


The Good, the Bad, the Ugly: 3 methods to get by in the Wild West of Loyalty

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**25 million
discussions**

Consumer voice:
unsentimental



**I'm not tied to any brand. If
something better comes
to the market, of course
I'll switch.**

what does

loyalty

actually
MEAN
& how do we
MEASURE
it?

When people do purchase
brands repeatedly, but
don't really feel & sound
like they're loyal...



We tested **3 loyalty models**

The classical



BRAND EQUITY

The updated



HUMAN BRAND

The disruptive



**FAME, FEELING,
FLUENCY**

Brand Equity



Think about buying a house...



Kids love it

Good neighbourhood

Close to good schools

Bank loves it

Etc.



Would you do the same
for a bag of chips?



Human Brand



WARMTH: ✓

Personalised coffee cups
Friendly space

COMPETENCE: ✓

The best coffee and espresso
drinks

STARBUCKS' PURPOSE

To inspire and nurture the human
spirit one person, one cup and
one neighborhood at a time.

Do you need to know more than this
to make the purchase?

Fame, Feeling, Fluency



Always
#LikeAGirl



Nike
Dream Crazier

**If it feels good,
do you still need to think about it?**

But how does this work in FMCG?

Research Approach

n=580
(460 coffee; 515 snacks)
e=± 4%
CAWI
Urban Representative
Sample by: age (18-65 y.o.),
gender, region, locality size

COFFEE



High brand
loyalty

Market dominated by
R&G
Dominant market
leader
...but curiosity to
experiment &
premiumization trend

Baked SALTY SNACKS



Lower
brand
loyalty

Fragmented market
No clear leader

Target brands

(more than 80% MOC)

DONCAFÉ

JACOBS

LAVAZZA

Tchibo

AMAROY
Premium Röstkaffee

Fortuna

COFFEE, R&G



TOORTVYLA

Salatini

Croco

Boromir **Chio**

7 DAYS

KUBETI

TUC

**Baked
SALTY SNACKS**



**The mental
shelf is
crowded!**

Consideration set

R&G

**Baked
Salty Snacks**

1 brand

1%

1%

2 brands

26%

21%

3 brands

19%

15%

4 brands

19%

19%

5 brands

12%

13%

6 or more brands

23%

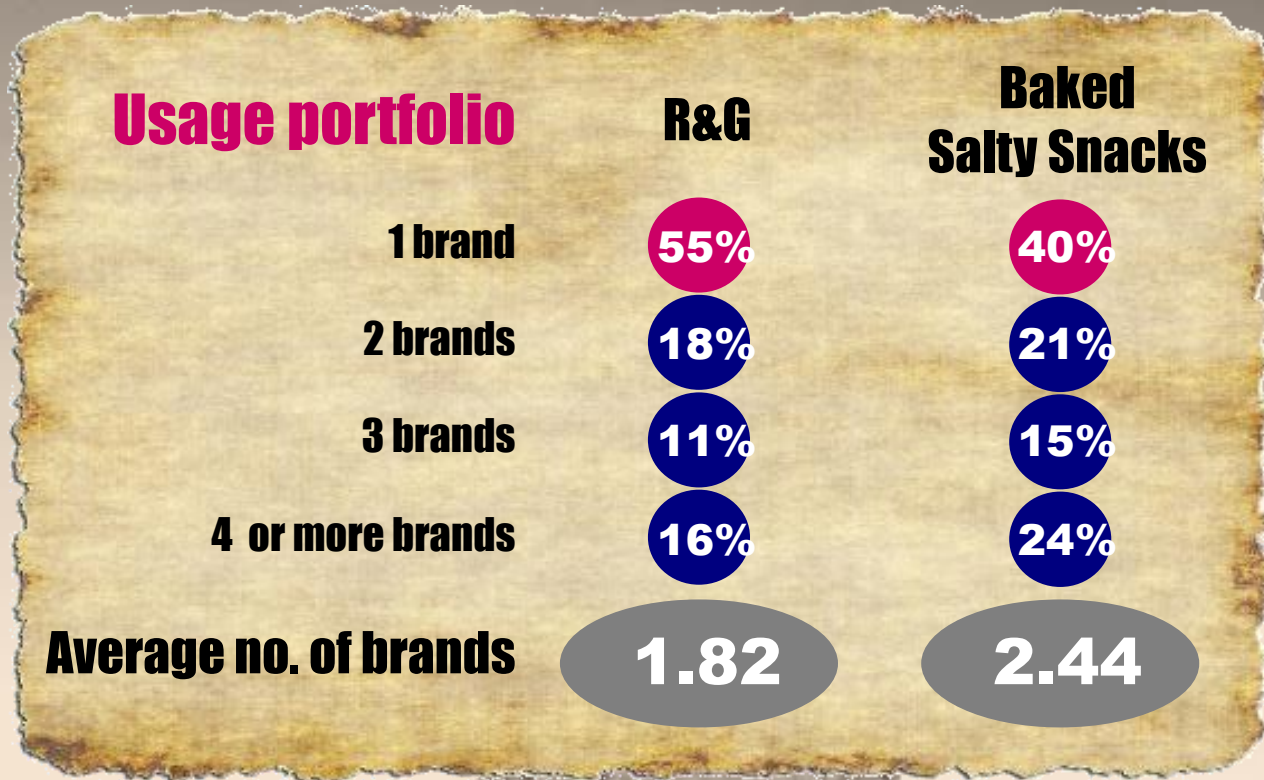
31%

Average no. of brands

4.53

4.92

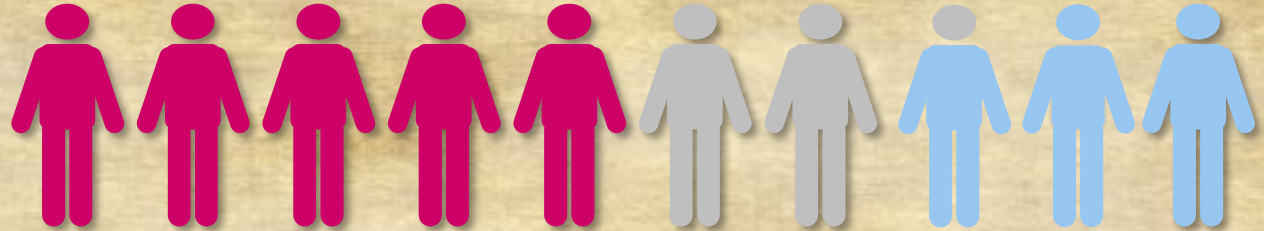
**Loyal
consumers
still exist.**





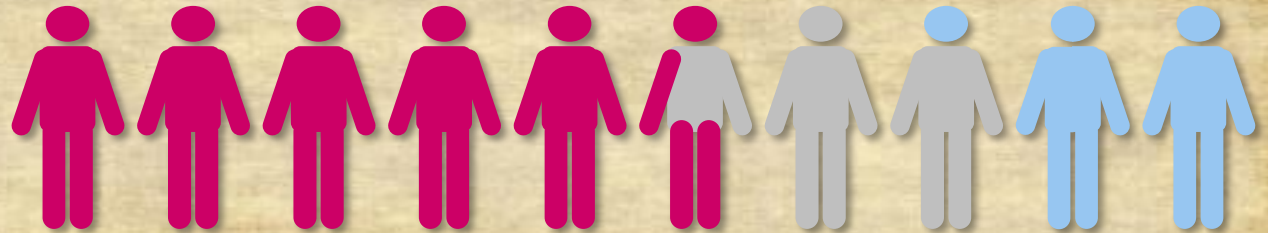
R&G

50% brand advocates



**Baked
SALTY
SNACKS**

54% brand advocates



Average Net Promoter Score per category

Did you create a relationship?

Resonance

Are you noticeable/differentiated/
memorable?

Response

What are your KPIs?

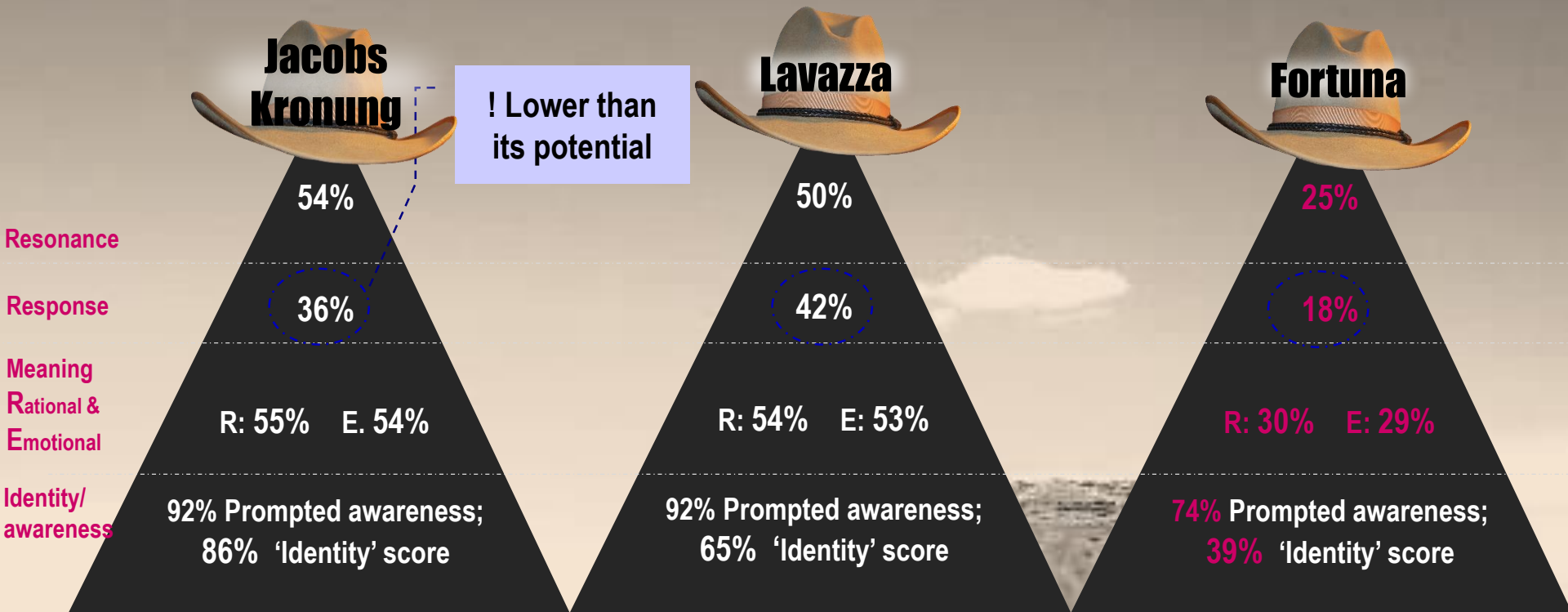
Meaning

Rational & **E**motional

Do you have a clear identity?

Identity/ awareness

Standard Equity





WARMTH

NEGLECT

COMPASSION, PITY

EMOTION
EMOTION

CONTEMPT

ADMIRATION

EMOTION
EMOTION

ENVY

LOYALTY

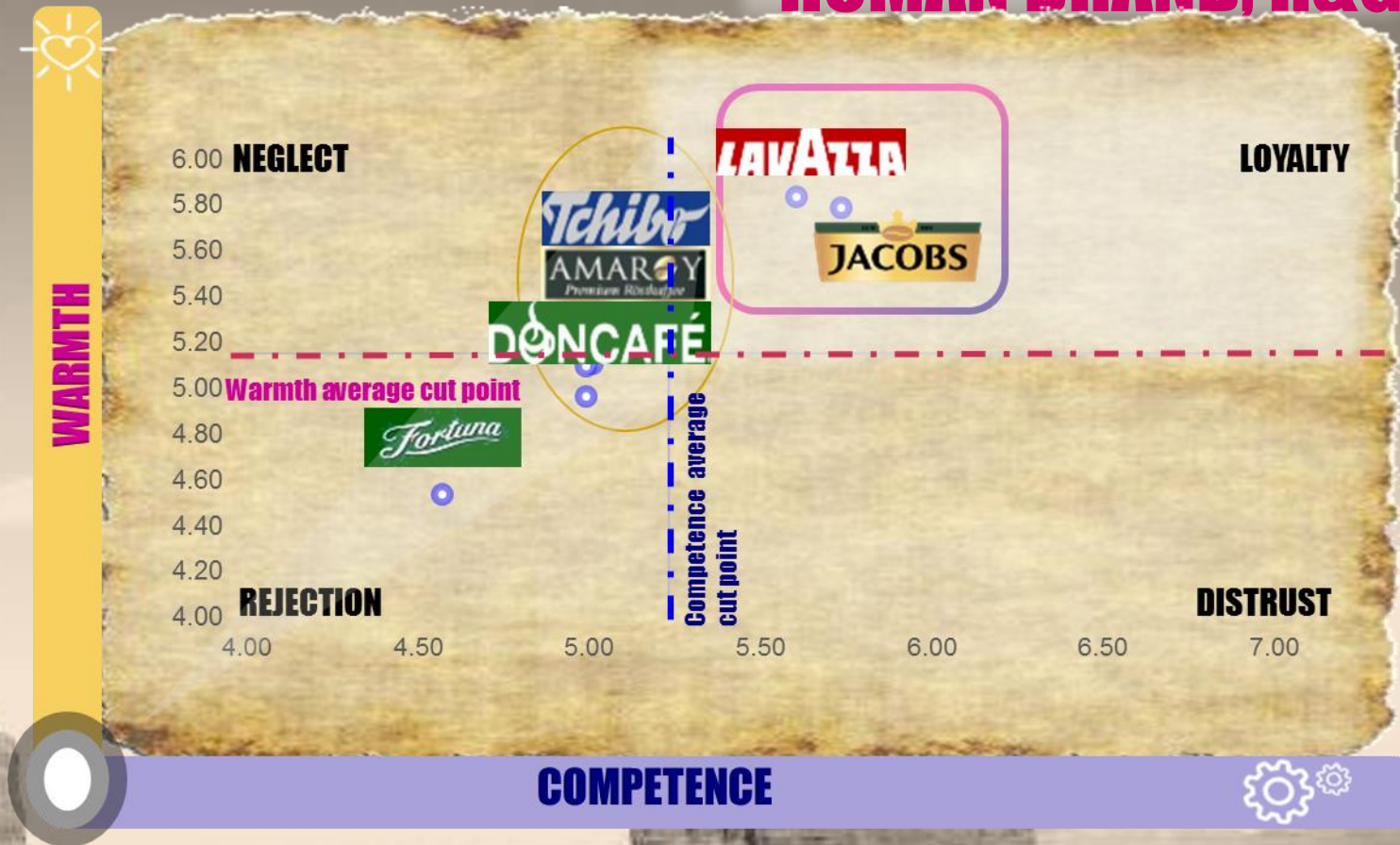
REJECTION

DISTRUST

COMPETENCE




Lavazza and Jacobs are the only ones truly “humanized”, as admired, not just used




Fluency

Is it easily
recognisable?

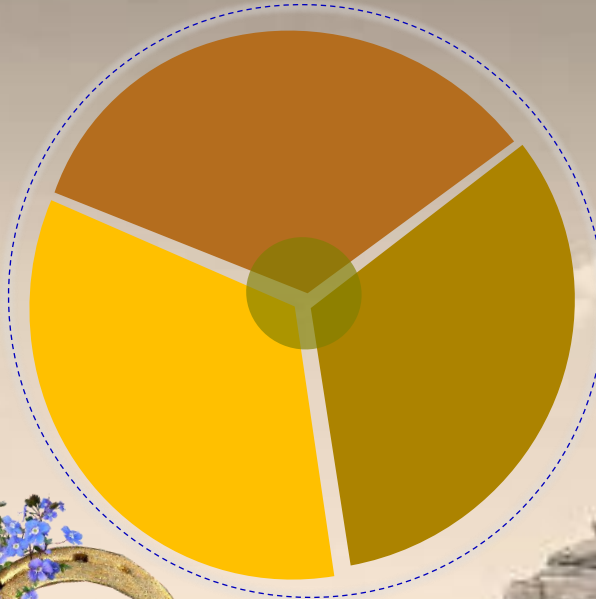
Brand assignation
(unbranded pack)
against timer

 Fame
Does it come
readily to mind?

Recall against timer

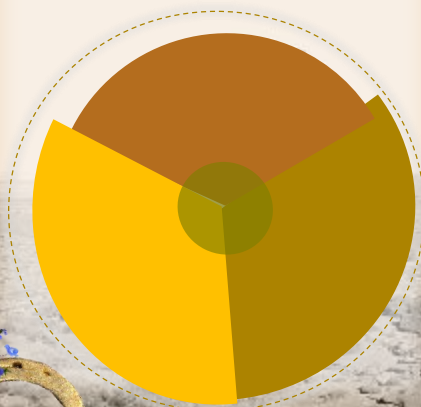
 Feelin
Does it feel good?

People are asked to label
feelings using simple
emoticons

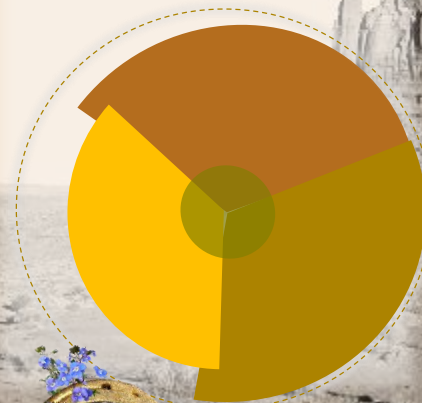


Fame	92% Prompted Awa. 54% ToM 15.4 secs	92% Prompted Awa. 7% ToM; 13.3 sec.	74% Prompted Awa. 6% ToM; 16.4 sec
Feeling	100%	96%	72%
Fluency (average %)	76%	50%	32%

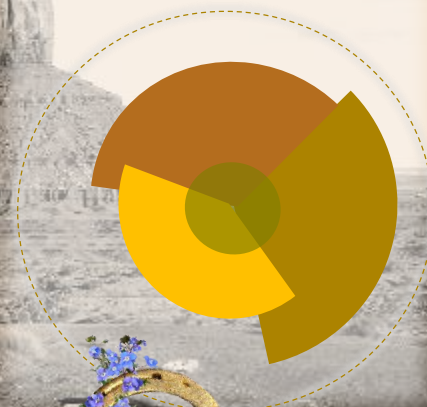
Graphical illustration
not scaled to size



Jacobs Kronung



Lavazza



Fortuna

Differences
market against
average;
Base: all aware

Each model is a good toolkit to build brand share and loyalty. Brands should choose the one that best fits their research purpose:

Learn!



Standard Equity: measures brand strength, identifies vulnerabilities or evaluates KPI progress in tracking studies.

Connect!



Human Brand: a valuable research tool for brands focused on building strong emotional relationships with their customers.

Stay!



Fame, Feeling, Fluency: offers the best research context to control the cognitive biases of standard market measurements.

THANK YOU!



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