SEIZING OPPORTUNITIES INSIDE THE CRISIS

INCREASING THE VALUE OF A PASTA BRAND, CASE STUDY

Mónica Kleiman
Cecilia Iglesias
ABOUT ESOMAR
ESOMAR is the world organisation for enabling better research into markets, consumers and societies.

With approximately 5000 members in over 100 countries, ESOMAR’s aim is to promote the value of market and opinion research in illuminating real issues and bringing about effective decision-making.

To facilitate this ongoing dialogue, ESOMAR creates and manages a comprehensive programme of industry-specific and thematic events, publications and communications, as well as actively advocating self-regulation and the worldwide code of practice.

ESOMAR was founded in 1948.

ABOUT ESOMAR MEMBERSHIP
ESOMAR is open to everyone, all over the world, who believes that high quality research improves the way businesses make decisions. Our members are active in a wide range of industries and come from a variety of professional backgrounds, including research, marketing, advertising and media.

Membership benefits include the right to be listed in the ESOMAR Directories of Research Organisations and to use the ESOMAR Membership mark, plus access to a range of publications (either free of charge or with discount) and registration to all standard events, including the Annual Congress, at preferential Members’ rates.

Members have the opportunity to attend and speak at conferences or take part in workshops. At all events the emphasis is on exchanging ideas, learning about latest developments and best practice and networking with other professionals in marketing, advertising and research. CONGRESS is our flagship event, attracting over 1,000 people, with a full programme of original papers and keynote speakers, plus a highly successful trade exhibition. Full details on latest membership are available online at www.esomar.org.

CONTACT US
ESOMAR
Eurocenter 2
Barbara Strozilaan 384
1083 HN Amsterdam
The Netherlands
Tel.: +31 20 589 7800
Email: customerservice@esomar.org
SEIZING OPPORTUNITIES INSIDE THE CRISIS

INCREASING THE VALUE OF A PASTA BRAND, CASE STUDY

Mónica Kleiman
Cecilia Iglesias

THE PASTA MARKET IN ARGENTINA BEFORE THE CRISIS
Towards the end of the 1990s the dry pasta market in Argentina, a category with approximately 95% penetration in homes, was highly atomized with more than 200 brands present. At the time category leader Matarazzo held an 11% share and was the main brand of Molinos, who also participated in this market with other minor brands. Dry pasta was a market where investment in advertising was low and in which Molinos concentrated more than half.

In 1997 Lucchetti, a Chilean-owned company, established its own production plant in Argentina and in a short time gained an 8% share with its brand Lucchetti, placing itself among the main brands in the market. (See figure 1.)

Since its launch in the local market its strategy has been to position itself as a “convenience” brand, aggressively priced (approximately 20% less than the leading brand) and seen as excellent value for money by its consumers. Although it did not rely on strong advertising campaigns, it had a visible and constant presence via promotions at point of sale as well as on TV programs with high audience ratings.

The Lucchetti business was low margin and achieved significant results through the volume it generated. Thus, in a few years it became a major player for Matarazzo and could come to challenge its leadership and profitability.

ARGENTINA HIT BY THE WORST CRISIS IN ITS HISTORY
During the 1990s, particularly during the first half of the decade, Argentina experienced a period of prosperity supported by deep liberal economic reforms. The Convertibility Act (1991) established a system of currency board which fixed the exchange rate (1 dollar = 1 peso) and quickly put an end to the worst hyperinflation (close to 2,000% in 1989) and stagnation in the country’s history. The rapid liberalization of the economy in order to control local producers and gain competitiveness, in addition to the privatization of state-run public service companies, completed the reform which followed the guidelines set down by the so-called Washington consensus. Consequently, Argentina experienced several years of growth and hope in
The rigidity of a monetary policy determined by the exchange rate, in addition to the bankruptcy of many local producers who were unable to endure the rapid liberalization, quickly led to unemployment and increased poverty levels. In addition, the fixed exchange rate had negative effects on competitiveness, which resulted in a situation requiring continual adjustments and ended in the worst possible way with the incidents in 2001.

This Argentine “wealth” was therefore hit by a collapse of such magnitude that it exceeded any type of expectation or forecast hitherto made.

In December 2001, faced with general protests, President Fernando de la Rúa was forced to resign in haste and there began an escalation in uncertainty and instability – looting in the Greater Buenos Aires area, successive demonstrations and violent repression by police in Plaza de Mayo – which was dramatically illustrated by the succession of five presidents in five days. In the midst of this lack of leadership Argentina declared a suspension of debt service payments, going into default.

The economic and institutional instability were such that much of the capital invested in the country was withdrawn. Uncertainty was infinite and prospects bleak.

Within this context so unfavorable for most companies, Molinos decided to bet on the future: to continue with its investment plan and to buy Lucchetti, with the aim of controlling and neutralizing its main threat in the dried pasta market. As might have been expected from its positioning, Lucchetti would be strengthened...
after the crisis and Matarazzo’s level of risk would be even greater. Once acquired, Molinos decided to maintain Lucchetti’s positioning as a *convenience* brand, but with less aggressive pricing.

At the time the Argentines found themselves in an extremely precarious situation, suffering the effects of the “*corralito*” (a measure which placed a restriction on the withdrawal of funds from personal bank accounts in order to prevent a larger run on local currency), unemployment of over 20%, poverty reaching 58% and the GDP dropping by 11% in 2002. Argentina was going through its toughest time since the reinstatement of democracy.

The crisis meant that the Argentines endured countless changes on economic and social levels. They therefore saw themselves forced to alter their behaviors and habits drastically, especially with regard to purchasing and saving.

As consumers, many faced a new reality and became “hunters” for the best prices and offers on the market, with high rotation between points of sale and an increased awareness of the set of existing brands. This new type of shopper, more skeptical of marketing promises and at the same time savvier in terms of optimizing his/her budget, was changing or creating new bonds with brands. Just like some brands undergoing a strong negative impact, there were others who became consumer allies by keeping close to them in times of adversity. Against this backdrop, Lucchetti formed a strong and close bond with housewives who felt a kind of *gratitude* to those brands who offered good value for money and not just the lowest price on the shelf.

The major crisis was not overcome without problems, embarking once again on the path of growth in 2003 after – as we have said – one of the hardest years in the country’s modern history. The solution implemented by the new government (devaluation and *pesificación* – i.e. converting from dollars into pesos – of debts and bank assets) brought about a sizeable redistribution of wealth from creditors to debtors, favoring the latter and seriously damaging middle class investors. Hence, whilst many consumers returned to the leading brands which they had been forced to abandon, many others who, due to their changed pattern of consumption, discovered new offerings and decided – or were obliged to – continue to trust in those brands which served them through the crisis. The market had changed and the players now held different positioning within each category as well as in relation to consumers.

**A CHANGE OF STRATEGY**

This new socio-economic scenario brought about a steep drop in margins with a subsequent plummet of advertising investment.

Faced with this new context and with a broad set of brands to manage, Molinos was forced to streamline portfolio management in order to generate sufficient funds to invest in innovation and communication.

Therefore, in order to optimize its portfolio strategy, the company decided to group its brands into three segments which would in the future head in different directions with regard to strategy. On the one hand, there were the growth brands (the biggest bet to increase volume); on the other, the emblematic brands (large and steady volume; low marketing investments would be made – a “maintenance policy”) and finally, the specialist brands (their differential premium positioning was to be developed in each category).
The first group, the growth brands, concentrated those with the greatest potential, where the largest investment and development efforts were made. Included in this set were Matarazzo and Lucchetti. The challenge was in defining clearly different roles in order to minimize cannibalization.

Whilst Lucchetti’s potential did not augur a sufficiently attractive business within the dry pasta market even if it performed better in terms of volume and contribution, it was clear that Matarazzo would be the premium brand within the local brands in the segment, taking advantage of and deepening the concept of “specialist” under which it was positioned.

This diagnosis led Molinos to start working on developing Lucchetti on the hypothesis that it was a healthy brand and showed signs of responding positively to small marketing actions. The company decided to consider alternatives to reposition the brand to give it more value and to assess its potential in order to extend its range of products to other categories.

Hence, Molinos decided to carry out research studies in order to gain a deeper understanding of the brand’s image and positioning, and to ascertain Lucchetti’s limits and scope.

HOW FAR AND IN WHICH DIRECTION COULD LUCCHETTI GROW?

Thinking of Lucchetti as an umbrella brand gave rise to a series of questions which needed to be answered by the study:

- Was Lucchetti strong enough to extend its line?
- To which categories could it be expanded? Where should it not go?
- Which values were relevant to Lucchetti and which could also be leveraged in the potential categories?

In addition, Molinos wished to analyze the business potential and interest that would be generated by each route.

The symbolic universe created for Lucchetti allowed them to recognize the horizons over which they could extend the brand: a strong bond with convenience, economy and at the same time with modern traits. The brand also belonged to the world of the homemade and the everyday, however showing some signs of emotional ties which spoke of a bond which went beyond cooking and pasta. (See figure 2.)
The main research findings revealed that consumers saw Lucchetti’s future development as the natural way to go. Its positioning was largely based on its good value for money rather than on its association with a certain category or a specific ingredient.

This helped to set the limits of the brand’s horizon on a map showing alternative routes to follow. Lucchetti was seen as a reliable, modern and good quality brand, all attributes that made it possible to seriously consider growing the brand. Lucchetti’s assets pointed towards a direction that would start with categories where things like nutrition and convenience were relevant, as these attributes began to emerge as key points for brand development. (See figure 3.)
FIGURE 3
LIMITS AND SCOPE OF LUCCHETTI

Once the category extension map was put together, it was decided to prioritize those categories which were closer in terms of positioning but which could also increase the brand’s contribution margins. (See figure 4.)
The research also confirmed that Lucchetti had built strong identification and a close bond with women. Its image was that of a modern mom who is devoted to her family but whom also seeks to improve her quality of life, which was strongly affected over the last few years. “Young and practical, she does a thousand things, like us, multitasking, multipurpose.”

The Lucchetti mom represented the Argentine mothers of today, who love their family just as much as moms from the past but who seek convenient solutions that help them to give the very best to their loved ones even if they’re pressed for time. She was a woman who openly admitted that she wanted to have more time for herself, to watch TV, to go to the hairdresser’s or the gym, or to work (we’ll return to this point later on).

Ever since Lucchetti set foot in Argentina, its communication was strongly based on actions on TV programs of high rating (like Mirtha Legrand and Susana Gimenez’s shows in 1997 or Julián Weich’s from then on: Sorpresa y Media, Trato Hecho). This was accompanied by a significant presence in points of sale (bundling free cooking utensils with the packs, gifts for children, more product quantity at the same price, travel contests, etc.)
The brand has always rewarded moms with important gifts but its wisest decision when it comes to bonding with housewives was the presence of the Lucchetti Mom on TV. This action took place in 2003, in the show *Trato Hecho*, and allowed Lucchetti to be seen as a brand that helped many women to realize their dream: be on TV and have their “15 minutes of fame.”

Through these promotional activities, the company managed to give content to “mom’s pasta” in a way that went beyond Lucchetti’s role as an ally in the kitchen by offering convenient and value for money products. Lucchetti proved that it understood moms.

**THE BEGINNING: OVERCOMING AND LEVERAGING THE OBSTACLES ALONG THE WAY**

After developing the brand’s limits and scope map, Molinos decided to move forward with turning Lucchetti into an umbrella brand. Lucchetti’s development was built around a well thought-out strategic vision, which was underpinned from the onset on a comprehensive research plan (24 studies over a four-year period). (See figure 5.)

**FIGURE 5**
**RESEARCH PROGRAM PLAN**

Lucchetti’s development path started when it entered the *bouillon* category. This high-margin category was by nature one of the big solutions to modern cooking and could also help to start adding “flavor” to the brand.

Additionally, bouillons and soups have a strong presence in the family diet and are frequently consumed. They are supported by two clearly differentiated elements:
- An emotional bond linked to their traditional presence in households, the family diet, and the children’s world;
- A high degree of convenience. (See figure 6.)
“Bouillon” featured several primary aspects of soup which were consistent with Lucchetti’s strengths: tasty flavor, convenience, and nutritional value.

The main challenge was to find an opportunity to differentiate from the traditional category leader, Knorr (Unilever), which held more than 60% of the market share and prompted a high degree of satisfaction among consumers. Knorr was an unquestionably accepted brand. It was difficult for consumers to think of a product which could be different from or superior to Knorr.
SEARCHING FOR A DIFFERENTIAL

A series of eleven research studies were conducted, in order to review, adjust, and move forward with the design of this new product and with the repositioning of the brand.

Five dissatisfaction factors were revealed by the first study about the bouillon category, even though the overall evaluation of the current offer was very good: difficult to dissolve, somewhat artificial/too concentrated flavor, excess of salt, excess of fat, and size issues which made the bouillons difficult to cut or crumble, and also to store. These factors had a low weight yet a significant potential in the light of the rising trends and values. Working only on the convenience factor in order to “make convenient more convenient” would not be enough to attract consumers, so a decision was made to work on all the weaknesses detected.

The study of the then-current values and trends revealed that consumers were seeking for alternatives which would allow them to enjoy their meals and at the same time take care of their health (boom of wellness trends). Development efforts were also focused on these aspects.

Molinos developed for Lucchetti a proposition aimed at stretching its differences from the category leader in various aspects:

- Product – lower fat content, crumbling;
- Format – dice (two Lucchetti dice are equivalent to one cube);
- Pack – cubic instead of rectangular;
- Naming – selecting names aimed at reducing the perception of artificiality.

Initially, the ideas evaluated were found strongly appealing among housewives. However, different issues came up during the assessment of the concepts and communication routes:

- Problems to comprehend the equivalence one cube = two dice and its implications on product yield;
- Feeling of lower convenience as compared with existing variants, for more dice had to be opened for the same preparation;
- Difficulty to “crumble” the dice, which was one of the main differentials to support the communication based on its strong appeal among housewives;
- Achieving the desired differential flavor.

After hard research and development work, Molinos was able to come up with a satisfactory product proposition which could support the “naturalness” and “healthiness” promise (lower fat content). (See figure 7.)
After the launch of Lucchetti bouillon, Knorr dramatically increased its communication investment (200%). This category, which had been stagnant for many years, grew an 8% thanks to the moves made by both brands.

Even though there were many obstacles along the way, entering the bouillon category was the kick-off to Lucchetti’s stretching beyond the pasta category.

**THE STORY AFTER THE BOUILLON LAUNCH**

The second most important milestone revealed by the research and development studies and later on leveraged by the brand is soups, which is described below. After its good performance in the bouillon category, Lucchetti proved to hold enough credentials to enter this market as well.

The soup proposition was aimed at outperforming the existing offer both in terms of innovation and differentiation. Initially, it consisted in developing a vegetable and noodle soup, leveraging on another of the very few weaknesses detected in the market leader (consumers thought its vegetable and noodle soup didn’t contain enough noodles and was of low quality). Additionally, considering that the key driver of noodle soup consumption is to complement the main dish and even replace it (adding egg and cheese to it, for instance), it became evident that housewives’ had big expectations about the soup’s quality and quantity of noodles and these were not satisfied by the market offer.
During the development stage, many obstacles had to be overcome to come up with the desired product. The market indicated that the most convenient alternative for housewives was a soup where they could find all the ingredients in a single pack (vegetables + noodles) to which they would only need to add water.

Production efforts were aimed in this direction, but even though a superior product was developed in terms of flavor and quantity of noodles, the R&D department was soon faced with their first big obstacle: vegetables and noodles could not be packed in the same bag. Since no technical solution could be found which allowed using a single bag, the product could only be sold separating the ingredients in two different bags. Initially, this was not only a complication but could also be perceived as a less convenient solution, which was at odds with one of the goals of the brand stretching: offering additional convenience in each launch.

The research revealed that the two separate bags were not perceived as a nuisance, but it also detected an opportunity to build on this limitation and turn it into a differential which would add value to the proposition: they highlighted the quality and quantity of the noodles offered by Lucchetti soups. This finding permitted to leverage on what had initially been a limitation, communicating it and emphasizing it as an advantage over the competition: "our soups are tastier because they contain abundant and tasty Lucchetti noodles". (See figure 8.)

**FIGURE 8**
**EVOLUTION OF CLEAR SOUP SHARE (MARKET SHARE IN LITERS)**
CONSOLIDATION
Lucchetti continued to grow by entering different categories, always taking into account the initial research study which revealed the limits and scope of the brand.

Apart from being supported by the development of new products, the brand stretching process also leveraged on additional actions: co-branding with other emblematic Molinos brands which were to implement a minimum investment maintenance policy. Based on these co-branding actions, Lucchetti enlarged and enriched its product portfolio, experiencing a strong growth after three years of work. Cases such as Máximo rice and Vitina semolina (special for children) allowed Lucchetti to boost its growth even further.

The strategy supporting the brand stretching process was based on consolidating the brand, maintaining its consistency along the way. Lucchetti’s launches should add value and differentiation as opposed to the current market offer, and each of them should incorporate a convenience upgrade. (See figure 9.)

FIGURE 9
THE PATH TOWARDS EXPANSION
COMMUNICATION SUPPORTING THE BRAND EXPANSION PROCESS

Being a convenience pasta brand with strong promotional actions, Lucchetti’s initial communication was supported by the slogan “la pasta de mamá” (mom’s pasta). Within the dried pasta world where advertising investment is relatively low, Lucchetti managed to maintain its presence via promotional actions on large-audience TV shows and at POSs.

These actions where consumers could “personify” the Lucchetti Mom allowed housewives to turn from buyers and users of the brand into recognized and rewarded mothers who participated in TV shows. This contributed to build a stronger identification among consumers.

The brand moved beyond consumers’ bond with the product. It gave them a space to develop their fantasies, dreams, and playfulness. It turned “kitchen-confined mothers” into TV stars who could enjoy their fifteen minutes of fame guilt free.

During these initial years, Lucchetti projected the image of a reliable, modern, and good quality brand linked to homemade food, care, and dedication.

It was linked to an ideal of a modern mother:

- Devoted to her family and children;
- With a personal life beyond her role as a mother;
- Active, with little free time;
- Vital, cheerful, and practical;
- Smart and with problem-solving capacity;
- Fond of preparing delicious meals for her family, without it implying a personal sacrifice.

Lucchetti consumers didn’t want the brand to project an extremely devoted mother exclusively focused on such role. This image was found too demanding for current life conditions and inevitably linked to the past (left behind and not missed). Being a mom was transcendental but not the only role in their lives. (See figure 10.)
The Lucchetti mother profile projected a woman who appreciates and enjoys motherhood and who does not want to be overwhelmed and pressed by household tasks more than necessary. She is a modern woman who preserves her own space, even if it is difficult to sustain.

After conducting the brand limits and scope research, Molinos decided to maintain the brand as top of mind among consumers of the category, supporting it with the tactical communication of new product launches, particularly bouillon and soup commercials. Once the brand expansion strategy had been developed, it was necessary to communicate Lucchetti’s new positioning as an umbrella brand, and thus an insight had to be found which could build strong empathy among consumers.

SEARCHING FOR AN INSIGHT
Simultaneously with the development of the product portfolio, the company started to search for insights which could help build Lucchetti’s communication as an umbrella brand. It was necessary to redefine the brand communication in order to include the new product categories in a single message which was comprehensive and at the same time consistent with Lucchetti’s positioning. The challenge was to nurture Lucchetti and turn it into a value for money brand, adding value to it.

The research study revealed that convenience, economy, and the maximization of the time and effort devoted to cooking were the main drivers of choice that would define the brand positioning. But Lucchetti’s value did not come only from making consumers’ lives easier, there was also an emotional bond which was to be reinvented in the new brand scenario. The brand imagery was tinged with affection and a strong emotiveness, but it was obviously also supported by pure rationality (value for money).
The trend studies showed that, particularly among mothers, there prevailed a permanent feeling of lack of time, fatigue, and stress, regardless of whether they worked outside the home or not. They recurrently voiced they need more time for themselves, although this did not make them feel guilty. Lucchetti, like other brands offering a convenience benefit, had presented itself from the beginning as a brand which understood mothers, which was close to them by offering products that would make their job easier and leave them some time for themselves.

The “perfect” mother profile was being perceived as overwhelming by current women. The “Lucchetti mom” was built on this “tired mom” insight, based on a real mother. It is a mother who does her best to deal with motherhood, who has flaws and makes mistakes, who feels frustration and fear, but above all, who loves her family a lot. Based on this, the Lucchetti Mother campaign was designed, aiming at building and rebuilding the emotional bond with current moms, based on their identification with this real mother.

The strategy of the campaign was intended to show mothers in ordinary situations to portray their everyday lives. Animation and humor were the resources used to prevent the portrayed situations from being perceived as aggressive or brutal, and from prompting strong rejection instead of building empathy and leading consumers to feel identified with the little scenes from everyday life. (See figure 11.)

**FIGURE 11**
**LUCCHETTI MOM, ADVERTISING CAMPAIGN IMAGE**

The multimedia campaign (TV, radio, web, subway TV service, etc.) was very successful and visible results were obtained in a short time. It achieved high levels of impact and awareness, positioning Lucchetti as an umbrella brand (in six months, it became the 2º top of mind food brand). It also increased its market share both in its original category (pasta) and in those where it had started the brand expansion process (bouillon and soup).

Additionally, the commercial not only built a strong identification among mothers, but also based on the animation and catchy jingle, it was well received and recalled by children.
FINALLY, THE RESULTS
The strategy devised for Lucchetti proved to be successful and to stem from a risky bet in times of strong uncertainty. Not only did the company manage to add value to the brand but also improved its performance in terms of bottom line results. Molinos succeeded in building a food brand which, via a differentiating message, created a strong emotional bond with the target, going from being a functional brand to being a strongly emotional brand.

The brand stretching also had a strong impact on Lucchetti’s dried pasta products – which are the core business of the brand. The new Lucchetti image, along with its revamped pack, allowed for the repositioning of its price as well as an increase in its margin, which had initially been one of the reasons for betting on its expansion. Consequently, its performance indicators also grew strongly in only one year, particularly in terms of consumer attraction and retention. (See figure 12.)

FIGURE 12
PERFORMANCE OF DRY PASTA LUCCHETTI IN KEY INDICATORS

The brand score (on a scale from 1 to 10) improved consistently in a two-year period, both globally and in the bouillon and soup categories. Lucchetti grew and supplemented this growth with a value-added that was perceived by consumers. (See figure 13.)
Additionally, the brand’s turnover increased by 400% after five years, with a relatively low marketing investment considering the magnitude of the project (around 5% of turnover). (See figure 14.)

This case is an example that supports the hypothesis that it’s possible to find business opportunities even in times of crisis, which are perceived to be the most dangerous times to make an investment. Achieving this calls for a good mix of relevant and value-added information and the strategic vision to make the decision and face the challenge at the right time.

THE AUTHORS

Mónica Kleiman, GfK, Argentina.

Cecilia Iglesias, Molinos, Argentina
APPENDIX
RESEARCH PROGRAM AT GFK

Year 2005
1. Limits and scope of Lucchetti brand (qualitative – 8 groups)
2. Advertising Pre-test (qualitative – 6 groups)
3. Lucchetti Bouillons Exploratory Study (qualitative with in-home product trial – 8 groups)
4. Lucchetti Bouillons Product Test (quantitative in-home interviews – 200 cases)
5. Lucchetti Bouillons Pack Test (qualitative – 6 groups + 6 in-depth interviews)

Year 2006
6. Lucchetti Bouillons Concept Test (qualitative – 4 groups)
7. Lucchetti Bouillons Concept Fulfillment (quantitative in-home interviews – 200 cases)
8. Lucchetti Bouillons Blind Product Test (quantitative – 200 cases)
9. Evaluation of names for Lucchetti Bouillons’ new flavors (qualitative – 4 groups)
10. Lucchetti Bouillons Concept Product Test (quantitative – 360 cases)
11. Insight generation for the communication strategy (qualitative – 10 groups)

Year 2007
12. Concept & Pack Test for Lucchetti line extension (qualitative – 4 groups)
13. Lucchetti-Máximo Rice Concept Test (qualitative – 6 groups)
14. Lucchetti Seasonings Exploratory Study (qualitative – 6 groups)
15. Lucchetti Bouillons Advertising Script Pre-test (qualitative – 6 groups)
16. Lucchetti Soups Exploratory Study (qualitative – 6 groups)
17. Lucchetti Clear Soups Concept Test (qualitative/quantitative – 4 groups + 4 workshops + 220 interviews)

Year 2008
18. Lucchetti Bouillon Granules Concept Product Test (qualitative – 8 groups)
19. Lucchetti Rice with Sauce Concept Product & Pack Test (qualitative – 8 groups)
20. Lucchetti Shelf Test (qualitative – 4 groups)
21. Vitina-Lucchetti Migration (qualitative – 6 groups)
22. Preferido-Lucchetti Migration (qualitative – 14 groups)
23. Lucchetti Advertising Pre-test (quantitative – 120 cases)
24. Vitina-Lucchetti Cream Soups Launch (qualitative – 4 groups)