



Food Retailing Monitor

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STUDY FOCUS & DESIGN OF QUESTIONNAIRE

Objective:

Implementation of a new Multi-Client study which, on the one hand, adopts significant components of the existing LEH-Monitor and, on the other, is based on the most up-to-date methods of market research.

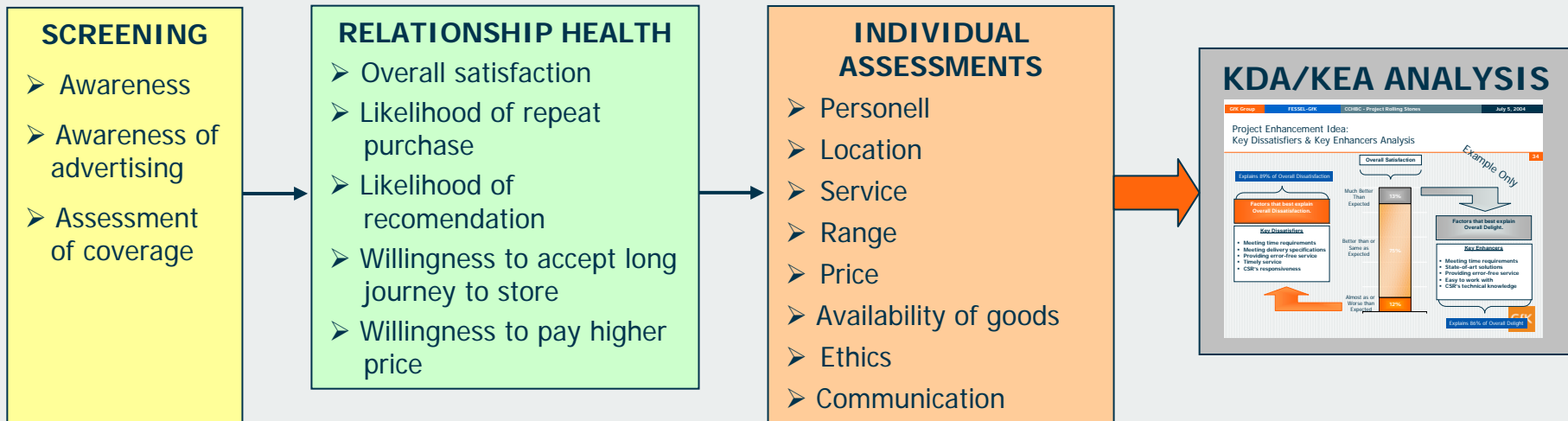
Procedure:

Survey of **Customer Satisfaction** (Relationship Health) and **Segmentation of the customers** with respect to their satisfaction with the LEH/individual store brands

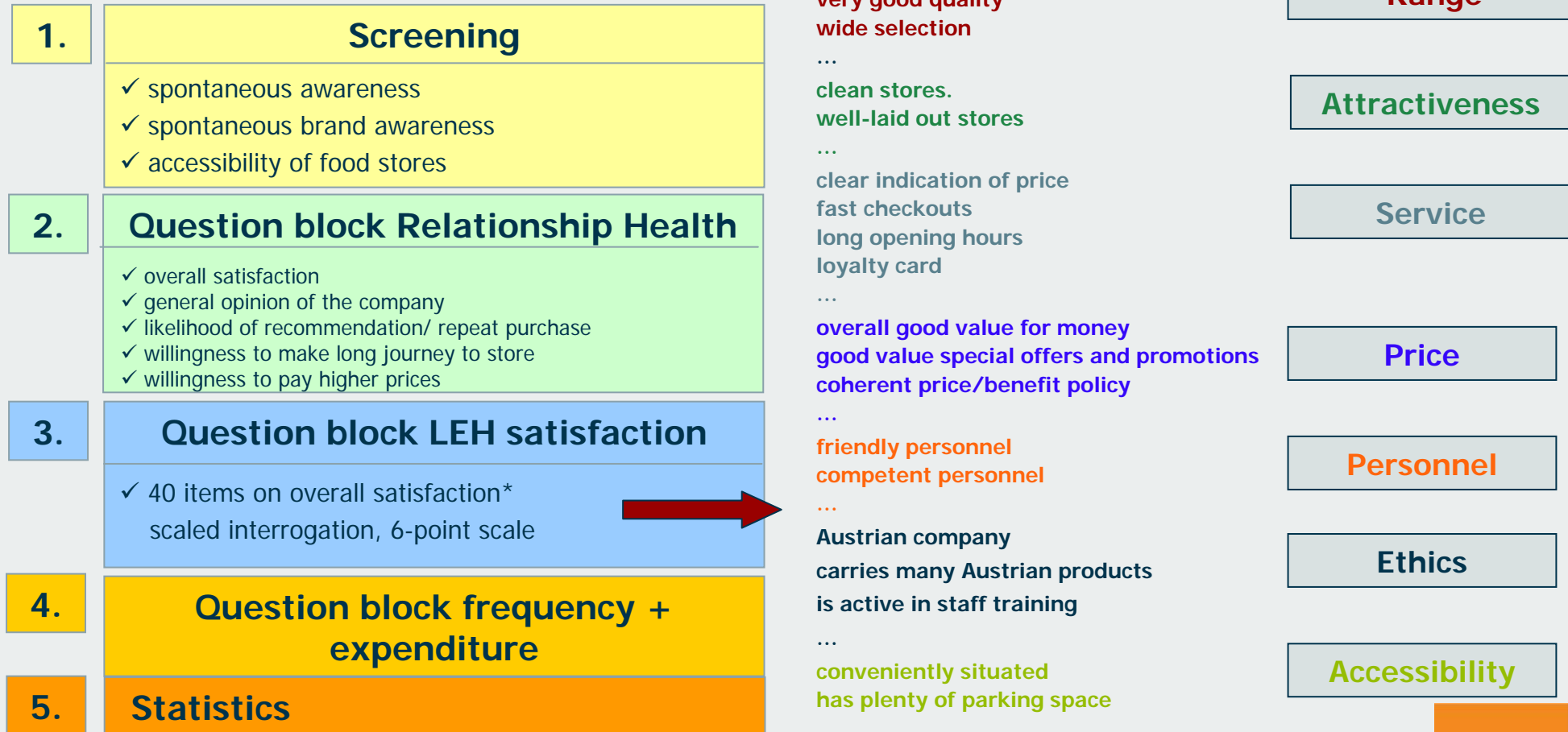
Identification of those **Key Factors** which have a decisive influence on customer satisfaction (KDA/KEA Analysis according to the **Kano** theory).

Derived from this, analysis of those areas which are decisive for **satisfaction** or **dissatisfaction** with the LEH and the individual store brands.

Design of the questionnaire:



THE QUESTIONNAIRE IN DETAIL



* Full list on next page

THE IMAGE – FULL LIST

PERSONELL

has friendly staff who are customer orientated
the staff are knowledgeable and able to provide specialist information

LOCATION

has convenient transport links
has easily accessible parking
is easy to reach because it is close by
stores are clean and well cared for

SERVICE

has opening times which suit me
no long queues at the checkouts, more tills opened quickly if required
prices are clearly indicated, you can see straight away what everything costs
pleasing service in cold meat, cheese and bread sections
offers an attractive loyalty scheme to regular customers, e.g. Club membership or card
easy return of deposit bottles
clear presentation of goods, you can find what you want quickly

RANGE STOCKED

always has fresh goods with long sell-by dates
overall offers very good quality
overall offers a wide choice
stocks many well-known brands
has a wide selection of attractive own brands only available from them
offers a wide range of regional products, i.e. locally produced or from their region

PRICE

overall has a well balanced price/benefit relationship
overall offers very good value for money
often has good promotions and special offers

COMMUNICATION

conveys a positive public image
has striking advertising campaigns
overall company has an attractive image
company's advertising tempts me to buy
leads by provides good guidelines for healthy eating

ETHICS

offers wide range of products produced in Austria
assures Austrian jobs
supports and promotes Austrian tradition and culture
actively implements staff training programmes

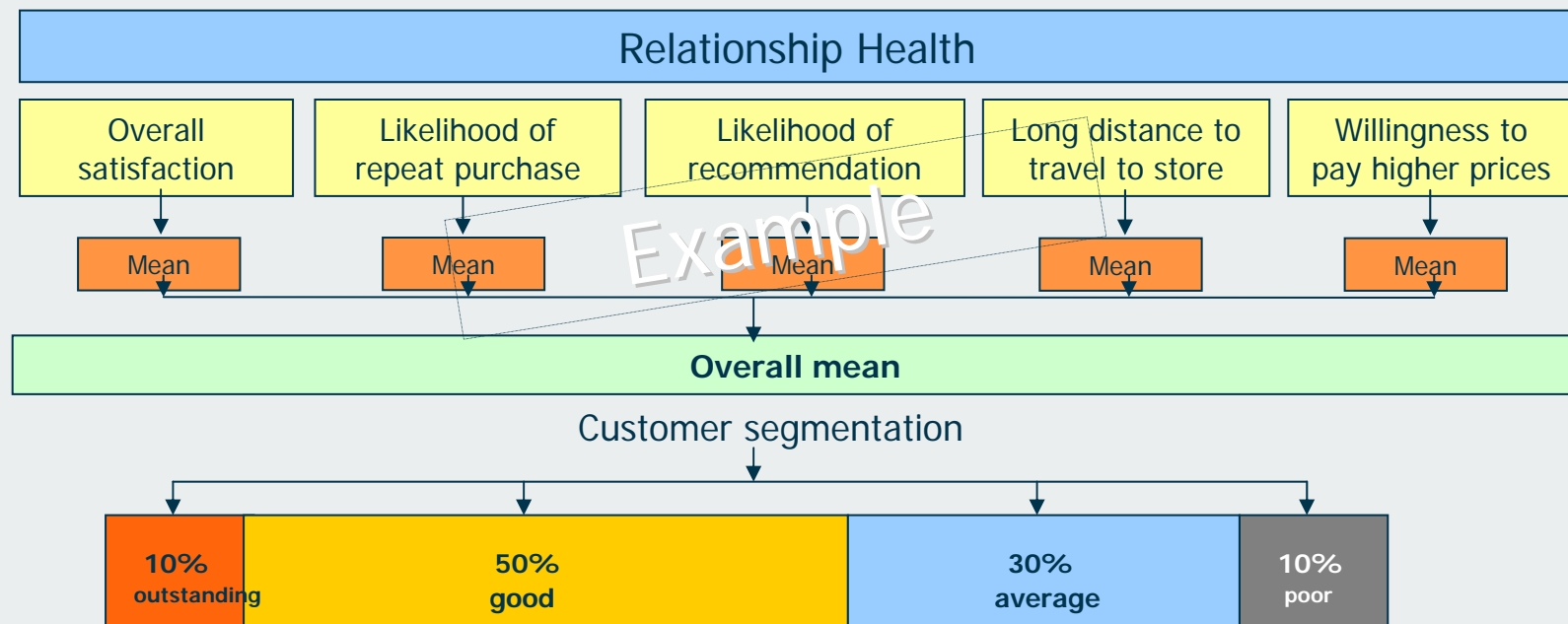
PRODUCT AVAILABILITY

offers a range of natural products and organic food stuffs
always have fresh bread and bakery products in stock
has a comprehensive range of dairy products such as milk, cheese and yoghurt
has own butchery counter with a wide selection of fresh meat
has a wide range of drugstore products such as personal hygiene products, household cleaners, detergents and baby foods/care products

RELATIONSHIP HEALTH: The formation of the dependent variable

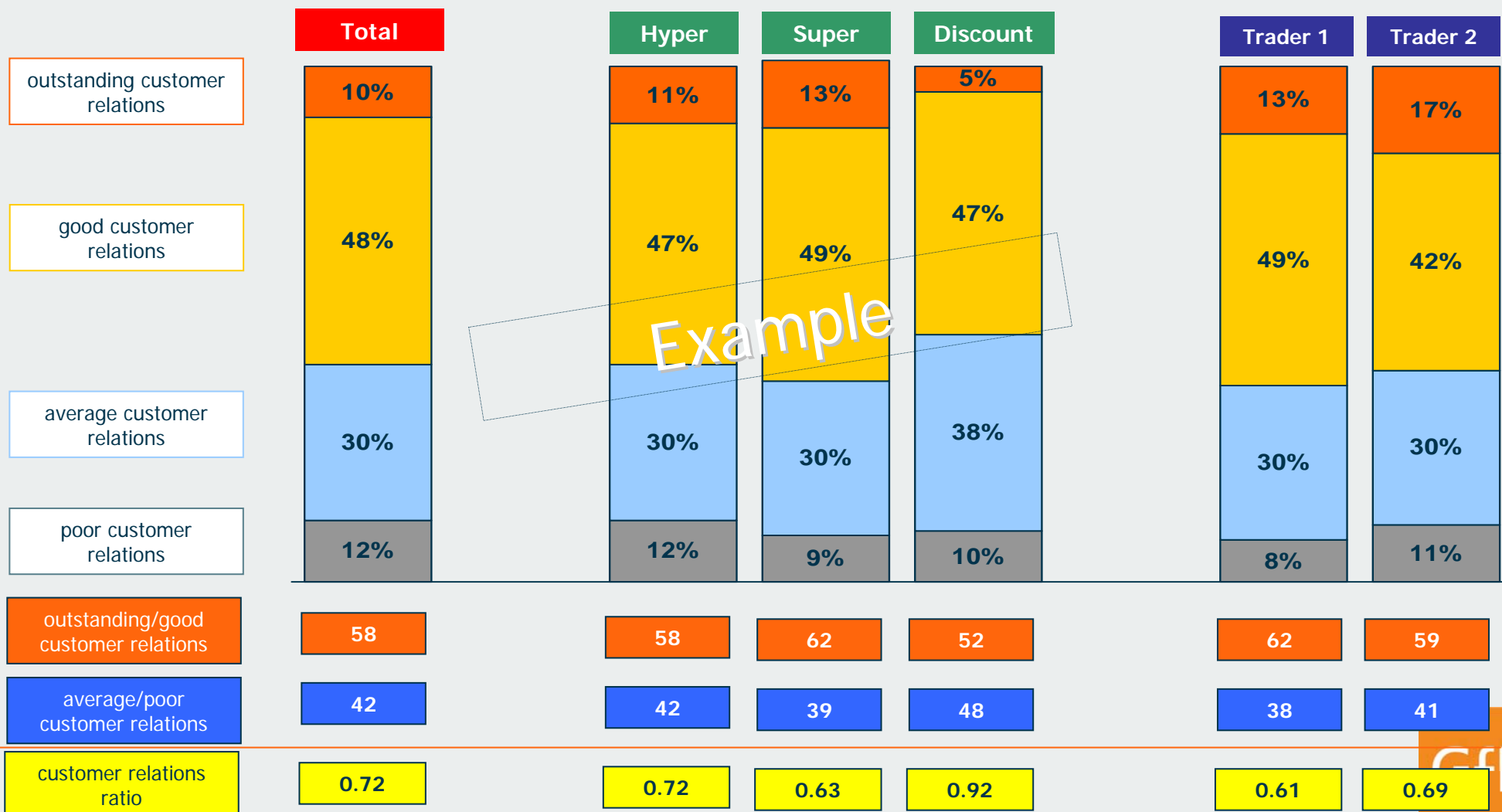
By the term **Relationship Health** we mean a dependent variable which fundamentally describes the level of satisfaction with a retailer. This variable comprises more than the usual question about overall satisfaction since, in our opinion, several aspects are relevant if we wish to describe a “healthy” relationship with customers.

The questions asked about Relationship Health result in a **Customer segmentation** which is orientated on the performance of an individual retailer. This is made up of 4 groups who range from persons with an outstanding customer relationship right through to those customers who are very dissatisfied.



RELATIONSHIP HEALTH:

Customer segmentation on the basis of the satisfaction model

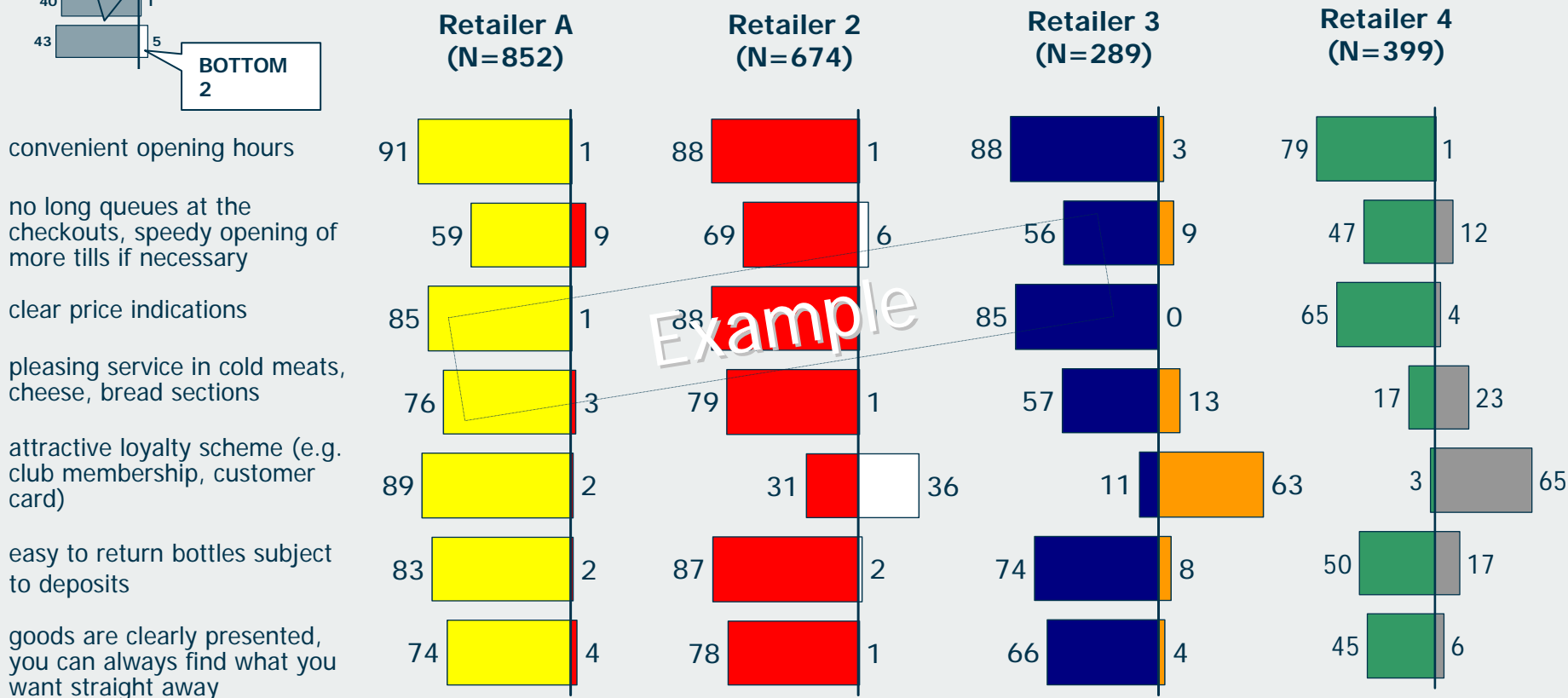
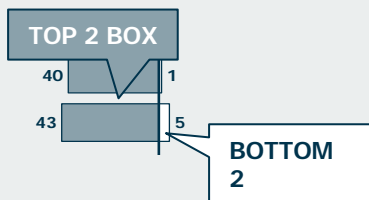


Example



PERFORMANCE-SCORES: Individual assessment of the LEH-marketing brands

The performance of the store brands is assessed by computing the Top-2-Box and the Bottom-2-Box values. The individual retailers are sorted according to type of operation and compared across all 39 items interrogated (independent variables). Percentage basis in each case is the number of active customers of the retailer.



Example

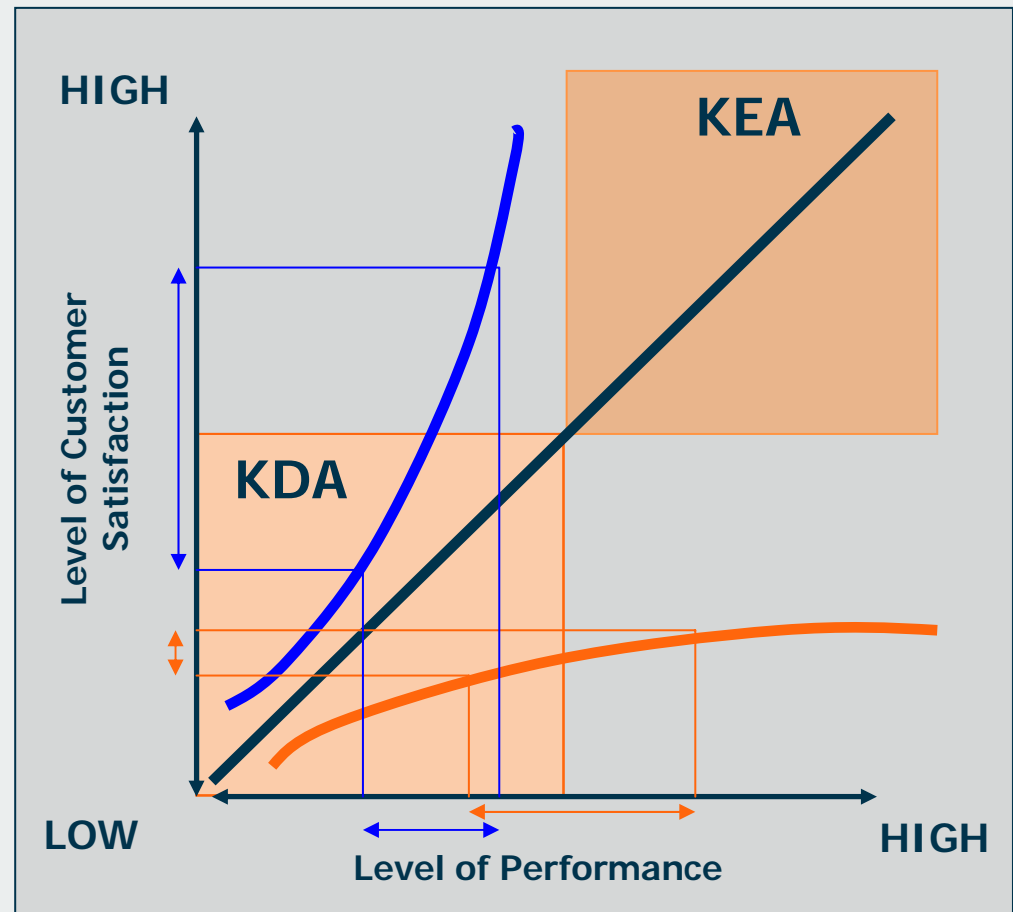
Project Enhancement Concept: Analysis of Key Dissatisfiers & Key Enhancers KDA/KEA (Based on Kano Theory)

An increase in performance does not necessarily have an impact on customer satisfaction (to the same extent).

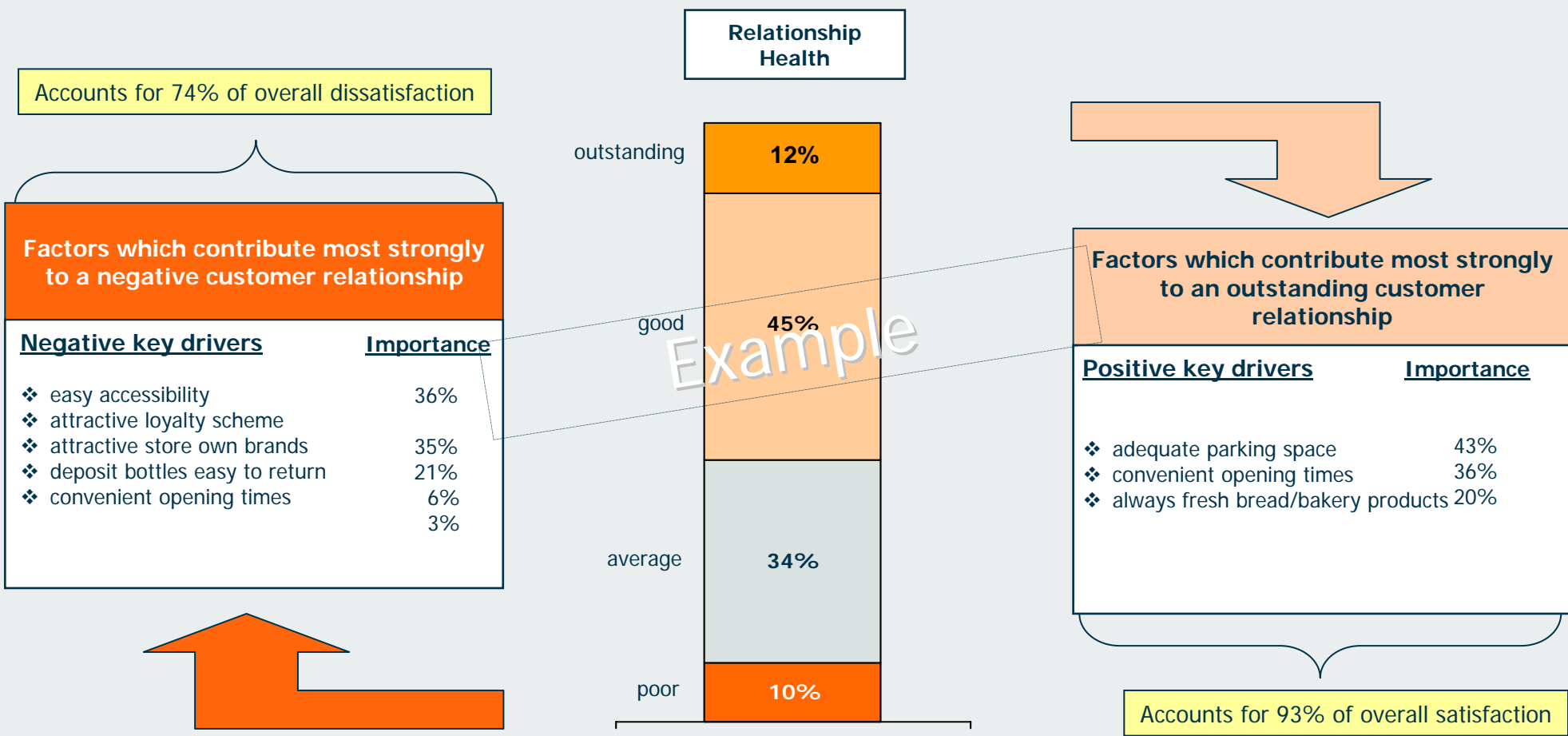
There are specific areas, where an increase of performance has only minor impact on customer satisfaction.

But there are also areas, where an increase of performance has a large impact on customer satisfaction.

The KDA/KEA analysis identifies the so called key drivers of your business – it detects positive drivers that help you to increase the level of satisfaction and negative key drivers (dissatisfiers) that affect the level of satisfaction in a negative way.

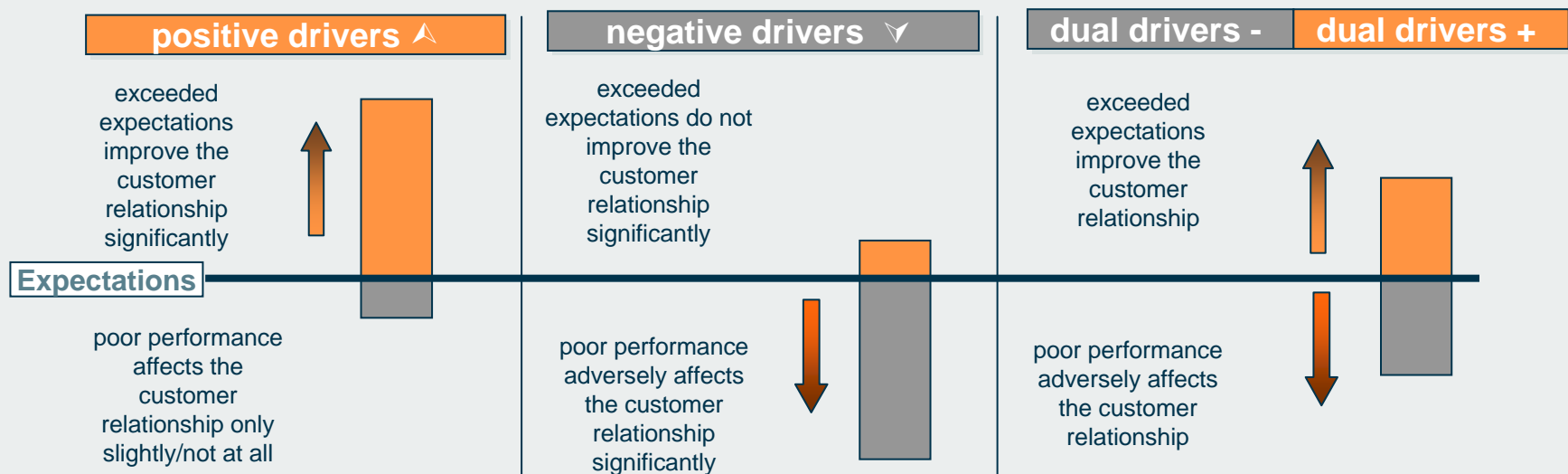


KDA-KEA-Key Driver Analysis: Retailer 1



KDA/KEA-Key Driver Analysis: positive, negative and dual drivers

- **The key drivers can have very differing influences on the overall level of satisfaction with a company:**
 - Primary consideration should be taken of the dual key drivers as they have the greatest influence on the Relationship Health.
 - Negative drivers should be dealt with in order.



1. Monitoring of own negative key drivers

2. Consideration of positive drivers in the relevant sector or of the competition

3. Maintenance of own positive drivers

4. Monitoring of all factors which are negative drivers for the competition

Drawing up a STRATEGY MATRIX using example Retailer 1



Methodology and Costs

Methodology:	Mix of methods: CAWI and CAPI interviews <ul style="list-style-type: none">➔ 70% CAWI (18-59 year-olds)➔ 30% CAPI (aged 60+)
Target group:	persons running households, aged 18+ years
Sample size:	N=1,000
Quota fitting:	Region, local population size, age and store-penetration (min. N=100 respondents per store brand)
Address source:	GfK-Onlinepool (recruited offline)
Area covered by study:	whole of Austria
Cost per customer:	
Basis price per participant:	EUR 12,000,--
Additional costs:	per KDA/KEA analysis: EUR 1,900,--

Services provided

- ➔ Organisation and planning
- ➔ Compilation/programming of questionnaire
- ➔ Fieldwork
- ➔ Analysis of the data, preparation of tables and graphics
- ➔ Presentation of the results
- ➔ A standard Report comprises
 - ✓ Tables including the most important sociodemographics
 - ✓ Specific analysis of regular customers
 - ✓ Charts
 - ✓ KDA/KEA-analysis for the entire market and individually for hypermarkets, supermarkets and discount stores
- ➔ Charges for other KDA/KEA-analyses (for example, at store own brand level) will be calculated individually.

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