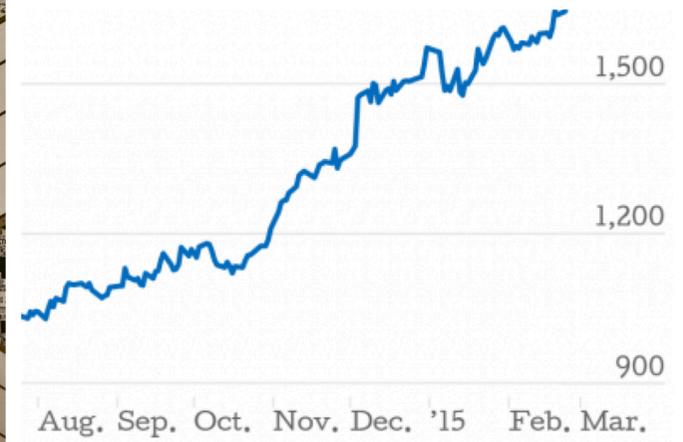




# Muse Marketing Strategy Credentials



# What we do

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- We make the connection between
  - How audiences think and behave
  - And how organisations respond
  - To achieve their objectives

**We create actionable, business building Marketing Strategy**





# We have classical marketing and brand skills

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- All of our people have experience of working in the most highly regarded clients and agencies
- We do not employ juniors to deliver output
- We work with some of the world's most knowledgeable, demanding clients
- We attempt to bring that background to all of the projects we work on



# The founders

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## Rick Butler

Graduate Trainee to Senior Planner, Lowe (Ad Agency of the Year, 2001)

Planner, Muse Strategy

Partner, Muse Marketing Strategy



## Simon McQuiggan

Graduate Trainee to Brand Manager, Nestle

Brand Manager to Director, Whitbread Beer Co.

M.D. Lowe Brand, and Lowe and Partners Group Board member

Managing Partner, Muse Marketing Strategy



## James Page

Trainee, Yellowhammer

Managing Partner, Ogilvy

Board Director, Lowe (Ad Agency of the Year, 2001)

Deputy Managing Director, Lowe Brand

Managing Partner, Muse Marketing Strategy

# Services

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- Project usually use one of, or a mix of, the following:
  - Audience segmentation and opportunity analysis
  - Brand definition
  - Brand analysis and knowledge auditing
  - Insight generation and qualitative research
  - Modelling and evaluation
  - Consumer engagement planning
  - Organisational alignment
  - Panels and quantitative research
  - Agency selection and management
  - Training
  - Specialist brand tracking
  - Workshops and co-creation facilitation



# Services

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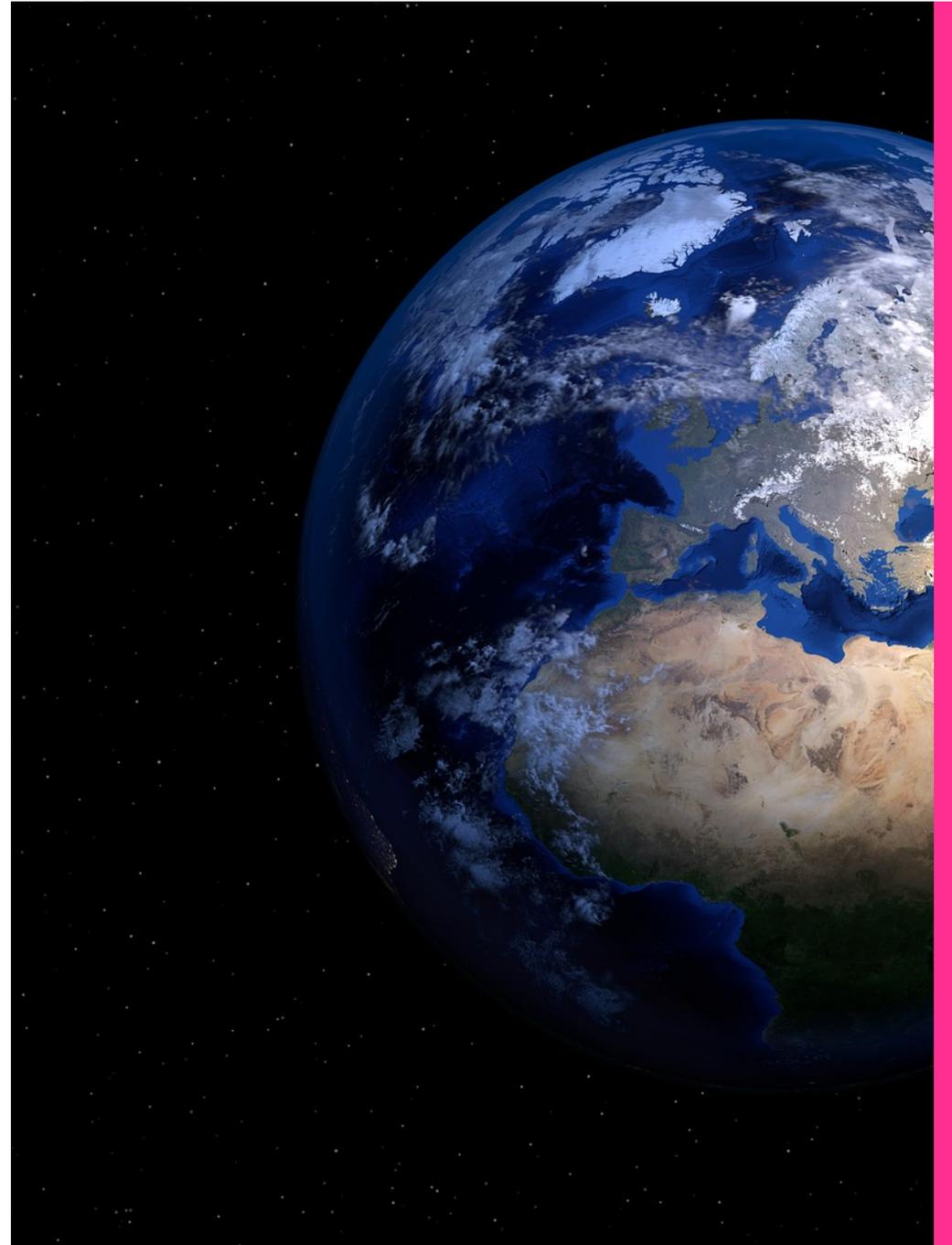
- We conduct:
  - Stand alone qualitative research
  - Stand alone bespoke quantitative research
  - Stand alone strategy projects
  - Research and strategy projects
- Approximate business mix:
  - 60% research
  - 40% strategy



# Where we work

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- UK
- Multi-nationally
  - Example projects:
    - UK, Russia, USA, UAE
    - China, Mexico, Germany
    - France, Germany, Spain, Italy
- Single overseas markets
  - Example projects:
    - France
    - USA
    - Romania



# Our approach

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- We prefer to be informal and collaborative
- We will always use the best methods that a project allows, rather than taking a standardised approach:
  - We work with our clients circumstances and culture
  - It is important to us that we add as much value as we can, to both our clients and to their audiences
  - If we don't believe that we can do good work, we will say so
  - If we believe that a client is taking the wrong course of action we will say so, but we will respect the decisions of our clients
- We place equal value on data analysis, qualitative evaluation, and creative thinking



# Clients\*



\* Examples, not our complete client list

# Case study 1

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## THE HEPWORTH WAKEFIELD

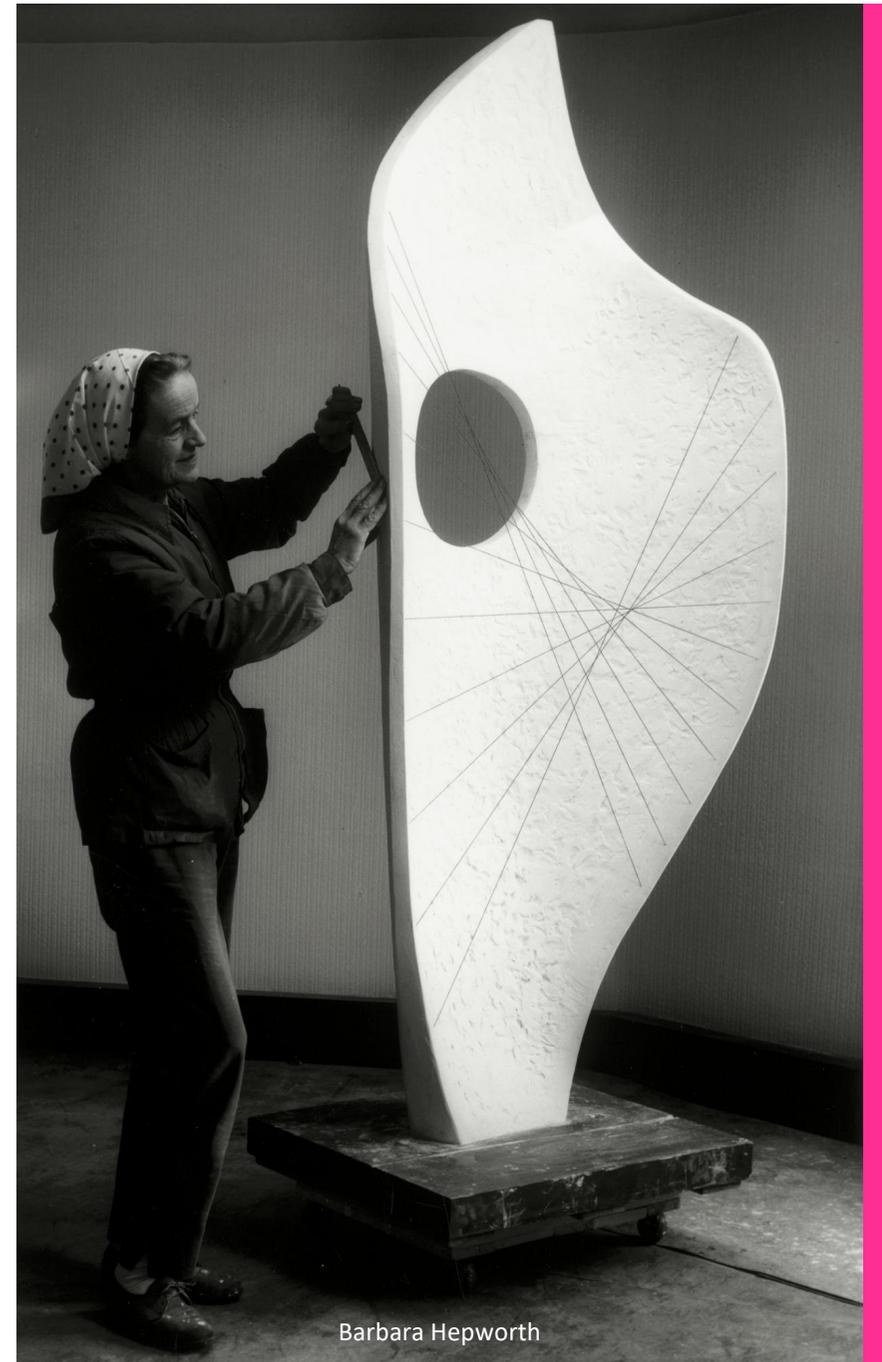
The value of properly constructed  
and implemented segmentation



# THE HEPWORTH WAKEFIELD

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- Background
  - THW launched to great fan fair in 2011
  - In the first 12 months it attracted almost 500,000 visitors
  - By 2016 visitor numbers had declined to 200,000
- We were appointed to identify a strategy to return visitor numbers to growth and the brief suggested that a segmentation would be helpful (which we agreed with)



# THE HEPWORTH WAKEFIELD

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- The base segmentation was created using TGI\*
- Then further 'enrichment research' was conducted and added to the segments, to provide the detail that was needed to make the segmentation actionable
- A segmentation 'universe' (who is to be segmented) was agreed, comprising of
  - People who visit cultural venues at least occasionally
  - Live in Yorkshire, the adjacent counties, and London (Approx. 40% of their visitors lived in London)
- The base segmentation visualised...



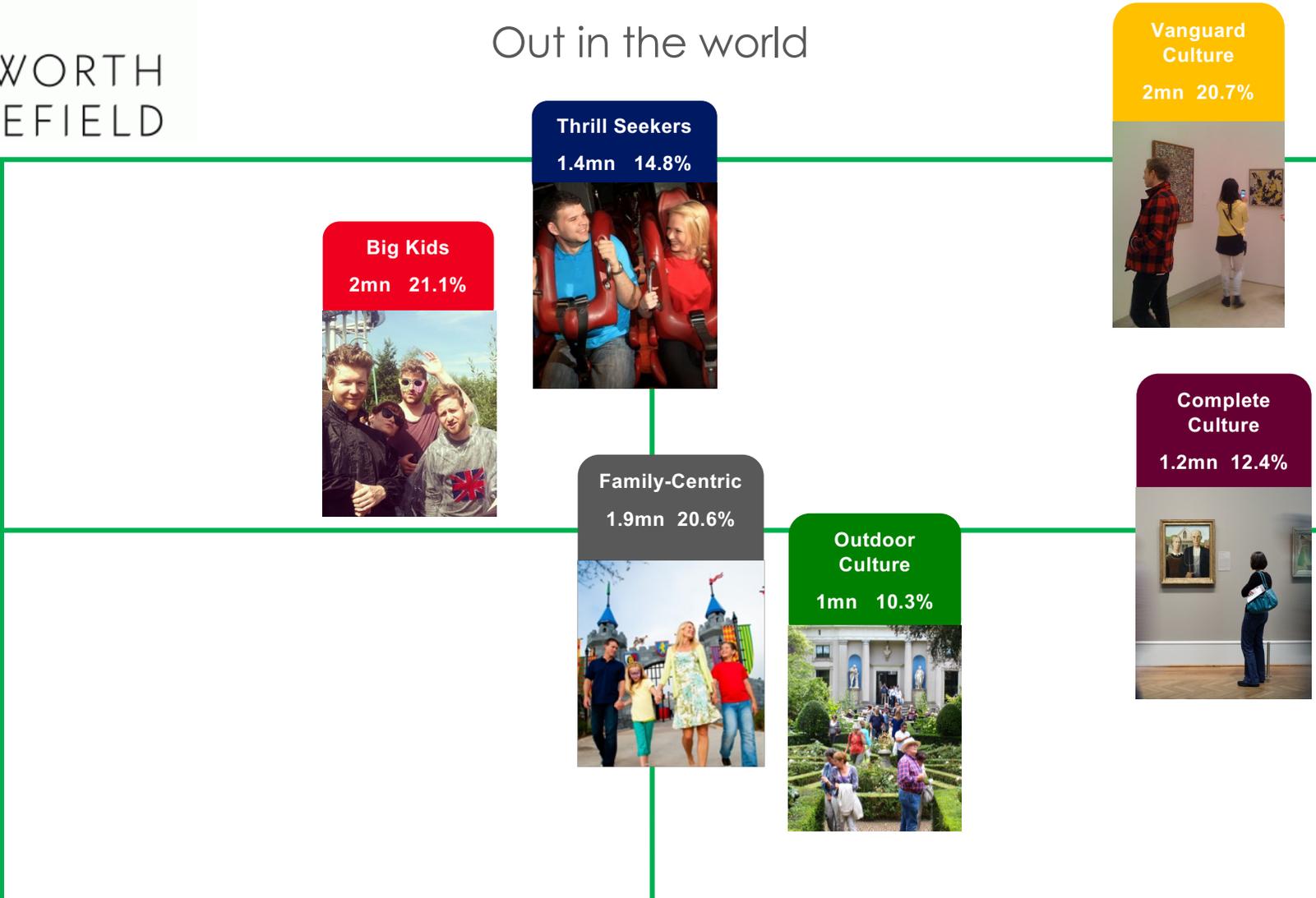
\*TGI is the worlds most widely used segmentation tool. High quality, low cost, widely recognised

# THE HEPWORTH WAKEFIELD

Out in the world

Self centred/traditional values

Socially aware and concerned



% = proportion of universe

Sitting at home

Source: TGI 2015

A segment summary follows:



## Vanguard Culture

2mn 20.7%



Progressive, adventurous and ethical cultural consumers.

Young, open to different cultures and art forms, exploring the contemporary and the new.

Aware of trends and the zeitgeist, motivated by self-education.

Visual arts, music, food, design and technology.

18-34, ABC1, Indexing highly for London, but throughout UK



Barbican Art Gallery

## Lexington



## National Theatre



## Festival Number 6



STATEMENTS STRONGLY AGREED WITH (++) AND DISAGREED WITH (--)

++ LIKE DIFFERENT PEOPLE, CULTURES, IDEAS, LIFESTYLES

++ I AM INTERESTED IN THE ARTS

++ PREPARED TO PAY MORE FOR ENV. FRIENDLY PRODUCTS

++ LIKE TO PURSUE A LIFE OF CHALLENGE, NOVELTY & CHANGE

++ I LIKE TO LISTEN TO NEW BANDS

++ I LIKE TO GO TO TRENDY PLACES TO EAT AND DRINK

-- MONEY IS THE BEST MEASURE OF SUCCESS

-- CELEBRITIES INFLUENCE MY PURCHASE DECISIONS

-- WATCHING TV IS MY FAVOURITE PASTIME

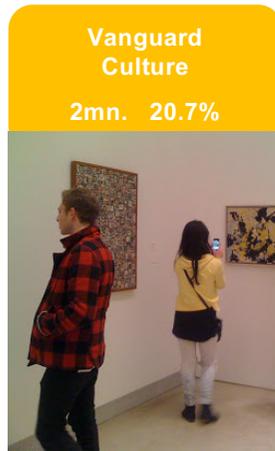
## White Cube



# THE HEPWORTH WAKEFIELD

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- Two segments were identified to conduct enrichment research amongst, being the two that the TGI data clearly showed were most likely to engage with the Gallery



- Enrichment research comprised three stages:
  - Qualitative groups amongst visitors from each segment
  - Qualitative research amongst non visitors from each segment
  - Quantitative research

# THE HEPWORTH WAKEFIELD

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- The base segmentation was presented to all departments
- Working sessions then took place with each function individually to identify further information needs that would make the segmentation actionable for them
- Those additional information needs were prioritised on the basis of
  - Will have a big impact
  - Of value to multiple functions



# THE HEPWORTH WAKEFIELD

- Research revealed reasons for not visiting amongst non visitors:

- Forgotten about the venue
  - A lot of visibility when launched but not seen anything since
- A negative perception of Wakefield
  - Down market, somewhat unsafe, nothing to do

- Visitors admire the venue:

- A good size: big enough to be interesting and worth a trip to visit but not big and impersonal
- For the majority, an interesting programme
- For a significant minority the programme is obscure and whether a visit will be enjoyable is a bit hit and miss
- A good location:
  - River Calder, Victorian mills, boats, garden, walk to it along the river, good activities, eg Christmas Market



# THE HEPWORTH WAKEFIELD

- A good location



# THE HEPWORTH WAKEFIELD

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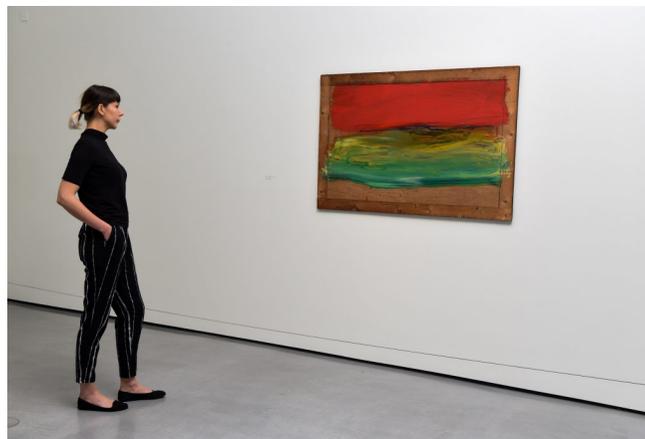
- We recommended targeting one segment only
  - Vanguard Culture
    - 2mn in number v 200,000 visitors and declining
    - To provide focus and concentrate marketing spend, allowing greater impact
  - Also proposed a complete change in marketing approach
    - From ads in generalist cultural publications such as Guardian Guide and local posters, to being part of the target audiences' lives ('surrounding the consumer'), in an empathetic tone of voice
      - Flyers in independent record shops, clothes shop, clubs, bars and restaurants
    - And only in Leeds
      - To allow the marketing spend to achieve high OTS (opportunities to see)



# THE HEPWORTH WAKEFIELD

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- We also recommended making a limited proportion of the programming somewhat more accessible and well known to overcome the reality that the programming is too obscure for some of the target audience
- And so that known artists could be communicated, therefore making communications more relatable and so motivating
- Some members of the curatorial team were resistant to this approach but it was adopted



Howard Hodgkin



Stanley Spencer

# THE HEPWORTH WAKEFIELD

- We provided coaching sessions with staff and written guidelines for the Gallery so that the principles established could be maintained after our project had finished

## **Surrounding the consumer**

- Being present in the lives of the audience
- Following their interests and being present there
- Particularly along the decision making process



## **Surrounding the consumer**

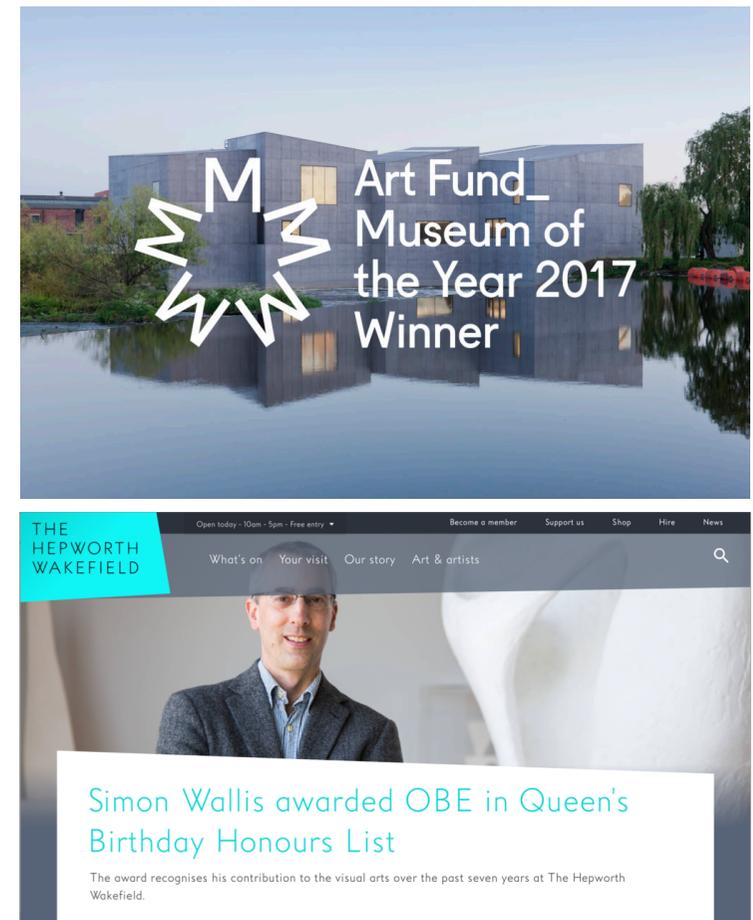
- Brand message on TV
- Posters on routes to supermarkets
  - reminder on day of shopping
- Posters in supermarket car park
- Trolley ads
- Promotion at POS



# THE HEPWORTH WAKEFIELD

- Results

- The first exhibition following the work was the first to achieve its target since the Gallery launch
- The Gallery tell us that they could see the nature of the audience change to reflect the target audience
- The long term decline in visitor numbers returned to growth within 12 months
- The Gallery was voted Museum of the Year 2017 in large part due to it's ability to re-engage audiences
- Simon Wallis, the Director, received an OBE



# THE HEPWORTH WAKEFIELD

- Comments from the Head of Marketing and ex Deputy Director of THW

**From:** Olivia Colling  
**To:** Simon McQuiggan

THW opened in 2011 to great acclaim and huge visitor numbers that far exceeded all expectations. However from 2013 visitor numbers dropped off on average 22% year on year. It was clear that something needed to be done.

The audience segmentation work undertaken with MUSE allowed the communications team to be more strategic in planning and delivering campaigns, moving away from an 'if it ain't broke' way of marketing the gallery to a more focused consideration of how to reach and engage key audiences that MUSE identified as the most likely to visit. MUSE worked closely with all of the teams at the gallery, at all stages of the project, resulting in a real sense of shared ownership of the segments – this had a positive impact on embedding the results across all areas of business to challenge every aspect of how we welcomed and encouraged people to visit and what people would like to see at the gallery.

The research into non-visitors and why they were not visiting was also vital to rethinking the type of exhibitions and learning activities we were programming and the need to broaden our offer to better suit our target audiences. This also informed our thinking about launching The Hepworth Prize for Sculpture to give us international prominence and a role in igniting debate around contemporary sculpture.

The first year of working in response to the research and segmentation resulted in 5% drop off; the second year has seen growth and this year is already up on the same period last year. We have now been nominated as a finalist for Museum of the Year 2017 in part because of all the initiatives we have done to turn our visitor numbers around.

The Hepworth Wakefield had opened with huge success, far exceeding visitor targets and attracting great interest and profile. However, three years after opening, visitor numbers had started to drop and the gallery wanted to better understand why people were not engaging with the gallery, what the barriers to visiting were and identify those segments with the potential for greatest growth and engagement.

MUSE was chosen from a rigorous tender process to work closely with the team and trustees. They worked well with the Gallery and identified 3 main barriers to visiting – some of which were surprising and unexpected. This helped the senior management team to agree on their top three strategic priorities and get full buy-in from the Board as an evidence based approach.

The work focused on increasing profile and directing a limited marketing spend to best effect in areas proven to have the highest growth potential. The findings ensured the team's focus was on creating projects in the immediate vicinity of the Gallery to increase dwell time and prompt decisions to visit, such as the introduction of major public events including the Print fair, and creating a new Gallery Garden capital project with Tom Stuart Smith. It also prompted greater collaboration with Arts Partners in the city region, in order to start to shift negative perceptions of Wakefield.

The results were immediately noticeable and exciting. Visitor numbers plateaued in the first 12 months after the research, following that they had started to slowly, but surely increase. Visitor satisfaction levels were at over 90% and the evidence was used as part of a successful city wide bid to secure a major Arts Council Cultural Destinations grant. The whole team engaged with the language and ambition to target specific segments and the Trustees appreciated the strategic approach and cohesion. The work continues and the profile of the Gallery has continued to increase as the Brand has also been developed. The exhibition programme has also started to more clearly reflect the findings. All of which has clearly contributed to the confidence and success cited in The Hepworth Wakefield's shortlisting this year for the Art Fund's Museum of the Year.

**Jane Marriott**  
**Director**  
Harewood House Trust

E: [jane.m@harewood.org](mailto:jane.m@harewood.org) M: 07786 080387

Harewood House Trust  
Harewood House  
Harewood

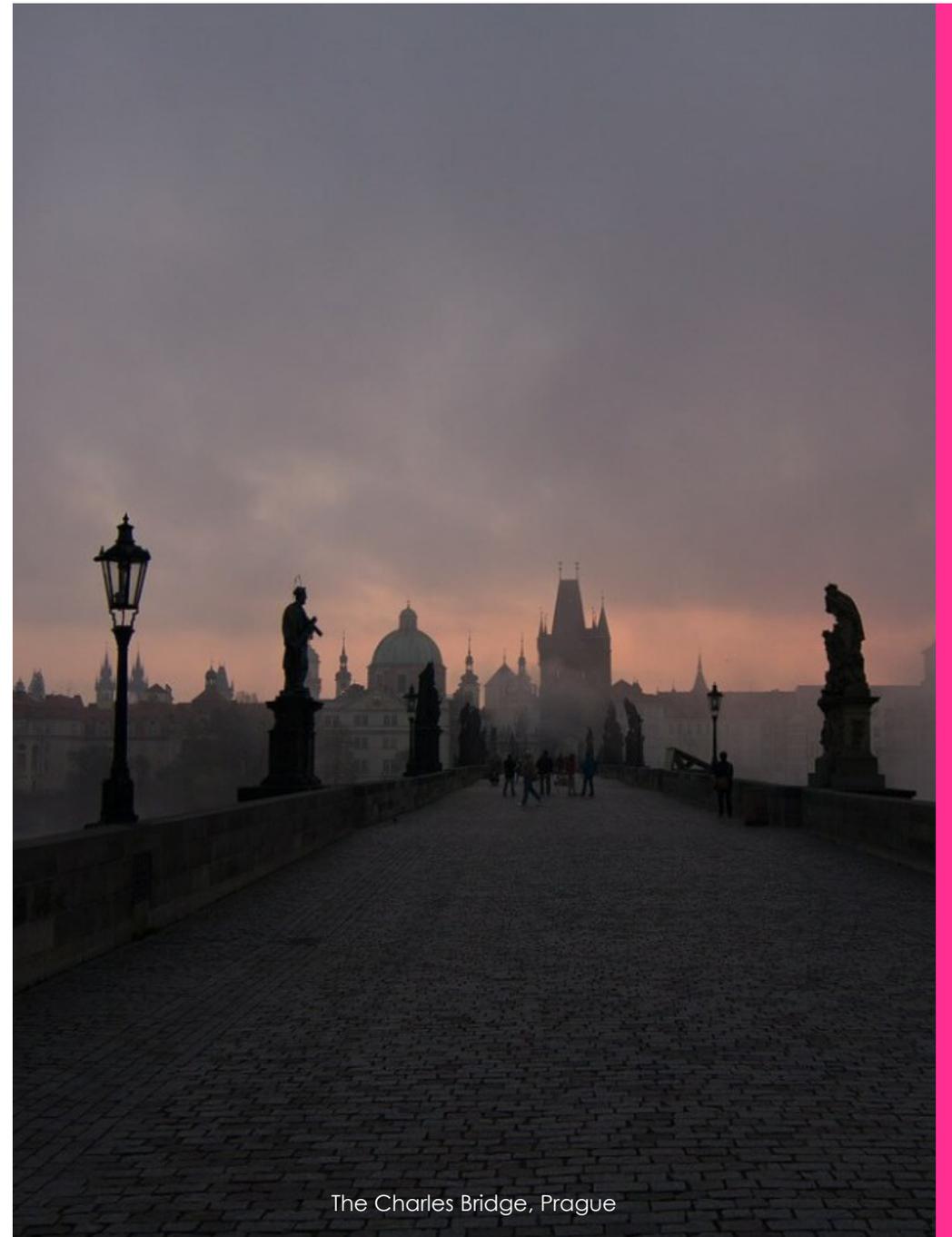


# Case study 2

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FMCG experience  
Working internationally  
Brand proposition development

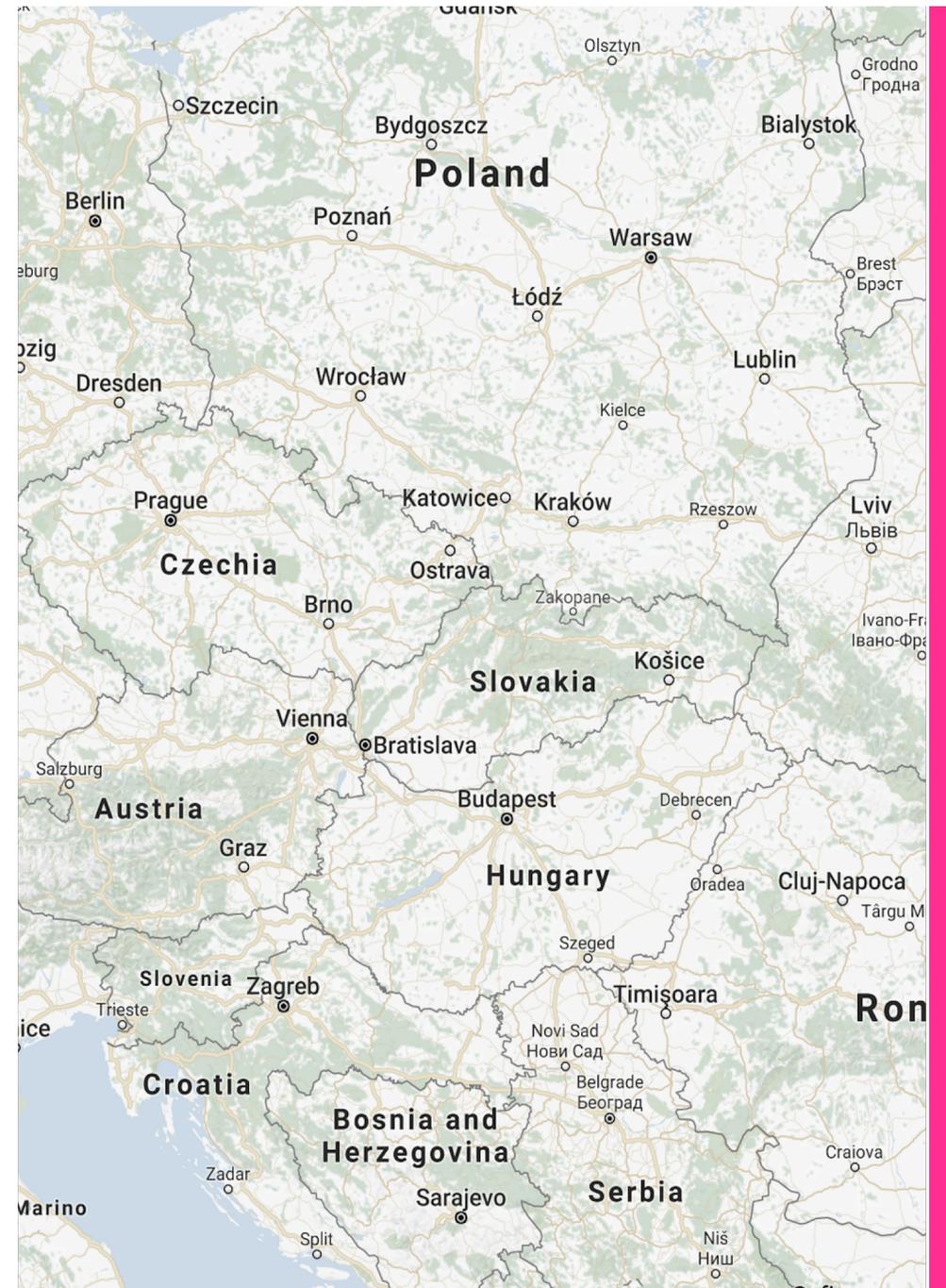


The Charles Bridge, Prague



Good Food, Good Life

- Nestlé's confectionary business in Central Europe was underperforming
- They had recently conducted a Central European confectionery consumer segmentation as a basis for further consumer insight and targeting
- We were appointed to work with Nestle to devise a strategy to return the business to growth





Good Food, Good Life

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- Our process
  - Portfolio strategy
    - Desk research regarding cultural characteristics per market
      - Not confectionery sector focused
    - Data analysis
    - Qualitative insight research
    - Overall strategy development
    - Overall strategy evaluation
    - Overall strategy proposal
  - Brand strategy
    - Data analysis
    - Insight research by brand by market
    - Proposition development by brand by market
    - Proposition evaluation research by brand by market
    - Proposition proposals by brand by market





Good Food, Good Life

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- Prior to the project Nestle had been prioritising their global / international brands in the region
- The first phase of the project revealed the following key insights
  - Whilst the majority welcomed the political changes that had commenced 25 years earlier, a number didn't like the increased risks in life and lack of certainty about the future that had come with them





Good Food, Good Life

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- The first phase of the project revealed the following key insights (cont)
  - Over time local consumers, who had initially welcomed western brands were increasingly of the view that many local brands were their equal and a degree of local pride was emerging
  - Both of the two insights above were particularly found amongst older consumers



One of the local brands held in high regard



Good Food, Good Life

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- As an entry strategy into a number of central European markets Nestle had acquired local suppliers
- As a result in, for example, the Czech Republic, Nestle owned some of the most well established local brands
- A regional portfolio strategy was arrived at of targeting older consumers via local brands and younger consumers with international brands
  - As a generalisation, where relevant, younger consumers tend to carry sector choices into later years and so this strategy would allow Nestlé's international brands to increase share over time





Good Food, Good Life

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- Work was then conducted on developing motivating propositions for relevant local brands. As example, the Czech Republic:
  - Nestlé had acquired the 'Orion' brand when they entered the Czech market. The brand was highly regarded in the Czech Republic and Slovakia
  - The brand comprised a number of sub brands:





Good Food, Good Life

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- Proposition options were developed for the Orion brand based on consumer insight research and brand / product truths
- In proposition evaluation research the proposition that held most appeal was **'Certainty'**
  - This is what older consumers missed about the pre political changes and sought in life today
  - The brand was associated with that period, when it had a share of over 30%
  - The brand was highly trusted and so the proposition was both motivating and credible





Good Food, Good Life

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- Propositions were then developed for each of the sub brands
- Those propositions were based on product truths
- For example, Studentska Pecet:
  - Studentska Pecet means 'student food'. It used to be displayed in large blocks and students (and others) would break off what they could afford
  - Older consumers held it in great affection, recalling their youth and times that they found more reassuring





Good Food, Good Life

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- The product contains multiple ingredients of different tastes and textures, as displayed on the packaging
- This creates a distinct mouthfeel, which is the motivating characteristic of the product for consumers
- From this insight we developed a number of propositions, which were then assessed and optimized in evaluation research
- The final proposition was **'Toys for your tongue'**, which had the following benefits:
  - Precisely described the product benefit from the consumers perspective
  - Had wit, personality and distinction
  - Highly creatively fertile





Good Food, Good Life

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- Outcome
  - Nestlé's confectionery business in Central Europe returned to growth within 18 months, after two years of decline
    - In the 2 years prior to the project there had been 1,000 redundancies. In the 2 years following the project there were 1,200 hires
  - 3 of the 4 brands we repositioned in Czech Republic and Slovakia achieved record levels of sales following their relaunch



Bratislava, capital of Slovakia. Amusingly the best way to get there from Heathrow is to fly to Vienna and sail down the Danube!

# Case study 3

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HNW / UHNWI's  
Global  
Service business



- We have included this case study because it deals with HNWI's
- However, unfortunately the NDA we signed limits the specific information we can present
- The brief was to develop insight into the needs of HNWI's and make proposals to respond to those needs
- We conducted extensive insight research to create a segmentation which identified unmet needs by segment, leading to prioritised recommendations

- Specific actions
  - We interviewed Schroders client managers, both in group discussions and depth interviews, with two purposes
    - To identify their perceptions and beliefs which could be tested as the project progressed
    - To build a relationship with them and to gain their commitment to supporting the project, as they were 'gatekeepers' to their clients
  - Client managers arranged interviews, to take place by phone or in person, either with HNWI's themselves or their Private Office managers

- Specific actions
  - We networked our way to HNW clients of competitors using the ‘Muse Knowledge Network’\*
  - In London and New York we were able to hold group discussions amongst HNW clients of competitors

\* A network of influencers and experts which we consult when required



Miami. The financial capital of South America according to one UHNWI we met there.  
And “the capital of dirty money” according to another

- Our work enabled us to create a qualitative segmentation of HNWI's
- It comprised of segments defined by a number of criteria:
  - Have inherited wealth and have a more national lifestyle (many in the UK)
  - Have inherited wealth and have a more global lifestyle (many in the Middle East)
  - Traditional entrepreneurs
  - New economy entrepreneurs (dot.com, Silicon Valley)
  - Become wealthy in their lifetime due to non entrepreneurial talents (particularly, but not exclusively, sportspeople)
  - Extent to which they wanted control over financial decisions
  - Extent to which they wanted to rely on experts for financial decisions

A number of key learnings emerged. Two examples:

1. Apparently reasonable assumptions about behaviours and needs could be very wrong:

- As example, it was assumed that successful entrepreneurs would want more control over their financial decisions than, for example, sportspeople. In fact many didn't:
  - Some believed that their financial judgement had led to their success and they wanted a high degree of control over financial decisions
  - Others believed that their ability to recognise expertise and to rely on it, had been the cause of their success, and so they wanted far less personal control
- Therefore, these two attitudes were represented in two different segments

2. The implications of a local versus global outlook

- The more local the outlook, the more personal the service sought
- The more global the outlook, the more systemised the service sought (But only regarding money. For example, hotel service was expected to be very highly personalised)

- We used desk research to identify at a top line level the segments that offered the greatest potential for growth
- However, that learning was enhanced by the questionnaire described on the next slide to arrive at a clear identification of the audiences and services that would enhance client satisfaction and provide the greatest return



- Actions

- A client questionnaire was created based on the needs identified by the project. It was either completed by the individual or their Private Office
- It identified the needs, and so the service preferences, of individual clients
- Additional service offerings were developed to address the needs of the segments
  - For example, greater automation was introduced for those that sought it, but those who sought personal service were not encouraged to adopt it
- In simple terms, the consequence of the project was a professional, insight based, CRM system



# Muse Marketing Strategy Credentials

