

# The Huge Difference Report Automation Can Make for a Smaller Research Agency

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**Bonamy Finch**

# Bonamy Finch – An Introduction

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- Formed in 2005, Bonamy Finch provides **advanced analytical services** to the market research industry
- We specialise in **segmentation, brand & retention modelling**, and **pricing / portfolio optimization**
- We work as a **technical resource** for small- and medium-sized research agencies, providing **analytics and consultancy**
- We also **work directly** with **well-known end clients**
- We are currently a team of 8 **senior researchers**



# We have jobs of all shapes & sizes...



***Conjoint models for mobile  
telecoms company***



***Single-country key driver  
analysis on iced tea***



***Global brand tracking for major domestic  
appliance manufacturer***

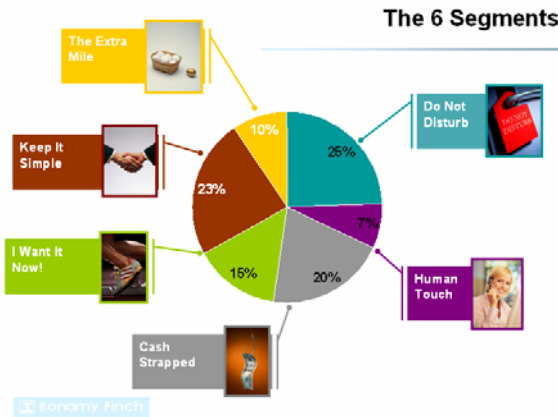
***Price threshold metrics  
for money transfer  
company***



***Multi-country segmentation on  
2-stroke diesel ship engines***

...with different deliverables...

Summary presentations for end client senior management

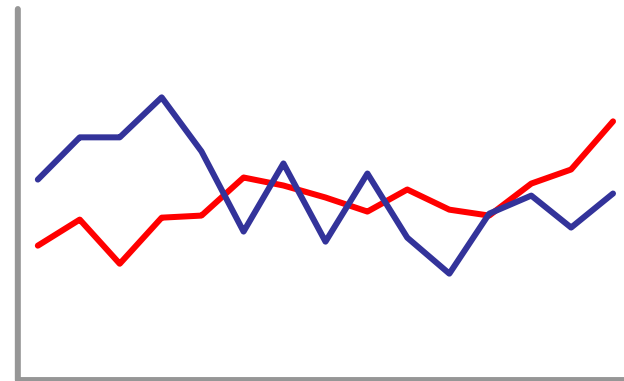


Reference decks for ongoing client decision-making



Bonamy Finch

Snapshot presentations from brand tracker data



Excel profiling spreadsheets for intermediary MR agencies

Segment sizes	Count	%
1	1728.0	25%
2	1305.0	20%
3	1710.0	25%
4	2041.0	30%

	Main	L10
% Solution Reliability	34.3	34.5

	Main	L10
% Algorithm Reliability - Q4a, Q1b, Q3b	83.8	83

Agreeing with any statement in fact	Indexed Factors							
	Colours do not indicate statistical				Colours do not indicate statistical			
Sort by Original order	▲	▲	▲	▲	▼	▼	▼	▼
Sort Ascending	▲	▲	▲	▲	▼	▼	▼	▼
Sort Descending	▼	▼	▼	▼	▲	▲	▲	▲
Base size	1728	1385	1710	2041	1728	1385	1710	2041
Segment	1	2	3	7	1	2	3	7
Needs Factor 1 - Passionate	61%	63%	52%	57%	108	112	86	98
Needs Factor 2 - Confident	100%	1%	55%	69%	224	1	90	122
Needs Factor 3 - Fresh	0%	0%	100%	89%	0	0	286	247
Needs Factor 4 - Different	68%	60%	53%	66%	114	96	80	110
Needs Factor 5 - Trendy	38%	16%	0%	97%	83	34	0	569
Needs Factor 6 - Retired	40%	33%	31%	40%	111	96	80	112
Needs Factor 7 - Feminine	66%	64%	62%	75%	98	94	90	117
Needs Factor 8 - Strong	16%	17%	6%	12%	141	149	41	94
Needs Factor 9 - Mainstream	25%	19%	23%	31%	98	72	90	138
Needs Factor 10 - Sporty / American	25%	19%	19%	33%	96	70	70	169
Needs Factor 11 - Extras	8%	5%	8%	19%	67	45	68	265
Needs Factor 12 - European / Nostalgic	9%	7%	9%	15%	81	58	86	183

...but many of them share similar traits

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**Segmentation profiling** – research agencies want a standard Excel output

**Detailed reference decks** – large documents call for common signposting and recognisable chart formats

**Brand tracker reports** – need to be harmonised across markets and targets for easy comparison

**Pricing studies** – multiple studies, with multiple iterations of a single chart, and very tight analysis timings

# Using E-Tabs Enterprise in Imaginative Ways

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**Multiple Reports**



*Media Profiling Study*




*Brand Scorecard*

**Single Reports**



*Pricing Study*



*Segment Profiling Template*

**Use once**

**Use over time**

# Electrolux Brand Scorecard

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**Monthly tracking of key brands** in 18 markets for one of world's largest home appliance manufacturers

*42,000 interviews per year*

*Global coverage, mixed methodology*

Live **web based reporting system**, with different functional tiers

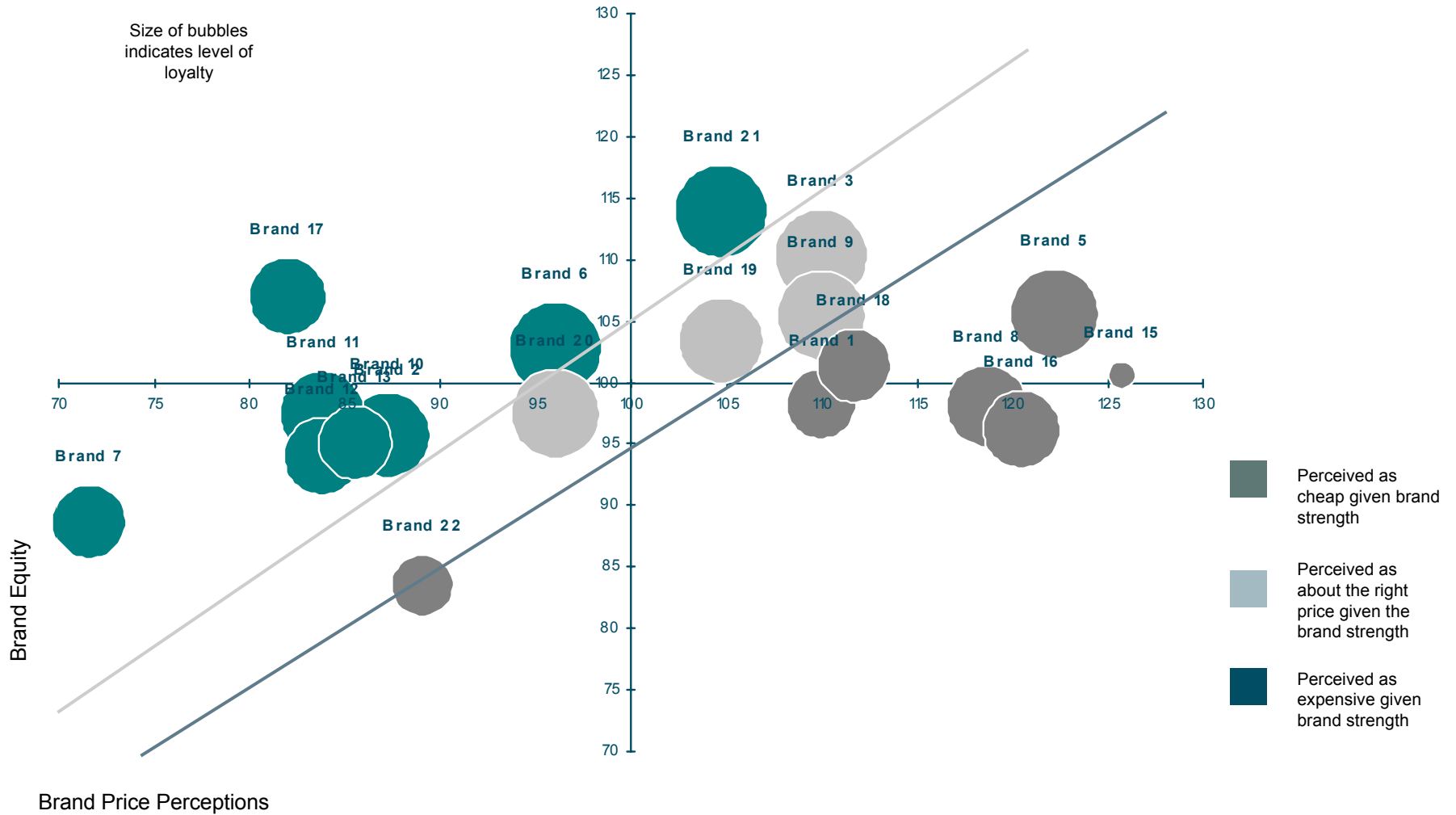
Supplemented with **fixed reporting structure**

*Country based quarterly reports – generated in E-Tabs Enterprise*

*Brand focus reports – easily adapted in E-Tabs from quarterly reports*

*Management summaries*

### 3. Brand Strength, Value and Familiarity in Q4, 2007

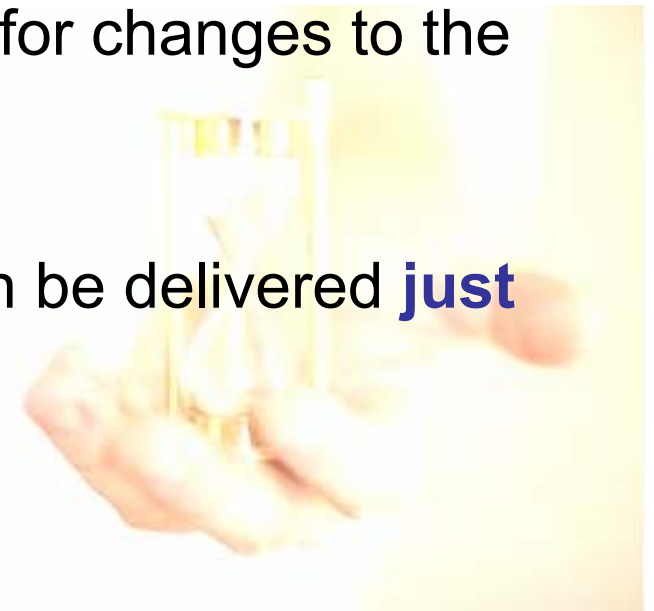


## The bottom line – does it save time & money?

We estimate that the set-up process and the first wave of reports combined have needed **less exec time** than a purely manual process

However, the significant cost benefits will be **seen in future quarters** - even accounting for changes to the deliverables

Error-free, standardised reports can be delivered **just days after data is available**



# Electrolux Media Profiling

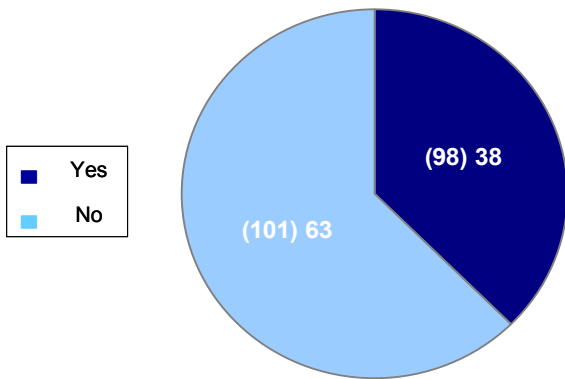
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- **Media profiling in 8 markets** across Europe
  - Deliver individual segment reports, per country, plus a segment summary report
  - Reports delivered as soon as possible after fieldwork, to ensure relevance
- In terms of work hours, estimated that the **E-Tabs approach saved 60%** compared to a 'manual' process
- **Cosmetic changes** were implemented much faster
- Tag setup allowed individual segment reports to be **easily created** from a **master template**

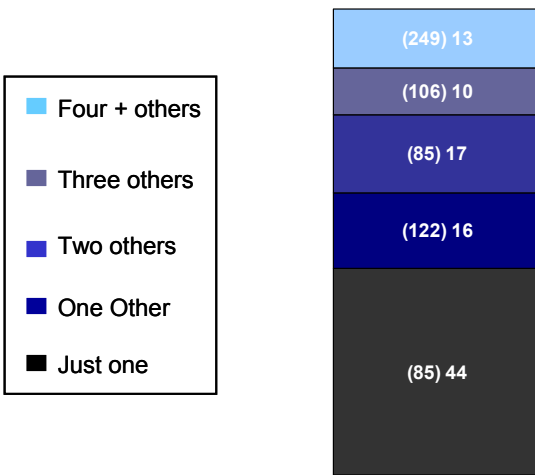
# Internet Usage – Segment 1: Buying process



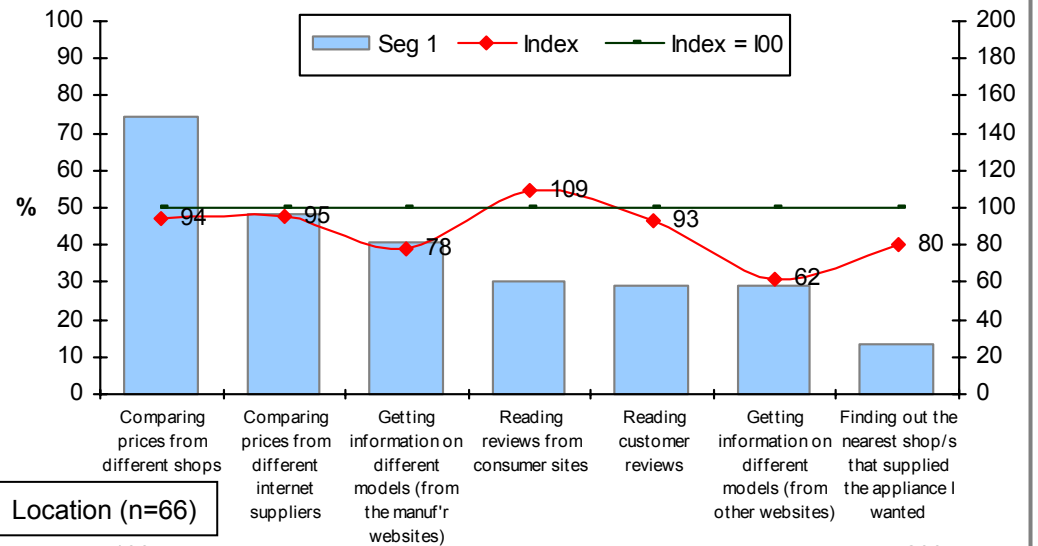
Used internet for purchase



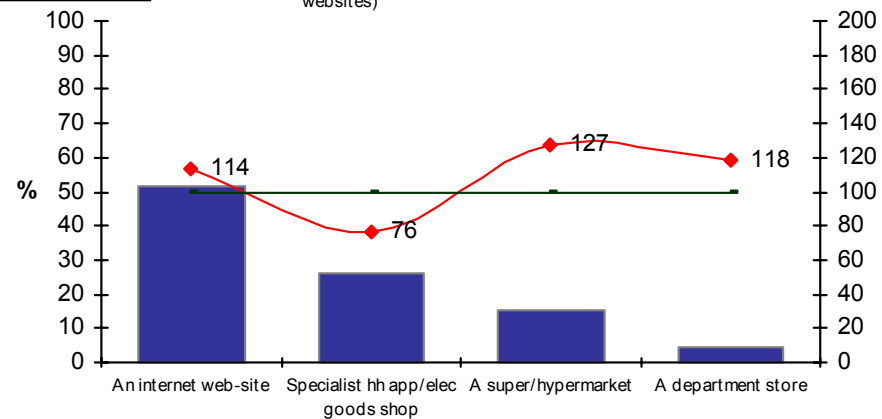
No. of stores visited before purchase



How internet used (n=66)



Location (n=66)



Base: France Non core – All those who have purchased an appliance in the last 12 months (n=176)

Q5\_12. Did you use the internet at all when you purchased the <insert appliance name>? Q5\_13. And what did you use the internet for during the purchase process?

# E-Tabs Enterprise is not just for large projects...1

- Segmentation profiling template
  - Bonamy Finch run c.10 segmentations a month for intermediary research agencies, each with 6-8 segment solutions, which need to be sized and profiled
  - We can generate **automated syntax** (written in VB) to provide standard output from **SPSS data files**, with standard tags

- **Flexible** enough to deal with **different parameters** (numbers of segments, type & number of profiling variables, and segmentation details)

Segment sizes	Count	%	
1	214.6	27.9	
2	344.4	44.8	
3	210.6	27.4	

	Main	L1O
% Solution Reliability	96.90%	93.10%

	Main	L1O
% Algorithm Reliability	93.90%	89.60%

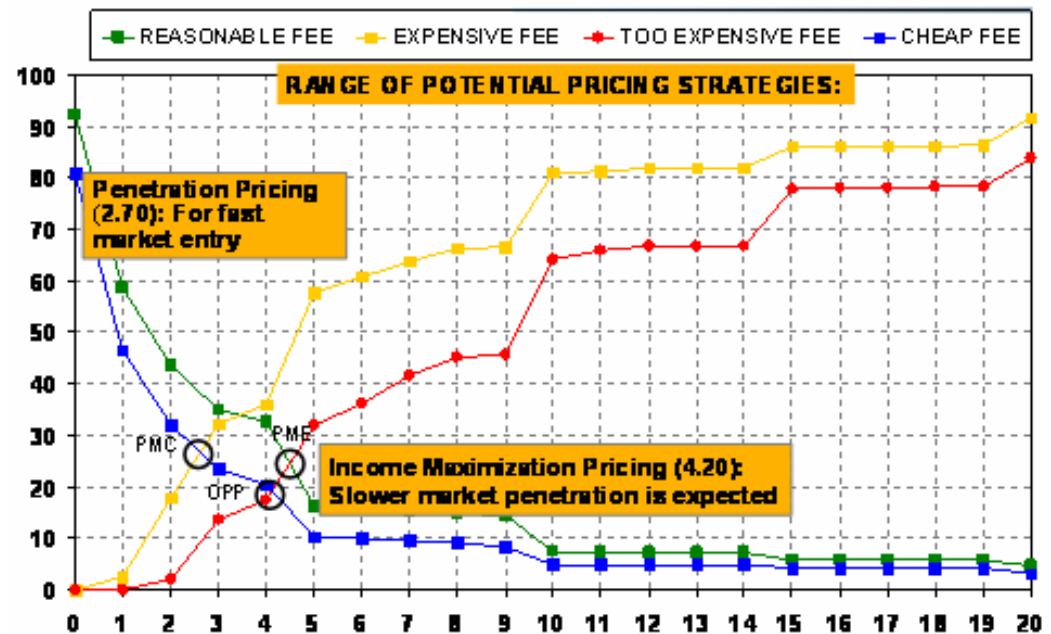
  

Sort by Original order	Factor scores 5 point, 1 = Disagree, 5 = Agree			Indexed - Factor scores Colours do not indicate statistical significance			
	▲ ▼	▲ ▼	▲ ▼	▲ ▼	▲ ▼	▲ ▼	
	215	344	211	215	344	211	
	1	2	3	1	2	3	
Factor 1	3.5	3.7	3.9	2.8	106	119	74
Factor 2	3.0	3.7	2.3	3.4	134	66	119
Factor 3	3.7	3.7	3.8	3.6	99	106	94
Factor 4	2.6	2.6	2.3	3.3	97	79	135
Factor 5	3.2	2.9	3.7	2.7	89	131	79
Factor 6	3.4	3.3	3.7	3.1	93	117	88
Factor 7	3.2	3.1	3.2	3.5	95	95	112
Factor 8	3.5	3.2	3.6	3.5	90	107	102
Factor 9	3.2	2.9	3.5	2.9	87	122	90

# E-Tabs Enterprise is not just for large projects...2

- Price Threshold Measures

- **Tight analysis timings** meant a manual approach wasn't viable
- Needed to plot the same chart for a **large number of subgroups** in multiple markets
- Downtime during fieldwork was spent ensuring **data specced** in the correct way
- Enterprise project consisted of **1 slide**
- **Full presentation** prepared in a **single day**



## How does E-Tabs benefit small companies?

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1

Large studies with fast, intensive reporting periods are now feasible – large teams of execs are no longer a requisite

2

Smaller businesses with more senior-focused teams can more effectively use their time & knowledge to provide a more insightful end product

3

Less reliance on large studies means we can apply the benefits of E-Tabs Enterprise imaginatively to smaller, but no less repetitive, tasks



# E-Tabs - 2 days to learn, a lifetime to master...

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2 main things to remember:

- Spend as much time as is necessary to get the **data in the right format**
  - It makes all the difference to programming & processing speed
- Use the **E-Tabs support team** – they always have an answer, and a **huge library** of ad-hoc hotfixes

Other Eureka! moments:

- Automating the process, as well as the product
  - **Using loops** avoids the need to manually start individual country or subgroup reports
  - Manage brand lists per market effectively
- Calling up **macros from PowerPoint**
  - Calculating optimal scales on scatter chart axes

# Benefits & Limitations of E-Tabs Enterprise

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- Benefits:

- **Increased control** over the end result
- **Huge cost savings**
- Fewer errors – and any errors are identified pre-delivery
- Happier execs (**fewer repetitive tasks, skills development**)
- Flexible & intuitive software, with **excellent training** and ongoing support

- Possible Limitations:

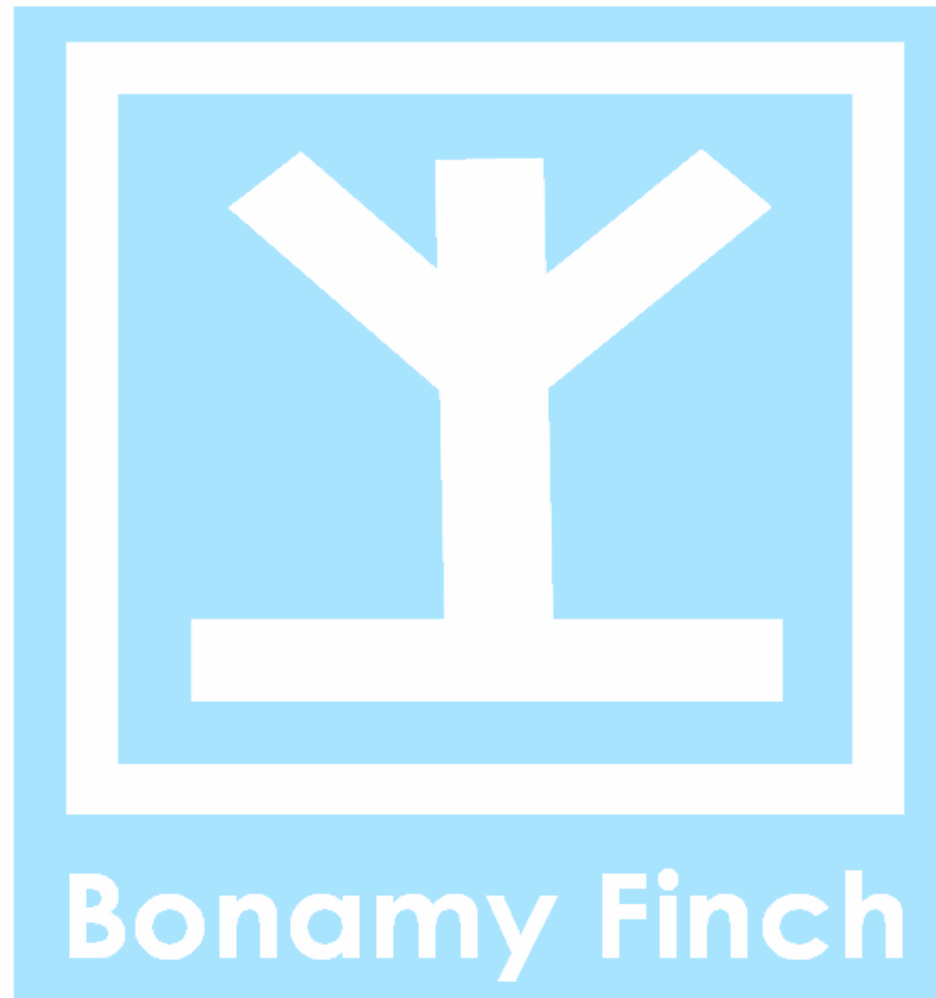
- Set-up costs sometimes a turn-off for clients, when **scale of end deliverable is uncertain**
- Needs a flexible, co-operative **DP team**
- Needs a structured, co-operative **end client!**
- Possible temptation to **'over-report'**



Any Questions?

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**Bonamy Finch**