

nxtMOVE was asked to understand the inter-relationships of the ski equipment and apparel market in N.A. and Europe and ...

... assess how the Client can leverage its existing position and make efficient changes that will drive growth

### The problem

(1 of 3)

- The Client's business was not growing at the levels that it's parent expected and it needed to understand the customer perceptions of:
  - ✓ its equipment (skis and ski boots); and
  - ✓ apparel brands
- It needed to understand its existing position and future prospects in relation to its competitors
- nxtMOVE evaluated brand perceptions, competitor positioning and the influence of outside sources at all levels of the value chain

nxtMOVE utilized three methodologies of research to complete the study: primary source interviews, online focus groups and end user surveys

## The approach

(2 of 3)

### Phase 0

#### Meet with key Client stakeholders to ...

- ... review existing perceptions of the market, brand statements / positioning, identify key ancillary issues to include in quantitative surveys and call-guides. Discussion topics outlined in the RFP discussed for inclusion

### Phase 1

#### Conduct in-depth telephone interviews with key stakeholders in the distribution value chain ...

- ... primarily focused on specialty retailers, buying groups, e-commerce sales portals, retail sporting goods retailers and rental / used equipment organizations

### Phase 2

#### Conduct bulletin-board focus groups with retailer buying decision-makers ...

- ... focused on perceptions and PDFs related to delivery performance, invoice accuracy, customer service, etc. for Client and competing brands

### Phase 3

#### Field online survey for end-users in each of the target markets to ...

- ... assess existing brand values / positioning, brand scoring, PDF leverage points and impact of ancillary influences on purchase decisions; among other consumer related issues

### Phase 4

#### Aggregate, analyze and report findings to Client and its parent

- nxtMOVE aggregated the findings from each phase of the research and analyzed the impact on the Client and provide recommendations for how the it could transform the learnings into actionable managerial insight

nxtMOVE provided relative brand perception scoring, demographic profiles and rationale ...

The results

(3 of 3)

1-3 Little/No Impact

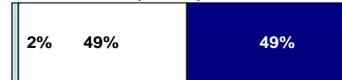
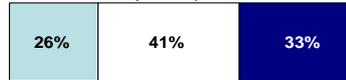
4-7 Some Impact

8-10 Great Impact

Impact of Price on Final Purchase Decision  
(n=71)

Impact of Margin on Final Purchase Decision  
(n=71)

Impact of Appearance on Final Purchase Decision  
(n=71)



Why do you say that?

- "Price has an impact on any decision. It is always part of the business equation."
- "Price something that is always mentioned. Consumers are much more price sensitive these days."
- "Economic times are tough right now. Consumers are always looking out for the best value they can get."

Why do you say that?

- "Margin is always something to consider. It drives your bottom line. But meeting the customer needs is the most critical."
- "It is pretty important, but the quality of the product is equally viable. I need a quality product for my customers. A happy customer is a returning customer."

Why do you say that?

- "Appearance plays a part in the process, but much of the decision comes from recommendations and testing. Appearance is more of a secondary consideration."
- "Skis are like any other fashion. An unattractive look, or something drastically different, isn't going to be a top-seller."

... for how and why decisions are made at each point in the distribution and value chains

For example, nxtMOVE analyses included scoring of responses (and examples of comments) from the N.A. and European distributor / retailer focus groups;

AND

Relative scoring of Client brands relative to the competition (based on end user responses – color-coded based on three tiered ranking)

Overall Preference Score

CLIENT

Comp. 1

Comp. 2

Comp. 3

Flat Skis (11.8)	11.8	6.4		
Ski Systems (15.0)	14.5	5.6		
Bindings (20.7)	17.2	7.9		8.4
Boots (17.3)	13.5		7.5	