«Good information for good decisions»

www.nomesis.it

NOMESIS
Via Giovanni XXIII; 74
25086 Rezzato, Brescia, Italia
Tel. 030.2793.124
Fax 030.2071.237
mail@nomesis.it
www.nomesis.it

RN14N2255H

Cookware International Observatory™

DEMO REPORT

Cookware International Observatory™ demo report

Index

Introduction

This Demo Report is aimed at presenting an abstract that exemplifies the Cookware International Observatory™ report.

The slides have been taken from a report we made in 2018 for a Company operating in the small kitchen appliances sector (for the sake of clarity, we will call it «Pots & Pans Inc.») for studying the Italian and English market, and they have been changed and made anonymous.

This Demo Report is Nomesis' intellectual property, hence, it is totally forbidden to use it and share it in whatever way outside without Nomesis' prior written authorization.

Cookware International Observatory™ demo report

Methodology

QUANTITATIVE RESEARCH PARAMETERS	DESCRIPTION
Objectives	Measure, monitor and analyze the foundamental indicators for guiding Pots & Pans' marketing mix
Macro-variables monitored	1. Socio-demographic variables 2. Product trends 3. Brand image and awareness 4. Cultures, styles and behaviours towards Pots & Pans Inc. 5. Purchasing patterns 6. Purchasing habits 7. Use habits
Target universe	Actual and prospect clients
Methodology	Sample survey
Data collection technique	Desk research, CATI interviews, CAWI interviews
Approach	"Opaque" and "transparent"
Sample	5000 total interviews in the Uk and 4000 in Italy
Output	Accurate measure of the KPIs with the connected causes and the resulting interventive indications.
Statistical processing	Multi-variate with SPSS
Sampling plan	Handled by Nomesis according to Pots & Pans requests
Lists supplier	Handled by Pots & Pans for the «clients» part and handled by Nomesis for the «non-clients» part
Degree of statistical confidence	95%
Interviews duration	An average of 28 minutes for «clients» interviews and 24 minutes for the «non-clients» ones
Detection period	March-June 2017

SOURCE: Nomesis' statistical processing with SPSS on the basis of the international survey

DEMO REPORT

Cookware International Observatory™ demo report

Key questions

AREA OF RESEARCH	KEY QUESTIONS	
SOCIO-DEMOGRAPHIC VARIABLES	*Who did take part to the survey? Where are they from? How old are they? What do they do for living?*	ACTIONABILITY: ***What to do now?***
PRODUCT TRENDS	*Which are the most requested materials for pots and pans in the English and Italian markets? How is the demand evolving?*	
BRAND IMAGE AND AWARENESS	*Which are the leading brands in the pots and pans sector? What are the strongest and weakest aspects of Pots & Pans' products?*	
CULTURES, STYLES AND BEHAVIOURS TOWARDS POTS & PANS INC.	*How much are Pots & Pans customers loyal to the brand?*	
PURCHASING PATTERNS	*Before the purchising, who deals – within the family – with the evaluation of alternative pots and pans? Who actually purchase them?*	
PURCHASING HABITS	*Where would the customers like to purchase pots and pans? Where do thay actually buy them?*	
USE HABITS	*How many times a week do the respondents cook? How long does it take to prepare the average meal?*	
PERFORMANCE MATRIX	*What are the attributes (e.g. style, affordability, reliability, etc.) on which Pots & Pans should invest? And what are those on which it shold disinvest?*	

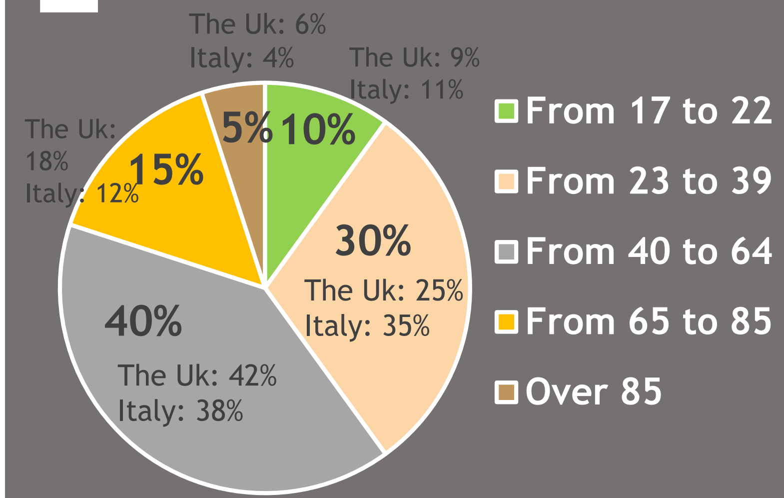
DEMO REPORT

Cookware International Observatory™ demo report

Socio-demographic variables

GENDER

AGE



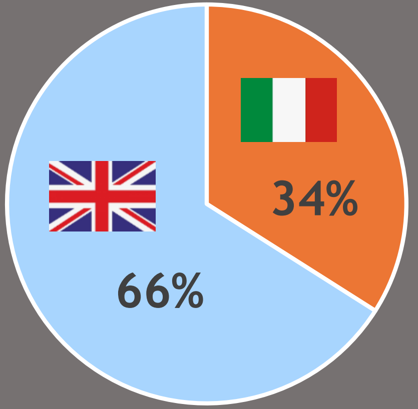
70% of the sample is between 23 and 65 years old

SOCIAL CLASS

	UK	Italy	Average
Upper class	2%	2%	2%
Middle class	18%	15%	17%
Low middle class	20%	18%	19%
Skilled working class	25%	15%	20%
Working class	30%	35%	32%
Low income earners	5%	15%	10%

50% of the sample belongs the working class

COUNTRY



66% of the sample is made by English people, the remaining 34% by Italians

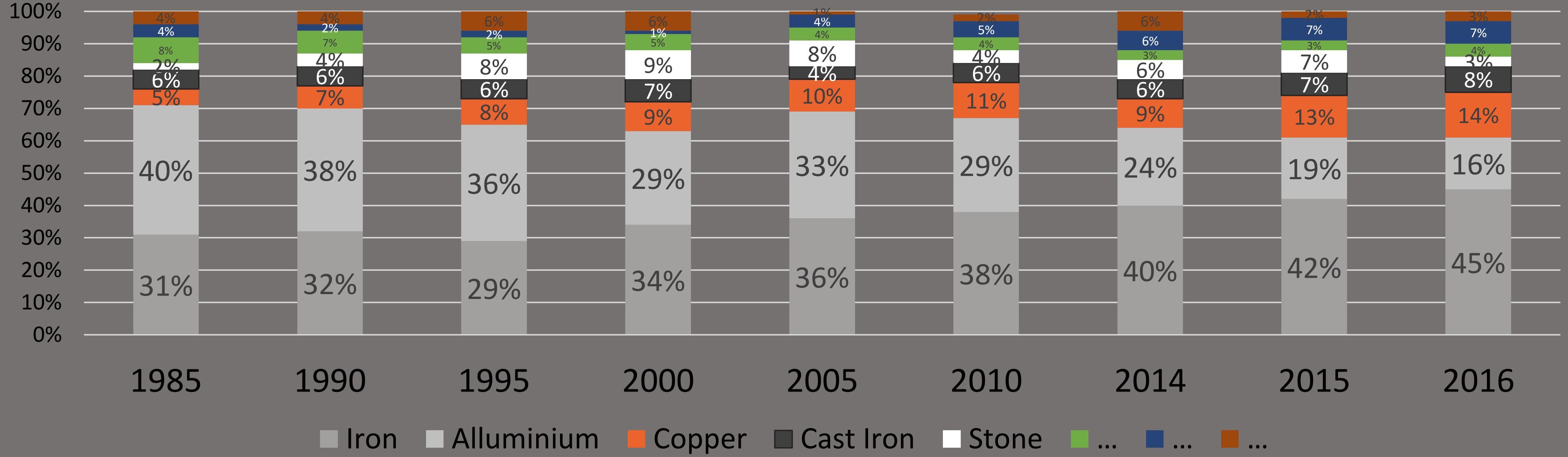
SOURCE: Nomesis' statistical processing with SPSS on the basis of the international survey

DEMO REPORT

Cookware International Observatory™ demo report

Product trends - English market

PANS AND POTS SALES THROUGH TIME BY MATERIAL



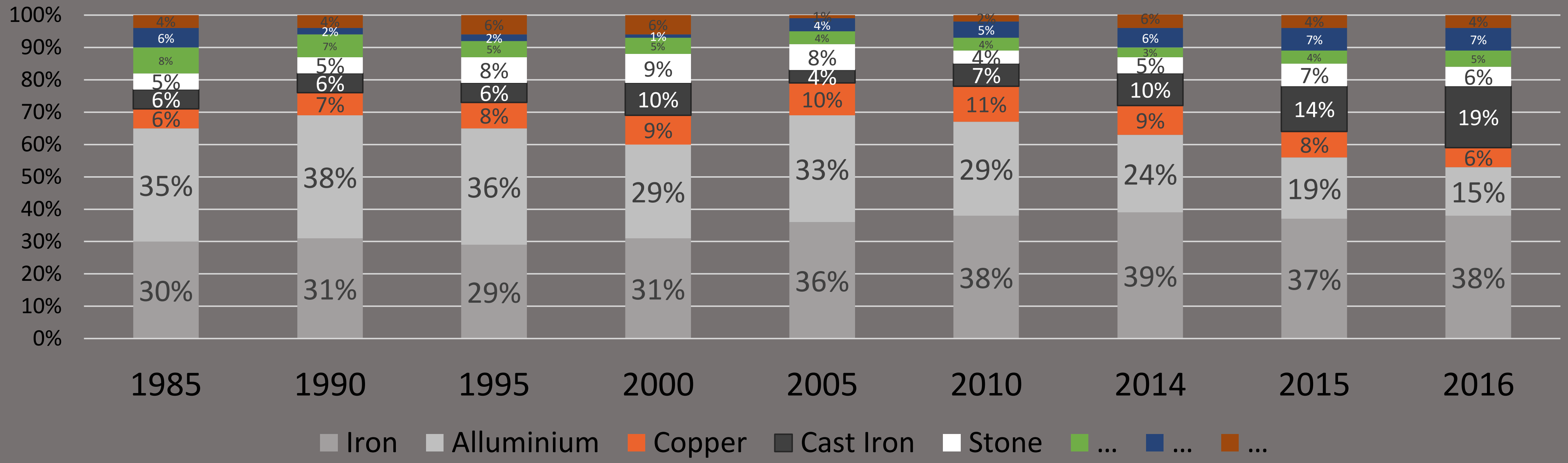
- In the last 30 years, more and more pans and pots sold are made out of **IRON**, which in 2016 was the material of almost half (45%) of those sold in the English market.
- Conversely, **ALUMINIUM** has been used less and less often (dropping from 40% to 16%).
- **COPPER** is the third most used material and it seems that it would overtake aluminium in a few years.

SOURCE: Nomesis' statistical processing with SPSS on the basis of the international survey

Cookware International Observatory™ demo report

Product trends - Italian market

PANS AND POTS SALES THROUGH TIME BY MATERIAL



- **IRON** pans and pots are the most purchased also in Italy, but the use of this material is not increasing like in the US.
- Like in the US, **ALUMINIUM** has been used less and less often.
- The sales of **CAST IRON** pots and pans are experiencing a sustained rise since 2005, so much that in 2016 cast iron pots and pans overtook aluminium in being the second most sold ones.

SOURCE: Nomesis' statistical processing with SPSS on the basis of the international survey

Cookware International Observatory™ demo report

Brand Image and Awareness

LEADING BRANDS

Q2: What do you think is the leading brand in the pots and pans sector?

BRANDS			AVERAGE
BRAND X	72%	30%	51%
POTS & PANS INC.	11%	49%	30%
BRAND Y	0%	10%	5%
BRAND Z	6%	2%	4%
…	…	…	…

In the UK, *Brand X* is considered to be the leading brand in the pots and pans sector, whereas Pots & Pans is considered to be the market leader in Italy.

POTS & PANS ATTRIBUTES

Q3: On a scale of 1 to 10, how much Pots & Pans Inc. is strong (10) or weak (1) in the following aspects?

ATTRIBUTES			AVERAGE
PRACTICALITY	9,2	8,7	9
STYLE	7,8	8,3	8,1
…	…	…	…
RELIABILITY	7,1	7,8	7,5
AFFORDABILITY	4,8	4,5	4,7

Both in the US and in Italy, Pots & Pans' strongest attribute is considered to be practicality, whereas affordability is its weakest aspect.

SOURCE: Nomesis' statistical processing with SPSS on the basis of the international survey

Cookware International Observatory™ demo report

NOMESIS ricerche e soluzioni di marketing

Cultures, styles and behaviours towards Pots & Pans Inc.

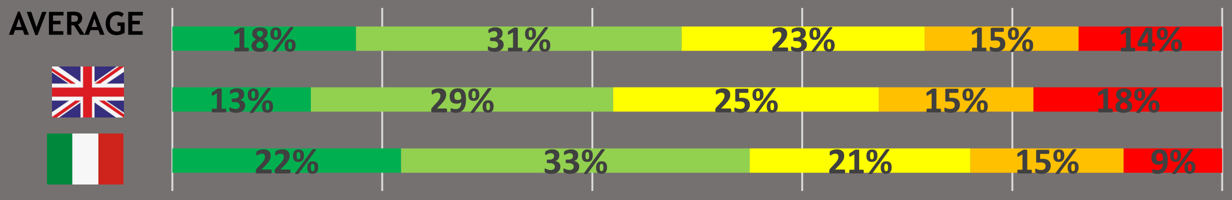
OVERALL SATISFACTION

Q10: On a scale from 1 to 10, where 1 means very little and 10 means very much, how satisfied are you with Pots & Pans Inc. overall?

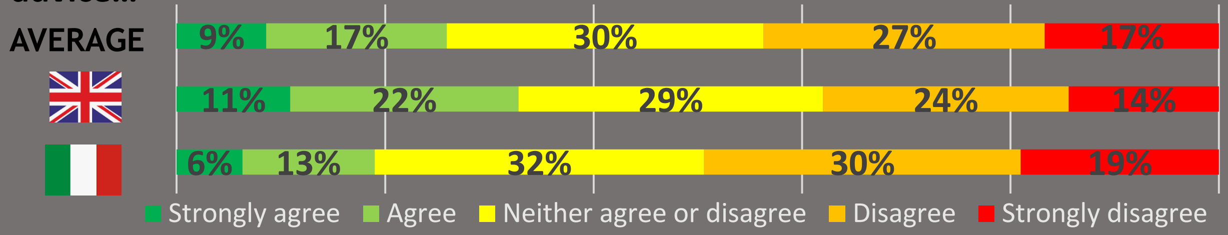
	AVERAGE		
POTS & PANS AVERAGE VOTE	7,3	6,9 ▼	7,6 ▲
% From 1 to 5	11%	17%	14%
% 6	12%	14%	5%
% 7	22%	31%	14%
% From 8 to 10	53%	38%	59%
% «DON'T KNOW»	2%	0%	9%

BRAND LOYALTY & ADVOCACY

Q36: If Pots & Pans Inc. were to raise their prices, I would continue to buy their products…



Q40: I have or would recommend Pots & Pans Inc.to someone who seeks my advice…



On average, ½ of customers are very much satisfied with Pots and Pans Inc.
Italians are more satisfied than English people

On average, ½ of customers would continue to buy Pots and Pans Inc.if its prices would rise, and 2/5 of them would recommend them.
Italians are more loyal but less advocate than English people

SOURCE: Nomesis' statistical processing with SPSS on the basis of the international survey

Cookware International Observatory™ demo report

Purchasing habits

Q21: Where do you usually purchase pots and pans?

CHANNELS	UK	Italy	AVERAGE
Hypermarket	72%	30%	51%
Online (Ebay, Amazon, etc.)	7%	49%	28%
Hardware store	10%	9%	10%
Discount	1%	2%	2%
…	…	…	…

Q22: Where would you like to purchase pots and pans?

CHANNELS	UK	Italy	AVERAGE
Hypermarket	55%	15%	39%
Online (Ebay, Amazon, etc.)	30%	65%	48%
Hardware store	5%	8%	5%
Discount	8%	5%	4%
…	…	…	…

Consumers would like to purchase on the internet more than they actually do. Conversely, They would like to purchase less in hypermarkets than they actually do.

SOURCE: Nomesis' statistical processing with SPSS on the basis of the international survey

Cookware International Observatory™ demo report

Purchasing patterns

RESEARCH

Q30: Do you usually make researches and valuate alternatives before purchasing pans and pots?

	AVERAGE	UK	Italy
NO	68%	62%	75%
YES	32%	38%	25%

Q31: Where do you usually make them?

CHANNELS	UK	Italy	AVERAGE
Internet	41%	25%	33%
Directly in the place where I have the intention to buy them	23%	40%	32%
Friends and family	28%	31%	30%
Specialized magazines	7%	3%	5%
...	...	...	...

Q32: In your family, who's taking care of them?

FEMALE RESPONDENT

MALE RESPONDENT

On average (Italy + UK), 1/3 of respondents is used to make researches before purchasing pans and pots.
In the US this activity is especially made on the internet, whereas in Italy directly in-store.
In both countries this activity is primarily carried out personally by the lady of the house.

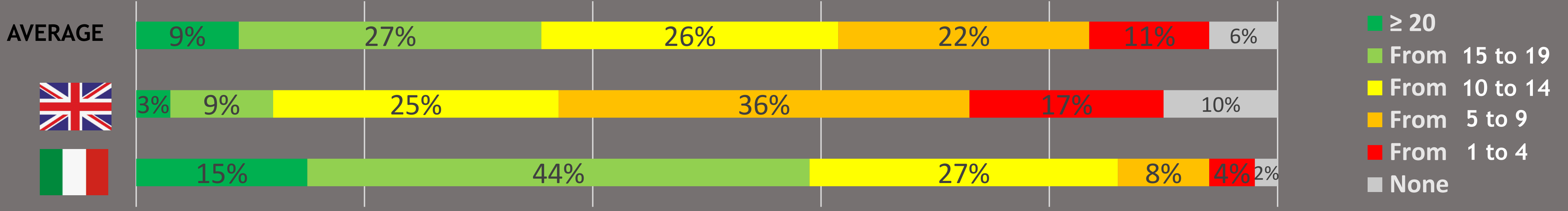
SOURCE: Nomesis' statistical processing with SPSS on the basis of the international survey

DEMO REPORT

Cookware International Observatory™ demo report

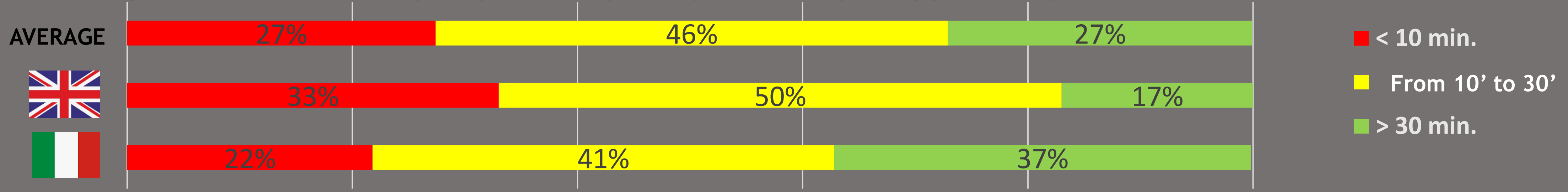
Use habits

Q50: On average, how many times do you cook during the week (by using pots and pans)?



Almost 1/3 of English consumers cook 4 times a week at most, while more than 1/2 of Italians do it more than twice a day

Q51: On average, how much time do you spend every time you cook (by using pots and pans)?



English people dedicate an average of 18’ to prepare their meals, whereas Italians dedicate 22’

SOURCE: Nomesis’ statistical processing with SPSS on the basis of the international survey

DEMO REPORT

Cookware International Observatory™ demo report

Use habits - English Market

MEALS COOKED IN A WEEK (Q50) / AVERAGE TIME SPENT FOR COOKING A MEAL (Q51)

Meals cooked in a week	< 10’	10 - 30’	> 30’
≥ 20 / 15 TO 19	7,5%	10,3%	4,8%
10 TO 14 / 5 TO 9	15,7%	18,5%	13,0%
1 TO 4 / NONE	10,0%	12,8%	6,5%

«COOK»

28% of our English respondents spend most of their time cooking and they cook many meals during the week

«TEPID»

33% of English people don’t spend much time doing their cooking activities.

«HURRIED»

39% of them doesn’t care much about cooking and having good meals

SOURCE: Nomesis’ statistical processing with SPSS on the basis of the international survey

DEMO REPORT

Cookware International Observatory™ demo report

Use habits - Italian Market

Q50 MEALS COOKED IN A WEEK / Q51 AVERAGE TIME SPENT FOR COOKING A MEAL

MEALS COOKED IN A WEEK	< 10’	10 - 30’	> 30’
≥ 20 / 15 TO 19	13,5%	16,7%	15,7%
10 TO 14 / 5 TO 9	9,5%	12,7%	12,0%
1 TO 4 / NONE	4,7%	7,8%	7,2%

«COOK»

44% of our Italian respondents spend most of their time cooking and they cook many meals during the week

«TEPID»

33% of Italians don’t spend much time doing their cooking activities.

«HURRIED»

22% doesn’t care much about cooking and having good meals

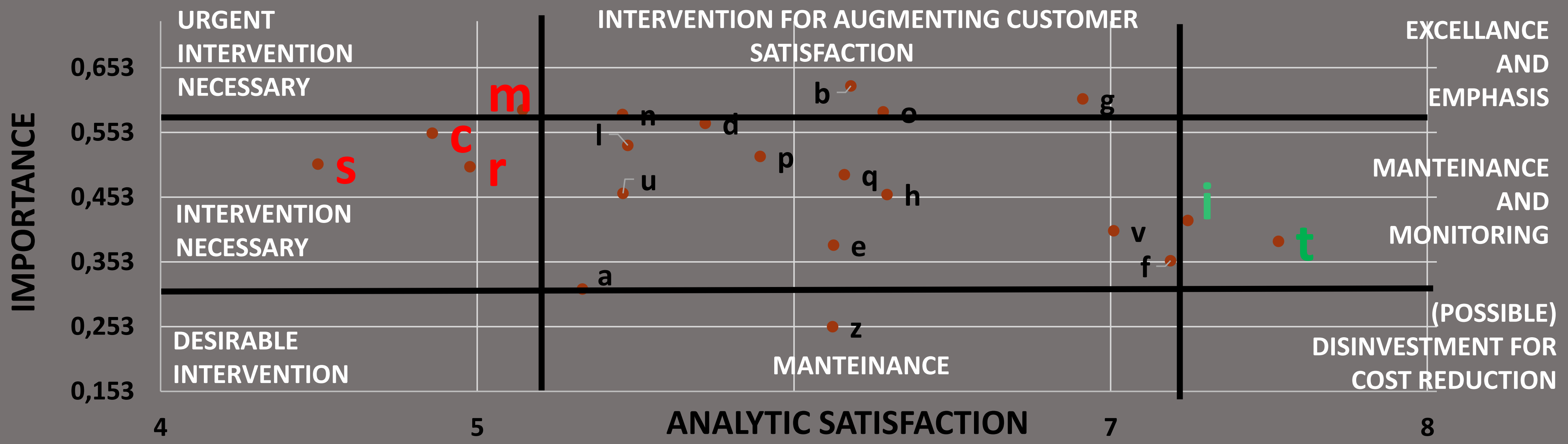
SOURCE: Nomesis’ statistical processing with SPSS on the basis of the international survey

DEMO REPORT

NOMESIS ricerche e soluzioni di marketing

Cookware International Observatory™ demo report

Performance Matrix - English Market

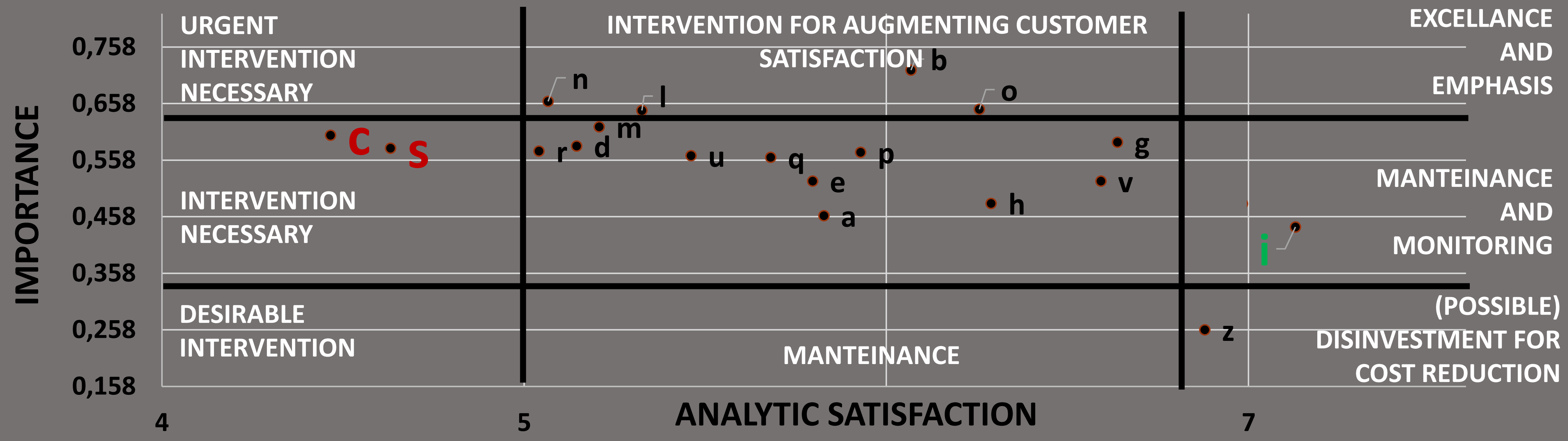


a	...	i	Style	r	Quality
b	...	l	...	s	Reliability
c	Affordability	m	Duration	t	Warranty
d	...	n	...	u	...
e	...	o	...	v	...
g	...	p	...	z	...
h	...	q	...		

SOURCE: Nomesis' statistical processing with SPSS on the basis of the international survey

Cookware International Observatory™ demo report

Performance Matrix - Italian Market



a	…	i	Style	r	…
b	…	l	…	s	Reliability
c	Affordability	m	…	t	…
d	…	n	…	u	…
e	…	o	…	v	…
g	…	p	…	z	…
h	…	q	…		

SOURCE: Nomesis' statistical processing with SPSS on the basis of the international survey

DEMO REPORT

Cookware International Observatory™ demo report

ACTIONABILITY - What to do now?

PRODUCT

- ***Focus on iron and copper products***, whose demand would probably continue to raise in the coming years
- ***Invest for increasing reliability, quality and duration***, the most problematic product attributes
- More than 80% of English people spend less than 30 minutes for cooking a meal: ***invest on products for short cooking times***

- ***Focus on iron and cast iron products***, whose demand would probably continue to raise in the coming years
- ***Invest for increasing reliability***, the most problematic product attribute
- Italians dedicate more time for cooking (22' for meal, on average): ***invest on products for medium-long cooking times***

SOURCE: Nomesis' statistical processing with SPSS on the basis of the international survey

Cookware International Observatory™ demo report

ACTIONABILITY - What to do now?

PRICE

- *Affordability is a point of attention. English people judge it as the weakest aspect of Pots & Pans Inc. and they are very little satisfied with it: be careful with further price increases because they could cause a loss of 1/5 of your customers.*

- *The same is even more true for Italy, where a price increase could even cause a loss of 1/4 of your customers.*

SOURCE: Nomesis' statistical processing with SPSS on the basis of the international survey

DEMO REPORT

Cookware International Observatory™ demo report

nomesis ricerche e soluzioni di marketing

ACTIONABILITY - What to do now?

PLACE & PROMOTION

- More and more customers would like to purchase on *the internet*, and the internet is also the preferred place to evaluate alternatives before purchasing: ***it's worth investing on it.***
- In 9 out of 10 cases, the evaluation of alternative products is made by a woman or in the presence of a woman: ***talk women's language!***

- The majority of customers still buys in hypermerkets, but a lot of them would rather buy on the internet: ***it's worth investing on it also in Italy.***
- In more than 9 out of 10 cases, the evaluation of alternative products is made by a woman or in the presence of a woman: ***talk women's language!***

SOURCE: Nomesis' statistical processing with SPSS on the basis of the international survey

Do you want to know more? Contact us!

Ezio Maestri
ezio.maestri@nomesis.net

NOMESIS
ricerche e soluzioni di marketing
via Giovanni XXIII 74 . 25086 Rezzato BS
tel. 0302793124 . fax 030 2793136
www.nomesis.it

Nomesis video presentation

https://vimeo.com/68046600