



NESPRESSO®

MARKET RESEARCH PROPOSAL

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1. EXECUTIVE SUMMARY

Nespresso is one of the major players in the coffee market where they aim to preserve its position as a market leader, prioritise innovation, enhance overall customer service and have customers think positively about the sustainability of its products.

This research proposal begins with a brief description of Nespresso, its product portfolio and the sustainability efforts implemented, followed up by a detailed market context which helps us understand the various components and how they alter the coffee business. The management decision problem is derived and then a literature review is formed to look at what Nespresso has previously done and cover any potential knowledge gaps in the coffee market. Next, the marketing research problem is constructed by coming up with specific research questions and formulating hypotheses with the aid of an analytical model.

A combination of exploratory and conclusive research designs were utilised and an appropriate sampling design was formed to collect the required data via a questionnaire using online surveys which is included in the annexure. The target population covers customers of Nespresso along with its competitors and a suitable sampling technique together with a reasonable sample size are established to obtain the samples.

Cross tabulations and ANOVA are used to analyse the collected data to identify any relationships between variables defined in the analytical model and gain in-depth insights.

Finally, the limitations encountered in this study and further scope for research in the coffee market are stated.

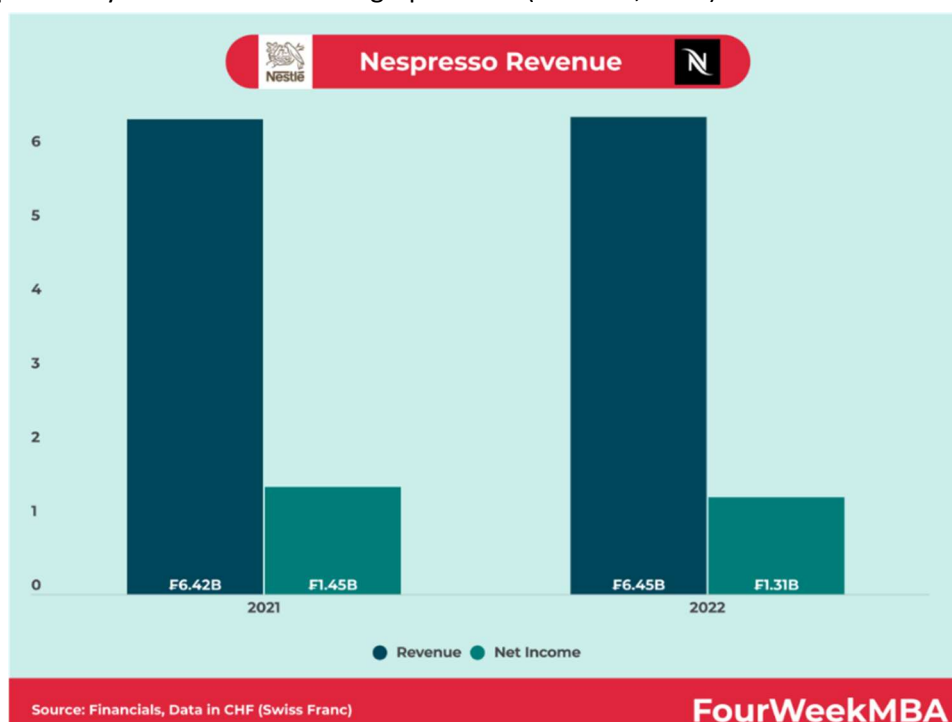
2. BACKGROUND INFORMATION ABOUT NESPRESSO

Nespresso is an operating unit of the Nestle Group, which operates in 81 countries and has its headquarters in Switzerland. It was established in 1986 by Eric Favre with a simple goal: enable anyone to make coffee like you get at a cafe. Currently, Nespresso offers a huge variety of coffee machines and capsules. According to Nespresso, there are 3 signature ranges of coffee machines: Original, Vertuo and Nespresso Professional.

The mission of Nespresso is to provide consumers with the finest coffee in the world and its vision is to provide the ultimate coffee experience. The company's primary target market include coffee drinkers (25-60 years old) who consume more than seven capsules per week (StudyCorgi, 2023). The secondary target audience is B2Bs (Business-to-Business) such as gourmet restaurants and first-class flights (StudyCorgi, 2023). In order to establish itself as a premium brand within its target market, Nespresso adopts a product differentiation approach (StudyCorgi, 2023). Coffee enthusiasts of all income levels as well as business clients find the machines and capsules appealing due to their wide range of prices. (StudyCorgi, 2023).

There are over 80 different capsules being offered by the company. Nespresso's airtight sealed aluminium capsules are the ideal way to preserve freshness once the coffee is harvested and processed in its country of origin (Coffee pods vs ground coffee vs instant coffee – what's your cup, n.d.). With each cup of coffee, the aluminium capsules provide maximum freshness by preventing oxidation (Coffee pods vs ground coffee vs instant coffee – what's your cup, n.d.). Nespresso capsules costs anywhere from US \$0.70 to \$1.20 per capsule, which is still less than the typical espresso from a coffee shop (Grant, 2020). The fact that each capsule contains 5 to 6 grams of coffee accounts for the low price range (Grant, 2020).

Today, the company enjoys a 25% market share of the world's coffee capsule market (ACaseStudy.com, 2018). In 2022, Nespresso generated over 6.4 billion Swiss Francs in revenue (over \$7B) but the net income has taken a hit when compared to the previous year as seen from the graph below (Cuofano, 2023).



(Cuofano, 2023)

There are 802 boutiques located in more than 500 cities which allows customers explore the huge collection of coffee flavours. Digital platforms such as an e-commerce website and a smartphone application help customers order machines and accessories. Furthermore, customer relationship centres provide technical support to consumers via phone or web-chats. Members of the exclusive membership programme, Nespresso & You, receive numerous incentives that ranges from free next-day delivery to savings on repairs, and much more as stated in Nespresso's webpage.

Nespresso's competitive edge has been mainly due to the company's focus on their premium brand image, product innovation, and a direct-to-consumer-sales approach. In addition to these key strategies, Nespresso has engaged in sustainability efforts and social responsibility programmes, which have helped further boost the company's brand image. In 2003, the Nespresso AAA Sustainable Quality™ program was launched in collaboration with the NGO Rainforest Alliance to ensure the future supply of high quality coffee and has now grown to include more than 150,000 farmers worldwide (Nespresso, n.d.). The primary goal of this initiative was to establish direct communication with farmers. Moreover, Nespresso has partnered with more than 40 organisations to improve sustainability for which, due to their commitment to environmental sustainability, Nespresso achieved a B Corp certification in 2022 (World Coffee Portal, 2022).

3. BUSINESS OBJECTIVES

- Maintain Nespresso's position as a leader in the premium coffee market
- Prioritise product innovation, develop new coffee blends and brewing systems
- Improve overall customer experience and retain customer satisfaction
- Encourage customers to have positive perceptions about the sustainability of its pods

4. RESEARCH AIMS

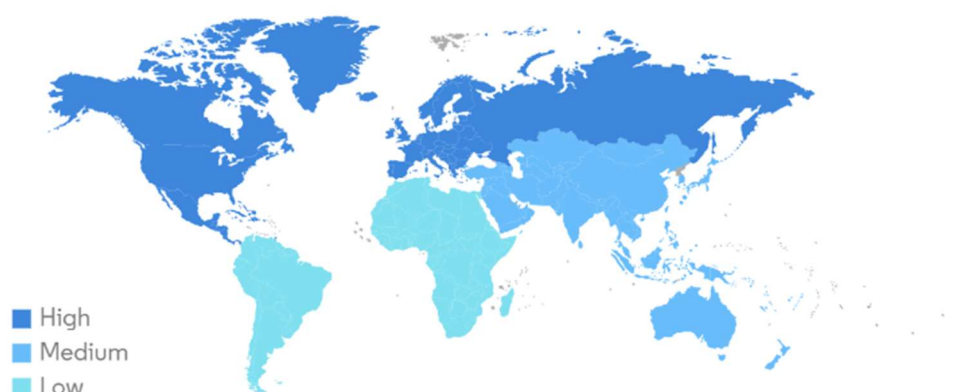
- Recognize customers' preferences for new coffee blends (such as seasonal varieties) and new brewing technologies
- Understand issues that customers face to identify areas for enhancement in product quality, packaging and customer service
- Assess the success of their sustainability initiatives and identify opportunities for further improvement

5. MARKET CONTEXT

Globally, the coffee market has been performing well in recent times. In 2022, the coffee pods and capsules market were estimated to be valued around US \$14.3 billion (Nandi, 2022). It is expected that the market will grow from US \$15.1 billion in 2023 to US \$21.8 billion by 2030 (Nandi, 2022).

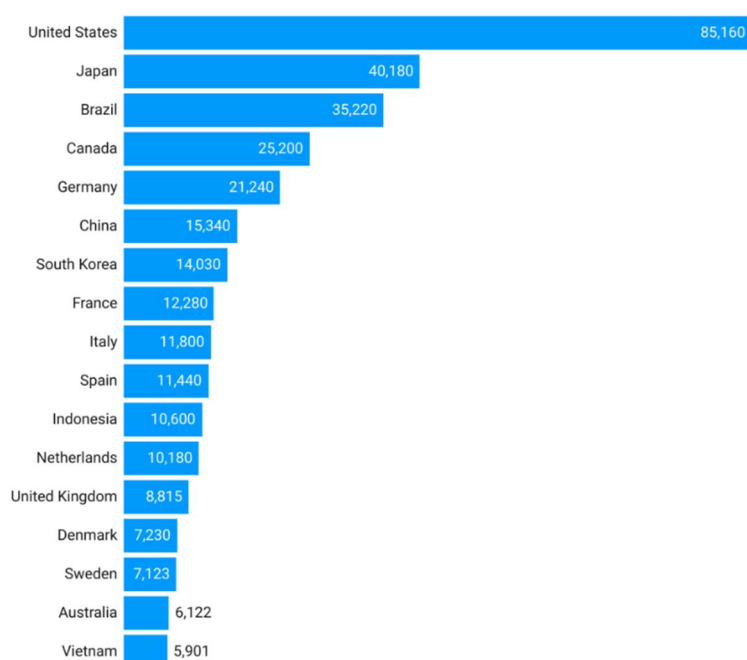
In recent years, the European market has seen an increase in demand for specialty coffee and single-serve methods (Mordor Intelligence, 2023). As seen in the image below, North America and Europe have a high market size when compared to other regions.

Coffee Pods and Capsules Market: Market Size (%), By Geography, Global, 2021



(Mordor Intelligence, 2023)

The bar chart below shows the revenue generated (in \$ million) by countries in 2022. As of 2022, the United States of America, Japan, and Brazil are the top three countries (Joshi, 2023).



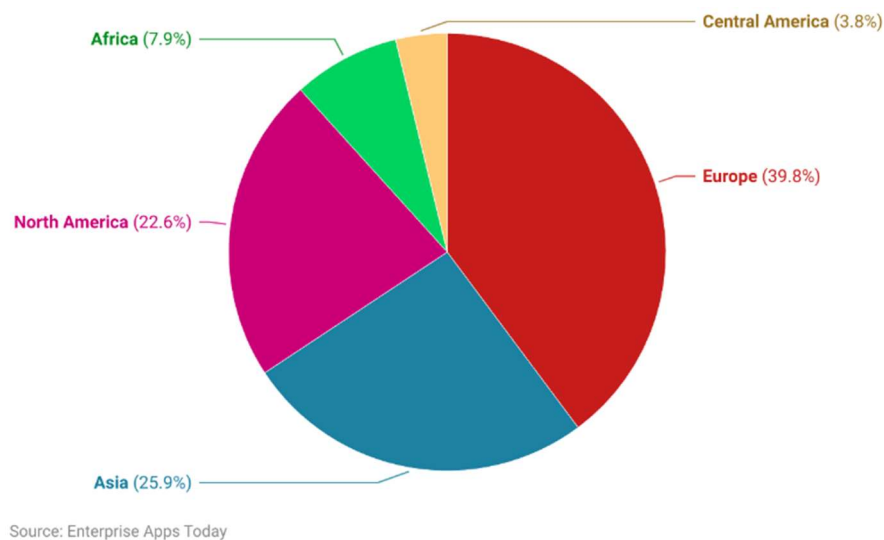
Source: Enterprise Apps Today

(Joshi, 2023)

Nestlé (Nespresso and Dolce Gusto), Tim Hortons and JAB Holding Company (Senseo, Tassimo, and Keurig) dominate the coffee pods and capsules market (Mordor Intelligence, 2023). Currently, Dunkin' Brands and Starbucks Corporation, two other major competitors also occupy a significant share of the market. (Mordor Intelligence, 2023).

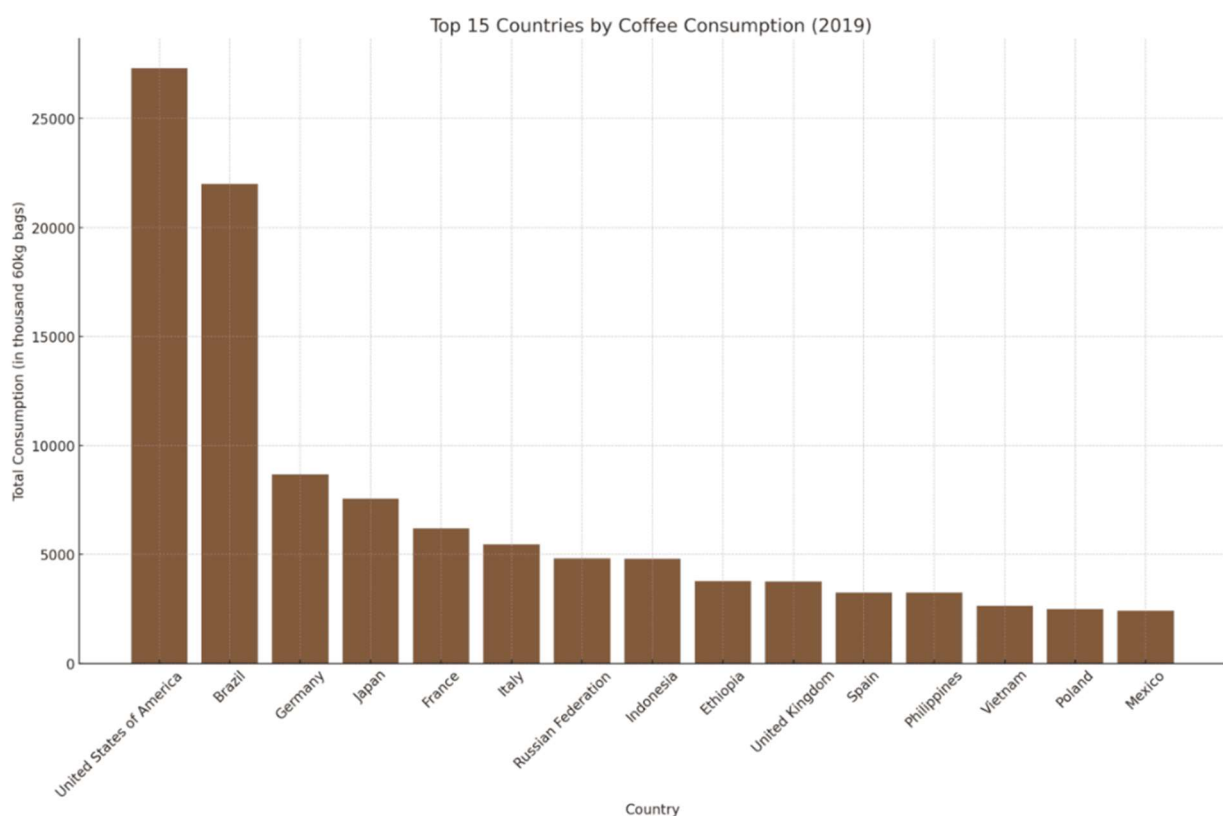
The rising demand for instant non-alcoholic beverages among youngsters, consumer awareness towards low sugar and non-alcoholic drinks, busy work schedules, and changing consumer tastes are some of the factors that have contributed to the increasing demand for coffee (The Business Research Company, 2023). Another key factor is the growing usage of coffee machines at home that replicate a cafe-style experience (Nandi, 2022).

The pie chart below shows the global coffee consumption in 2022. Europe leads with 39.8% followed by Asia and North America. Africa and Central America are the least contributors with a combined consumption of only 11.7% (Joshi, 2023).



(Joshi, 2023)

Observations from the chart below indicate that the U.S. is the world leader in drinking coffee followed by Brazil and Germany (Tom, 2023).



(Tom, 2023)

In the U.S. around 72% of the population aged 60 and above drink coffee everyday which is the highest. In contrast, the least coffee-crazed age group in the country is those who are between 18 and 24 years old where only 47% drink coffee regularly (Joe's Garage Coffee, 2023).

More than 50 countries produce coffee around the world, with Brazil, Vietnam, and Colombia being the top producers (Crockett, 2023). Coffee farmers in these countries frequently deal with challenging economic conditions such as limited access to credit, low bean prices, and weather that can affect crop yield (Crockett, 2023). Economic issues such as trade agreements and currency exchange rates also have an impact on the coffee market, which can influence the price of coffee for consumers (Crockett, 2023). In addition to that, there is a growing concern of climate change among coffee growers (Crockett, 2023). One of the latest trends for companies is the use of bioplastics and biodegradable materials in the production of coffee capsules (The Business Research Company, 2023).

6. MANAGEMENT DECISION PROBLEM

- How can Nespresso further differentiate itself from its competitors as a leader in the premium coffee market?
- What new coffee flavours can be added to the existing varieties and should Nespresso invest in new technologies?
- What steps can be taken to improve customer experience and build trust among customers?
- How can Nespresso effectively communicate the sustainability of its pods to its customers?

7. LITERATURE REVIEW

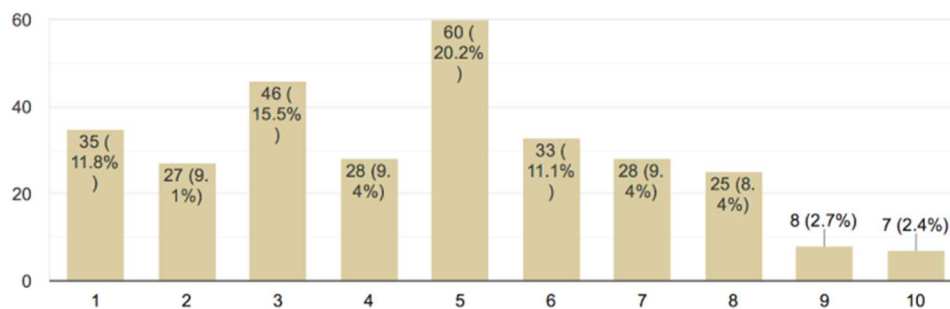
To maintain market dominance, Nespresso follows the “bait and hook” business model (Teece, 2010): the company sells coffee machines at the lowest possible price to gain market penetration and then sells proprietary consumable capsules, that generate recurring revenue, at a very high-profit margin; since only Nespresso capsules are compatible with the machine, consumers purchase only Nespresso capsules (Brem, Maier, & Wimschneider, 2016).

According to the official Nespresso webpage, 54% of recyclable materials has been used to make the machines. In order to retain its customers and provide a quick online ordering solution, Nespresso has added a feature which allows customers to automate their future orders (Schwab, 2021). Schwab also adds that this feature eliminates competition and defends market share.

Research conducted in 2019 revealed that there appears to be a misalignment between Nespresso’s brand vision and the consumer’s image of the brand. The graphs below illustrate the responses from a survey.

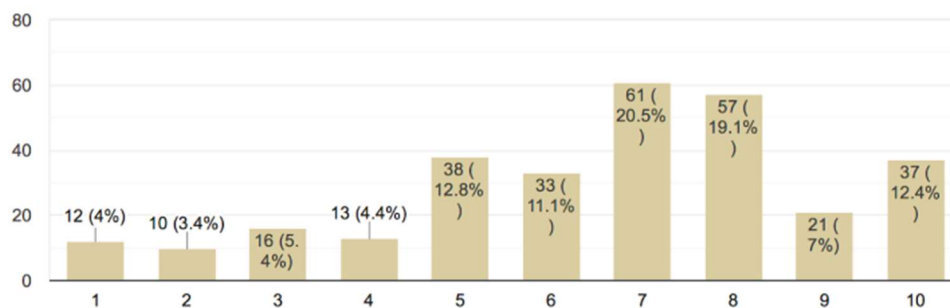
How sustainable do you perceive Nespresso?

297 responses



How important is sustainability for you when choosing a coffee brand?

298 responses



(Felder, Nyremo, Strålmán, & Widerberg, 2020)

Nespresso, in order to communicate its message on sustainability, partnered up with The Guardian to release a branded content supplement to target the progressive, middle-class, slightly wealthier-than-average homeowners who tend to be more aligned with this sustainability message (Sagar, 2021). Research commissioned by Nespresso with 2000 respondents has found that 91% of the UK population claimed they recycle frequently, 42% implied they found recycling complicated and 32% said they found it difficult to recycle (Morrell, 2023). To tackle this issue, Nespresso collaborated with Royal Mail, hoping to improve capsule recycling efforts across the UK (Morrell, 2023).

Companies such as Starbucks offers non-dairy milk options and plant-based beverages, replacing sugar with plant-based sweeteners. Functional ingredients like turmeric, collagen, and mushrooms which boost energy and relieve stress are also being added to coffee flavours (CBI, 2022).

The rise in specialty coffee capsules presents opportunities for exporters, including Nespresso, which has launched the Reviving Origins programme, aimed at bringing back lost coffee origins from Colombia, Zimbabwe, Uganda, DR Congo, and Cuba (CBI, 2022).

8. MARKETING RESEARCH PROBLEM

a. BROAD STATEMENT

Collect information about customer preferences for new coffee blends, new brewing technologies, and issues customers face in quality, packaging and customer service. Gather data on the effectiveness of Nespresso's sustainability efforts.

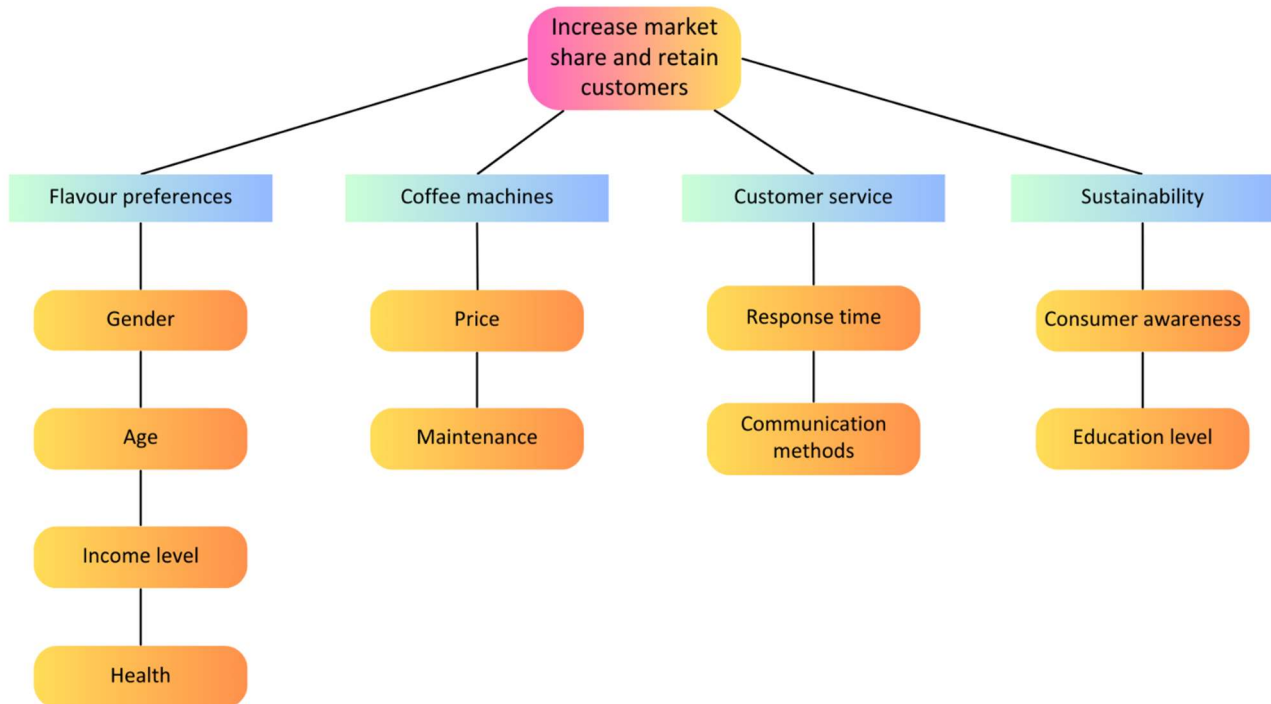
b. SPECIFIC COMPONENTS

- i. Under what demographic factors should the preferences of both Nespresso customers and non-customers for new flavours be evaluated?
- ii. Under what psychographic factors should the preferences of both Nespresso customers and non-customers for new flavours be evaluated?
- iii. Benefits and limitations of existing Nespresso coffee machines
- iv. Based on which factors to evaluate customer feedback on their experiences with Nespresso's customer service?
- v. Based on which factors to evaluate consumers' perceptions on Nespresso's sustainability initiatives

c. RESEARCH QUESTIONS

- i. Does gender play a role in flavour preferences?
- ii. Does age play a role in flavour preferences?
- iii. Does income level affect the willingness to try out new flavours?
- iv. Do consumers prioritise health when choosing coffee flavours?
- v. To what extent does price affect the maximum willingness to pay for a coffee machine?
- vi. Are the machines easy to clean and maintain?
- vii. Does response time affect customer experience with Nespresso's customer service?
- viii. Which communication methods positively influence customer service experience the most?
- ix. To which extent are consumers aware of Nespresso's sustainability initiatives?
- x. Does education level have an impact on consumers' perception on Nespresso's sustainability initiatives?

d. ANALYTICAL MODEL



e. HYPOTHESES

H1 : Gender plays a role in flavour preferences

H2 : Age plays a role in flavour preferences

H3 : Income level has an effect on the willingness to try out new flavours

H4 : Consumers prioritise health when choosing coffee flavours

H5 : Price has a significantly negative impact on the maximum willingness to pay for a coffee machine

H6 : The machines are easy to clean and maintain

H7 : Response time has an effect on customer experience with Nespresso's customer service

H8 : Web-chats positively influence customer service experience the most

H9 : Consumers are not very aware of Nespresso's sustainability initiatives

H10 : Education level has an impact on consumers' perception on Nespresso's sustainability initiatives

9. RESEARCH DESIGN

Exploratory research was carried out to gather background information about Nespresso, to understand the coffee market and to identify key factors affecting the market. A literature review was formed using exploratory research to observed what Nespresso and its competitors have done to improve their market shares and retain customers. Using all of the information obtained, research problems were defined, the analytical model was developed and hypotheses were formed.

Descriptive research was used to describe the factors affecting the market such as preferred communication methods with customer service. A multiple cross-sectional design for surveying will be implemented as data will be collected from both Nespresso customers and competitor customers and information will be gathered only once from each sample. The target population will be divided into two and data will be collected once from each sample for the time period of 6 months. Since the time period to conduct the research is 6 months a longitudinal design is not preferred.

Causal research will be applied to determine relationships between variables defined in the analytical model and to test the hypotheses. For example, does gender and income level influence flavour preferences or whether education level has an impact on the willingness to engage in eco-friendly activities, evaluating the cause and the effect.

10. SAMPLING DESIGN

a. TARGET POPULATION

The target population for this research are avid coffee drinkers worldwide aged 25 – 60. Since the target population comprises of Nespresso customers and competitor customers, the target population is divided into two.

b. SAMPLING FRAME

The sampling frame for Nespresso customers will be the database of customers who have previously ordered items online from Nespresso which is provided by the client.

For non-customers, competitors can be contacted to obtain their customer databases. However, most competitors will be reluctant to share such valuable information without incentives. Online communities featuring coffee enthusiasts and online polls are a good source of finding competitor customers.

c. SAMPLING TECHNIQUE

Probability sampling technique is the most suitable method for this research. This technique is preferred to non-probability sampling technique because we seek to draw reliable conclusions about the entire population.

Under this technique, stratified sampling will be chosen to sample Nespresso and competitor customers. The target population will be split into strata based on age and income level. Elements within each stratum are homogeneous whereas elements in different strata are heterogeneous. Then within each stratum, elements can be selected using simple random sampling. Stratified sampling ensures that all relevant subpopulations are included in the sample hence the sample is representative of the entire population.

d. SURVEY TECHNIQUE

An online survey will be administered to both Nespresso customers and non-customers since it is cost-effective and there is no interviewer bias. Online surveys are more effective than personal, telephone, or postal surveys due to consumers being in various geographical regions and time zones.

For Nespresso customers, the database provided would contain contact numbers and/or email addresses which can be used to send the link to the survey.

e. SAMPLE SIZE

The initial sample size for Nespresso and competitor customers will be calculated using the equation given below:

$$\text{Initial sample size} = \frac{\text{Final sample size}}{\text{Incidence rate} \times \text{Completion rate}}$$

- For Nespresso customers :

As stated in the brief, a minimum of 5000 Nespresso customers globally is preferred for the sample size. However, not all participants would not respond therefore we adjust the sample size for incidence and completion rates. The incidence rate and completion rate can be estimated to be 85% and 80% respectively. The initial sample size for Nespresso customers to be taken would be:

$$\text{Initial sample size} = \frac{5000}{\frac{85}{100} \times \frac{80}{100}} = \mathbf{7353}$$

- For competitor customers :

Gathering an equal sample size for non-Nespresso customers can be difficult given the limited time period. Therefore, a final sample size of 2500 will be taken. Incidence and completion rates will be lower than that of Nespresso customers so we assume the rates to be 70% and 65% respectively. The initial sample size for competitor customers to be taken would be:

$$\text{Initial sample size} = \frac{2500}{\frac{70}{100} \times \frac{65}{100}} = \mathbf{5495}$$

11. MULTIVARIATE DATA ANALYSIS

Variables such as gender, communication methods and consumers' awareness on sustainability are nominal therefore cross tabulations can be used to analyse and identify if there are any association between those variables. If any relationships are found, strength of the relationship can be found by using the contingency coefficient statistic.

Another analysis technique is ANOVA which can be utilised to see how independent categorical variables such as income level and how often a person drinks coffee affects maximum willingness to pay for a coffee machine. A major reason to use ANOVA is that it allows multiple variables to be analysed in one comprehensive test.

12. LIMITATIONS AND FURTHER SCOPE FOR RESEARCH

a. LIMITATIONS

The time period given to conduct this research is 6 months which could be insufficient to carry out a thorough analysis. The limited timeframe would make it highly unlikely to find statistics for all geographic regions. In addition to that, an online survey might not capture consumers' thoughts and emotions. By administering the questionnaire in English, there is a language barrier which might affect participants' interpretability of the questions and hence affect data collection.

b. FURTHER SCOPE FOR RESEARCH

Aside from the existing factors, there may be additional factors that may have a significant impact on market share such as advertising channels. Qualitative methods like focus groups and in-person interviews can be implemented to gain a richer understanding of consumers' perceptions. Alternative data sources (online reviews or social media data) can be acquired to supplement the research and draw accurate insights.

13. ANNEXURE

a. QUESTIONNAIRE



Crafting the perfect cup of coffee : Participate and win £50

This survey aims to identify factors that will help Nespresso improve its relationship with its customers, discover consumers' preferences and better understand potential customers' thoughts. Your time and effort invested in participating is highly appreciated, while your responses will remain anonymous. By completing the survey, you will receive a £50 voucher from Nespresso.

Estimated time to complete : 20 minutes

Please follow instructions where appropriate.

Section 1 : General information

Q1. How often do you drink coffee?

☐ Daily ☐ Weekly ☐ Monthly ☐ Occasionally ☐ Never

Q2. Where do you drink coffee most often?

☐ Home ☐ Coffee shop ☐ Take away

☐ Other (Please specify) _____

Q3. How healthy do you consider yourself on a scale of 0 to 10?

0	1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	---	----

Not at all healthy

Extremely healthy

Section 2 : Consumer preferences

Q4. Are you open to trying new coffee flavours and brewing methods?

- ☐ Only new coffee flavours
- ☐ Only new brewing methods
- ☐ Both
- ☐ Neither

Q5. Rank the following flavour profiles from most preferred to least preferred.

(1 – most preferred to 6 – least preferred)



Fruity -



Floral -



Chocolatey -



Nutty -



Spicy -



Earthy -

Q6. Are you a consumer of Nespresso products and services?

- ☐ Yes
- ☐ No (Please answer only Q10, Q11 and do not answer section 3)

Q7. Have you purchased a coffee machine from Nespresso?

- ☐ Yes (Please skip Q10 and Q11)
- ☐ No

Q8. If yes, how easy is it to use and maintain your Nespresso machine?



Very easy



Easy



Neutral



Hard



Very hard

Q9. Any features that you like and don't like in a coffee machine made by Nespresso?

Q10. Why haven't you purchased a coffee machine from Nespresso?

- ☐ Too expensive
- ☐ Was not recommended
- ☐ Environmental concerns
- ☐ Availability issues
- ☐ Lack of awareness
- ☐ Already own a coffee machine from a different brand
- ☐ Other (Please specify) _____

Q11. If you were to buy a coffee machine, what would be your maximum willingness to pay?

- ☐ Less than £50
- ☐ £50 - £74
- ☐ £75 - £99
- ☐ £100 - £249
- ☐ £250 - £499
- ☐ More than £500

Q12. Please indicate your satisfaction with the following statements.

	Extremely satisfied	Satisfied	Neutral	Dissatisfied	Extremely dissatisfied
How satisfied are you with the current brand of coffee machine that you use? (Skip this question if you do not own a coffee machine)					
How satisfied are you with the quality of the products Nespresso offers?					
How satisfied are you with the packaging of the products Nespresso offers?					

Q13. Any issues or suggestions you would like to share on the quality and packaging of the products Nespresso offers?

Section 3 : Customer service

Q14. Have you ever contacted Nespresso's customer service?

☐ Yes ☐ No

Q15. If so, what is your preferred method for interacting with Nespresso's customer service?

☐ Phone ☐ Web-chats
☐ Mail

Q16. Please indicate your agreement with the following statements about Nespresso's customer service.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Representatives were knowledgeable and helpful					
Response time was quick					
Nespresso kept you informed about the progress of your issue					
Nespresso customer service resolved your issue quickly and efficiently					
Based on your experience, you trust Nespresso to handle future concerns effectively					
The quality of your customer service experience was good					
Overall, the customer service contributed positively to your brand perception of Nespresso					

Q17. How could Nespresso improve their customer service?

Section 4 : Sustainability

Q18. Do you engage in eco-friendly activities?

☐ Yes ☐ No

Q19. How aware are you of Nespresso's sustainability efforts?

Not at all aware Somewhat aware Very aware
☐ ☐ ☐

Q20. How did you get to know about Nespresso's sustainability efforts?

- ☐ Newspaper
- ☐ Social media
- ☐ Family and/or friends
- ☐ Official website of Nespresso
- ☐ Other (Please specify) _____

Q21. How satisfied are you with Nespresso's sustainability initiatives?



Extremely
satisfied



Satisfied



Neutral



Dissatisfied



Extremely
dissatisfied

Section 5 : Demographics

Q22. What is your age?

- | | |
|--|--|
| <input type="checkbox"/> Under 20 | <input type="checkbox"/> 41 – 50 years old |
| <input type="checkbox"/> 21 – 30 years old | <input type="checkbox"/> 51 – 60 years old |
| <input type="checkbox"/> 31 – 40 years old | <input type="checkbox"/> Over 61 |

Q23. What is your gender?



☐ Male



☐ Female



☐ Prefer not to say

Q24. Country of residence : _____

Q25. What is your household income?

- ☐ Below £5,000
- ☐ £5,000 - £9,999
- ☐ £10,000 - £49,999
- ☐ £50,000 - £99,999
- ☐ £100,000 - £149,999
- ☐ Above £150,000

Q26. What is your level of education?

- ☐ No formal schooling
- ☐ Elementary
- ☐ Middle school
- ☐ High school
- ☐ College degree and above

Thank you for completing the survey.

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