

MARKETING EXCELLENCE 2

ebookers

Creating crossborder consistency
in an online brand



MARKETING
SOCIETY

AWARDS FOR
EXCELLENCE

in association with
Marketing

About The Marketing Society



INSPIRING BOLDER MARKETING LEADERSHIP

The Marketing Society is a not-for-profit organisation owned by its members, with over 2500 senior marketers. Over the past 50 years it has emerged as one of the most influential drivers of marketing in the UK business community.

The Society challenges its members to think differently and to be bolder marketing leaders by supporting the development of leading-edge thinking, and promoting the evidence of effective marketing. The Society does this through the Marketing Society Awards for Excellence; its publications Market Leader, Our Week and rich online Knowledge Zone; a national programme of world-class events; innovative professional development, such as the annual Marketing Leaders Programme; and extensive on-and-offline networking opportunities.

www.marketing-society.org.uk

Foreword

By Roisin Donnelly,
President of The Marketing Society

What is marketing excellence?



Roisin Donnelly
President of
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Corporate Marketing
Director and Head of
Marketing at Procter &
Gamble UK and Ireland

Marketing excellence can drive breakthrough business results for the short and long term. Marketing excellence requires great strategic thinking, great creative thinking and perfect execution.

But how do we assess *marketing* excellence? First we choose brilliant industry judges who are all experienced and successful practitioners of excellence and we ask them to pick out the cases which they see as remarkable. We ask them to look for two key qualities from our winners: creativity and effectiveness.

But marketing continuously changes and evolves, as consumers become more sophisticated and demanding and the media for communicating with them ever more diverse. So the standards for marketing excellence change and in turn become more demanding.

We believe that The Marketing Society Awards for Excellence in association with *Marketing* set the standard of marketing excellence in the UK. They have established this reputation over a period of

more than 25 years, and they have always been based on the principle of searching out the best examples of different marketing techniques in action, that showcase great strategic thinking, great creativity and perfect execution.

In order to be a winner of one of the Society's Awards, marketers have to demonstrate that what they have done is outstanding in comparison with marketing in all industries not just their own particular sector.

If a marketing story has been good enough to impress our judges, then all marketers can learn from it – however senior they have become. The collection of case histories brought together in this book is the best of the best from the past four years of our Awards, and I am confident that it truly demonstrates *marketing excellence*. I have been truly inspired by these case studies and I hope you will be too.

ebookers

Creating crossborder consistency in an online brand

Snapshot

An innovative approach to uncovering consumer insights helped the revitalised brand reposition itself seamlessly across Europe.

Key insights

- The business needed to develop a coherent, fresh and harmonised brand across Europe to stand out in a competitive and cluttered online travel market.
- The firm involved managers, staff and customers in finding the right solution — and one which could be built on similarities in the different markets while allowing for local nuances.
- The resulting brand was based on a simple and streamlined design that reflected consumer desire for bookings to be quick, intuitive and hassle-free.

Summary

ebookers.com is a leading pan-European online travel agency specialising in worldwide travel. It offers a wide range of travel products, including a choice of over 250 airlines, more than 86,000 hotels, holidays, car hire and insurance. ebookers.com is part of global online travel company Orbitz Worldwide.

In Europe, ebookers operates in 13 markets. Each of these is at a different stage of development and serves customers with different needs. Back in 2006, the size and positioning of the ebookers brand varied hugely from country to country as a result of its historical development. To benefit from both commercial and marketing economies of scale, the business needed to develop a stronger, fresher and more consistent brand.

The company and its partner, co-creation specialists Promise Corporation, embarked on an innovative crossborder rebranding programme which involved managers, staff and customers. This not only delivered superior results but built internal support and understanding, which led to a more rapid and smoother implementation of the new brand.

Following the launch in mid-2006, the growth in ebookers revenues significantly outstripped the market, unprompted brand awareness more than doubled and increased sales attributable to the brand rose by almost 50% year-on-year (YOY).

A fiercely competitive market

ebookers is one of many players in a European online travel market which has seen an explosion of growth in the last few years. It's estimated there are more than 50 players in the UK alone. Because ebookers was a relatively small player and not as well resourced as many of its competitors, standing out in such a busy market was a big problem as all players fought for supremacy. In addition, ebookers had grown by acquisition, so was composed of many different small businesses, each with their own offering, names, language, and style, and each facing challenges specific to their local markets. For example:

- In the UK, the most advanced European market, ebookers was relatively strong at No.3 in the market.
- In France and Germany, ebookers was virtually unknown, and the word 'ebookers' had no meaning.

In addition, the ebookers business was trying to change focus and shift its emphasis away from flights towards hotels and 'dynamic packages' where margins were richer.

When the Promise team first got together with the ebookers team, it found a brand that was fragmented and lacking a clear vision, and a business that was simply not reaching its full sales potential. One consequence of the way that the ebookers business had developed was an almost complete lack of hard information or insight about its customers. Who were they? What was going on in their lives? What were they looking for? How could ebookers be more appealing to them?

Getting to know the customers

Relying on standard approaches such as focus groups and questionnaires was not going to be effective in this industry. It was unlikely to generate the quality of insights that would enable ebookers to transform its position in the market. So an insight programme was set up consisting of a combination of small groups and large workshops called BigTalk. This brought together ebookers staff and their customers to define jointly what the brand should be like in the future. It was built around groups of 50+ consumers and staff, who worked together over one to two days to share experiences and also work creatively to solve problems.

Having this sort of conversation with customers was a vital step because today's consumers want to be in charge: they want to buy what they want, where they want it and when they want it. Nowhere is this truer than in travel: people used to define themselves by their education or their family or their job. Nowadays they are much more likely to define themselves by their holidays and the experiences they have there. The new travel generation are intolerant of interruptions and unwanted corporate messages or demands for attention. In other words, they want things on their terms.

This approach uncovered fresh new insights in the search for a new positioning for ebookers that would both build on past strengths and help it stand out in the future. Including staff in the conversation was equally important because it meant that the company could harness their creativity and challenge some sacred cows: for example, that the brand didn't matter because consumers bought on price alone or that the old ebookers logo with its bubbles was well-known and valued by consumers.

Reconciling the needs of different consumers in different countries

The European travel market is by no means homogeneous. Here are just a few of the differences:

- In the UK, the biggest market by a mile, people travel as much as they can and as often as they can. They are fearless value hunters with few qualms about buying online.
- In Germany, people like packages and it's difficult to use credit cards online.
- The Swiss are obsessed with planning and getting the quality they expect.
- In France, consumers like websites that feel like paper brochures.
- And in Finland there is a lack of choice as few airlines go there.

Finding a positioning that would work in all these territories and promote growth was going to be tough. The breakthrough came by plotting a continuum across the key European markets, based on consumers' level of familiarity with buying online. At one end of the spectrum were mature markets like the UK and Finland. At the other were markets displaying lower confidence, most notably France. All the other markets could be plotted between the two extremes. Once the difference in maturity was taken into account, much of what consumers look for was found to be remarkably similar.

Time was also spent understanding how the rational components of choice (eg. price) played out versus the emotional components (eg. discomfort about leaving home). This is where more deep-rooted differences between markets were found. The British are particularly greedy for more and new experiences. The Swiss and Germans are full of potential anxiety about quality.

Finally, a quantitative technique called value mapping was used to test and validate the key drivers of choice in each individual market and across Europe as a whole (Figure 1). This is a technique that identifies what's important to consumers in the decision-making process and then goes on to rank the different attributes with qualitative research. This is then validated with a much bigger sample using quantitative techniques.

This enabled the company to develop the key brand attributes and identify which should be fixed across all markets and which should be more flexible. The fixed elements were attached to the new ebookers brand. The flexible elements were embedded in the communications toolbox that supported the brand.

Creating the brand roadmap

Consumers spend a lot of time talking about two things. First, price. Second, their expectations: how excited they feel or how concerned they are that they will 'get what they expect'. So possible ideas for the brand could have centred around value, trust or quality. They were the obvious solutions. However, using deeper insights, it was decided that the key focus for ebookers should be about making the experience of booking as easy as possible.

The more mature the market, the truer this was. As consumers became more confident they looked to multiple sources to gain information; they didn't need ebookers to excite them and they didn't rely on ebookers to be an arbiter of quality. But they did all want the experience of booking to be quick, intuitive and trouble-free. That didn't mean that value, choice and quality were of no importance but it did mean that the core brand idea — the brand essence — should not be focused on them.

Armed with these insights and a clear sense of what the ebookers brand needed to focus on to be successful, a set of practical tools to help the teams across the company bring the ideas to life was developed. The brand roadmap, seen in Figure 2, created a clear pathway to link corporate strategy, brand strategy and the customer journey to generate brand preference. This clarity was a key output for an organisation where lots of people come from a technology background and were sceptical about marketing.

1. Tone of voice

With so many people producing copy, and the written word being the principal source of interaction for the majority of customers, the language, tone and style that ebookers used was a potential source of brand strength. Detailed guidelines covering tone of voice were prepared with 'worked examples' in different languages. The tone of voice was designed to reflect the personality of the brand and to make sure that an online brand appeared friendly, straightforward, warm and helpful.

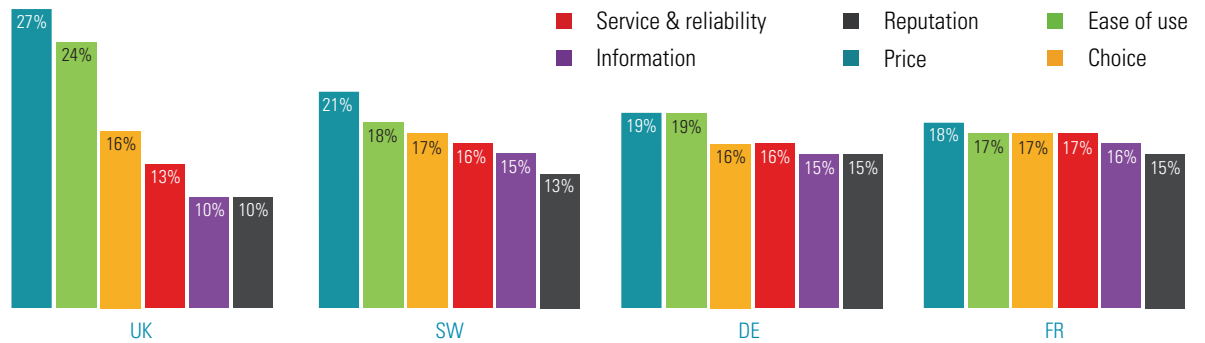


Figure 1. What's important to our customers?
 Source: Promise Survey 2006 (UK) and 2007 (SW,DE,FR).
 Surveys of 500 users of online travel sites. UK drawn from qualitative consumer groups.



Figure 2. Brand roadmap

2. Brand toolbox

Figure 3 shows the new logo, which reflected the core brand positioning: simple, streamlined and uncluttered.

3. Colour

ebookers' colours were chosen to be bright and strong. There was some flexibility in the palette to enable businesses to continue to use legacy colours that had built significant consumer recognition for a limited time.

4. Shape

Strong shapes create a distinctive visual language and provided a holding device for messaging. There were a lot of shapes because ebookers is a very campaign-led business and needs constantly to update and refresh its messages.

5. Imagery

Imagery focused on atmosphere and character, avoiding those typically clichéd holiday shots. People appeared in the pictures but were secondary to the destination, because customers wanted to imagine themselves there, not see a crowd of strangers (Figure 4).

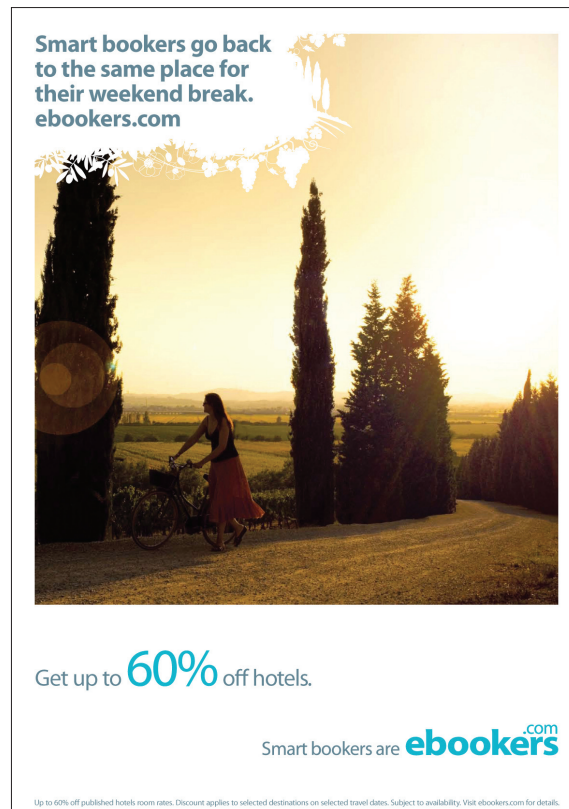
Record results

The UK relaunch took place in 2006, with other markets following in 2007/8. The outcome surpassed the company's expectations.

- Commercial success. There were eight consecutive quarters of revenue growth in excess of 20% up to autumn 2008 as measured by value of gross bookings, significantly outstripping the growth of most of the competition.

ebookers.com

Figure 3. New logo



Smart bookers go back to the same place for their weekend break. ebookers.com

Get up to **60%** off hotels.

Smart bookers are **ebookers.com**

Up to 60% off published hotels room rates. Discount applies to selected destinations on selected travel dates. Subject to availability. Visit ebookers.com for details.

Figure 4. Example of advertising

Giving the change full backing

Senior ebookers' managers strongly welcomed the crossborder repositioning.

- Customer experience. *"The customer experience online is true to the brand values in all 13 countries where it has been introduced. I think this would have been difficult, maybe impossible, if we had not involved the local marketing teams."* Gilles Despas, managing director, Continental Europe, ebookers Europe.
- Marketing economies of scale. *"In spite of many differences between individual markets, there is now a powerful positioning that works for everyone. This was one of my key objectives at the outset."* Alan Josephs, CEO, ebookers Europe.
- Effective use of marketing resources. *"We've been able to maintain awareness and sales even though we've had to cut our ad spend. I think this is because everything works together better now to reinforce the brand."* Claire Howard-Jones, head of marketing, ebookers UK.
- Internal management and efficiencies. *"Clear brand guidelines mean more professional,*

memorable and consistent marketing communications, as well as consistency across the customer experience: what you get on the web matches what you get offline."

Matthias Thuerer, marketing manager, ebookers Switzerland.

- A framework to inform human resources (HR) development. *"Developing the brand values into a framework to drive our recruitment and induction plans has helped us to focus and raise standards internally."* Frank Broese, HR director, ebookers Europe.
- A professional and informed approach. *"It's like being able to see in the dark — for the first time, we have reliable knowledge about who our customers are and what they want."* Claire Howard-Jones, head of marketing, ebookers UK.
- A process that led to success. *"We were sceptical at the outset, but working with our customers helped us learn new things and see new possibilities."* Susanna Piri, marketing manager, ebookers Finland.

- Brand awareness. Before brand relaunch, spontaneous brand awareness was 8%. Six months later, awareness had risen to 18%. Prompted awareness was 70% pre-launch and stabilised at 82% with virtually no ongoing advertising support.
- Brand pulling power. Growth of traffic from sources that ebookers attributed to branding (customers

searching specifically for the ebookers name) was up 47% YOY by February 2008. Conversion on brand name pay per click was four times that of conversion on normal pay per click. 12% of total traffic now came from people who typed ebookers.com directly into the Google browser bar. Prior to launch this figure was 5%.

Sponsors

Aviva - 300 Years of Insight

We're the world's sixth-largest insurance group and the biggest in the UK, with 46,000 employees that everyday serve 53 million customers worldwide.

We are committed to delivering one distinctive experience for our customers. Wherever they are, we want them each to feel that "no one recognises me like Aviva". Our global consumer research reveals that most of our competitors are particularly bad at recognising people's individual significance. This research also tells us that small human touches can make a huge difference to a customer's experience. Our aim is to make recognition the familiar quality that distinguishes Aviva from our competitors - just as Apple means user-friendliness and FedEx means reliability.

BT operates in over 170 countries and is one of the world's leading communications services companies. BT is a major supplier of networked IT services to government departments and multinational companies. It's the UK's largest communications service provider to consumer and business markets and is made up primarily of four customer-facing lines of business: BT Retail, BT Global Services, Openreach, and BT Wholesale.

BT operates in a thriving, multi-trillion pound industry that spans the whole world. In recent years the global communications market has been focused on convergence, whereby the boundaries between telcos, IT companies, software businesses, hardware manufacturers and broadcasters have become intertwined to create a new communications industry.

BT has evolved from being a supplier of telephony services to become a



"We know insurance isn't just about policies and pensions; it's about people. That's why we're making our customers the big picture, putting a spotlight on them and our people. Putting customers at the heart of everything not only makes sense for them, it makes good commercial sense too." (Amanda Mackenzie, Aviva's chief marketing and communications officer)

We are working hard every day to build the company around what our customers want from us. That's why Aviva now ranks among the UK's top ten most valuable brands, according to the 2010 Brand Finance Global 500 survey and that success is something we are looking to replicate across the world.



leading provider of innovative communications products, services, solutions and entertainment products. BT's business customers range from multinational, multi-site corporations to SMEs and start-ups.

More than 80 per cent of the FTSE 100 and 40 per cent of Fortune 500 companies rely on BT for networking, applications and system integration. The National Health Service, Procter & Gamble, PepsiCo, BMW, Emirates, Fiat, Microsoft, Philips, and Unilever are just some of the organisations working with BT.

BT has been a driving force behind the success of 'Broadband Britain'. Thanks to the company's investment, nearly every home in Britain now has access to broadband and in September 2009, BT announced plans to more than double the availability of its fastest fibre broadband service.

MARKETING EXCELLENCE 2

“A treasure trove of examples covering the whole waterfront, from launching new brands to revitalising, sustaining and extending established ones, and from insights to advertising and sustainability. Whatever your business, it should make you proud to be a marketer, shake up your thinking and inspire you to go the extra mile.”

Professor Patrick Barwise, London Business School, Chairman of Which?

“This exciting book demonstrates how great marketing can solve the most difficult problems, through analysis, teamwork and creativity.

It contains 34 fascinating case studies, selected from hundreds of high quality entries to The Marketing Society Awards for Excellence. Those involved had the determination to win, and the courage to think differently. An inspiring read.”

Professor Hugh Davidson, Co-Founder, Oxford Strategic Marketing

“This is the textbook, the toolkit and the manual for marketing excellence.”

Cilla Snowball, Chairman, AMV BBDO

“These cases are a great source to stimulate your thinking. Some will stimulate new thoughts, some will unlock ideas from the back of your memory. All of them however are great fuel for growth.”

Keith Weed, Chief Marketing and Communication Officer, Unilever

Featuring 34 award-winning case studies from some of the world’s leading brands:

Sky+ BT Business NHS Blood and Transplant Magners Change4Life allii O2 Waitrose KFC McDonald’s Hovis British Gas Audi Marks & Spencer Virgin Atlantic Dulux Sainsbury’s Pedigree Thinkbox Harlequins More Th>n UPS Walkers Aviva ebookers Shell ICI Paints Channel 4 British Heart Foundation Keep Britain Tidy Ariel

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