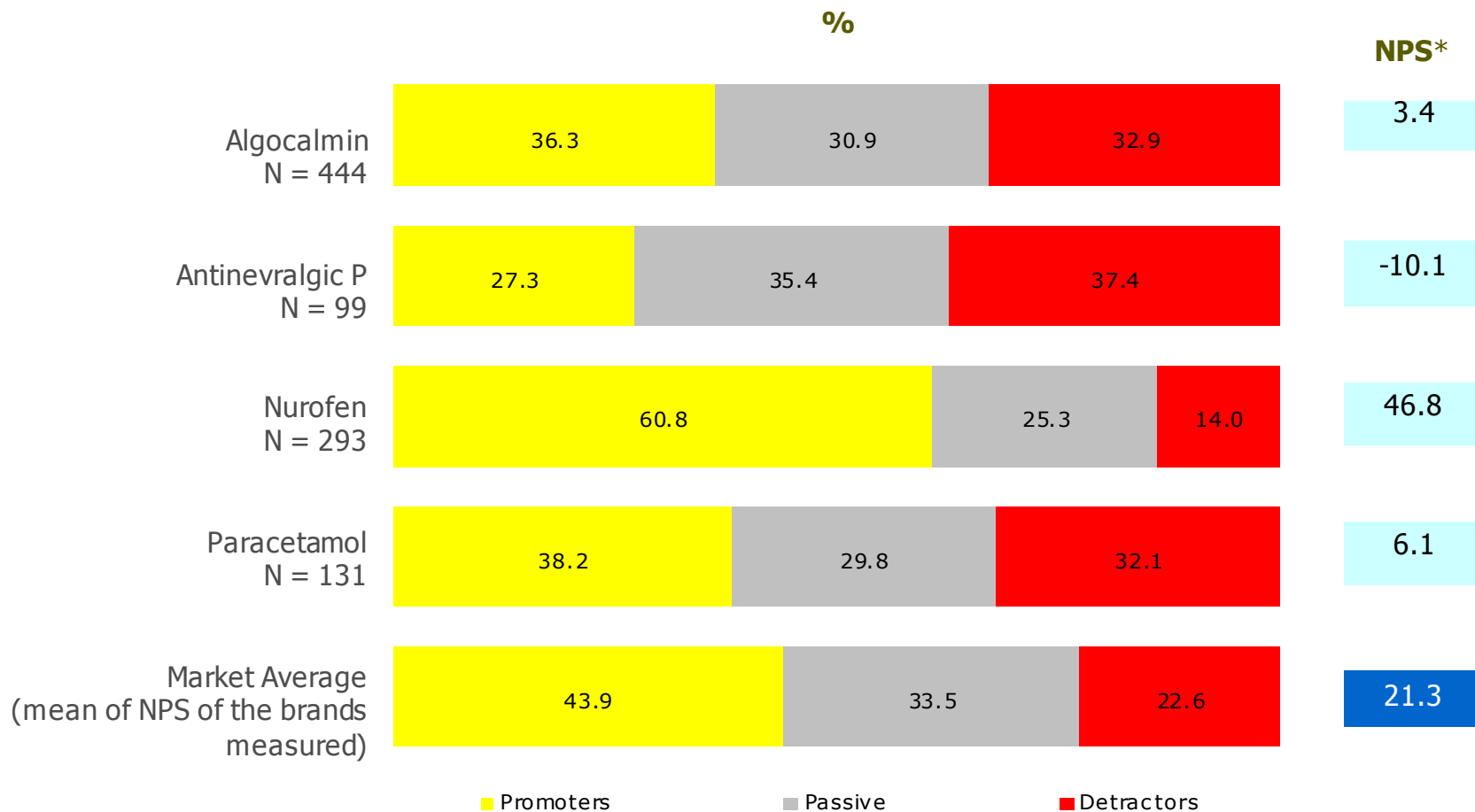
Cough and cold meds: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

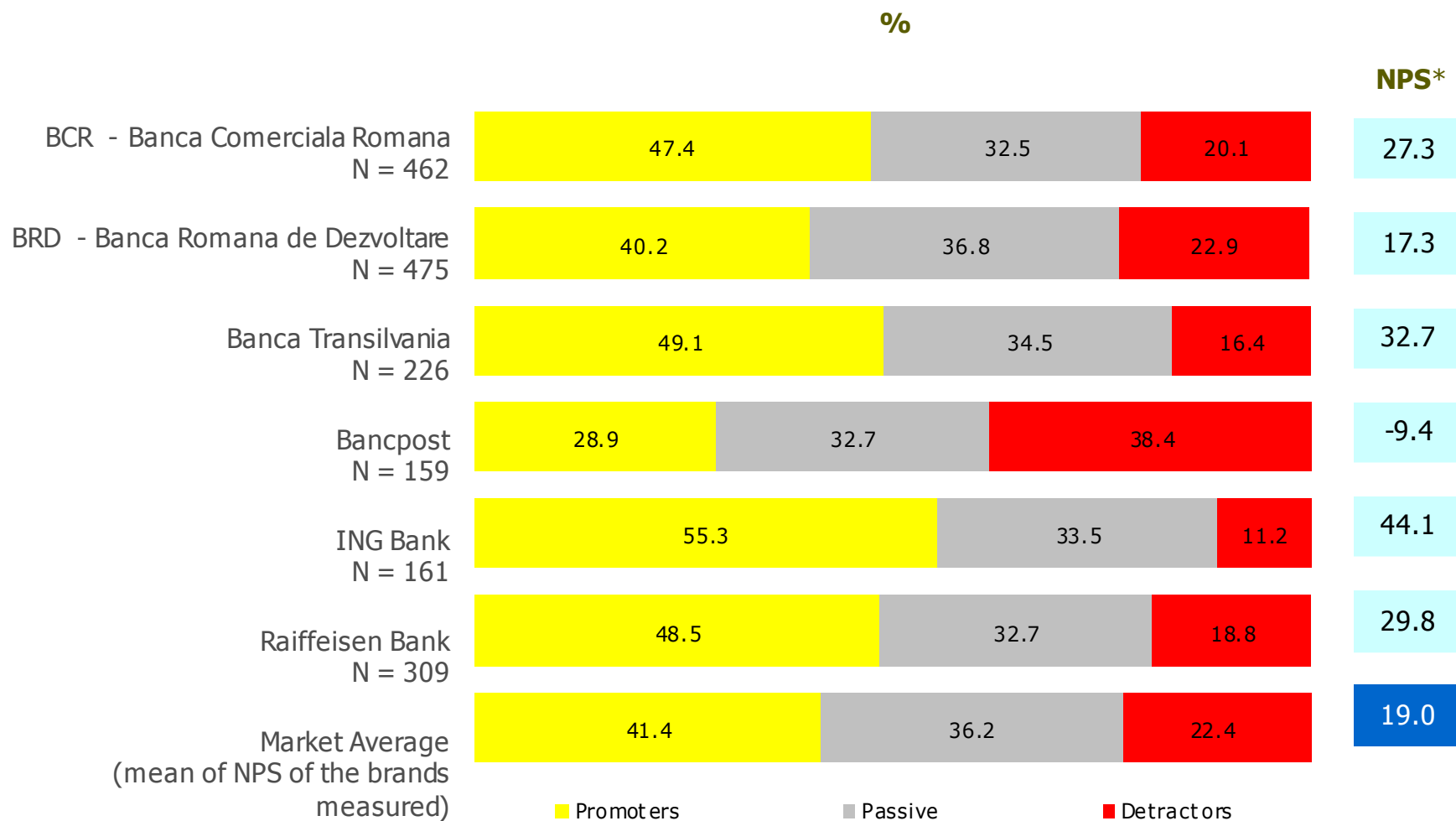
Analgesics: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

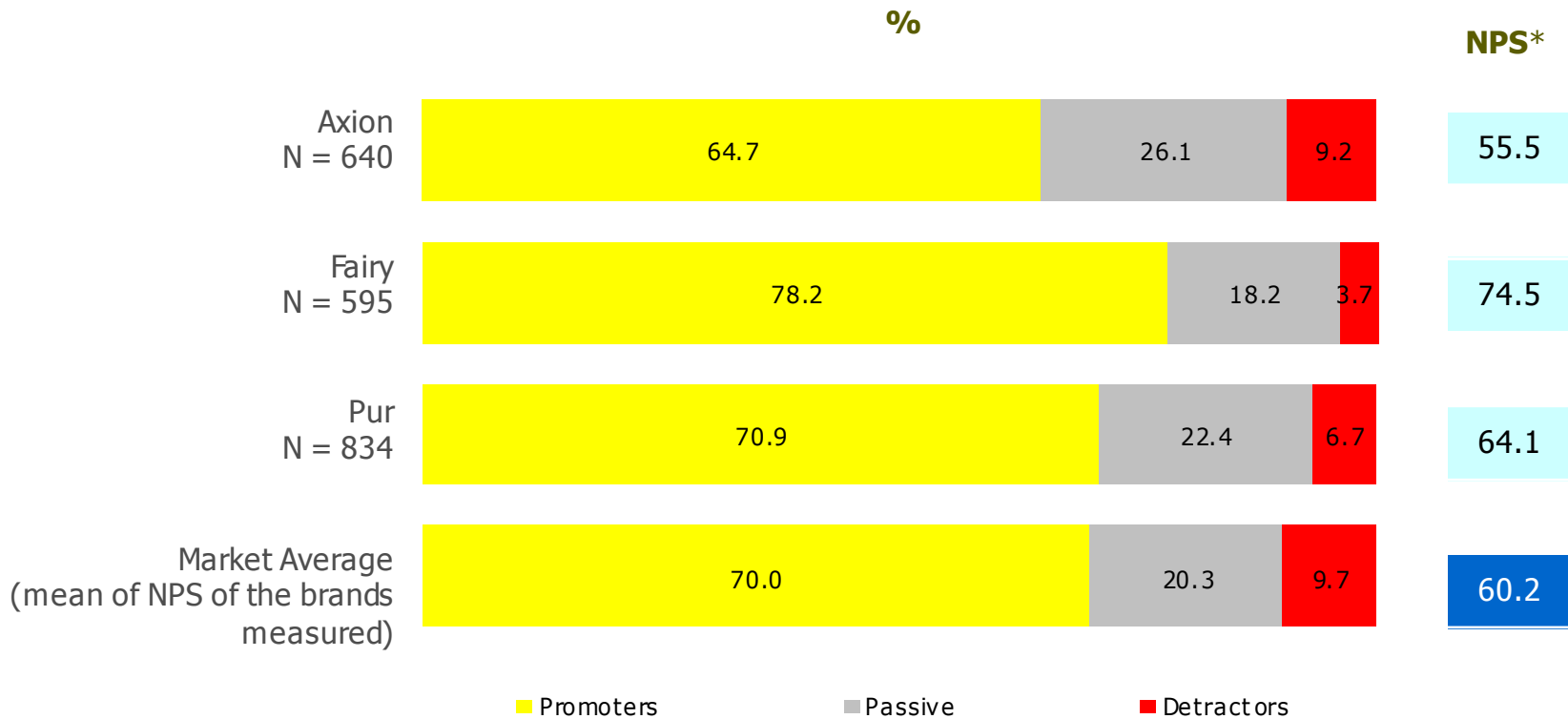
Banks: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

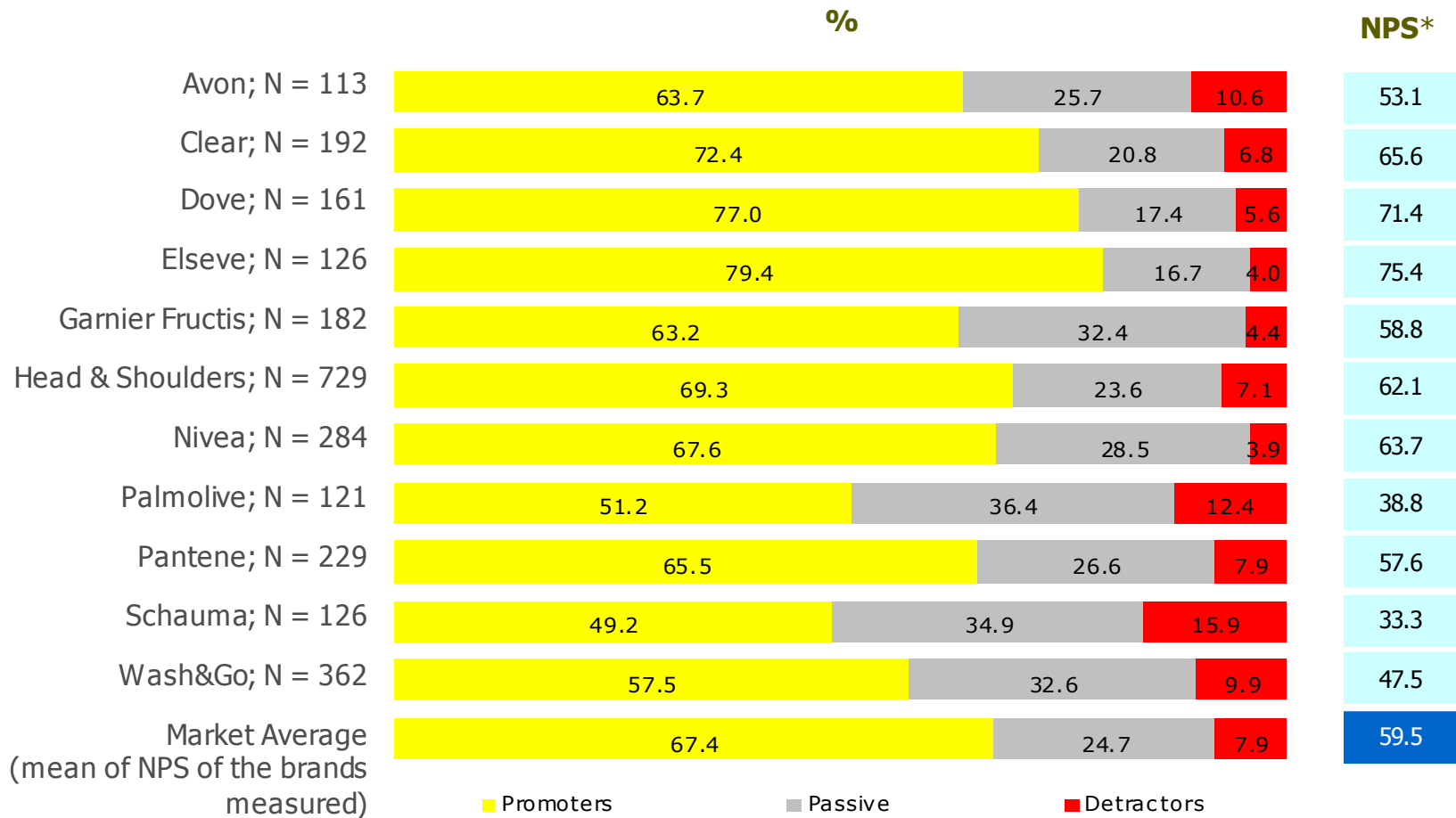
Dishwashing detergent: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

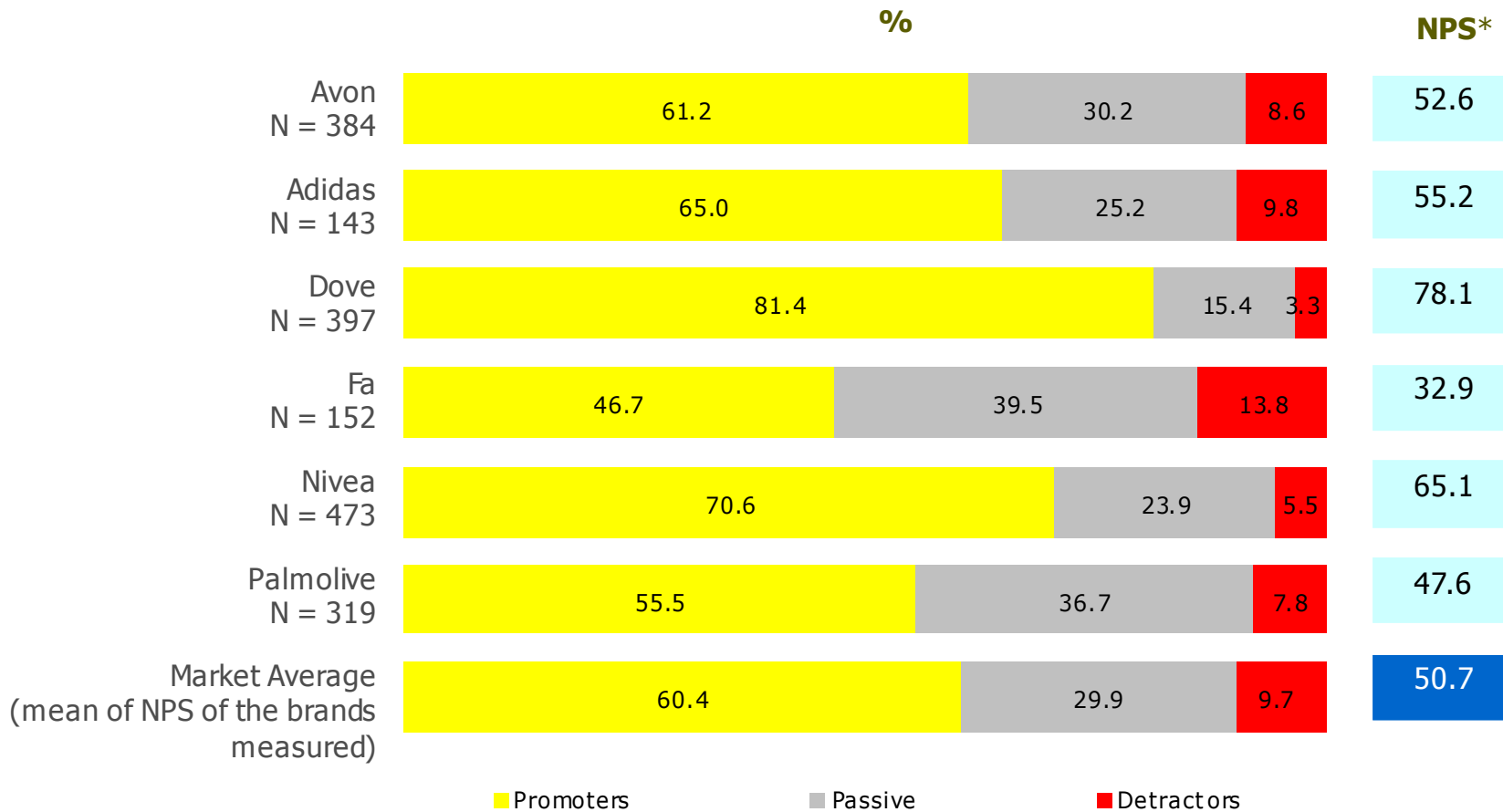
Shampoo: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

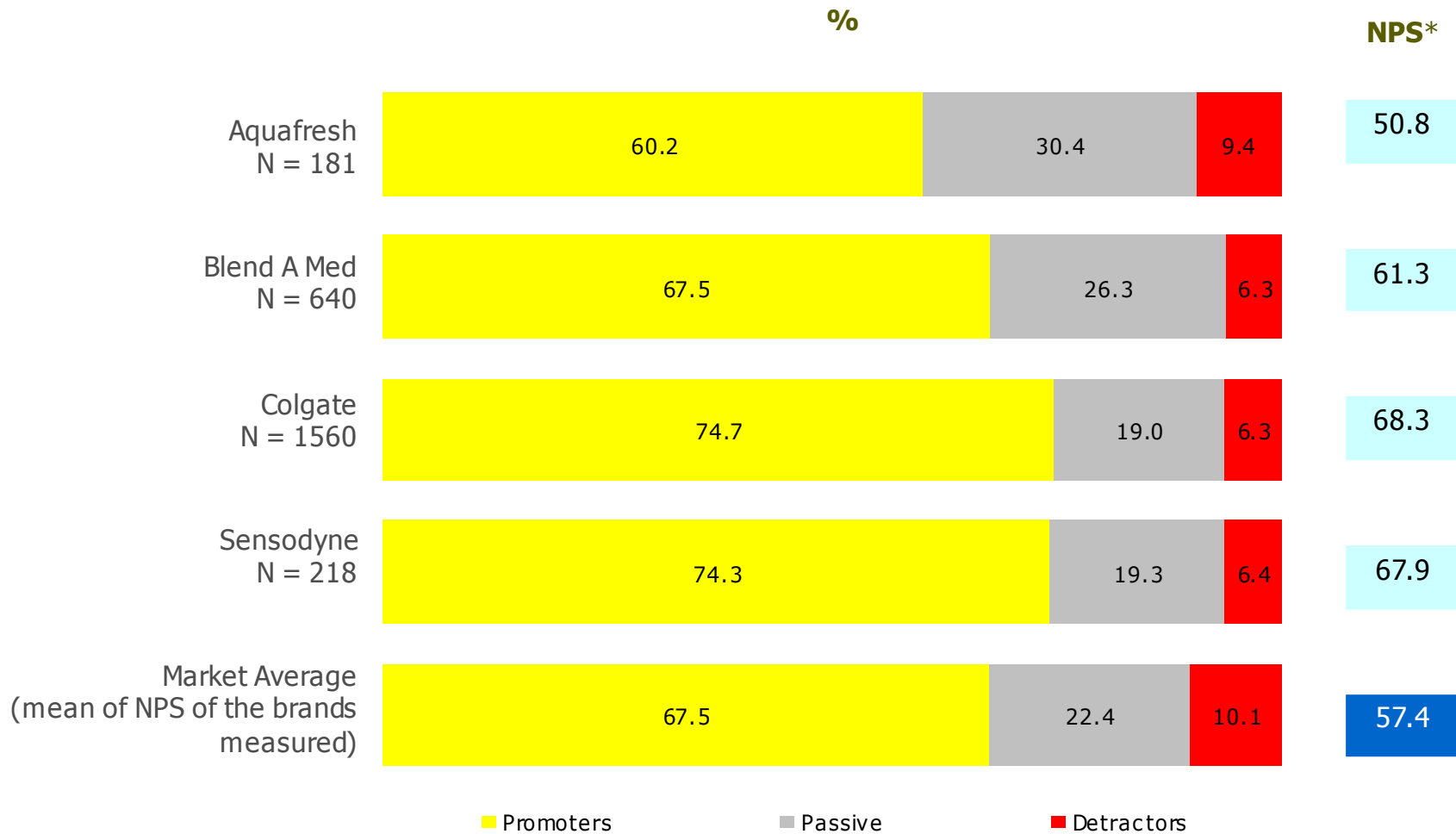
Shower Gel: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

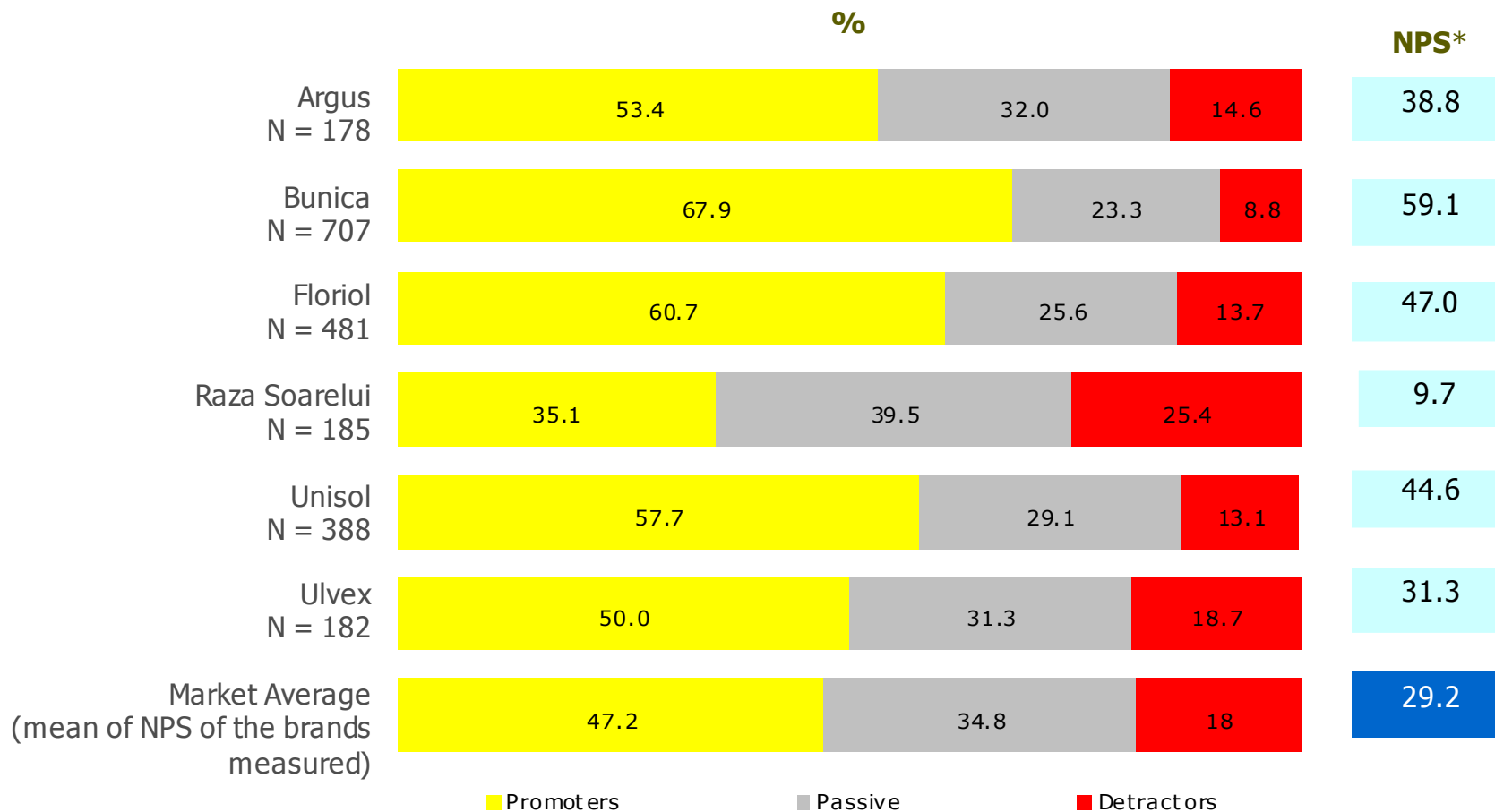
Tooth Paste: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

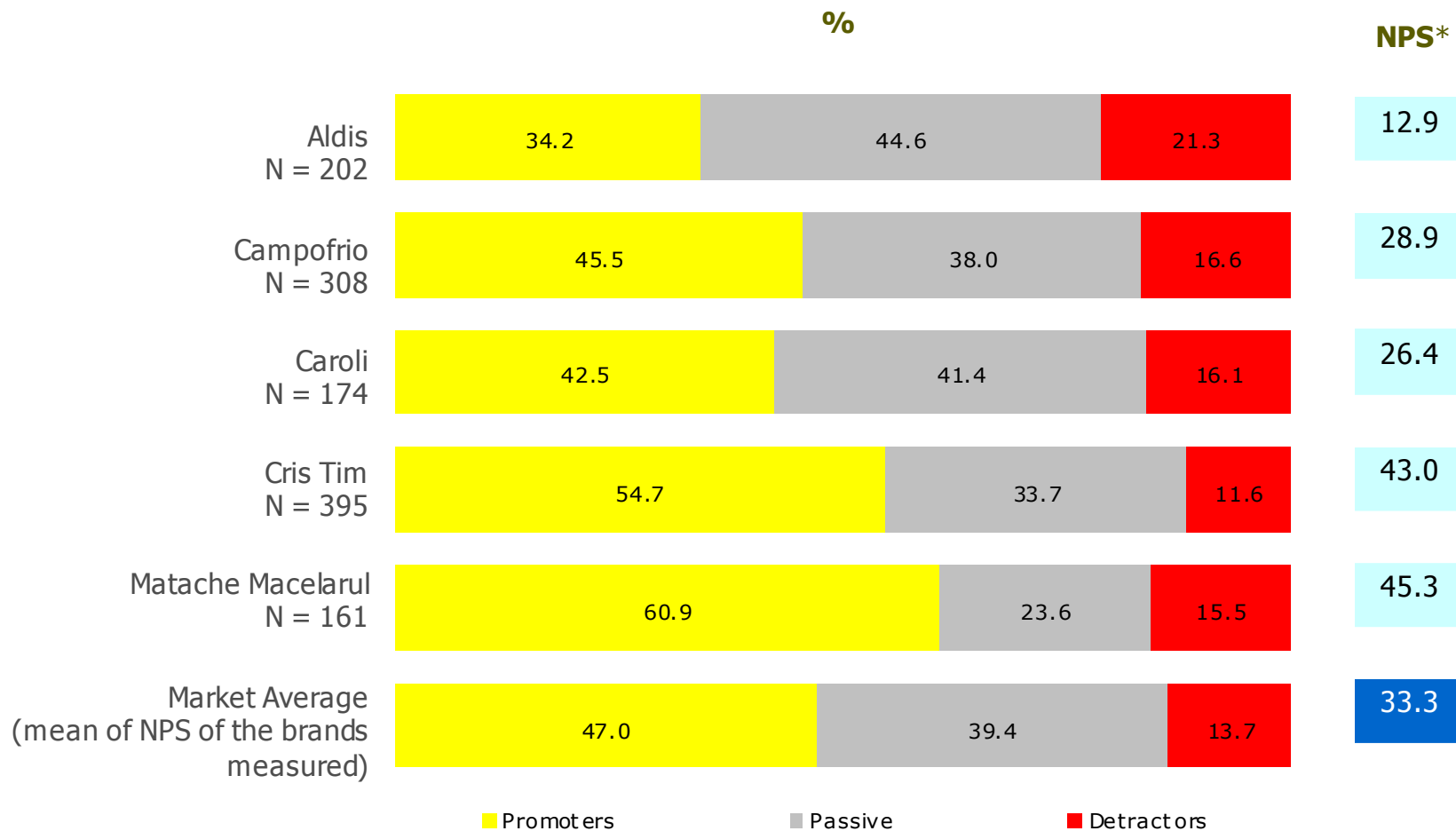
Cooking oil: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

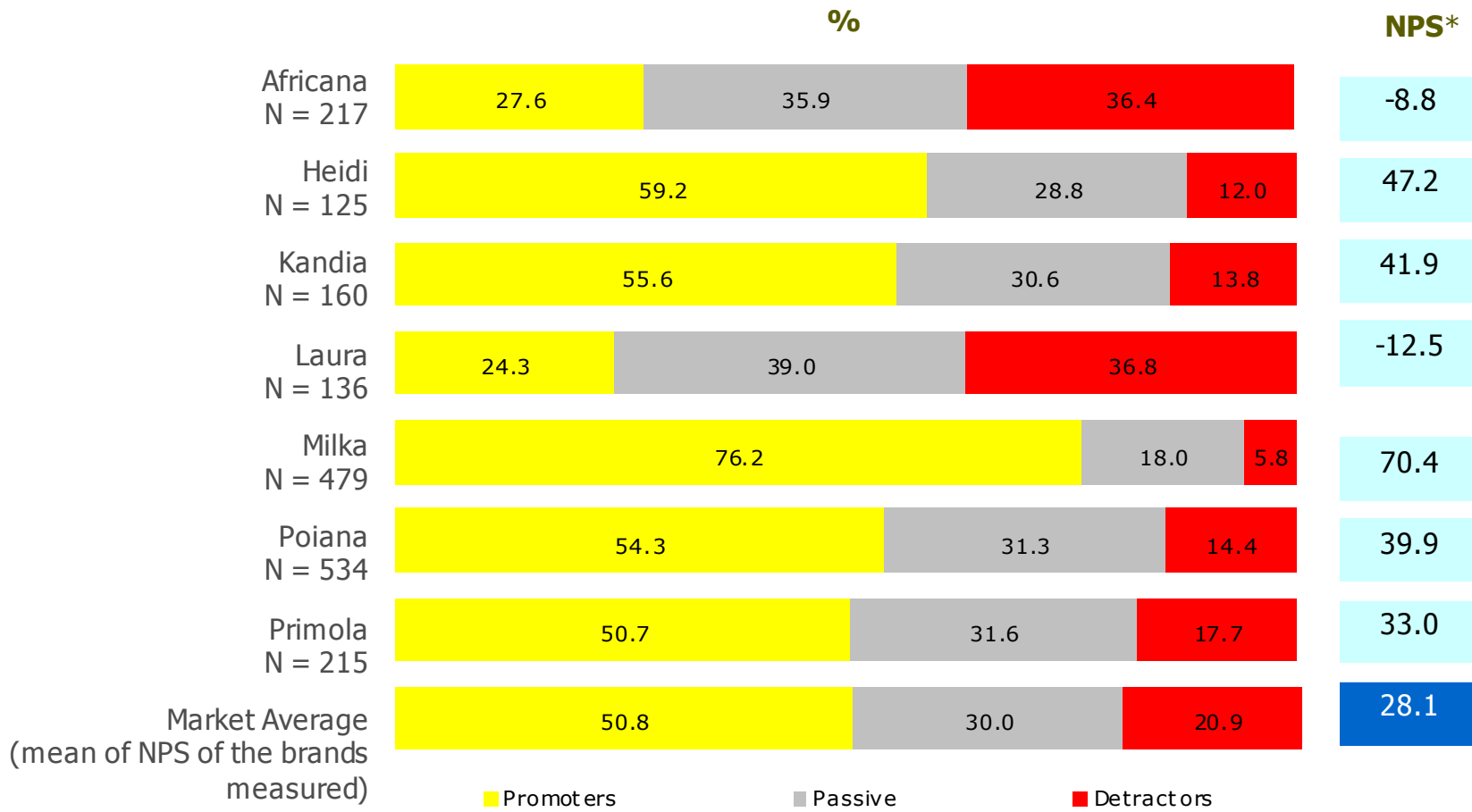
Processed Meat : Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

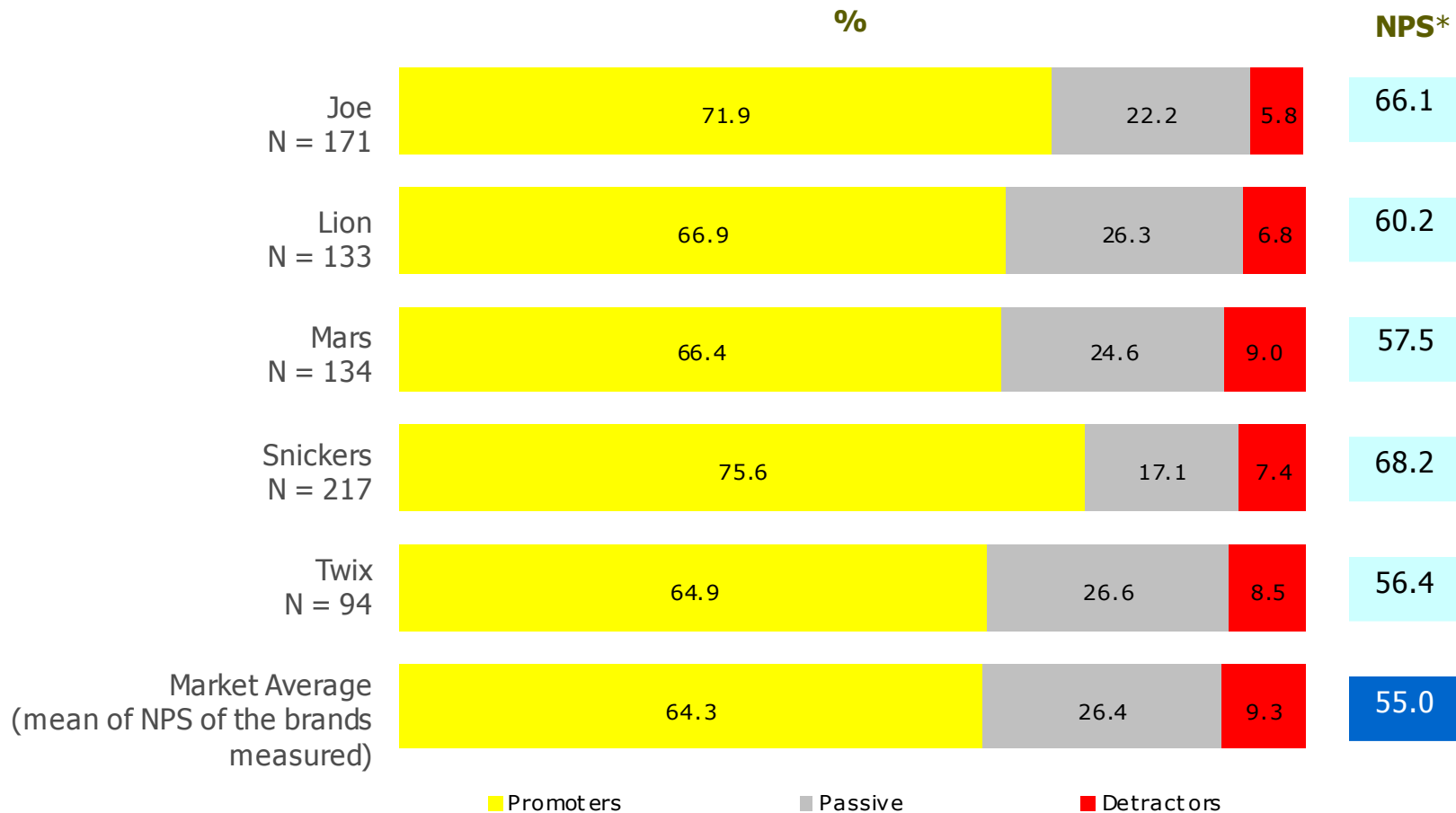
Chocolate (Tablets): Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

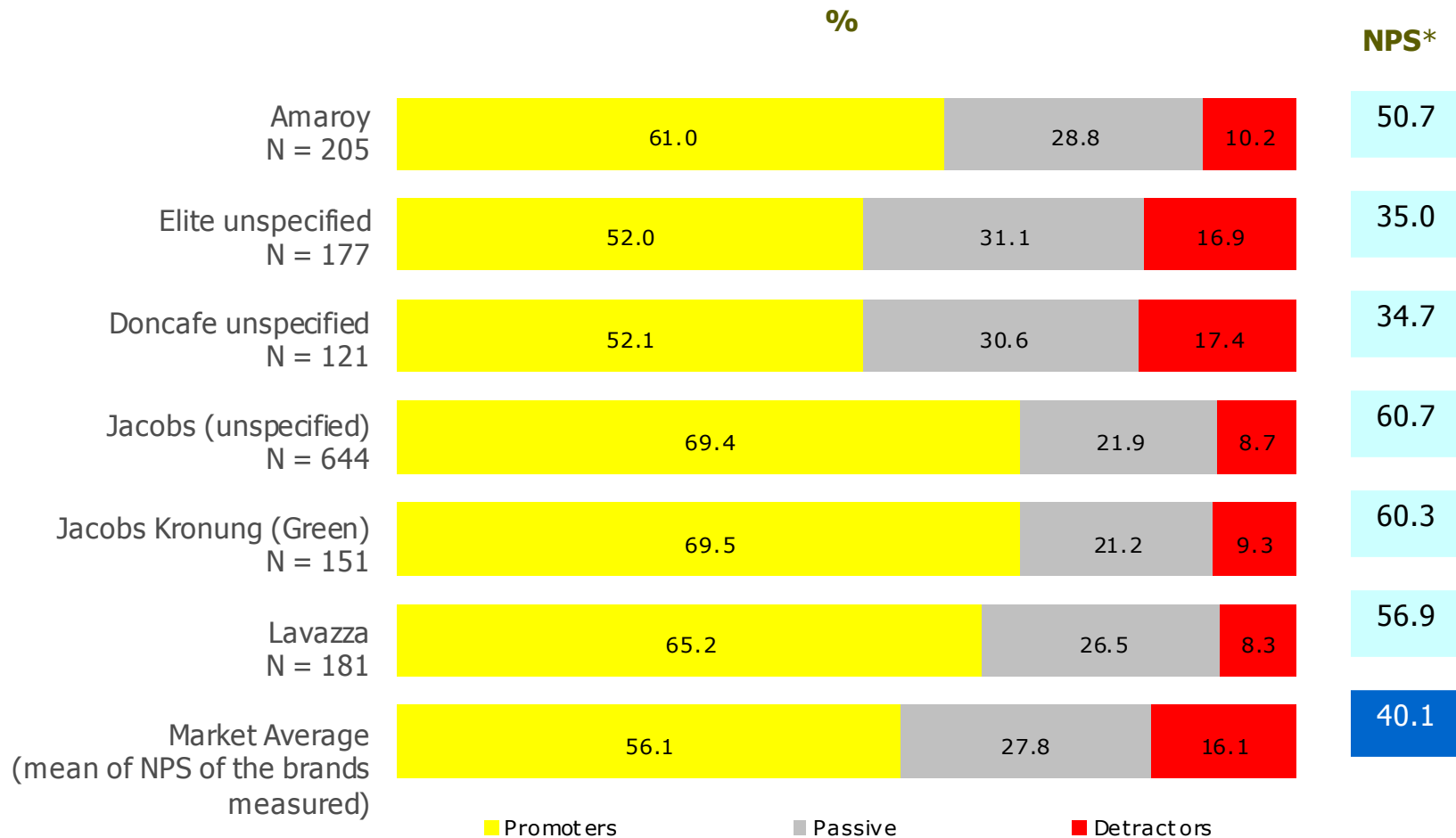
Chocolate Bars and wafers : Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

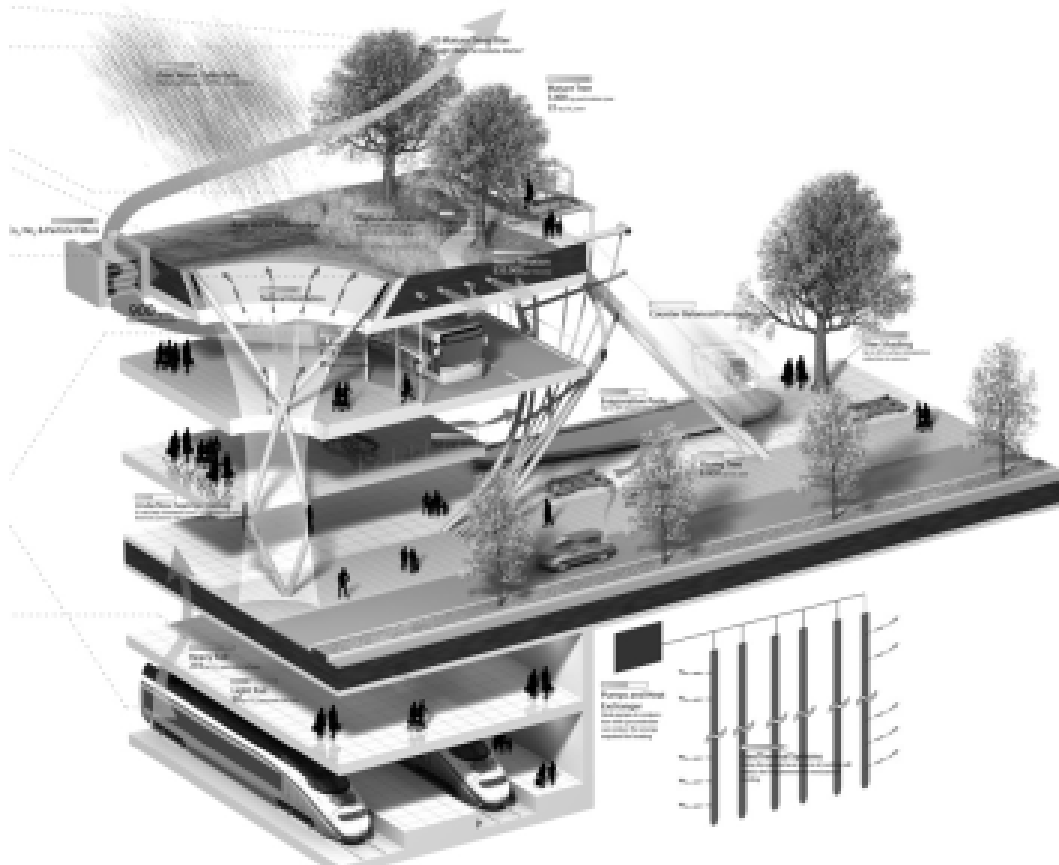
Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

Coffee R&G: Recommendation of the Used Brand



*Net Promoter Score = Promoters (10+9) – Detractors(6+...+0)

Q. Would you recommend ...[SHOW EACH BRAND USED IN THE PAST 12 MONTHS] to a colleague or a friend ? Please use a 0 to 10 scale, where 0 means "I wouldn't recommend" and 10 means "I would recommend for sure"

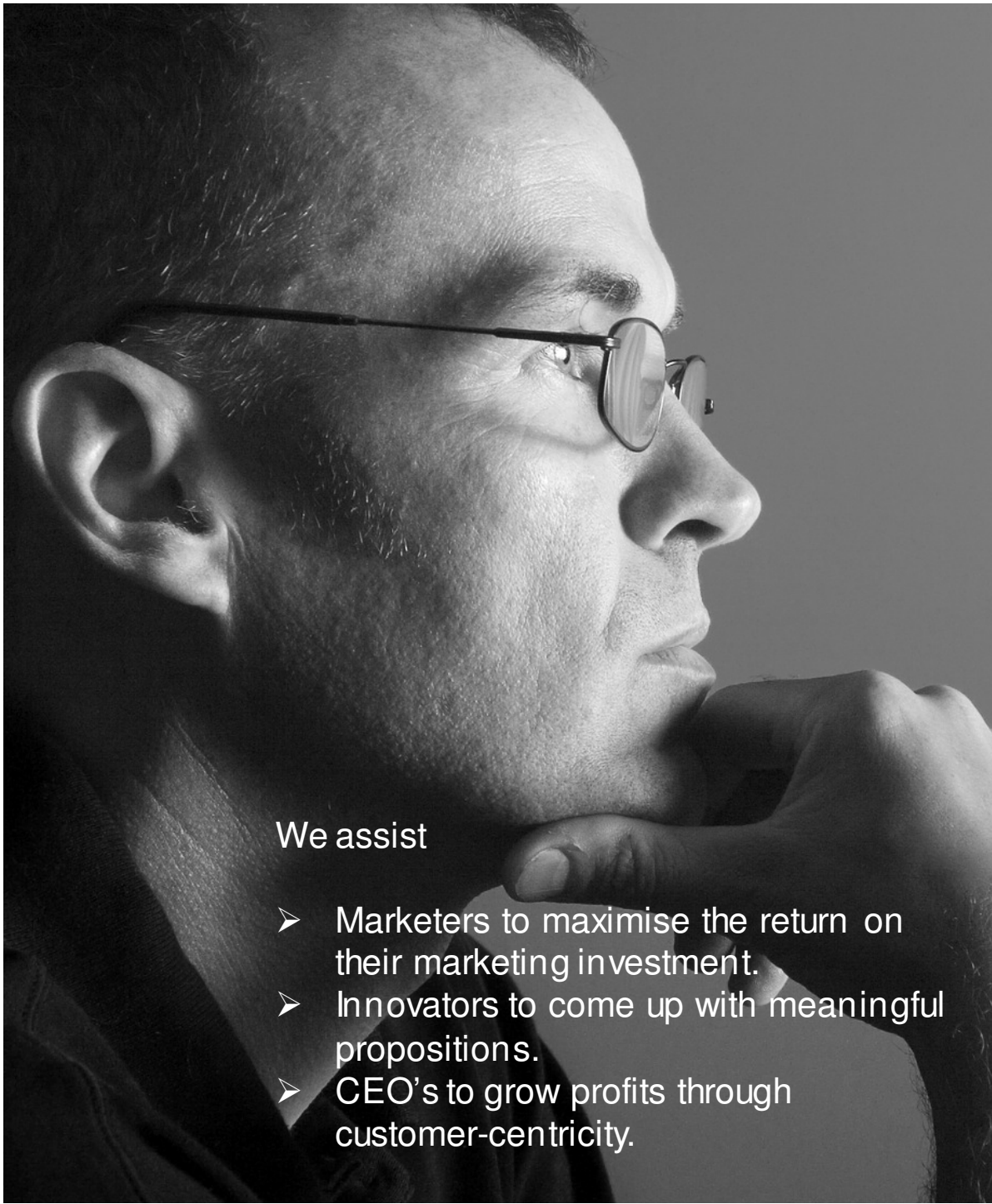


Key objectives for the NPS

Simple measurement, benchmarking and prediction

Deeper understanding and identification of focal points

A way to balance short and long term



We assist

- Marketers to maximise the return on their marketing investment.
- Innovators to come up with meaningful propositions.
- CEO's to grow profits through customer-centricity.

Want to know more about your NPS score?

Call us to find out more about the Net Promoter Score, your results in the Romanian Benchmark Study and ways in which you can turn this data into sustainable business growth.

Contact Ramona Pătrășcanu, Futurelab Associate Bucharest at:

- rpa@futurelab.net
- 0751229217

FUTURELAB

THE ARCHITECTS

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Some Credentials

Astra Zeneca
Deloitte
Fortis Investments
Heineken
Hewlett Packard
Lego
Management Centre Europe
Mobistar

OUR CREDENTIALS

Selected brands we recently served



Futurelab Blogs



- +75,000 high-profile readers
- Top 50 in AdAge Power 150
- ca. 10,000 daily feed readers

Online Publications



- Close to 100,000 readers
- International "standard" works
- High profile readership

A Dedication to Excellence



- One – rapidly expanding - international team
- Blending experience, talent and research
- Dedicated to bold pragmatism in all we do

Daedalus Group Companies and their core competencies

- Daedalus Group is a **one-stop-shop for information and business knowledge services**.
- The group has been set up in order to provide two major advantages to its clients:
 - **High degree of specialisation and high professional standards** are ensured through the existence of separate group entities
 - **Clients benefit from significant savings** obtained through integrating complementary services
- **Vertical integration of research, business intelligence and consulting is the group's competitive advantage** when it comes to complex projects. On one side, the companies within the group have predefined interfaces between them, assuring thus time saving, better communication and higher integration of the project objectives. On the other hand, coordination of the activities is provided internally, eliminating wasting of resources and additional costs
- Each company within the group is considered a preferred partner in terms of priority of the job and in terms of price – therefore **the Group as an entity is more flexible and less expensive** as compared to any subcontracting alternative.



Business Consultancy



Marketing Research



Data Collection

Daedalus is one of the most dynamic marketing research companies in Romania

