

WT.SH, DiWiSH &
Marketing-Club Schleswig-Holstein

Warum BMW-Fahrer GEO eher nicht lesen Die Kunden und ihr persönliches Wertesystem (und was das für die Markenführung heißt)

Tom Ramoser

Kiel, 1. März 2017

**Für Unternehmer und Manager
sind nur ganz wenige Dinge so bedeutend
– und herausfordernd –
wie die richtigen Kundensegmente* zu kennen
und erfolgreich anzusprechen**

***) Die Annahmen in der Kundensegmentierung haben direkte Wirkung auf die Strategie**

Anhaltende Konsumtrends ...

Hohe Marktsättigung

- Die Leute haben alles
- Die Leute sind gut ausgebildet, kritisch
- Die Leute sind gut informiert, preis-sensible
- Die Leute sind extrem anspruchsvoll geworden

Anhaltende Konsumtrends ...

Strukturelle Krisen

- Anhaltende Arbeitslosigkeit
- Rückläufiges Real-Einkommen, steigende Armut
- Unsichere Renten, limitierte Krankenversicherungen
- Ökologische Herausforderungen, Globale Erwärmung
- Verschwinden der nationalen Grenzen, Migration

Anhaltende Konsumtrends ...

Digitale Medien & Virtuelle Realität

- Steigende Hyper-Interkonnektivität, Jagd auf “Likes”
- Online Vertriebskanäle ändern die Verkaufsregeln
- Online Bezahldienste ändern die Finanzregeln
- Parallele Identitäten, Verlust von Authentizität
- Explosion von „Fake News“, Echo-Kammern

Anhaltende Konsumtrends ...

Psychologische Identitätskrisen

- Zunahme von Narzissmus, Hedonismus, Eskapismus
- Zunahme von Patchwork-Familien, Civil Unions
- Veränderte Geschlechterrollen, Sexting
- Infragestellung der Ideale der Aufklärung
- Wer bin ich? ist immer schwerer zu beantworten

Anhaltende Konsumtrends erfordern eine völlig andere Art der Kundenidentifikation und Ansprache

Anhaltende Konsumtrends ...

... lösen konventionelle Segmentierungsmodelle auf ...

... erfordern die Kenntnis persönlicher Wertesysteme

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Strukturelle Krisen

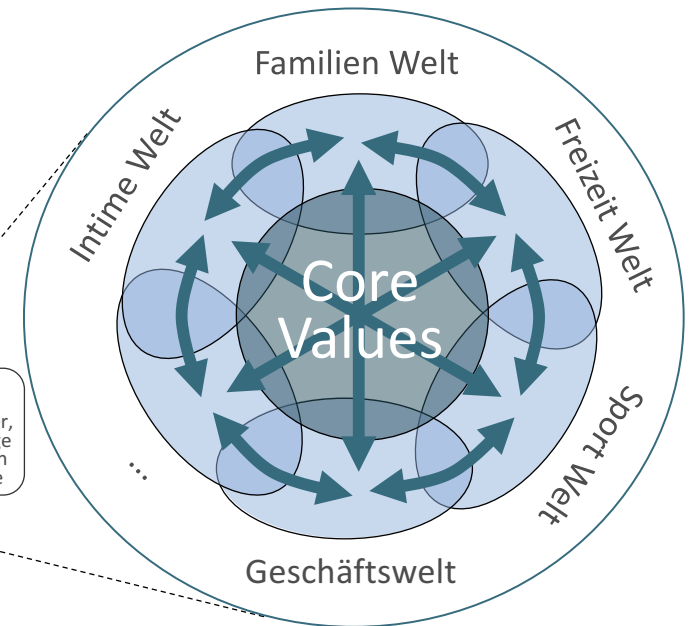
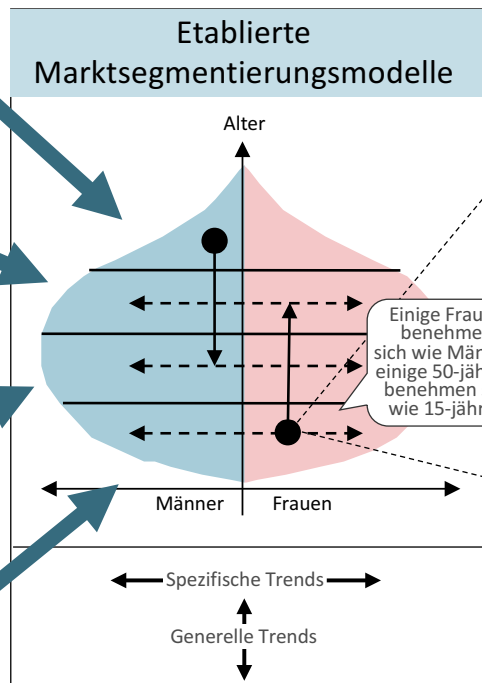
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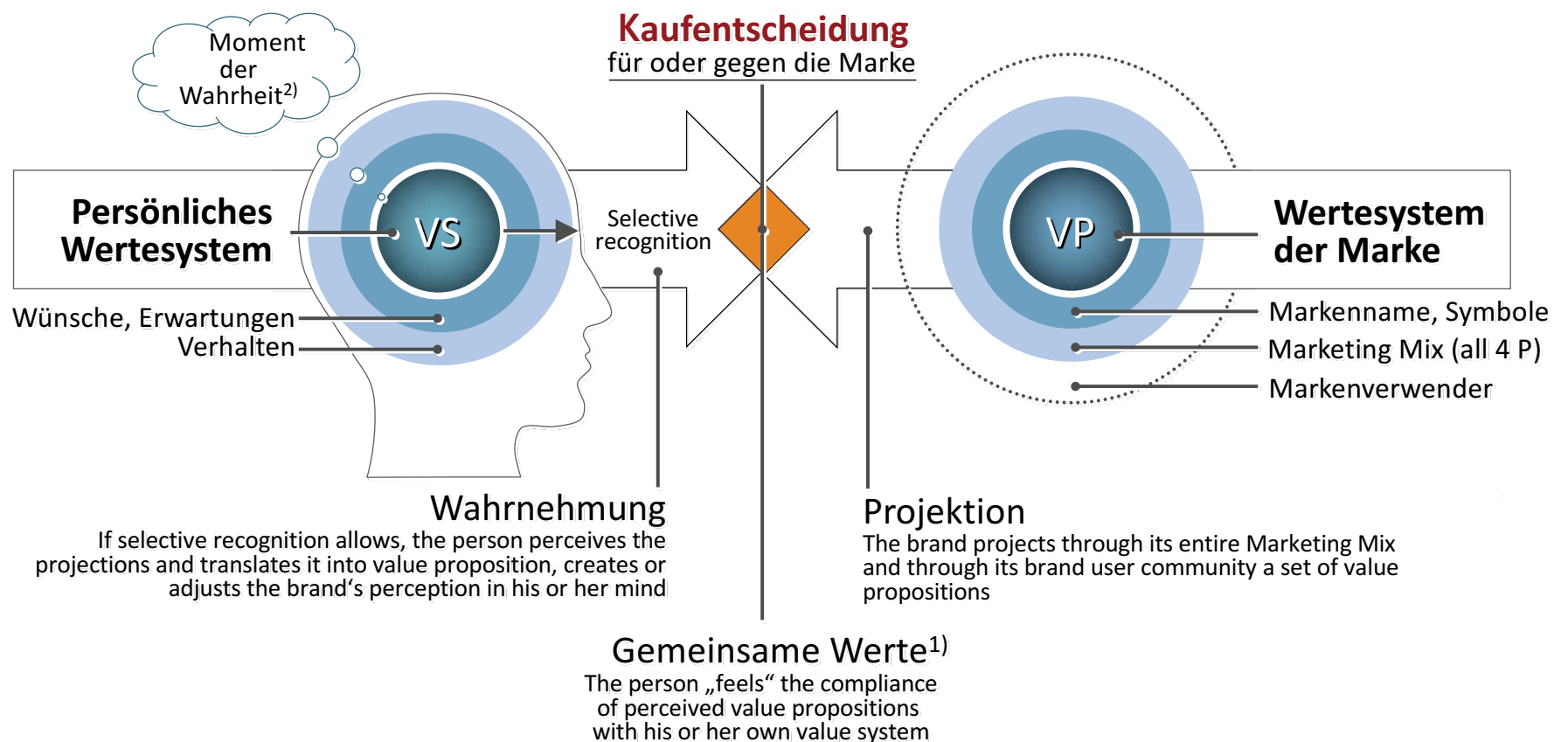
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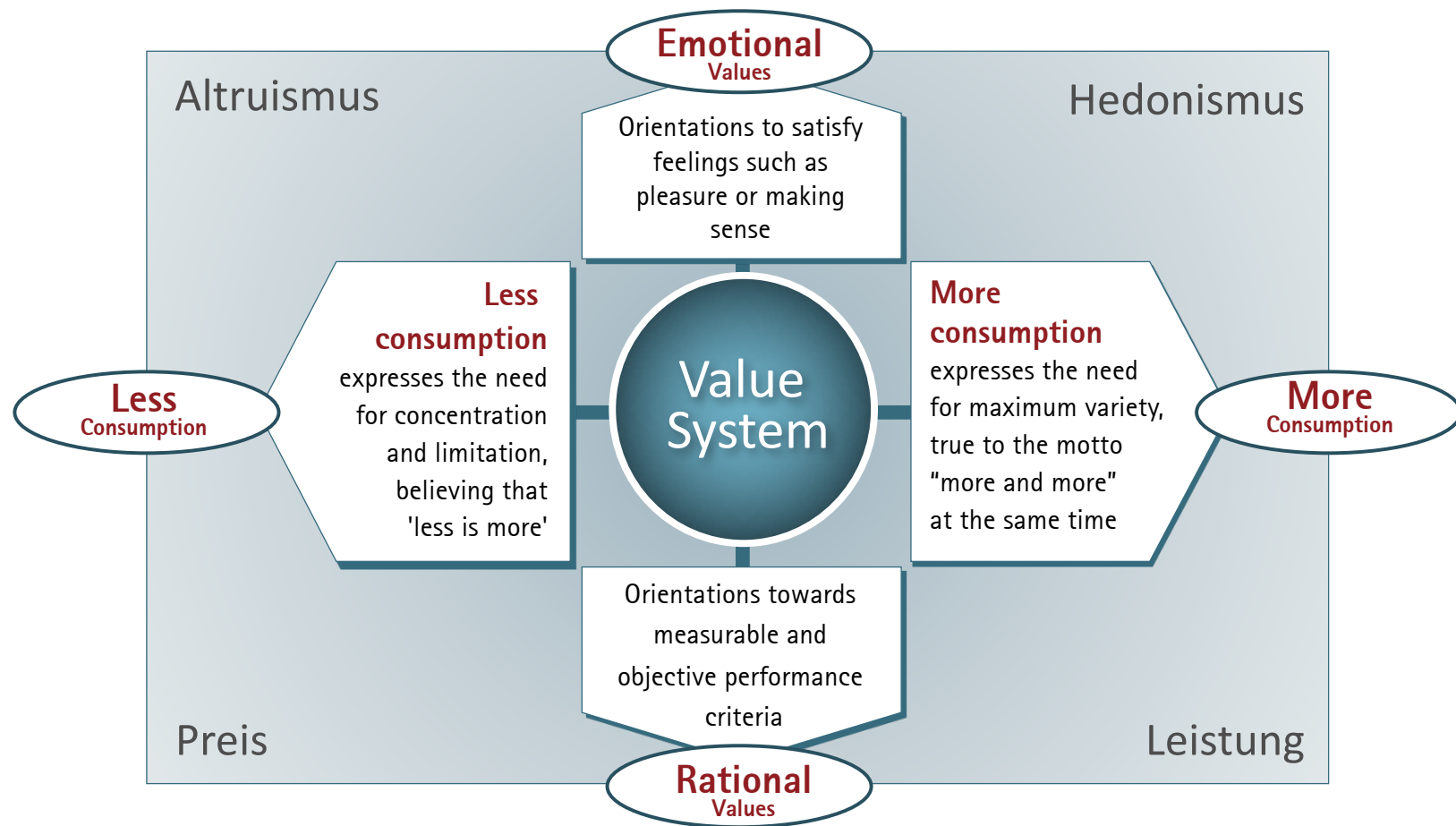
Menschen springen von einer „Welt“ in die nächste unter Beibehaltung ihrer Core Values - Archetypen Prinzip -

Je mehr das Wertesystem einer Person mit dem wahrgenommenen Wertesystem einer Marke übereinstimmt, um so wahrscheinlicher ist eine Kaufentscheidung

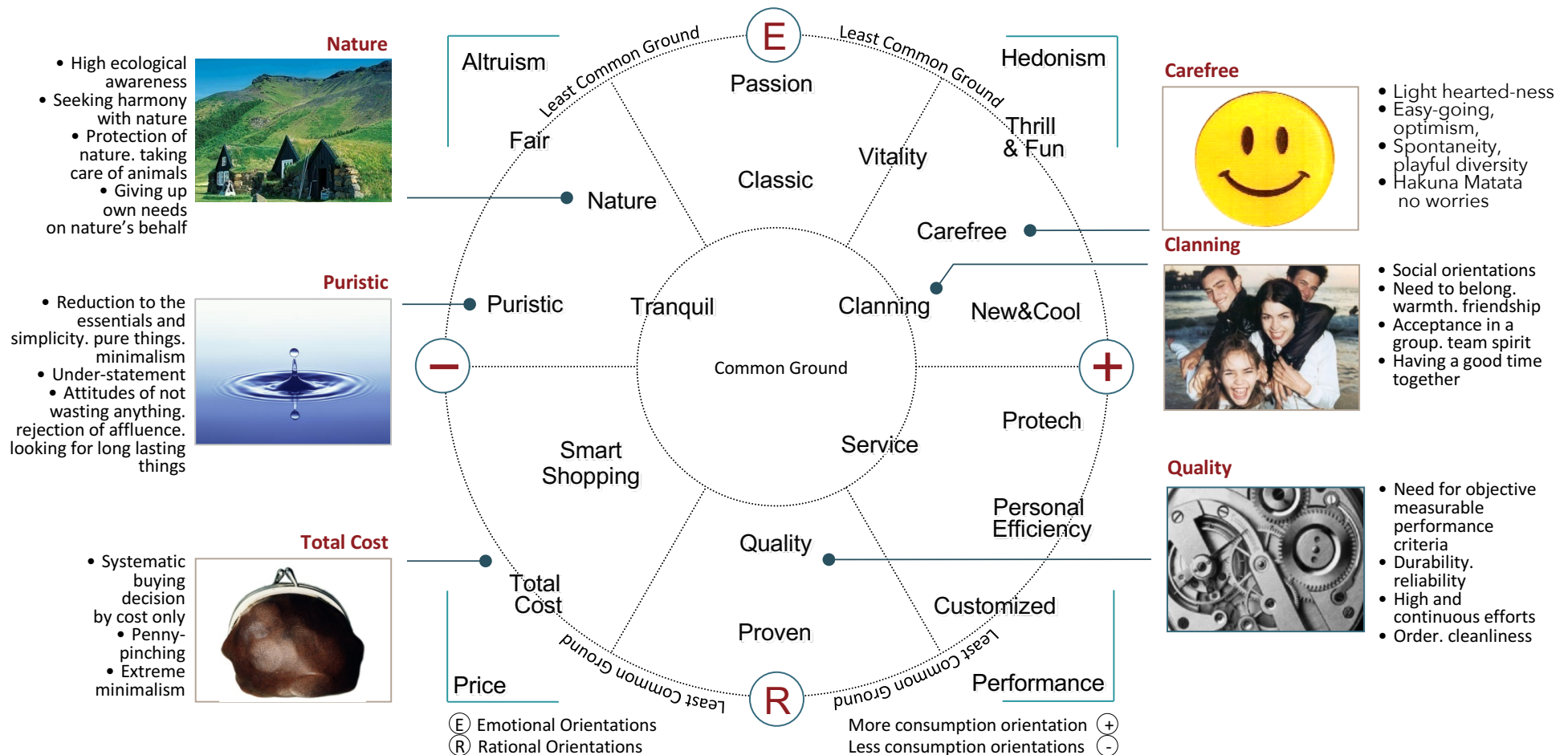


1) The more a perceived value propositions of a brand match with a person's value system, the more likely is his or her involvement, engagement and buying the brand
 2) Moment of truth refers to either an independent re-confirmation of the original motivation for buying this brand, or newly defines the brand in ones mind

The Rosebud Project has Been Identifying and Tracking People Values and Orientations for Consumption for More Than 20 Years in More Than 15 Countries Around the Globe



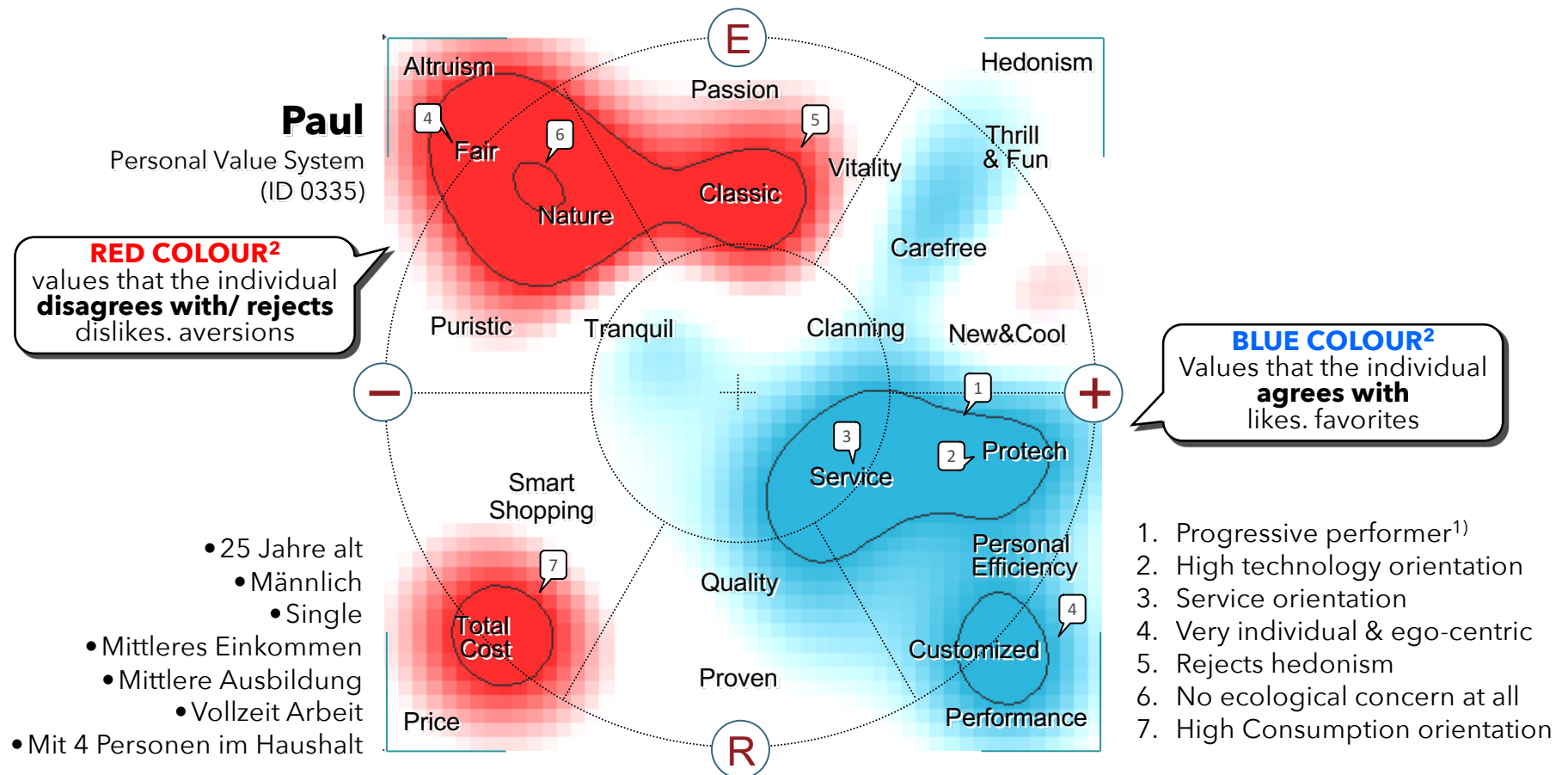
Rosebud hat 19 universelle Werteorientierungen von Menschen identifiziert, mit umfangreichen quantitativen Langzeitstudien in vier Kontinenten



1) See Appendix and next chart for complete description

Source: Rosebud. The Strategic Business Development Group

Der Rosebud-Profiler visualisiert das Wertesystem einzelner Personen



1) See Appendix for complete description

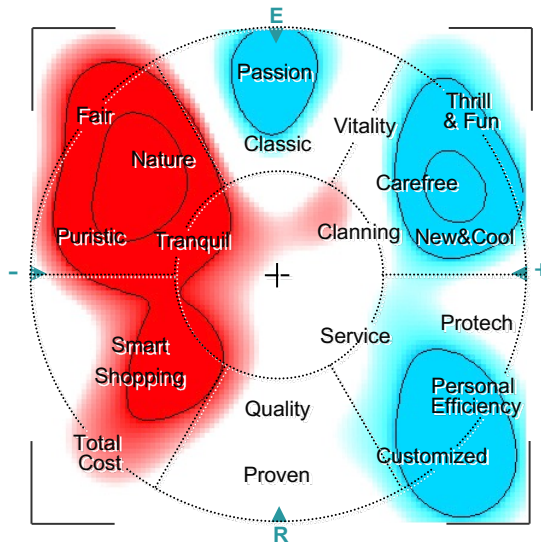
2) Number of concentric rings indicates amplitude/ intensity of factor/value; total number of rings is referred to as DoP, Degree of polarization

Source: Rosebud. The Strategic Business Development Group. TNS Data (United States, March 2015, n=1,500, GenPop, 14-65 yrs, CATI)

Paul fährt einen BMW, würde aber das Geo-Magazin eher nicht in die Hand nehmen

BMW¹⁾

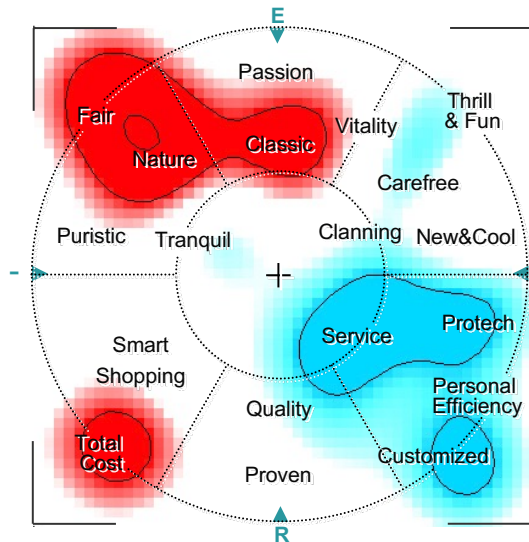
Brand Profile (118 vs. 1.693; $z_{\max}=12.7$)



- Progressive hedonistic
- Progressive, pro-technological performance orientations
- Individualistic
- Not-altruist, ego-centric, Not-purist
- Expressive orientations
- Not-price/ pro-luxury orientations

'Paul'

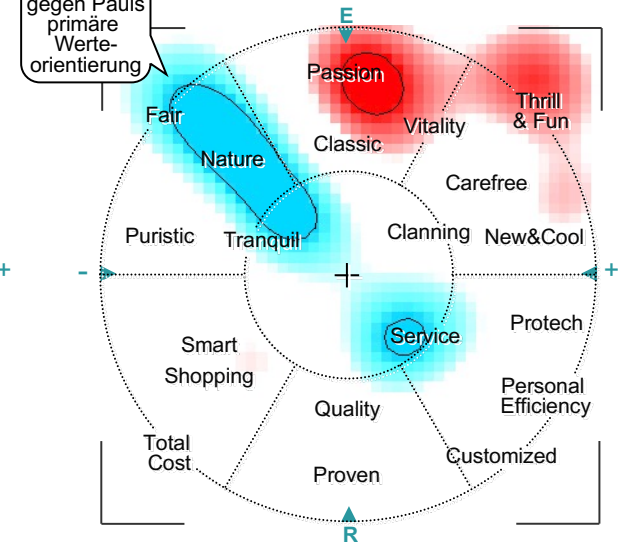
Personal Value System (#0335; $z_{\max}=5$)



- Progressive performer
- High technology orientation
- Service orientation
- Very individual and ego-centric
- Rejects hedonism
- No ecological concern at all
- High Consumption orientation

GEO-Magazin

Brand Profile (155 vs. 1.358; $z_{\max}=12.7$)



- Pro-Altruistic
- Pro-Ecologic
- Pro-Tranquil, rejection of stress and hectic
- Traditional value set
- Not hedonistic
- Not expressive and attention seeking

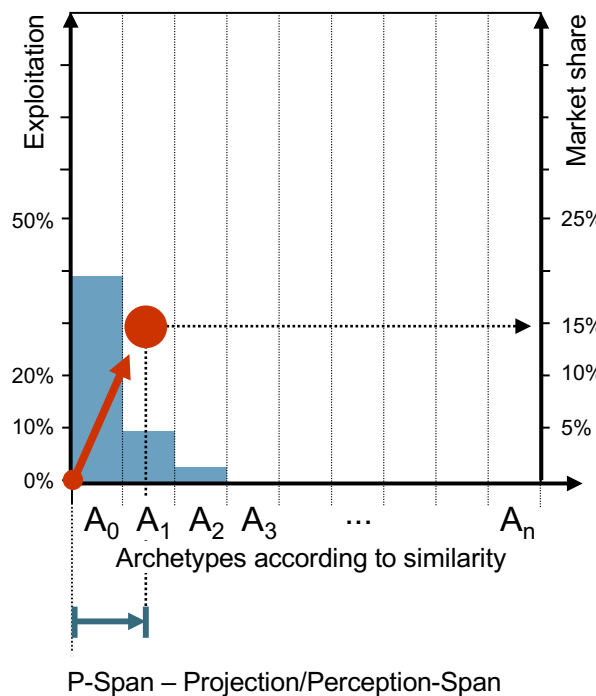
1) Rosebud compiles the perceived value system of a brand (AVP) as the difference between the aggregated values of brand users vis-a-vis non-users

Was heißt das für die Markenführung?

Eine Marke ist wie ein Gastgeber, der zu einer Party einlädt

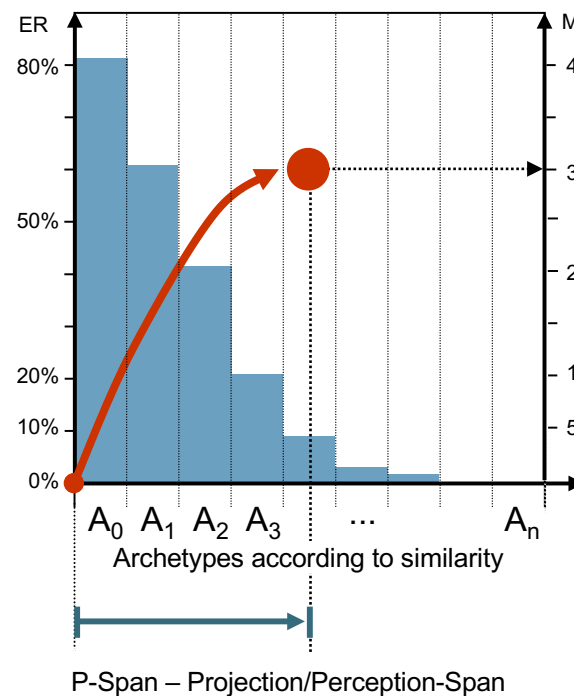
Marken Aufbau

Inviting Friends ...



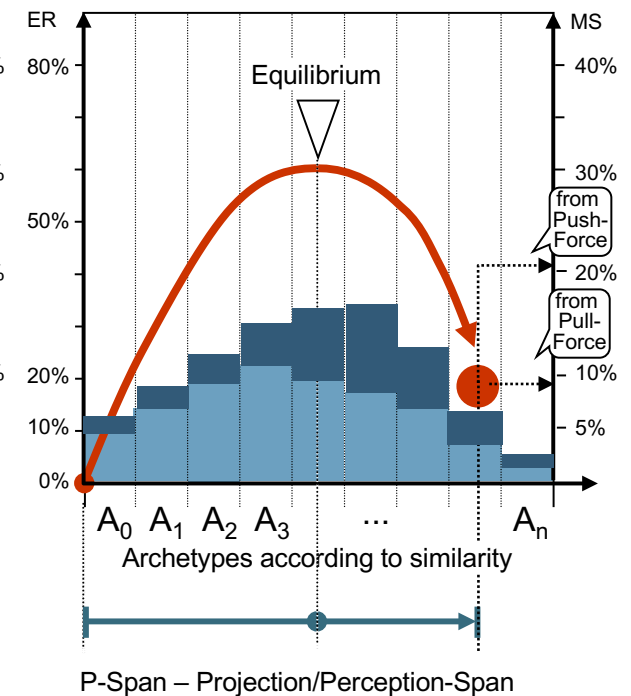
Marken Optimierung

And the friends-of-the-friends ...



Marken Abbau

And now everyone else ...



A Archetype, market segment according to a value-based segmentation process

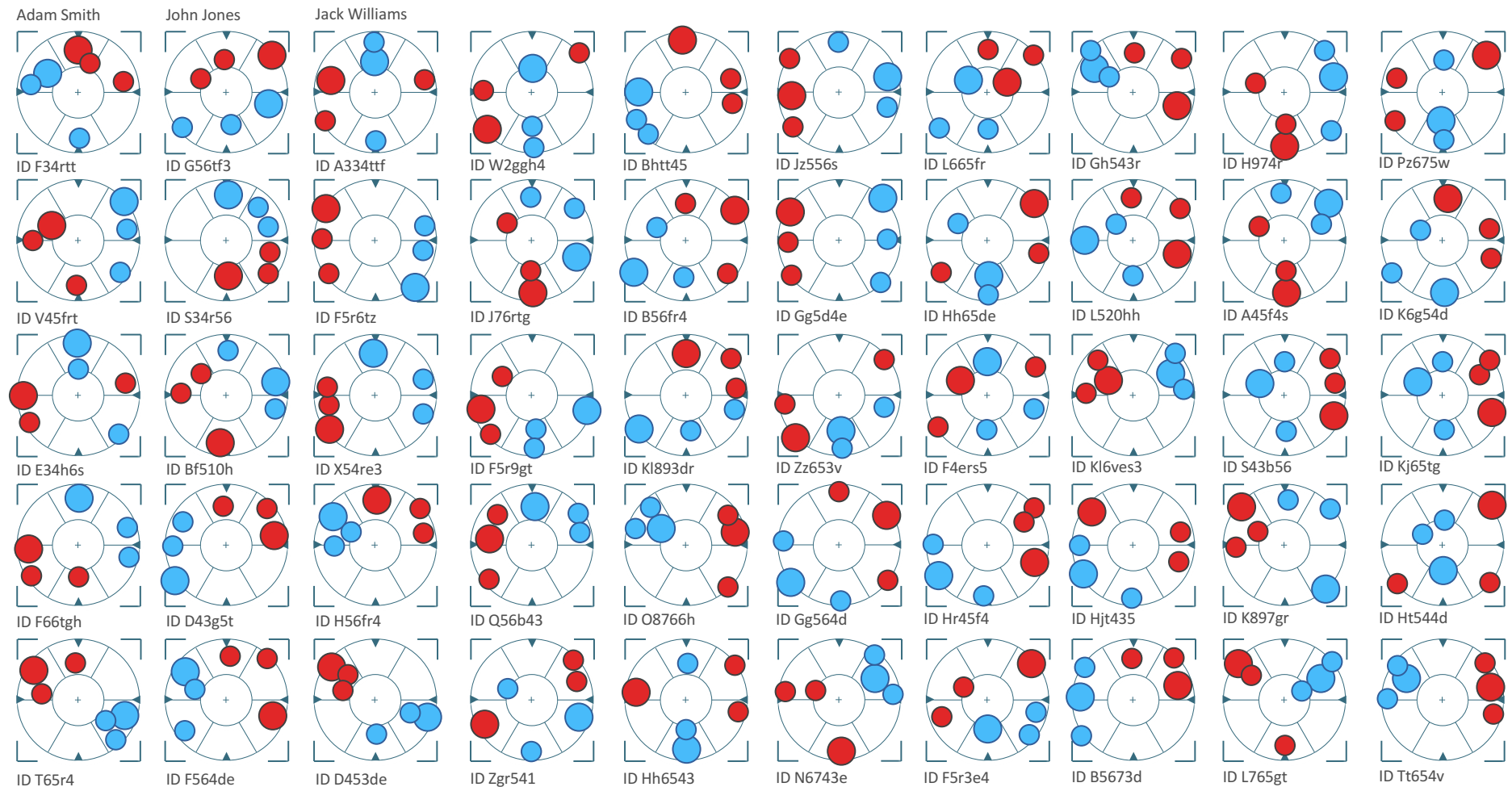
A_0 Initial Archetype (Peer group of protagonists)

A_1 Next similar Archetype to A_0

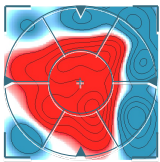
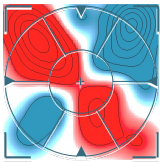
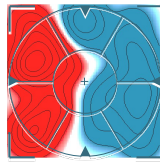
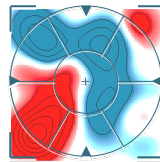
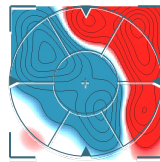
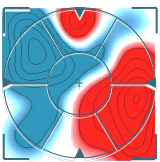
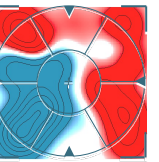
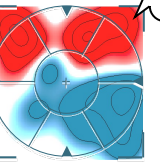
A_n Least similar, opposite Archetype to A_0 (Peer group of antagonists)

Source: Rosebud. The Strategic Business Development Group

Alle Menschen sind verschieden und haben verschiedene Motivationen etwas zu kaufen, oder nicht zu kaufen



Deutsche Archetypen – Marktsegmente nach Wertesystemen

Archetypes	INO 15.9 %	HED 14.4 %	PMX 10.0 %	TMX 15.6 %	TRA 14.5 %	HUM 10.7 %	MIN 7.1 %	RPE 11.8 %
Value System Germany								
Relationships	Modernity → Tradition Dynamic → Static Low Price → Very high → Very high → Very Low Price							Hi-Technology Dynamic Medium Price
Personality Attitudes	• Innovatoren • Regelbrecher • Nonkonformisten • Einzelgänger • Fordern Normen und Konventionen heraus • Sehr kreativ • Laut, schnell & ruhelos • Ausdrucksstark • Setzen neue Trends in der Mode und im Lebensstil • Progressive Leistungsorient. Technologien • Hohe Effizienz • Systematische Suche nach Preisvorteilen	• Hedonisten • Party-Leute • Positiv, Happy (nach Außen) • Spontan • Suchen Abenteuer und Risiko • Ausdrucksstark, suchen Aufmerksamkeit • Geringe Leistungsorient. Technologien • Vermeiden harte Arbeit und Anstrengung • Sehr hohes Eigeninteresse	• Progressive Maximalisten • Größer ist besser • Progressive Grundeinstellung zu Hedonismus, Technologie und Leistung • Sehr Ausdrucksstark, suchen Aufmerksamkeit • Adaptieren neue Trends, hohe Modeorient. • Laut, schnell & ruhelos • Sehr hohes Eigeninteresse • Sehr hohe Luxurorient. Verschwender	• Traditionelle Maximalisten • Genießer, arriviert • Traditionelle Grundeinstellung • Sehr hohe Classic-orient., suchen zeitlose Schönheit, klassische Statussymbole • Suchen stille Momente, vermeiden Stress • Übernehmen soziale Verantwortung • Sehr hohe ethische Ideale, Umweltorient. • Sehr hohe Luxurorient.	• Traditionalisten • Traditionelle Leistungsorient. Qualitätsorient. harte Arbeit, Disziplin, Ordnung, Perfektionismus • Familienwerte, hohe soziale Verantwortung, ethische Ideale • Suchen max. Sicherheit und Zuverlässigkeit, No Experimente • HUM-modisch • Ruhe als Ziel, Lehnen neue Technologien ab • Haben tägliche Routinen, planen Zukunft im Detail	• Humanisten • Sehr hohe ethische Ideale, altruistisch, ökologisch, soziale Verantw. • Familienwerte • Idealistisch • Ruhe als Ziel • Lehnen alles Neue ab, kein Glauben an Technologien • Puristische Orientierungen, moderater Minimalismus, vermeiden Verschwendung • Keine Leistungsorientierung	• Minimalisten • Extremer Minimalismus, Pfennig-fuchser, systematische Suche nach Preisvorteilen aus Eigeninteresse/ Geiz • Sehr starke Ablehnung von Hedonismus und progressiver Leistungsorient. • Suchen keine Aufmerksamkeit • Puristische Orientierungen, vermeiden Verschwendung um jeden Preis • Geringe Leistungsorientierung	• Rational Performer • Bewundern Leistung • Extreme Technologieorientierung/ gläubigkeit • Harte Arbeiter Workaholics, hohe Effizienz, organisiert, zuverlässig • Sehr starke Ablehnung von Hedonismus, vermeiden Vergnügen, suchen keinen Spaß • Hohes Eigeninteresse

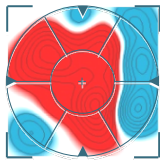
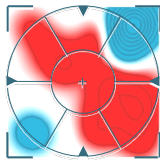
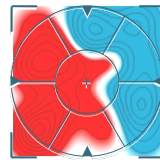
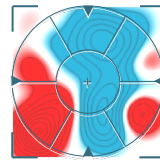
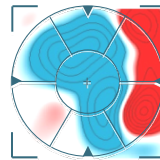
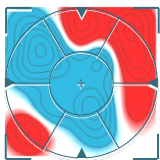
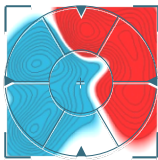
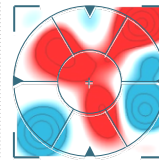
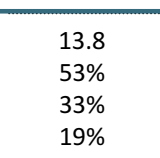
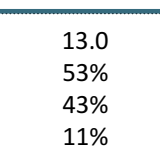
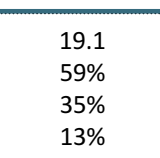
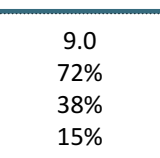
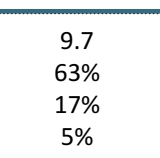
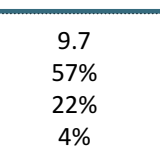
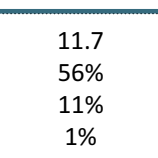
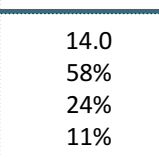
Paul ist Mitglied im Archetype RPE

Deutsche Archetypen – Häufig genutzte Internet Seiten

Germany	INO	HED	PMX	TMX	TRA	HUM	MIN	RPE
Archetype Value System								
Websites Frequently Visited In decreasing order	1. LinkedIn 2. Ask 3. Lokalisten 4. Twitter 5. Bing 6. Xing 7. iTunes 8. Skype 9. Yahoo 10. Google Plus 11. Facebook 12. Youtube	1. Facebook 2. Youtube 3. eBay	1. iTunes 2. LinkedIn 3. Xing 4. Twitter 5. Ask 6. Skype 7. Bing 8. Youtube 9. Facebook 10. Lokalisten 11. Yahoo 12. Amazon 13. Google	1. Google Plus 2. iTunes 3. Xing 4. Amazon 5. Skype	1. Amazon 2. eBay	1. Lokalisten	1. eBay	1. Xing 2. Google Plus 3. Twitter 4. iTunes 5. Google 6. eBay
Websites Least Visited In decreasing order	1. Google	1. Amazon 2. Xing 3. Yahoo 4. Bing		1. Facebook 2. Ask	1. Facebook 2. Youtube 3. Skype 4. iTunes 5. Yahoo 6. Twitter 7. Google Plus 8. Xing	1. Google 2. Youtube 3. Amazon 4. eBay 5. Facebook 6. iTunes 7. Skype 8. Twitter 9. Bing 10. Yahoo	1. Youtube 2. eBay 3. Amazon 4. Skype 5. Google 6. Plus 7. iTunes 8. Yahoo 9. Xing 10. Twitter 11. Facebook	1. Facebook

Source: Rosebud. The Strategic Business Development Group, Toluna (Germany, GenPop, Feb. 2014, n=3.895, CAWI, 18-65 yrs.)

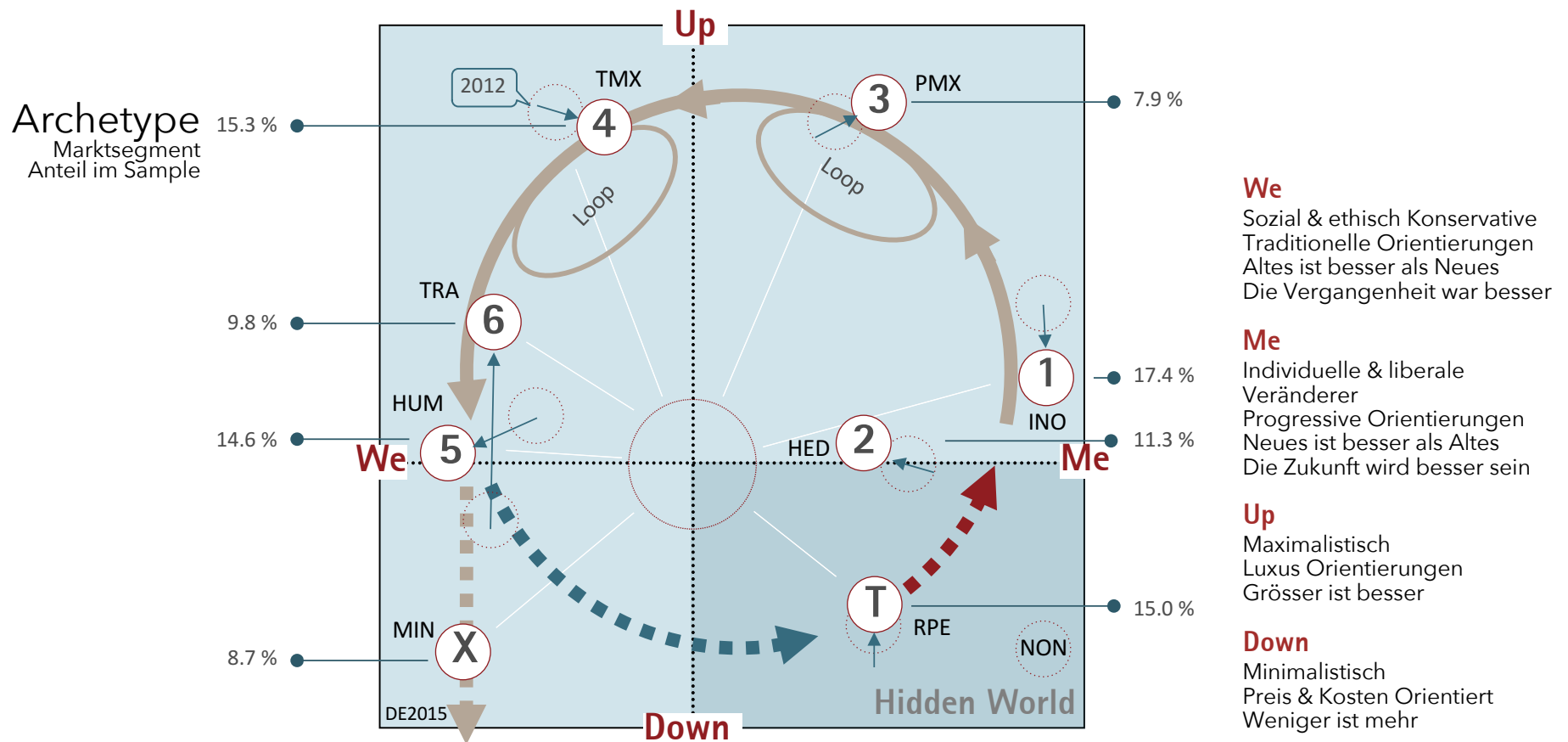
Die Archetypen geben unterschiedlich viel Geld aus

Archetypes	INO C1	HED C2	PMX C3	TMX C4	THE C5	TRA C6	MIN X	RPE T
Value System Russia								
Beer								
General Population [%]	13.8	13.0	19.1	9.0	9.7	9.7	11.7	14.0
Kvas-drinking [<=1x/wk]	53%	53%	59%	72%	63%	57%	56%	58%
Beer-drinking [<=1x/wk]	33%	43%	35%	38%	17%	22%	11%	24%
Cocktail-drinking [<= 1x/mo]	19%	11%	13%	15%	5%	4%	1%	11%
Alpha [PI>20k Ru/month]	14	8	13	11	3	6	3	15
Beta [PI 6-20k Ru/month]	53	39	56	52	52	47	26	46
Gamma [PI <6k Ru/month]	33	53	31	37	45	47	71	39
Personal Income [Ru/mo]	11,211	8,161	11,304	10,440	8,070	8,337	6,414	10,614
Houshold Income	30,858	23,584	33,259	31,462	23,382	24,010	15,002	30,616
Socio.eco.index	2,99	3,44	2,76	2,66	3,03	3,04	4,05	3,21
Spending Index	Medium	Medium	Very High	Very High	Low	Medium	Very Low	Medium
Crisis saving, red. greatly	9%	8%	6%	5%	7%	11%	21%	10%
Over/under-representation	+17%	+59%	+15	+31	-38%	-20%	-60%	-18%
Overall consumption [l/wk]	2.34	2.49	2.43	2.07	2.13	2.08	2.48	2.53
Overall spent [Ru/mo]	475	510	589	465	327	408	305	512
- at home, public [%]	59%	76%	63%	69%	77%	80%	94%	66%
- in bar, restaurant [%]	41%	24%	37%	31%	23%	20%	6%	34%
Average spent [Ru/liter]	52	50	61	56	38	49	31	51
Premium spent [Ru/l vs.MIN]	21	19	30	25	7	18	0	20
Rank	3	2	1	5	7	6	8	4
Economic Relevance [Pts]	157	199	296	115	33	61	20	119

Source: Rosebud. The Strategic Business Development Group, GFK (Russia, May 2009, n=3.000, Market Participants, 18-65 yrs, F2F, Main Sample)

Die deutschen Archetypen sind seit 2012 etwas progressiver und weniger hedonistischer, ausgenommen *Humanisten*

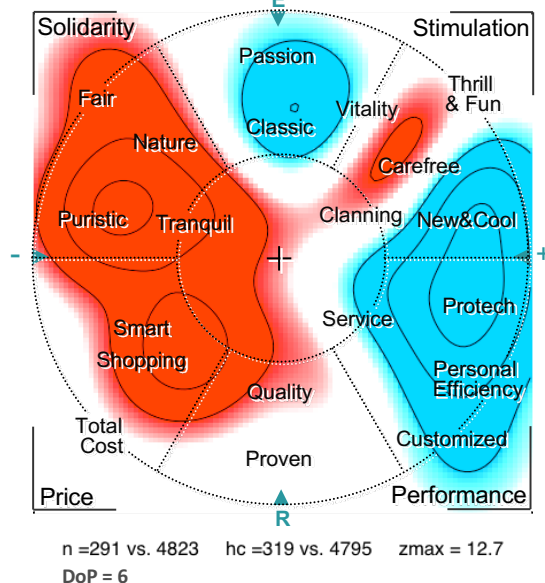
Deutsche Archetypen 2015 vis-à-vis 2012



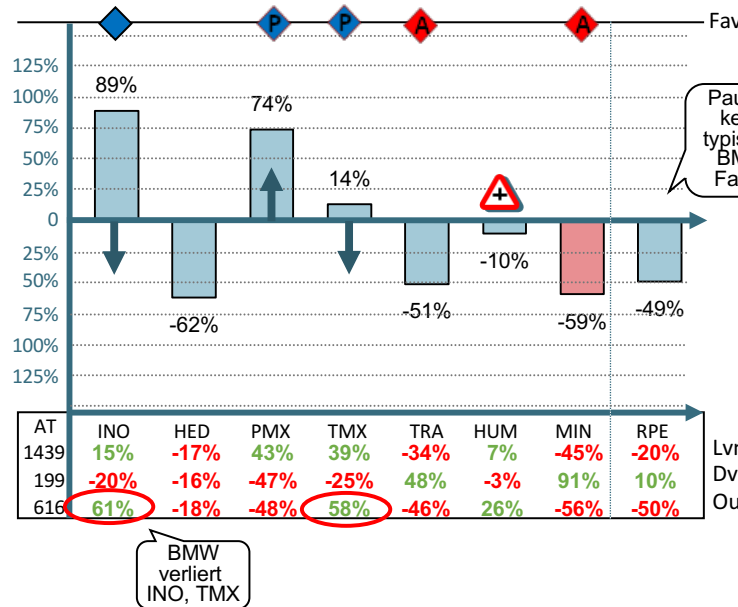
Starke Marken polarisieren in gegensätzliche Gruppen von Protagonisten und Antagonisten, haben geringe Spannungen innerhalb der Markenverwender und damit einen hohen „Pull“

BMW 2016, USA

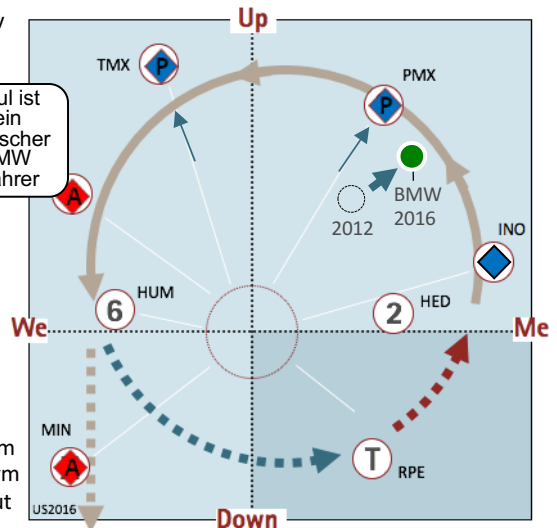
Actual Value Perception (AVP)



Archetype Composition



Battlefield Position



Q24a. Which of the following brands do you like, which not do you not like? Scale 1-5; dislike very much (Dvm), dislike somewhat, like somewhat, like very much (Lvm), don't know

Q24c. Which of the following brands do you currently use personally? Scale 1-2; yes, no

Q24d. Which of the following brands did you use in the past, but no longer? Scale 1-2; yes, no

- E- Altruism
- R- Moneyism
- E0 Traditional hedonism
- R0 Traditional performance
- E+ Progressive hedonism
- R+ Progressive performance
- Pro-Value, Likes
- Anti-Value, Dislikes
- Conflict w/ Delimiter
- Warning, too little
- Warning, too much

- Up Maximalistic, luxury
- Dn Minimalistic, reduction
- We Social conservative
- Me Individual progressive
- Neutral Point, Cross-section of population

- Current Brand Position (AVP)
- Protagonists (P) Delimiter
- Antagonists (A) Delimiter
- Force-field, Attraction, Distraction
- Projection, Advertised Position

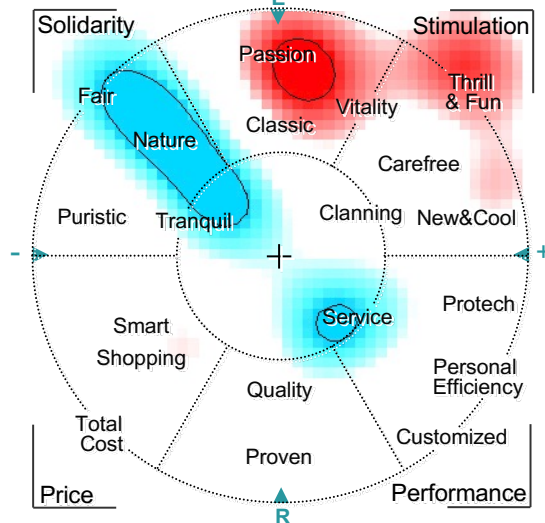
- 1 INO: Surprise, Curiosity & Pride
- 2 HED: Ecstasy, Pleasure & Ease
- 3 PMX: Euphoria, Strength & Interest
- 4 TMX: Potency, Pleasure & Certainty
- 5 TRA: Security, Acceptance & Relief from Doubt
- 6 HUM: Compassion, Peace & Relief from Danger
- X MIN: Stingy, Envy & Relief from wasting own money
- T RPE: Curiosity, Potency & Pride

Source: Rosebud. The Strategic Business Development Group, ResearchNow (United States, Jan.2016, n=5.114, GenPop U.S. Census weighted, 16-75 yrs)

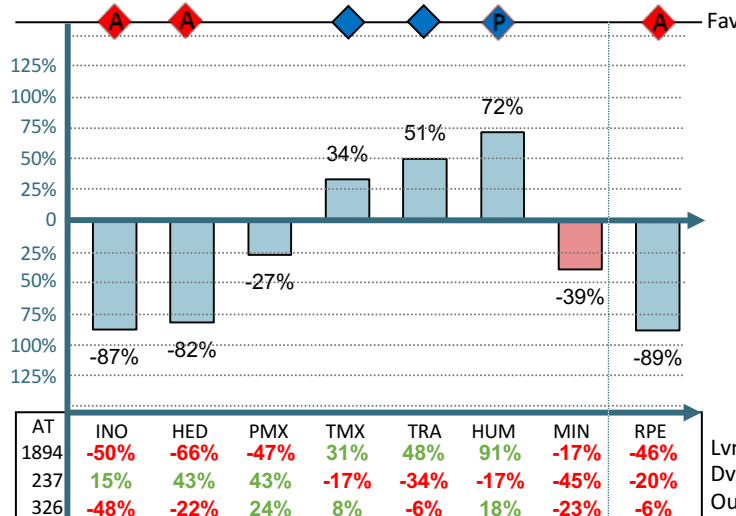
Das GEO Magazin ist auch eine starke Marken, aktiviert aber ganz andere Protagonisten und Antagonisten als die Marke BMW

GEO-Magazin

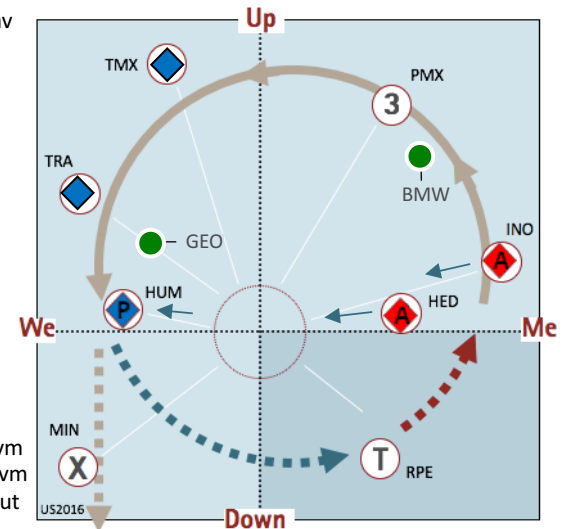
Actual Value Perception (AVP)



Archetype Composition



Battlefield Position



Q24a. Which of the following brands do you like, which not do you not like? Scale 1-5; dislike very much (Dvm), dislike somewhat, like somewhat, like very much (Lvm), don't know

Q24c. Which of the following brands do you currently use personally? Scale 1-2; yes, no

Q24d. Which of the following brands did you use in the past, but no longer? Scale 1-2; yes, no

E- Altruism
R- Moneyism
E0 Traditional hedonism
R0 Traditional performance
E+ Progressive hedonism
R+ Progressive performance

Pro-Value, Likes
Anti-Value, Dislikes
Conflict w/ Delimiter
Warning, too little
Warning, too much

Up Maximalistic, luxury
Dn Minimalistic, reduction
We Social conservative
Me Individual progressive
Neutral Point, Cross-section of population

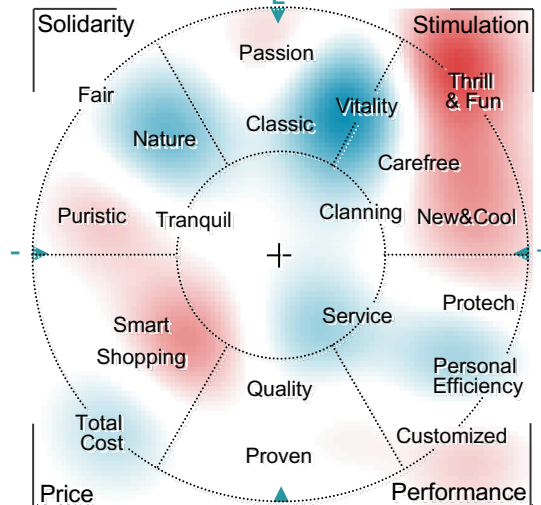
Current Brand Position (AVP)
Protagonists (P) Delimiter
Antagonists (A) Delimiter
Force-field, Attraction, Distraction
Projection, Advertised Position

1 INO: Surprise, Curiosity & Pride
2 HED: Ecstasy, Pleasure & Ease
3 PMX: Euphoria, Strength & Interest
4 TMX: Potency, Pleasure & Certainty
5 TRA: Security, Acceptance & Relief from Doubt
6 HUM: Compassion, Peace & Relief from Danger
X MIN: Stingy, Envy & Relief from wasting own money
T RPE: Curiosity, Potency & Pride

Schwache Marken haben einen Querschnitt der Bevölkerung akquiriert, kein Profil, maximale Spannungen innerhalb der Markenverwender erfordern „Push“, mindern Profitabilität

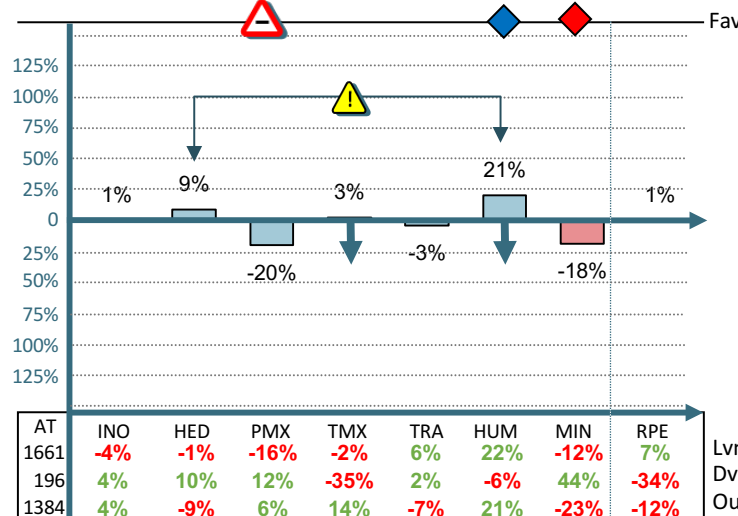
Toyota 2016, USA

Actual Value Perception (AVP)

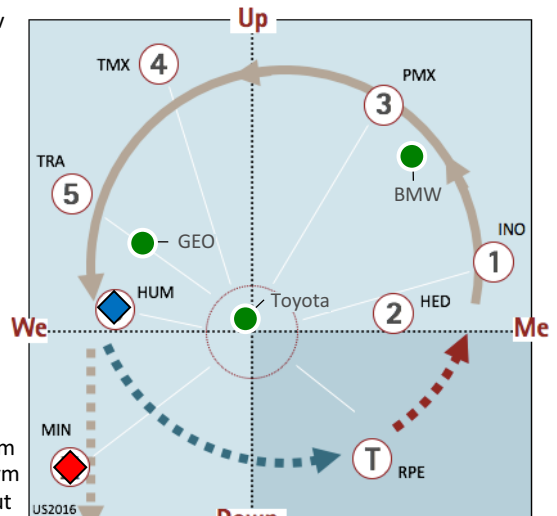


n=1233 vs. 3881 hc=1265 vs. 3849 zmax = 12.7
DoP = 0

Archetype Composition



Battlefield Position



Q24a. Which of the following brands do you like, which not do you not like? Scale 1-5; dislike very much (Dvm), dislike somewhat, like somewhat, like very much (Lvm), don't know

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Neutral Point, Cross-section of population

Current Brand Position (AVP)
Protagonists (P) Delimiter
Antagonists (A) Delimiter
Force-field, Attraction, Distraction
Projection, Advertised Position

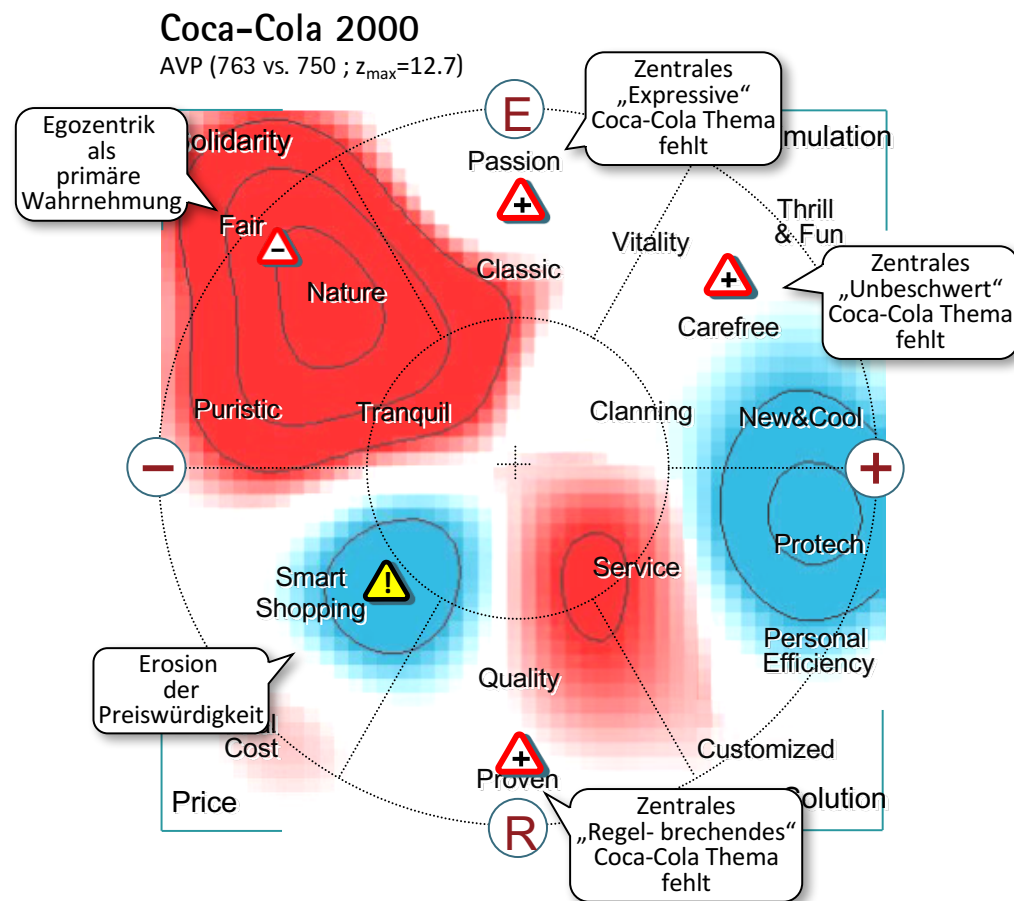
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3 PMX: Euphoria, Strength & Interest
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T RPE: Curiosity, Potency & Pride

Source: Rosebud. The Strategic Business Development Group, ResearchNow (United States, Jan.2016, n=5.114, GenPop U.S. Census weighted, 16-75 yrs)

Fallbeispiel Coca-Cola 2000 - 2016



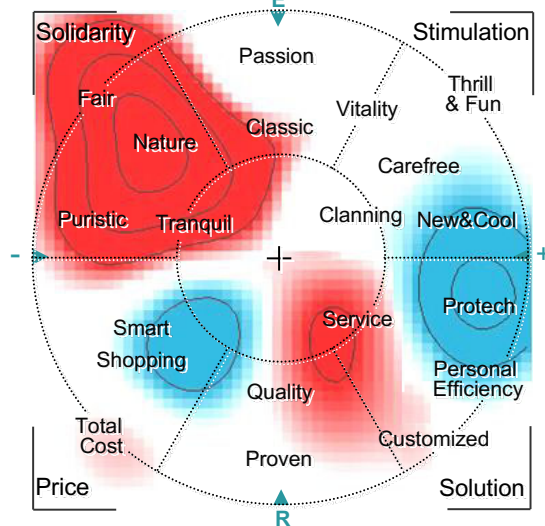
Im Jahr 2000 zeigte Coca-Cola's Werteprofil in Deutschland klare Anzeichen einer fortgeschrittenen Erosion



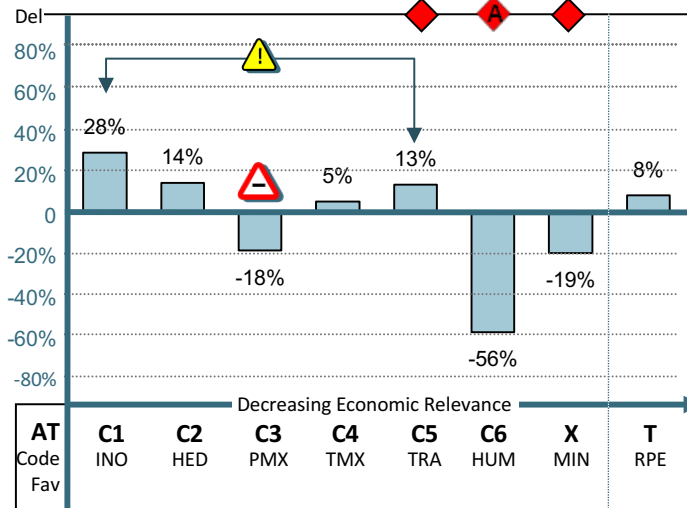
Coca-Cola's Verwenderanalyse zeigt erhöhte Spannungen zwischen progressiven, regel-brechenden und traditionellen Nutzersegmenten, die Marke verfügte über keine Protagonisten

Coca-Cola 2000

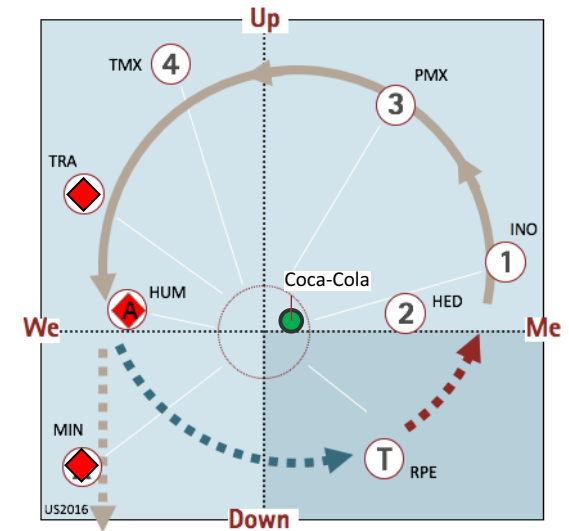
Brand Profile – Actual Value Perception



Brand User Analysis



1.) Over/ under representation of Archetype in brand user group, in %



E- Altruism
R- Moneyism
E0 Traditional hedonism
R0 Traditional performance
E+ Progressive hedonism
R+ Progressive performance

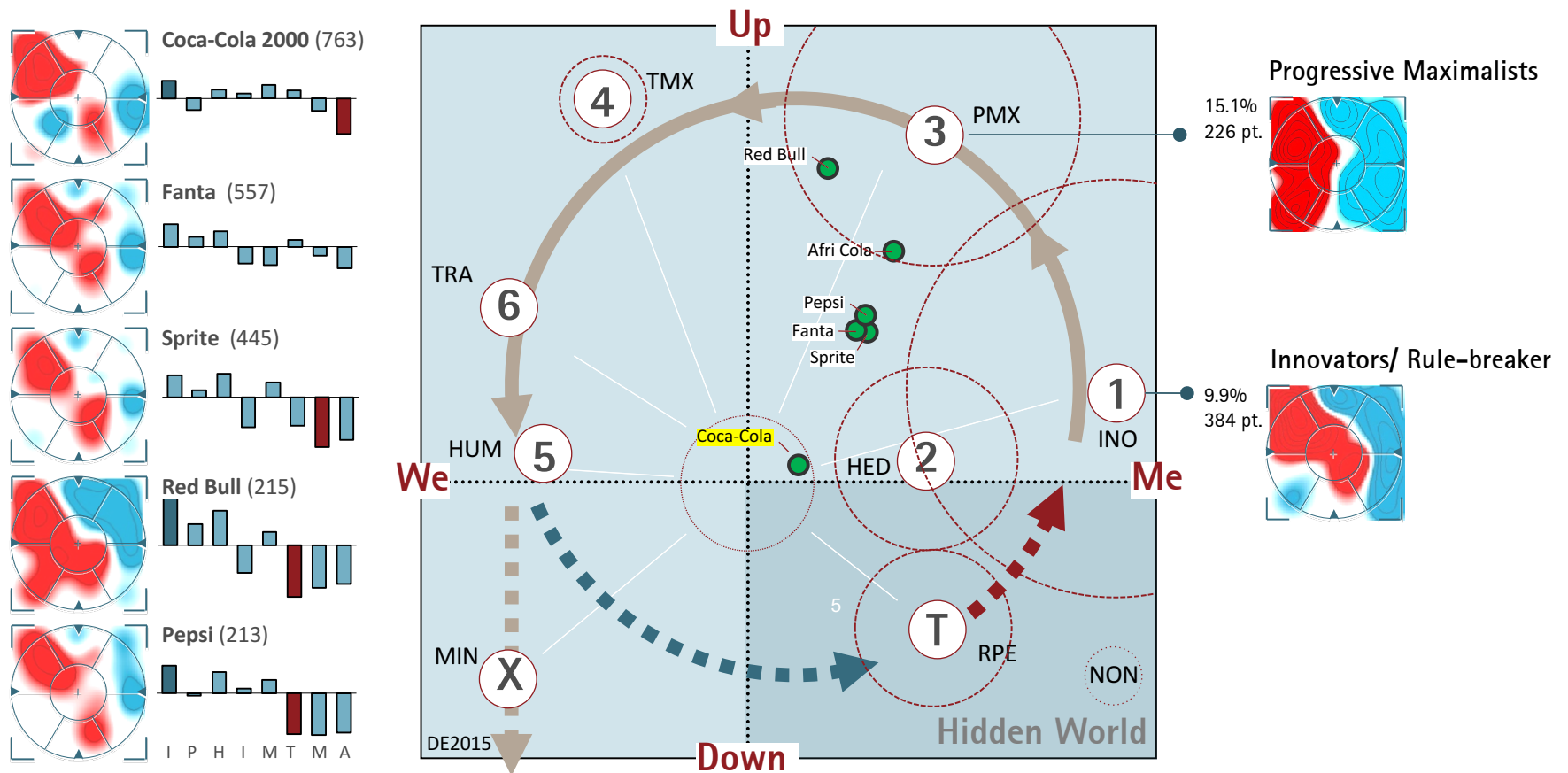
Pro-Value. Likes
Anti-Value. Dislikes
Conflict w/ Delimiter
Warning. too little
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Up Maximalistic. luxury
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Coca-Cola war im Jahr 2000 auf dem Weg, den ökonomisch relevanten Markt zu verlassen



1) Simulation, Archetypes from May 2004

Source: Rosebud. The Strategic Business Development Group, TNS Data (Germany, Aug.2001, n=1.511, 16-65 yrs, CATI)



Im Jahr 1999 warb Coca-Cola mit „Enjoy“ und fröhlichen Szenen aus der Kindheit und dem Leben junger Erwachsener

PVP Projection analysis of Coca-Cola „Snow flakes“ (1)



- Wintertime, out in the country, big snow flakes are falling, view from above
- A group of children are having a good snow ball fight
- The children are all properly dressed in typical classic/ European winter clothes and scarfs

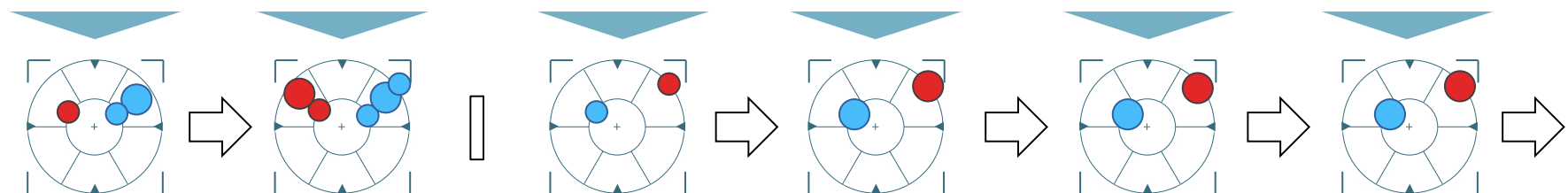
- The boys are wild, throwing snow balls at each other, chasing the girls ...

- The girl with the blue scarf escapes, stops playing ...

- [Slow motion]
- ...and starts to 'dance' with the snow flakes

- [Zoom in]
- The girl closes her eyes, opens her mouth and starts to dream ...
- It appears, that the girl dreams to have become a snow flake herself - floating around free

- [Cut]
- [Close up]
- A face (nose, eyes only) with closed eyes appears to be still the same girl's face – but not quite
- The background color changes from a cold to a warm tone

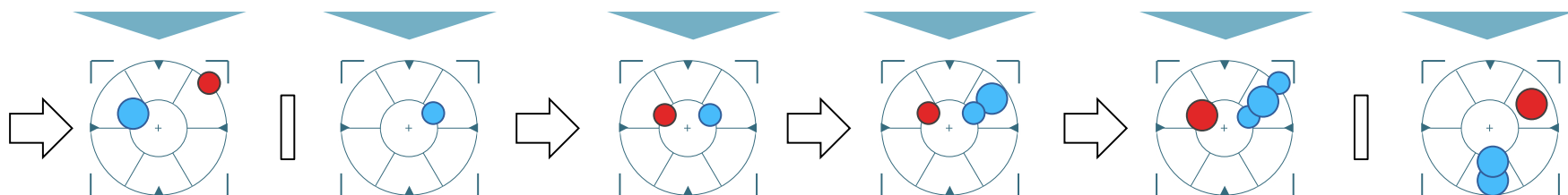


Coca-Cola's 1999 TV-Spot "Schneeflocken" projiziert die Idee, dass das Getränk so erfrischt wie nur ein Wintertag im Sommer

PVP Projection analysis of Coca-Cola „Snow flakes" (2)



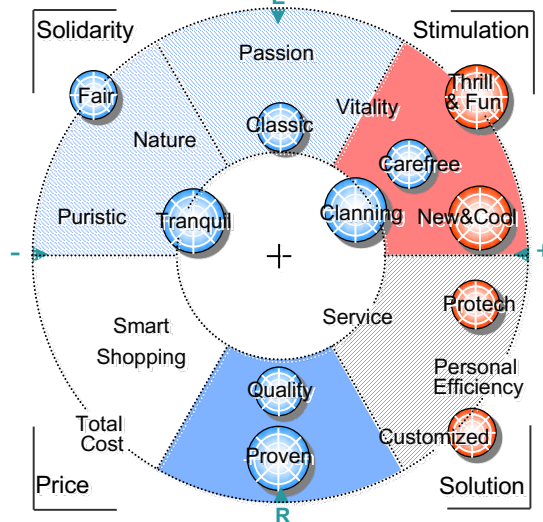
- [Zoom out]
- The face shows now a older girl – probably the same girl as a teenager in the future – drinking from a bottle of Coca-Cola with closed eyes – appearing to be enjoying the drink very much
- The girl stops drinking, puts the bottle down and turns around
- Her face brightens up (almost intimately) as if she recognizes someone she likes a lot ... and whom she has not noticed approaching while busy enjoying her Coca-Cola
- The scene is obviously taking place at the beach where it is warm
- The someone from the previous scene obviously takes the hand of the girl ...
- ... and she gladly gives in at last getting up from her seat in the sand
- She is splashed at by others from her peer group
- She has not let go of the Coca-Cola bottle and is still holding on to it
- She splashes back (but not too much) ...
- ... and all seem to have a very good time with each other
- The story seems to be that the girl is feeling very hot at the beach, drinks a Coca-Cola and while she is enjoying the refreshment she remembers her youth in the cold wintertime having a snowball fight – i.e. Coca-Cola 'works' like the winter in good old times



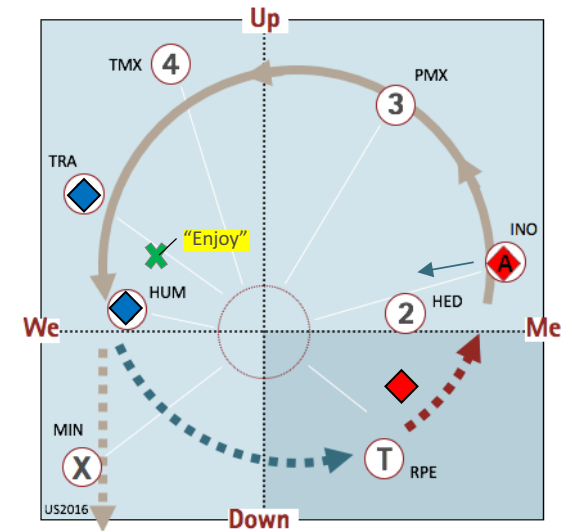
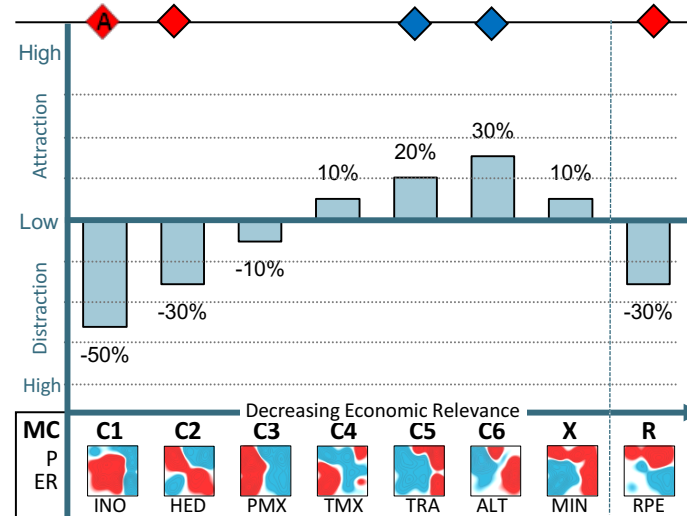
In Summe projizierte Coca-Cola mit "Enjoy" ein traditionelles Leistungsprofil mit anti-hedonistischen Elementen

Coca-Cola "Enjoy"

Projected Value Proposition



Attraction & Distraction



E- Altruism
R- Moneyism
E0 Traditional hedonism
R0 Traditional performance
E+ Progressive hedonism
R+ Progressive performance

Pro-Value, Likes
Anti-Value, Dislikes
Conflict w/ Delimiter
Warning, too little
Warning, too much

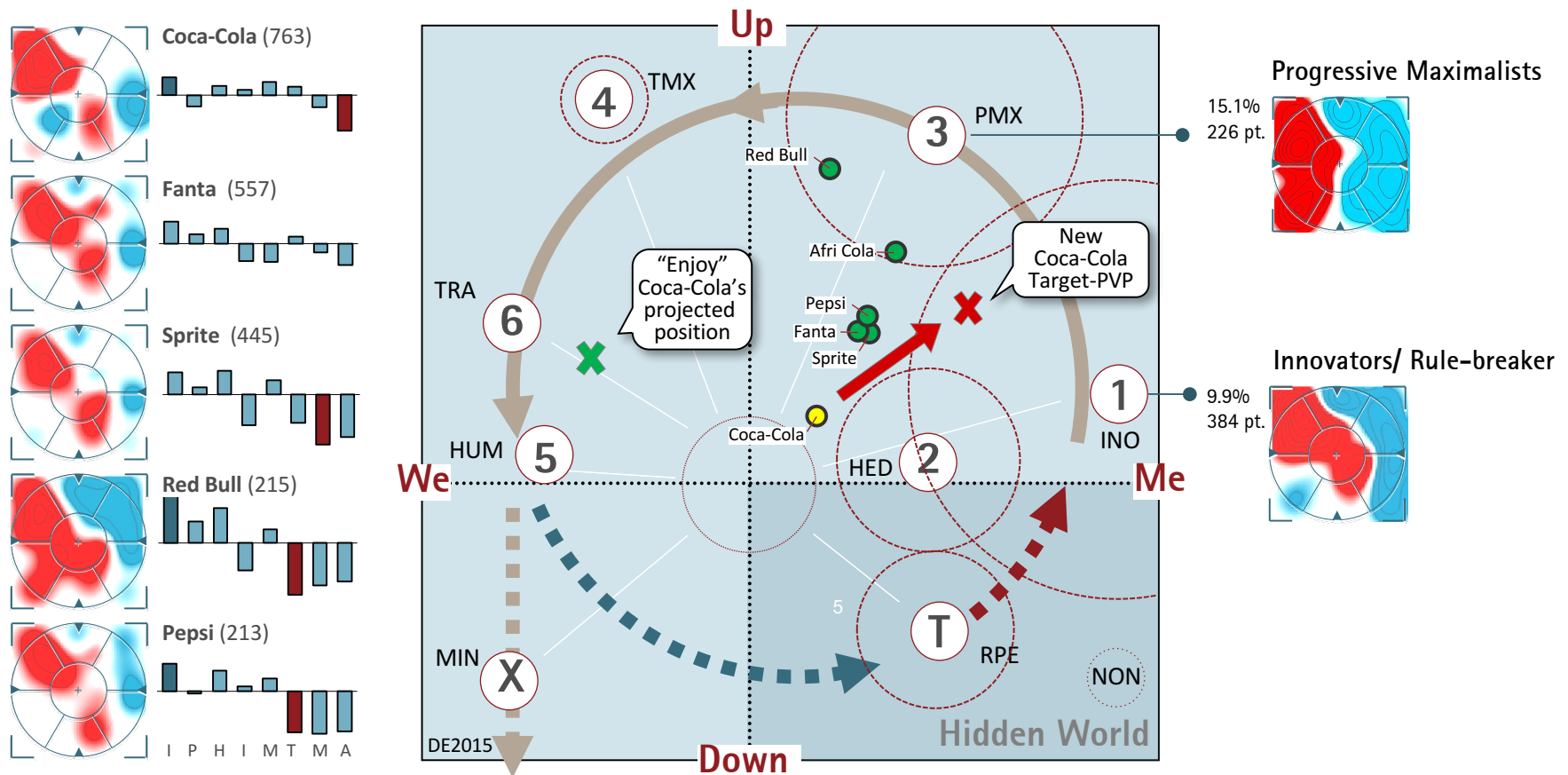
Up Maximalistic, luxury
Dn Minimalistic, reduction
We Social conservative
Me Individual progressive
Neutral Point, Cross-section of population

Current Brand Position (AVP)
Protagonists (P) Delimiter
Antagonists (A) Delimiter
Force-field, Attraction, Distraction
Projection, Advertised Position

1 INO: Surprise, Curiosity & Pride
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TRA: Security, Acceptance & Relief from Doubt
ALT: Compassion, Peace & Relief from Danger
X MIN: Stingy, Envy & Relief from wasting own money
T RPE: Curiosity, Potency & Pride

Source: Rosebud. The Strategic Business Development Group, Qualitative PVP Assessment Panel Panel

Die projizierte Zielposition von "Enjoy" liegt klar außerhalb des ökonomisch relevanten Marktes, Coca-Cola sollte vielmehr seine Markenposition in Richtung *Innovatoren* stärken



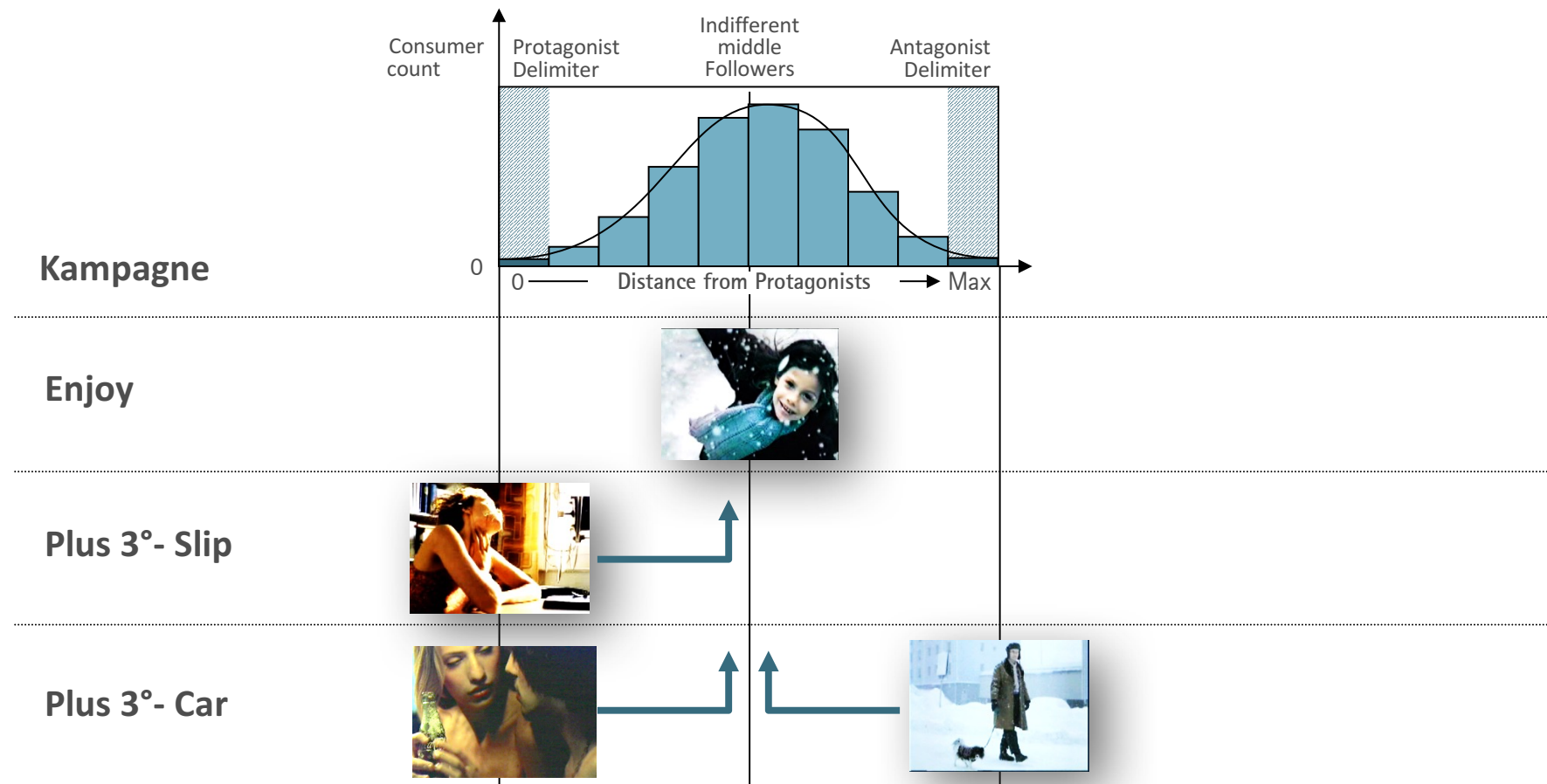
1) Simulation, Archetypes from May 2004

Source: Rosebud. The Strategic Business Development Group, TNS Data (Germany, Aug. 2001, n=1.511, 16-65 yrs, CATI)





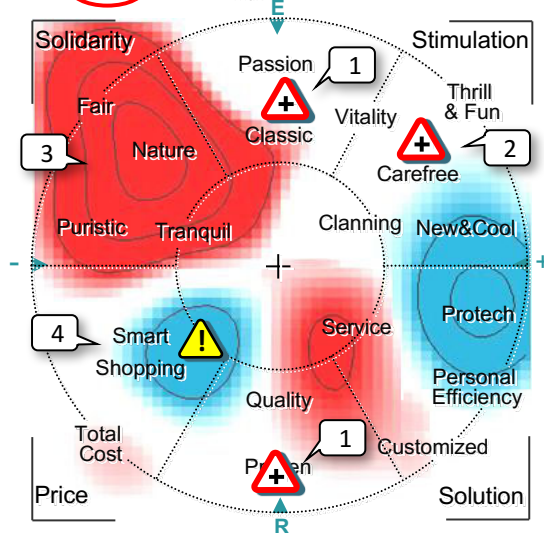
Coca-Cola's "Drei Grad Celsius" Kampagne polarisiert und stellt die Zuschauer vor eine einfache Wahl



Nach dem Launch der neuen Kampagne verbesserte sich die Markenposition, Preiswürdigkeit und Absatz von Coca-Cola's deutlich

Coca-Cola 2000

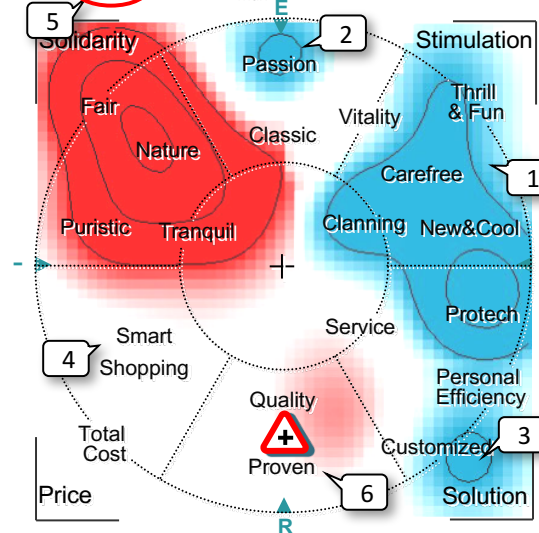
AVR (763 vs. 750; $z_{\max}=12.7$)



1. Central "Coca-Cola" theme missing, i.e. Carefree, Not-Proven
2. No hedonistic differentiators
3. Egocentricity as primary value proposition/ representation, too strong (rel.)
4. Erosion of price-worthiness

Coca-Cola 2001

AVR (927 vs. 582; $z_{\max}=12.7$)



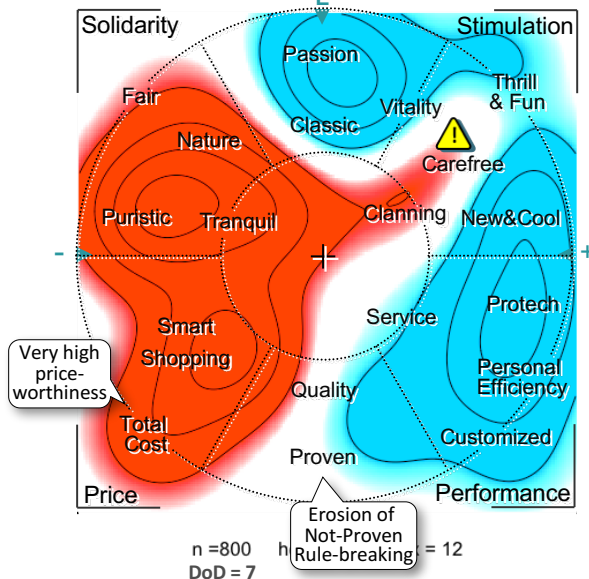
1. Development of new hedonistic differentiators
2. Increase of expressive positions
3. Increase of individualistic positions
4. Improved price-worthiness
5. Increase of consumption from n=763 to 927 user
6. Anti-Proven still missing

In 2012 zeigt Coca-Cola USA seine typische, stark differenzierte Markenposition

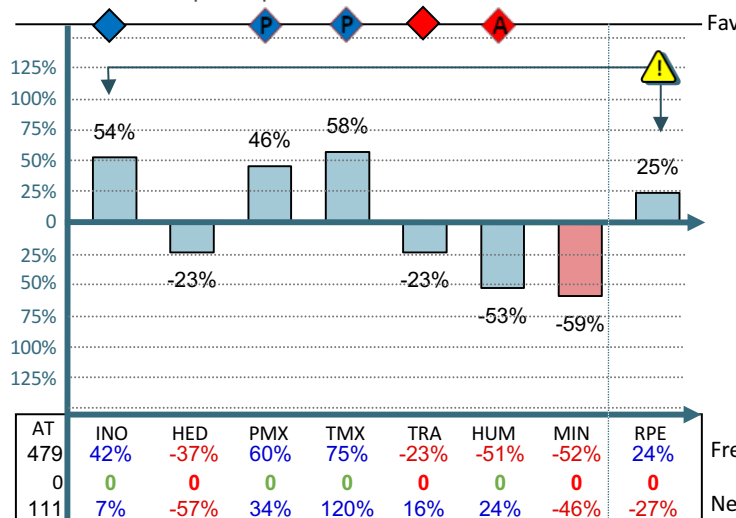
Brand Diagnosis Summary

Coca-Cola 2012, USA

Brand Profile, Actual Value Perception (AVP)

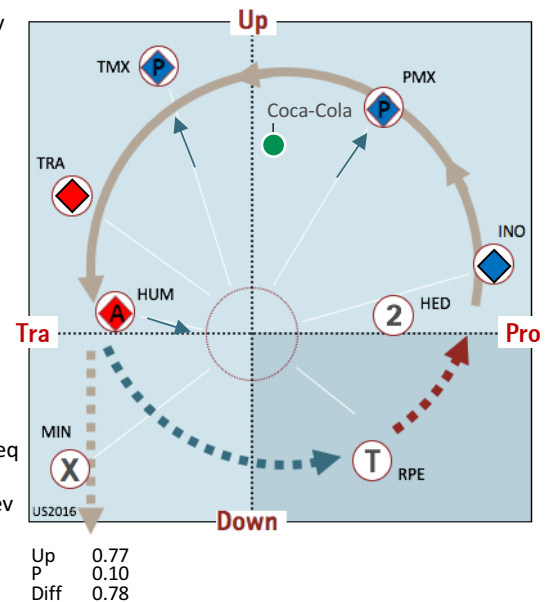


Brand User Group Composition



Over- / Underrepresentation of Archetypes in Brand User Group

Battlefield Position



Q30.7 For the following list of beverage brands, please tell us how often you buy or use products or services of these brands? Scale 1-4; Never, Rarely, Occasionally, Frequently

- E- Altruism
- R- Moneyism
- E0 Traditional hedonism
- R0 Traditional performance
- E+ Progressive hedonism
- R+ Progressive performance
- Pro-Value, Likes
- Anti-Value, Dislikes
- Conflict w/ Delimiter
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- Warning, too much

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- Dn Minimalistic, reduction
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- Me Individual progressive
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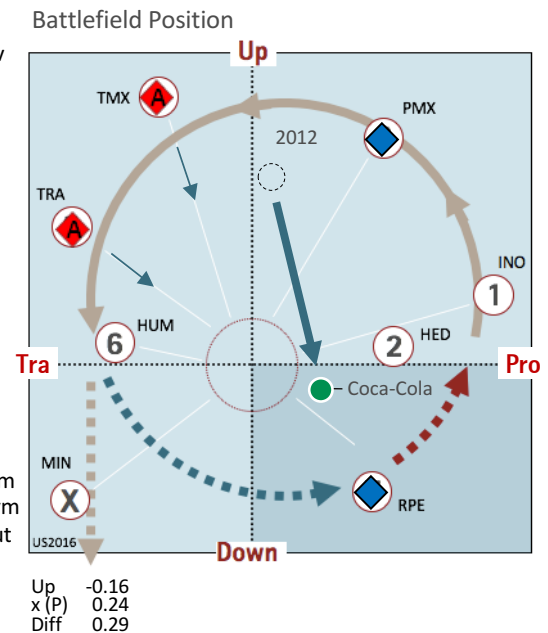
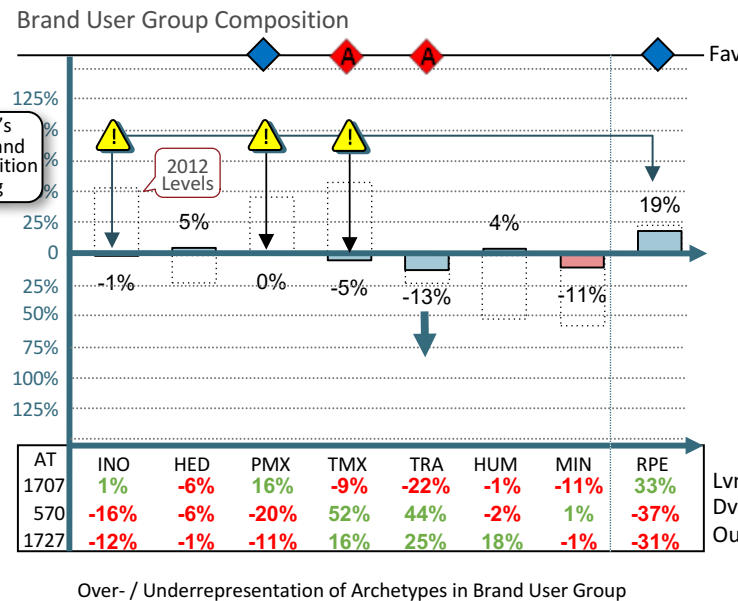
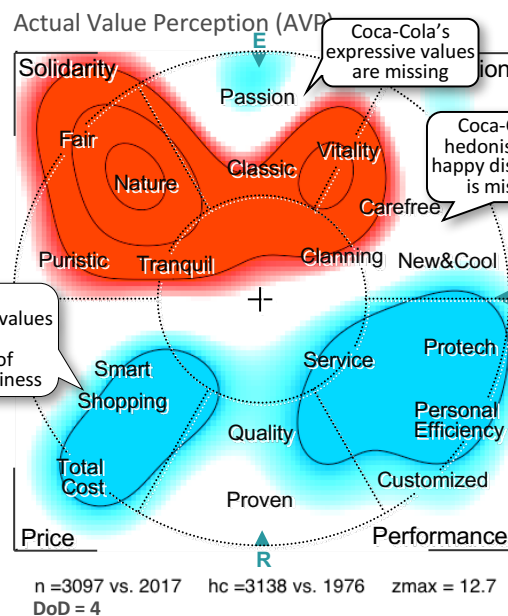
- Current Brand Position (AVP)
- Protagonists (P) Delimiter
- Antagonists (A) Delimiter
- Force-field, Attraction, Distraction
- Projection, Advertised Position

- 1 INO: Surprise, Curiosity & Pride
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- 5 TRA: Security, Acceptance & Relief from Doubt
- 6 HUM: Compassion, Peace & Relief from Danger
- X MIN: Stingy, Envy & Relief from wasting own money
- T RPE: Curiosity, Potency & Pride

Source: Rosebud. The Strategic Business Development Group, Toluna (United States, Jan.2012, n=1,079, Car Driver, 18-65 yrs)

In 2016 hat Coca-Cola USA – in einem beispiellosen Fall – alle hedonistische Werte verloren, die Markendifferenzierung reduziert, und die Preiswürdigkeit ist wieder geschwächt

Coca-Cola 2016, USA



Q24a. Which of the following brands do you like, which not do you not like? Scale 1-5; "dislike very much" (Dvm) to "like very much" (Lvm), "don't know"

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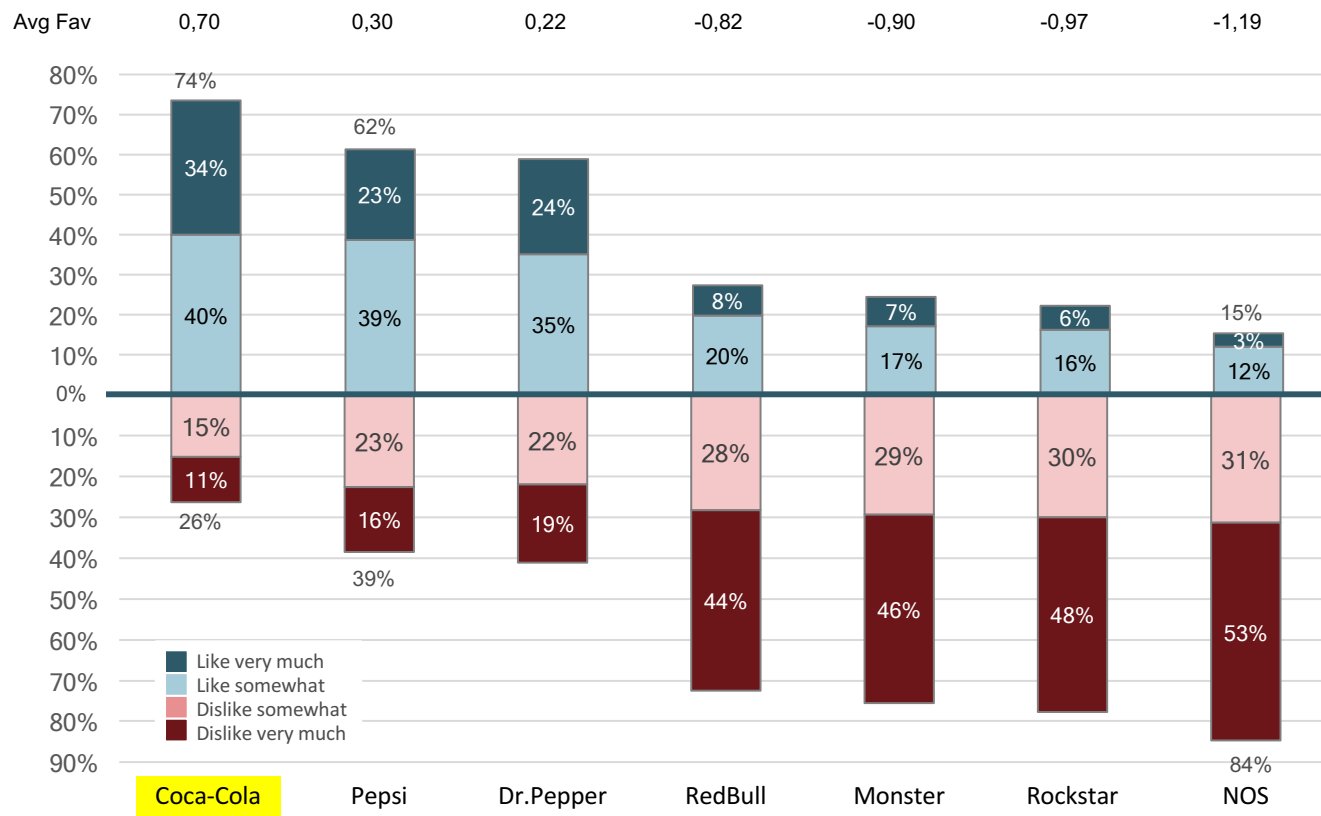
Neutral Point,
Cross-section of
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Gleichzeitig ist Coca-Cola aber die beliebteste Softdrink Marke in USA

Favourability of Selected Soft & Energy Drink Brands 2016 in The U.S.



Avg Fav: Average favorability, scale of 4, ranging from -2 (Dislike very much) to +2 (Like very much);

% Values: Percentage of respondents who are aware of the brand

Source: Rosebud. The Strategic Business Development Group, ResearchNow (United States, Jan.2016, n=5,115, GenPop U.S. Census weighted, 16-75 yrs)

Abnehmende Markendifferenzierung geht mit rückläufigen operativen Gewinn einher, zeigen Finanzberichte

Favorability & Differentiation of Selected Brands



Warum BMW-Fahrer GEO eher nicht lesen, und was das für die Markenführung heißt

1. **Genaue Kenntnis der Wertesegmente im Markt**

Das Verhältnis der Segmente zueinander, und ihre ökonomische Relevanz in der Kategorie

2. **Genaue Kenntnis der eigenen Position im Battlefield**

Eigene Stärken, und besonders die eigene Schwächen schonungslos beim Namen nennen

3. **Genaue Kenntnis der Positionen der Wettbewerber im Battlefield**

Besonders deren Schwächen und Risiken

4. **Strategische - unternehmerische - Auswahl von wenigen, wirtschaftlich bedeutenden Zielsegmenten für eine hohe Markendifferenzierung**

Was kostet's, was bringt's? Wirtschaftliche Bewertung von strategischen Optionen

5. **Maßgeschneiderte Kommunikation - weniger Wertversprechen sind mehr - und mutige Ausführung für eine hohe Markenpräferenz - Schlüssel & Schloss-Prinzip:**

Wenige, in sich stimmige Wertversprechen aus 1.)

6. **Wenn Ihnen nichts mehr anderes einfällt, dann reduziere den Preis**

Vielen herzlichen Dank

Tom@Ramoser.net

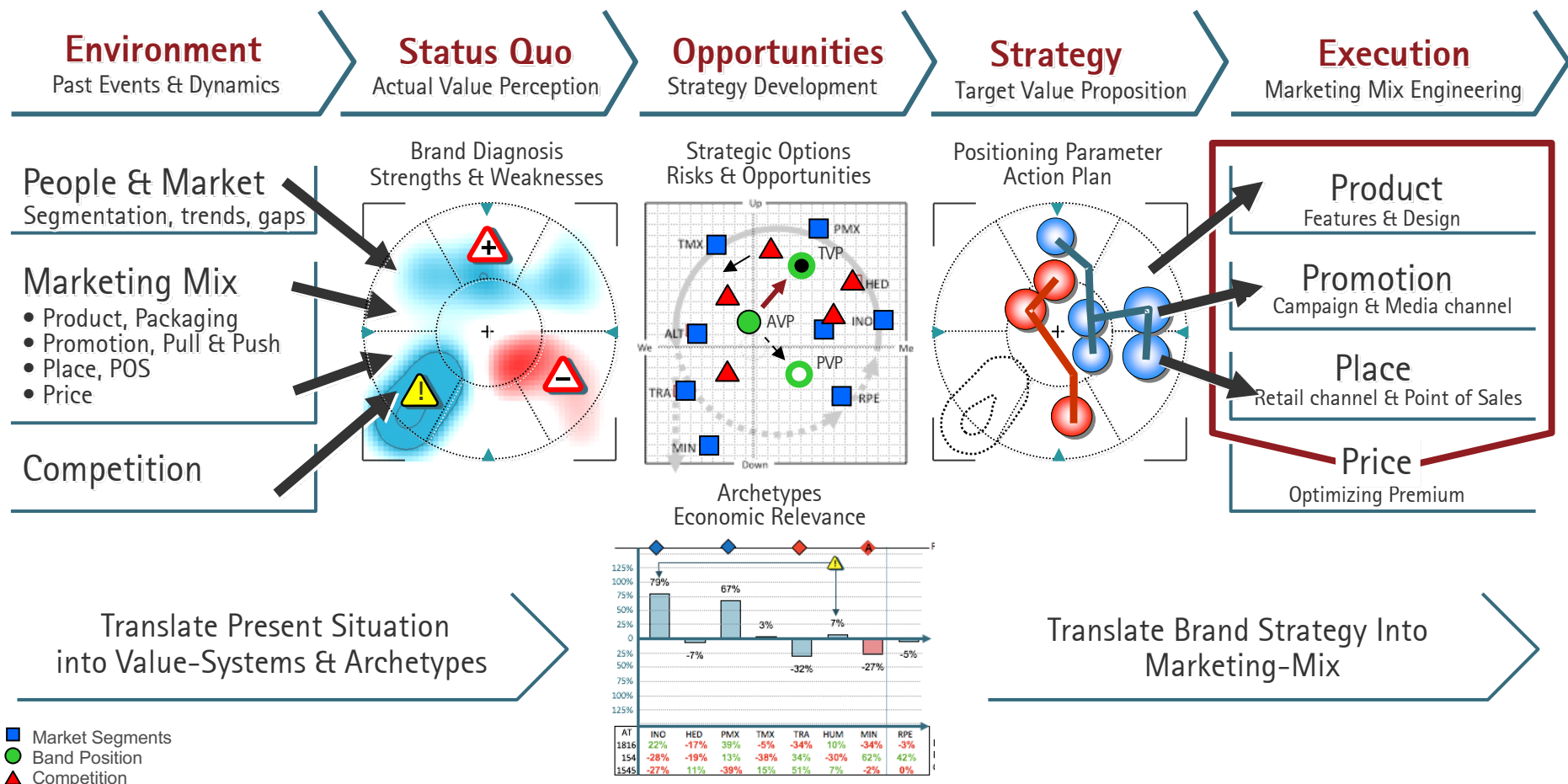
Appendix

Who's Rosebud ... ?

- **Meant to increase a brand's economic performance**, an interdisciplinary team of seasoned experts from around the world, a team of rich diversity with qualitative and quantitative capabilities
- **People-centered brand philosophy**, with emphasis on emotional motivations
- **Entrepreneurial & creative**, rule-breaking problem solution techniques to ultimately come up with answers how to best improve the economic performance of a brand or brand portfolio
- **Research & development-driven**, invented the value-based Archetypes market segmentation and brand diagnosis approach in the Nineties, committed to always offer the latest version and most advanced application
- **Successfully completed more than 150 brand strategy projects**
- **Global reach** with projects in Europe, China, Japan, India, Brazil, and the United States. Operating from Hong Kong, Beijing, Munich, New York and San Diego
- **Publishing in leading periodicals**, such as Manager Magazine and Harvard Business Review
- Some of the most dynamic and successful corporations worldwide use Strategic Brand Management by Rosebud



The Purpose Of Strategy is Advantage – Rosebud Integrates the Entire Strategic Business Development Process from Diagnosis to Execution



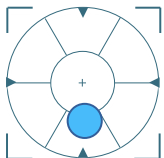
Source: Rosebud. The Strategic Business Development Group

The Rosebud Project Has Identified 19 General Consumer Orientations and Values

Quality



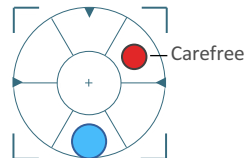
- Need for objective measurable performance criteria
- Durability, reliability
- High and continuous efforts
- Order
- Cleanliness



Proven



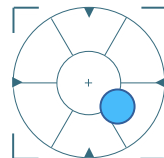
- Need for successful experience
- Maximum security, reliability, scientific proof
- Tradition, routine, "the good old things"
- Extreme discipline, Perfectionism



Service



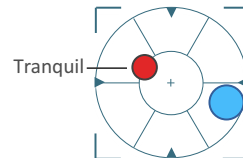
- Need for uncomplicated information and fulfilment
- Need for competent and practical advice
- Need for sensitivity, respect and honesty
- "Warm" interaction



24/7 Protech



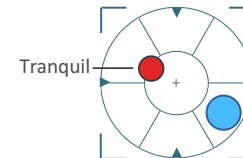
- Pro-technological orientations
- Application of newest/latest technology
- Need for fast information and access, anytime, anywhere
- "Cold" transaction



Personal Efficiency



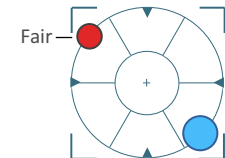
- Desire to make the best out of time
- Extreme efficiency, best possible performance
- Speed
- Expecting standby solutions



Customized



- Need for maximum individuality
- Just-for-me availability
- Direct involvement, one-to-one
- Controllable uniqueness, exclusivity
- Maximum flexibility and variety

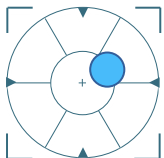


The Rosebud Project Has Identified 19 General Consumer Orientations and Values

Clanning



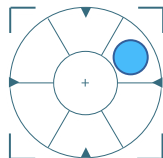
- Need to belong, warmth, team spirit
- Desire for acceptance in a group
- Spending time with friends or family
- Having a "good time" together



Carefree



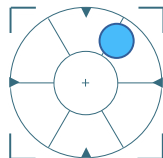
- Need for light hearted-ness
- Easy-going, optimism, positivism
- Spontaneity, playful diversity
- "Hakuna Matata" – no worries



Vitality



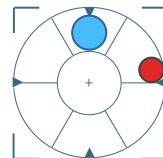
- Need for physical and mental fitness
- Activity
- Either: health orientation, healthy living
- Or: liveliness, mobility, independence, initiative



Classic



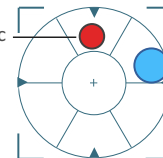
- Need for timeless elegance and style
- Beauty, aesthetics and design
- Conservative hedonism
- Conservative status and elitist thinking



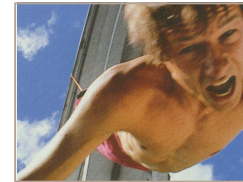
New&Cool



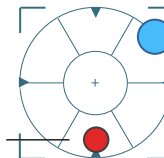
- Need to set trends, rule breaking
- Maximum variety and stimuli
- Progressive hedonism
- Avantgardistic status and elitist thinking
- Self-differentiation from the "grey masses"



Thrill&Fun



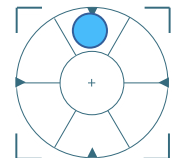
- Thrill, risk and adventure seeking
- Need to have "adrenalin in the blood"
- Rebellious rule breaking
- Need for self definition, extreme challenge, pushing the limits



Passion



- Attention seeking, expressive attitudes
- Desire for admiration - ability for admiration
- Living out profound emotion, enthusiasm
- Sex
- Also: showing off, narcissism

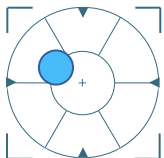


The Rosebud Project Has Identified 19 General Consumer Orientations and Values

Tranquil



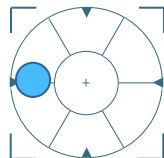
- Need for calmness, peace, relaxation
- Slowing down, de-stressing, regeneration
- Looking for harmony, inner peace, avoiding stress and hectic
- Soft escapism



Purism



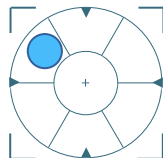
- Reduction to the essentials and simplicity, pure things, minimalism
- Under-statement
- Attitudes of not wasting anything, rejection of affluence, looking for long lasting things



Nature



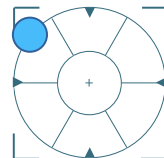
- High ecological standards, holistic views
- Trusting in nature's power
- Seeking harmony with nature
- Protection of nature, taking care of animals
- Giving up own needs on nature's behalf



Fair



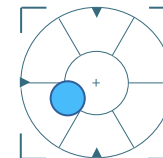
- High ethical standards, holistic views
- Rejection of exploiting people
- Solidarity, active social engagement
- Readiness for self-sacrifice and rebellion on behalf of humanity



Smart Shopping



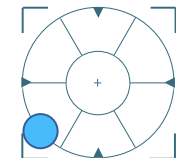
- Systematically seeking "value for money"
- Active bargain hunting
- Clever attitude
- Price sensitive
- Scepticism vis-a-vis a brand's pricing



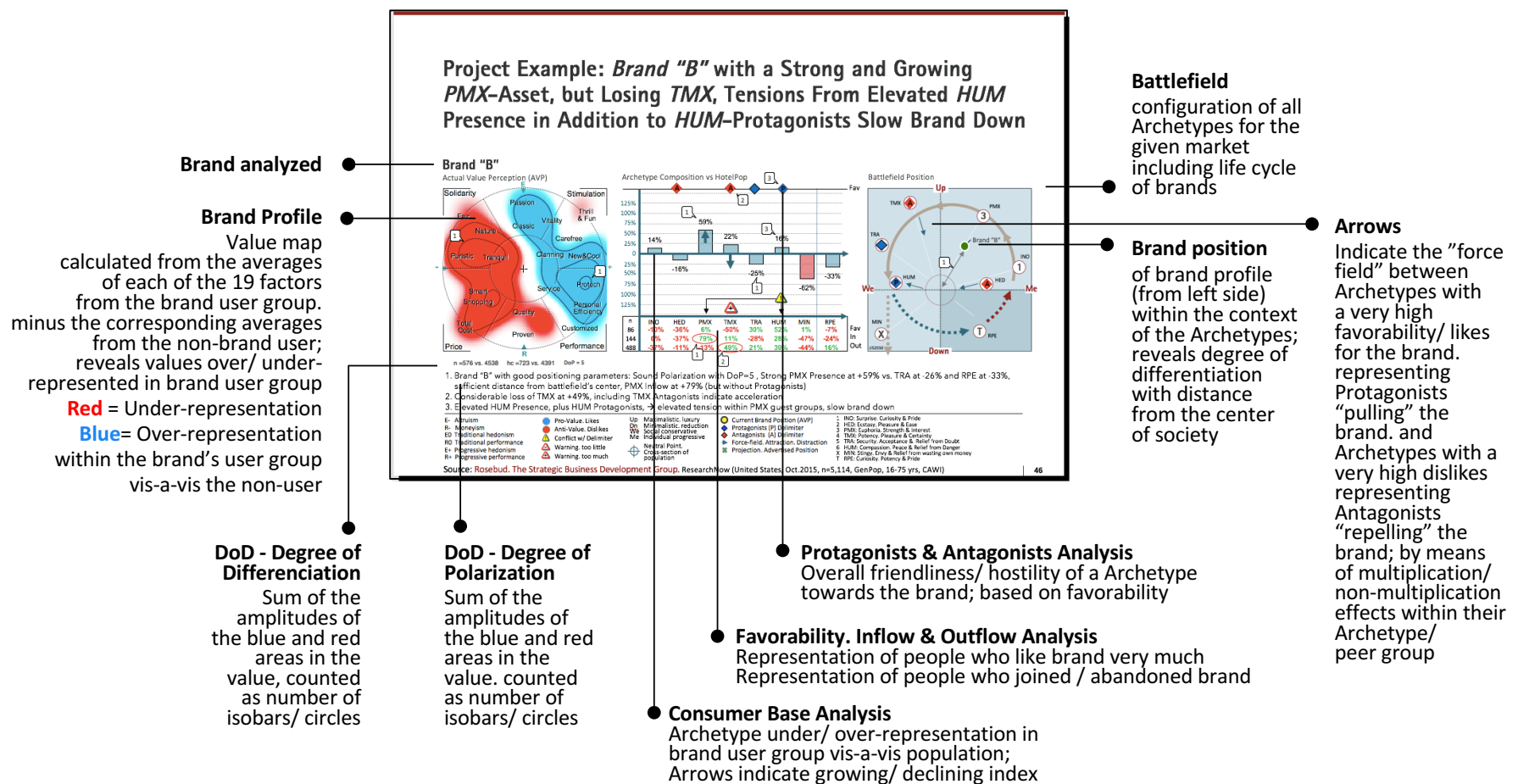
Total Cost



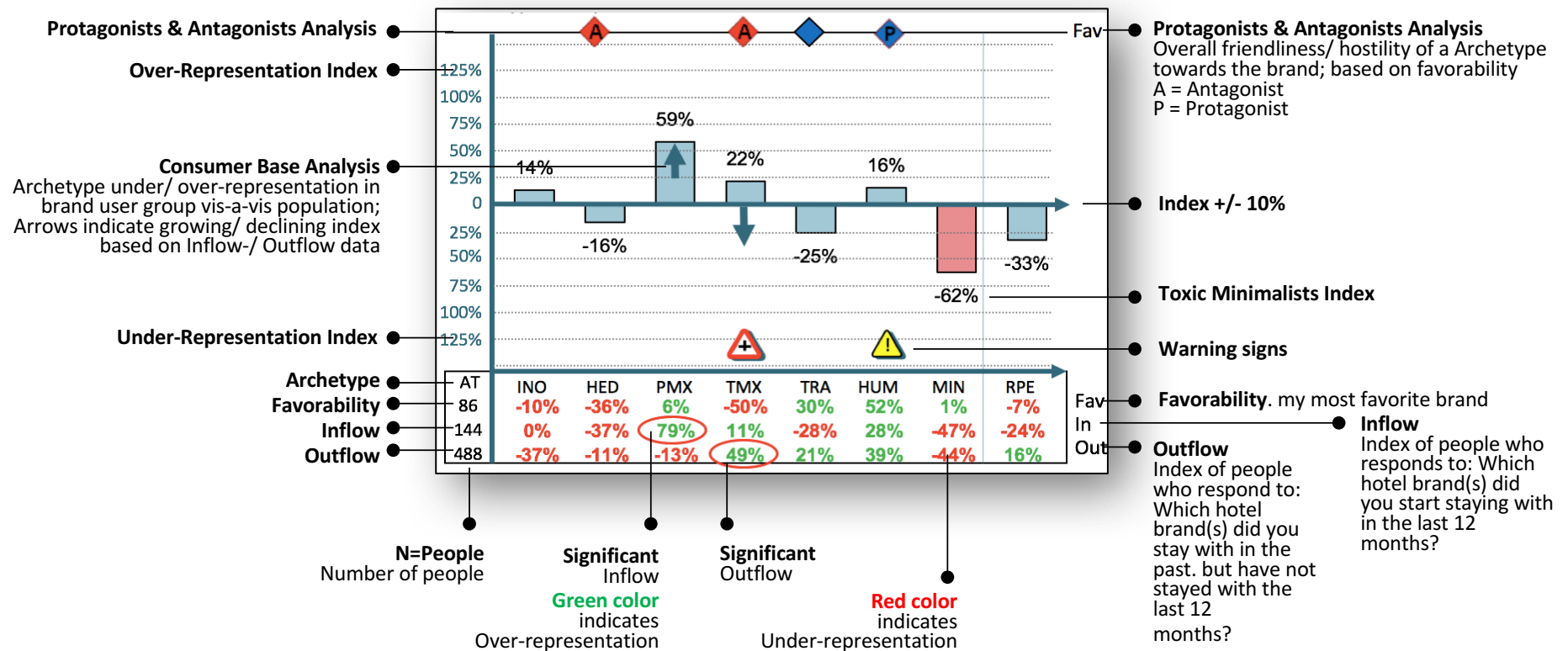
- Systematic purchase decision driven solely by cost
- Extreme penny-pinching
- Extreme minimalism



How to Read Rosebud's Brand Diagnosis Cockpit Charts



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Rosebud. Unleashing the Power of Brands

Rosebud

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