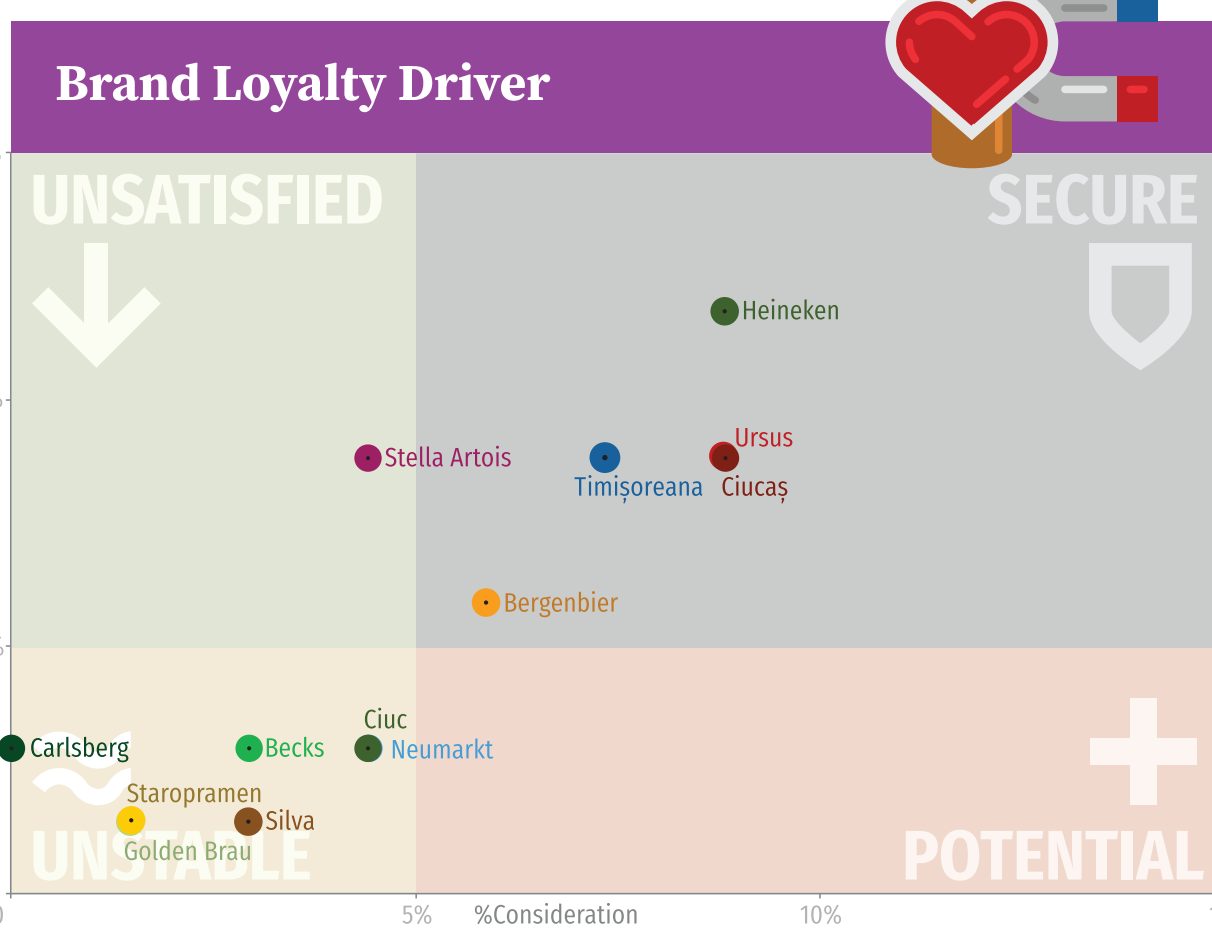
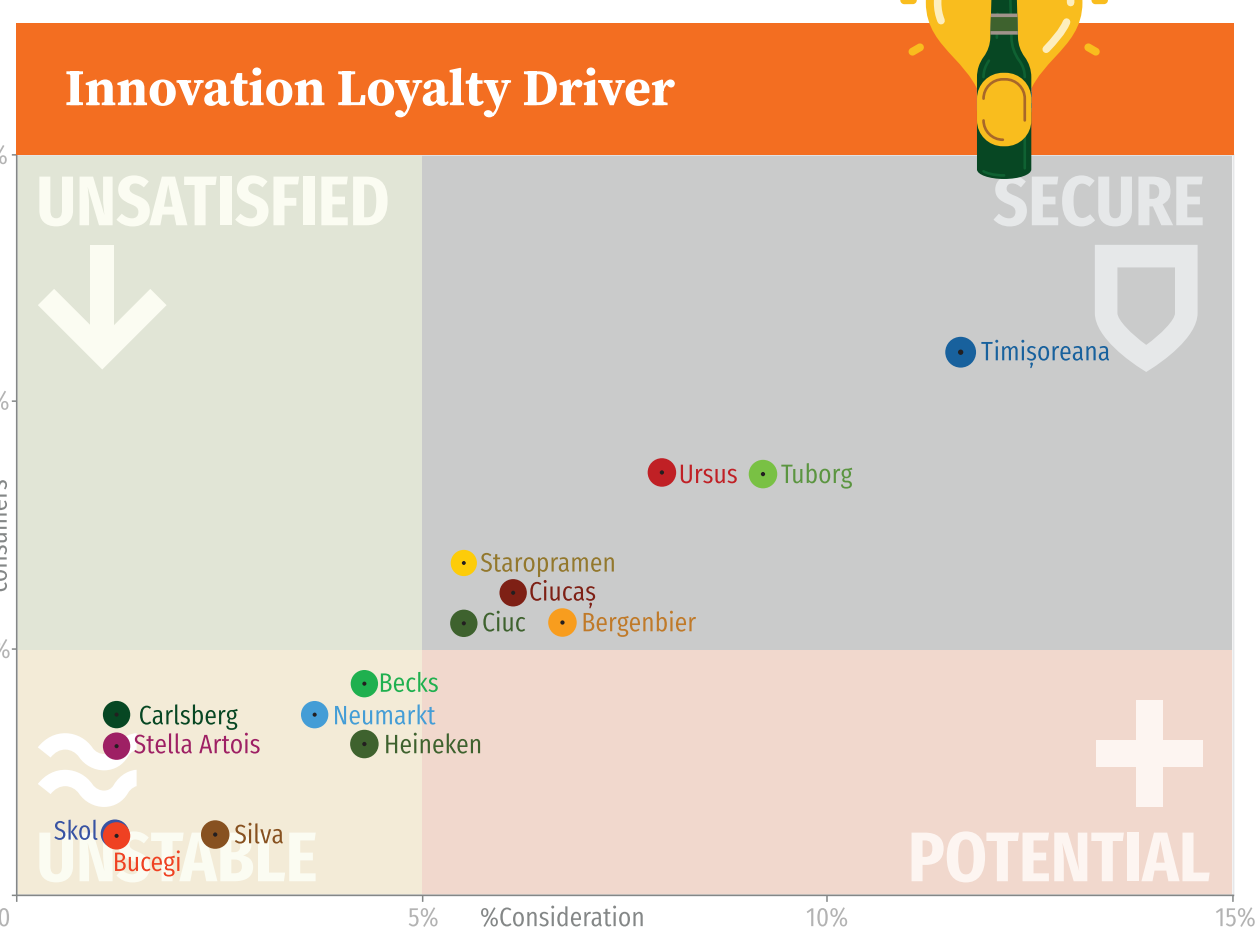
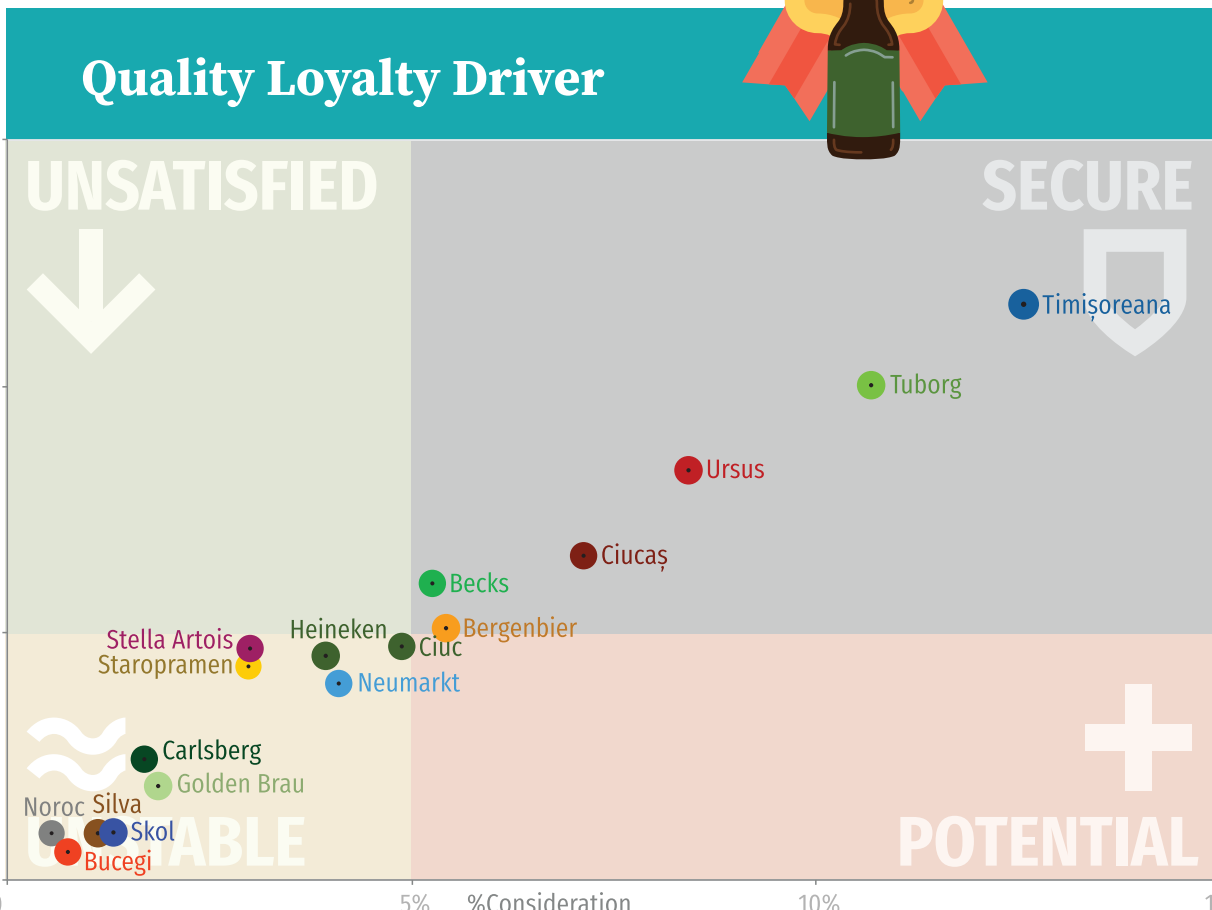
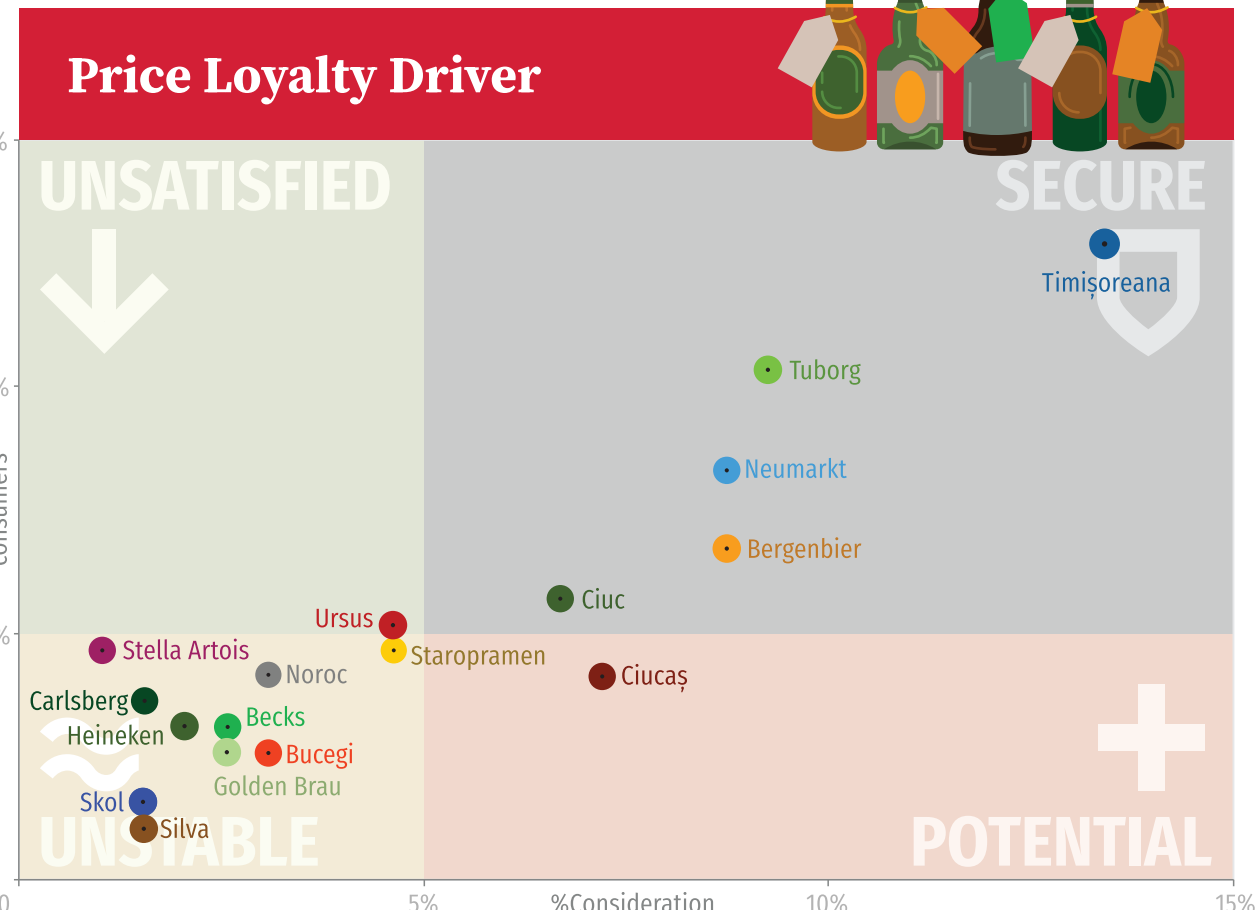
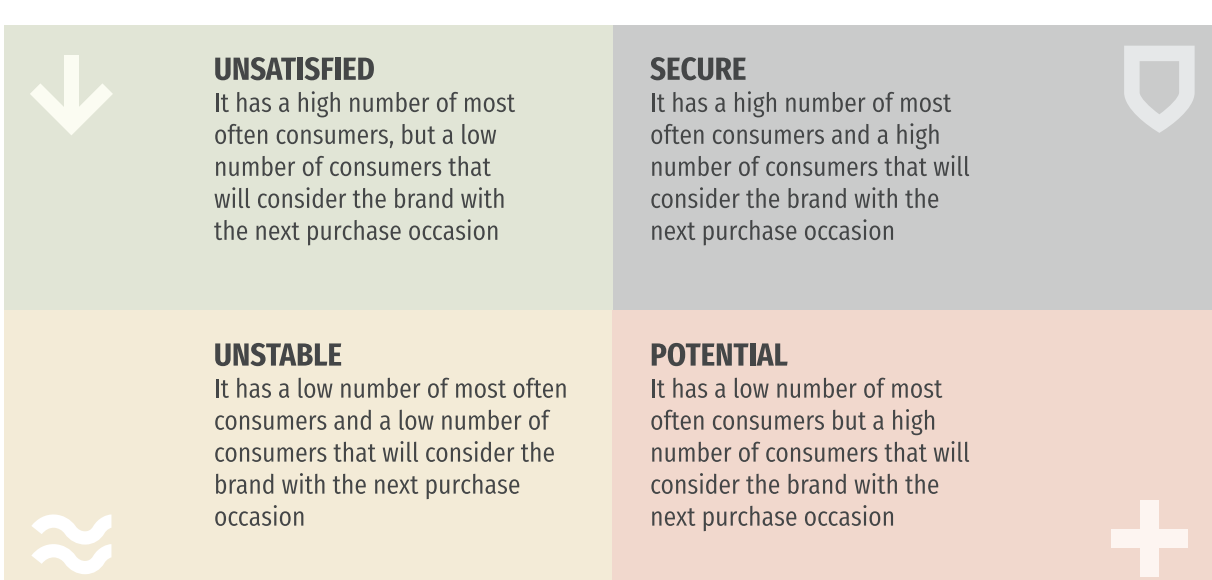


# Loyalty Driver Map Interpretation

## Beer Category

This perceptual map is a graphic representation of most often consumed brands reported to the level of consideration at the next acquisition.

Each map shows to what extent those who most often consume a brand would choose it or not at the next purchase occasion, taking into consideration the following factors: price, quality, innovation or brand.



## Key Findings

### HEINEKEN

Heineken is highly consumed by those who buy their beer taking into consideration the brand. For this segment, Ursus is the main national competitor.

Among those who take into consideration the innovation as main loyalty driver, Heineken is below market average in terms of actual consumption and future buying occasion, even if it is recognized as a qualitative product by those who chose a beer based on quality criteria. Better results are obtained on this driver by brands who have a more diverse variety of flavors or types of beer.

As expected, being a premium beer brand, it has a very low consumption level among those who take into consideration the price as their loyalty driver and an even lower future consumption intention.

Analyzing the four investigated attributes, the highest opportunity for Heineken is among those who chose the beer taking into consideration the brand as loyalty driver, based on the fact that it has above average most often users who consider this attribute and will also re-purchase it.

### URSUS

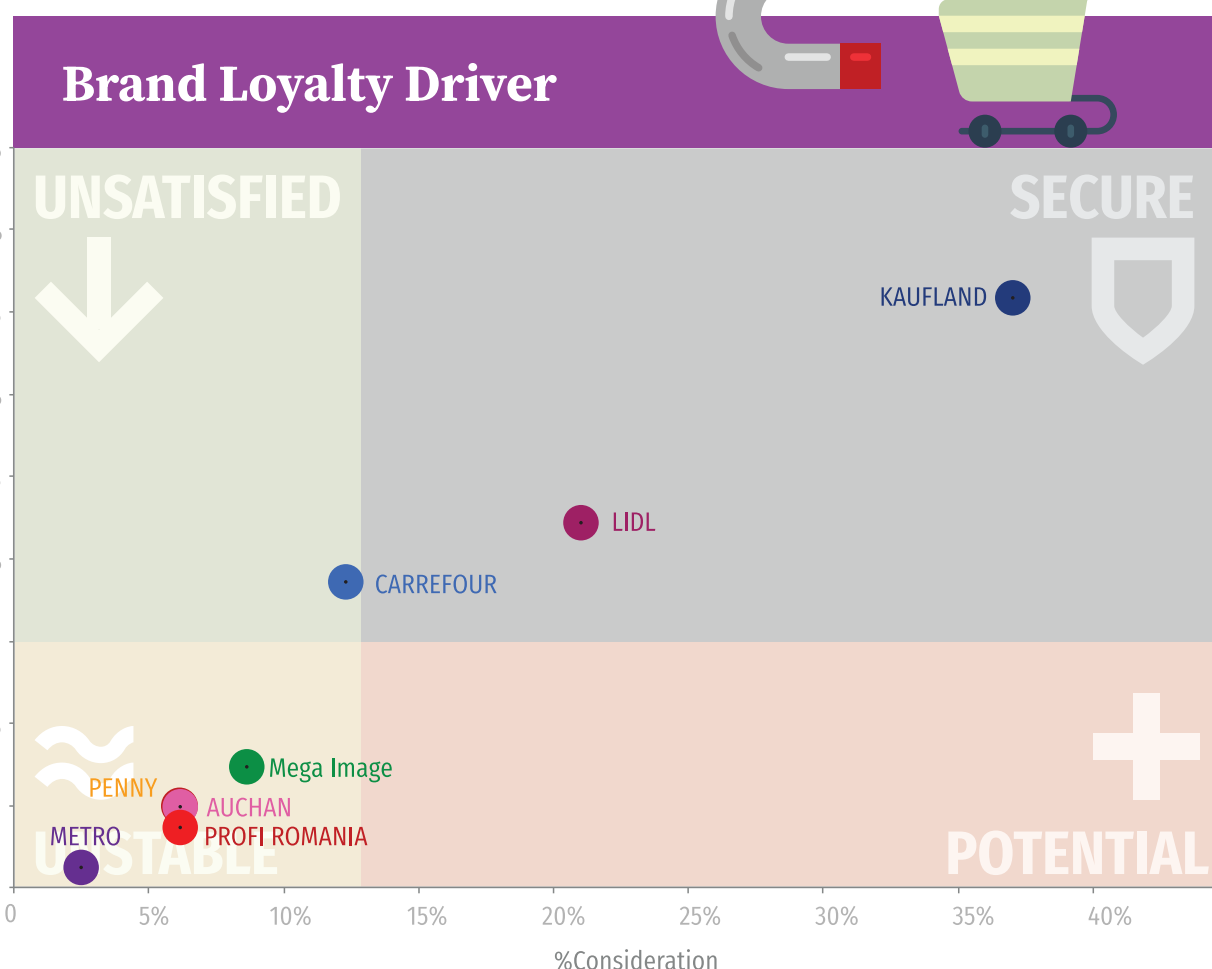
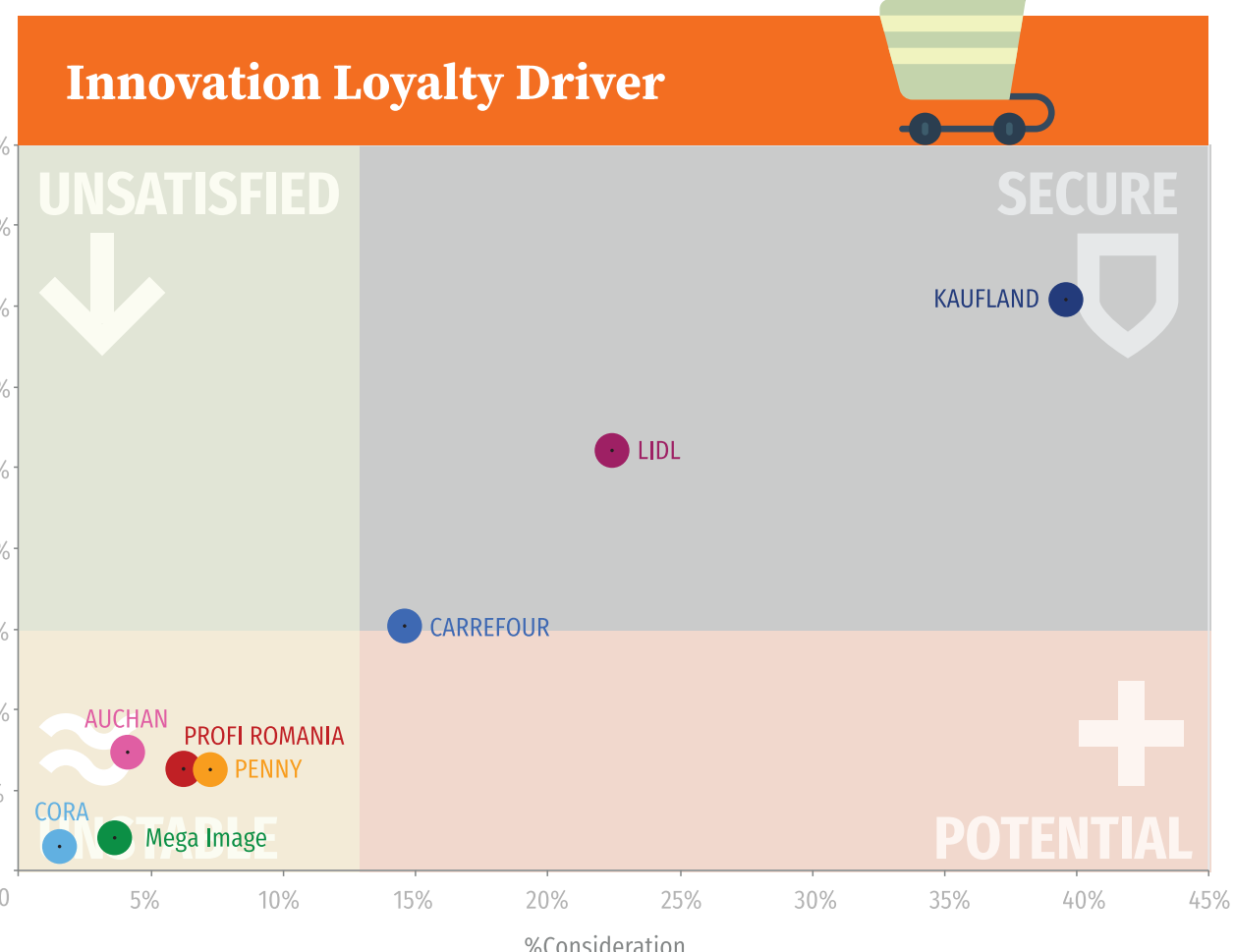
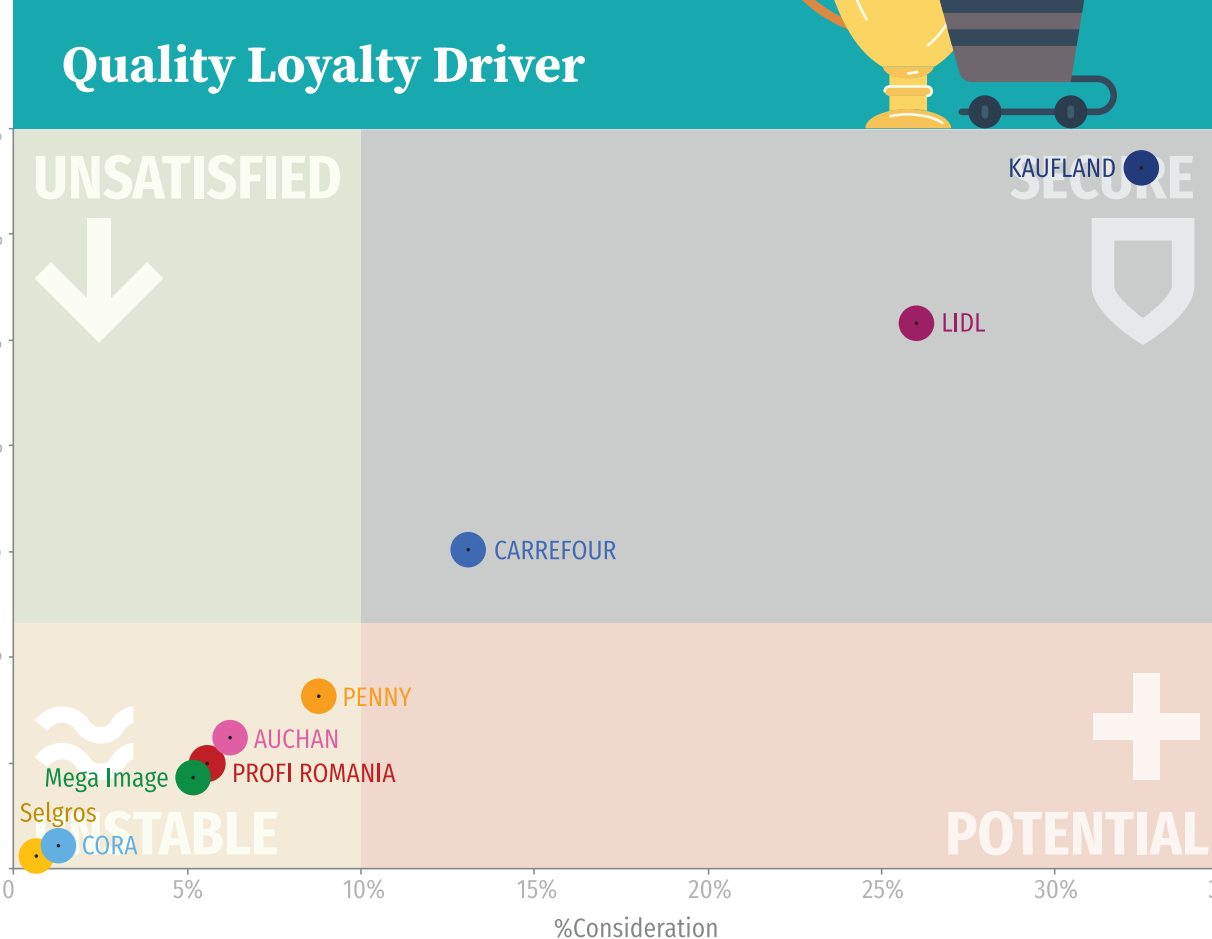
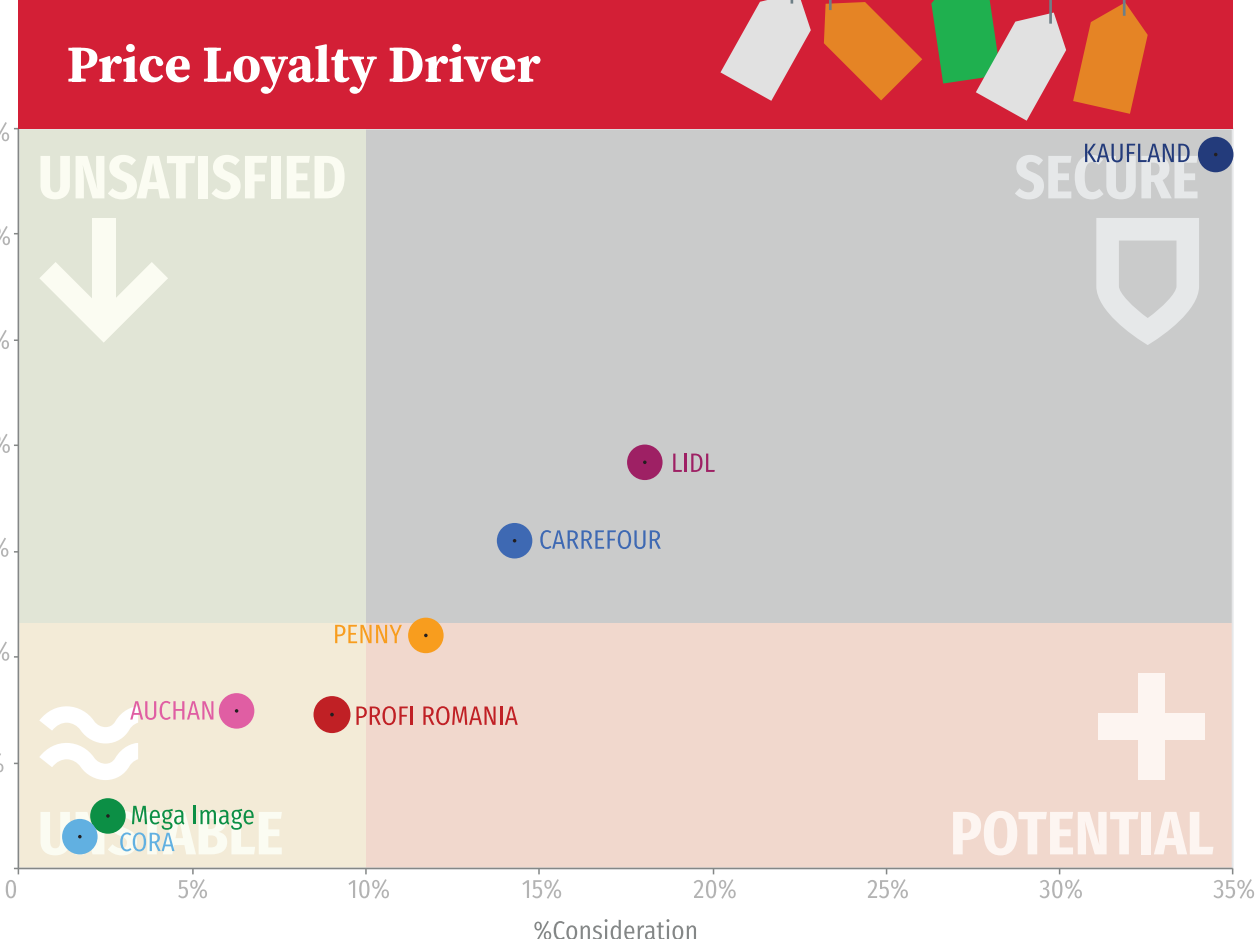
Being the Romanian king of beer, Ursus, is one of the strongest players among those who take into consideration the brand name as main loyalty driver, thanks to young and fun communication campaigns which engaged the consumers with new and surprising elements. Quality and Innovation are also strong loyalty attributes.

As a general key finding, Ursus is one of the most equilibrate beers in terms of loyalty drivers performance, reaching a good position on brand name, quality and innovation, even on price loyalty criteria is above market average.

### NEUMARKT

Neumarkt, the beer of strong and bitter taste, has as main loyalty driver the price. Even if it strongly communicated taste as main point of difference, in terms of quality as loyalty driver Neumarkt reaches the market average, with a weaker instead of lower performance as an innovating product.

## Retail Category



## Key Findings

The retail market, compared to the beer market has a much more homogeneous identity, Kaufland being the single player whose communication efforts become extremely visible in all four loyalty drivers attributes.

When correlated the number of visitors to the retail market with the 4 consumer segments stimulated by brand, price, innovation and quality, innovation has the strongest results. Innovation makes people curious!

### Kaufland & LIDL

Kaufland and LIDL registered very good scores on all loyalty drivers. Kaufland occupies the first position at a significant difference from the rest of the competitors on all 4 attributes measured, thanks to a good brand identity. The number of those who would consider visiting the store at the next purchase occasion is significantly higher than the number of those who visit it most often.

### PENNY

In a category dominated by price and proximity criteria, even if it is has a low consideration score among those who take into consideration innovation or brand as loyalty drivers, Penny has a good potential to secure those consumers that are orientated towards the price when choosing a product/service.