



Plunkett Research[®], Ltd.

Our Market Research = Your Smart Decisions

CUSTOM MARKET RESEARCH | SURVEYS + ANALYTICS



Income Statement (Whole \$) Note: Delays in reporting may affect data provided. Latest years will be found on subsequent pages.

	2012 AES	2012 Average of Corporates (\$M)	2013 AES	2013 Average of Corporates (\$M)
Total Revenue	18,140,999,680	7,598,333,420	15,891,000,320	7.2
Cost Of Revenue	14,426,999,808	4,789,844,740	12,643,999,744	4.4
Gross Profit	3,713,999,872	2,808,488,680	3,247,000,576	3.1
Operating Expenses				
SG&A Expense	263,000,000	264,895,365	250,000,000	
R&D Expense	1.66	3.49	1.38	
Other Operating Expenses				
Restructuring and Merger/Acquisition Costs		(11,100,000)		

ANALYSIS OF COMPETITORS



Any industry • Anywhere in the world





Market research is often the best investment you can make. Data is everything in today's business environment, and well-designed research projects will gather and then analyze data specific to your needs. The end-result should be insights that you can use to shape your strategy, develop new products or services, understand your customers or beat your competitors. What could be more important?

Unfortunately, the global research marketplace is crowded with too many options and too many vendors who lack expertise, transparency or objectivity. Choosing the correct partner is vital to the success of your market research project.

At Plunkett Research, our mission is to use our 30+ years of experience and our renowned knowledge base in order to design and execute the best possible research project for your situation. Whether you need consumer surveys, B2B research, industry analytics or insights regarding your competitors, we will gather and analyze the ideal data for you.

I would enjoy an opportunity to personally discuss your project with you, and I encourage you to contact us at any time to ask questions or discuss your ideas.

Best regards,
Plunkett Research, Ltd.
Jack W. Plunkett, CEO

Our Market Research = Your Smart Decisions.

"I shared with the team my reaction to your PowerPoint, which was exceptionally helpful and better than I have seen from similar assignments. We have been very happy with your work every step of the way, Thank you!" - Tommy Bahama

"Really appreciate the depth you were able to get to so quickly... The team has looked through the material and are very happy with the data you pulled together. Thanks again for the quick turnaround, we really appreciate the partnership." - Hilton Hotels

“THANKS A LOT FOR ALL THE DATA!

We are also happy to have you as a partner and I have really appreciated all of your updates and help.” - H&M

4 WAYS MARKET RESEARCH CAN HELP YOU MAKE SMART DECISIONS

1 CONSUMER STUDY TIPS

Design your research project to help you uncover vital insights:

- Determine the strength of your brand
- Understand consumers' needs, likes and dislikes
- Understand evolving consumer attitudes
- Understand how consumers search for products/services
- Understand what drives final buying decisions
- Learn how consumers are frustrated by choice, price or service

2 B2B AND INDUSTRY RESEARCH TIPS

Develop vital strategic data:

- Determine the size and growth rate of your market
- Verify the need for a new product or service
- Identify points of pain among customers
- Identify, rank and score acquisition candidates
- Identify disruptive startups and technologies

3 BUILD A COMPETITIVE INTELLIGENCE DATABASE

Understand your competitors:

- Who and where are they?
- What are their strengths and weaknesses?
- In which areas are they investing or innovating?
- What are their key products?
- What are their strategies?

4 BUILD UNIQUE DATABASES TO HELP BOOST YOUR FIRM'S GROWTH

- Identify potential customers
- Identify potential distributors or partners
- Identify potential suppliers



CASE STUDIES

Project Objective: Conduct an Online Survey of Consumers to Determine both Brand Awareness and Interest in a New Product

A leading retailer required vital consumer insights regarding brand awareness and new product concepts. Plunkett Research first created a strategic project outline, and then carefully designed a multi-stage questionnaire.

- Once the questions were completed, we selected the best possible online panel where we could identify and target consumers for the survey.
- We then programmed and designed the survey pages. The design was carefully tested for usefulness on smart phones, and for completion in under 10 minutes' time.
- Consumers within the panel were filtered by criteria for geography, income level and interest in specific types of products.
- After we received thousands of completed surveys, we carefully parsed and analyzed the results on a per-question, per-consumer segment basis.
- The final outcome was delivered in a user-friendly PowerPoint presentation, suitable for use in the client's boardroom.

Synthesis & Recommendations

- ✓ The client was able to quickly gain extremely valuable data on consumers' perceptions of and satisfaction with the client's locations and products.
- ✓ In addition, the client gained vital insights from consumers' reactions to an entirely new product concept – data that enabled the client to make critical strategic decisions.



Project Objective: Support Business Entry into a New Health Care Sector

Key Project Details

For one of the world's largest medical technology firms, our project required an analysis of the market for specialty health-related products and services in the US and EU. This included market size, potential growth, current competition, the regulatory environment and points of pain at end-users.

- In addition, we provided SWOT analysis of current competitors in the marketplace, and ranked competitors as possible acquisition targets.
- Data to be targeted within the hospital/clinic industry was very specific, including:
 1. Country-by-country market size and growth potential
 2. Products and prices of competitors
 3. Distribution models and possible distribution partners
 4. Potential acquisition targets ranked and analyzed

Synthesis & Recommendations

- ✓ We were able to create a database of hundreds of competitors, product offerings and distributors.
- ✓ We researched and listed go-to-market concepts, best practices and market opportunities.
- ✓ We conducted in-depth interviews with executives at end-user facilities in multiple nations to gain extremely valuable insights.
- ✓ We provided insights into pricing, products, innovations and marketing practices of market leaders.

CASE STUDIES

Project Objective: Determine Best Practices in Hotel Direct-Booking, Loyalty Programs and Repeat Guest Strategies

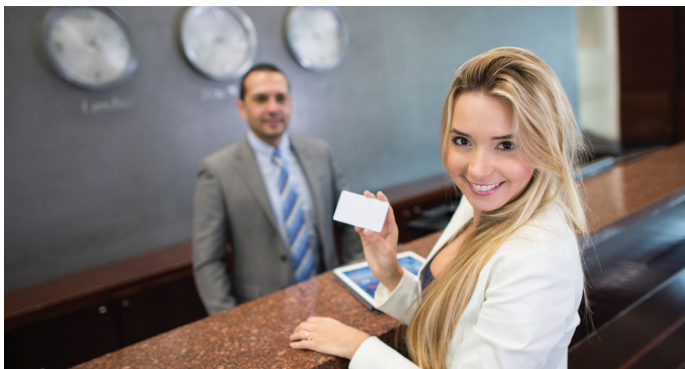
Key Project Details

A global hospitality firm required an in-depth analysis of key marketing strategies used by hotel industry competitors. While it would have been easier to limit our research to the activities of top hotel chains, we also studied innovative boutique chains and independent hotels.

- We analyzed best practices in pricing, special rates for loyalty program members and messaging to build repeat bookings.
- We researched effective strategies for dealing with online travel booking sites such as Expedia, and travel review sites such as TripAdvisor.
- We outlined competitive operating models, critical success factors and marketing challenges, along with pricing strategies.
- In addition, we identified and analyzed key changes in loyalty programs, rewards, tiers, black-out dates and other details of competitors' membership rewards.
- We categorized effective strategies for leisure travelers as well as for the "Road Warriors" (high frequency business travelers) segment.

Synthesis & Recommendations

- ✓ We identified unique strategies used by dozens of chains, independent hotels and online travel agencies.
- ✓ We identified unique methods for increasing direct bookings while building customer loyalty and repeat business.
- ✓ The client gained the ability to respond quickly and effectively to competitive conditions in the marketplace.



Project Objective: Create a Detailed Database of Competitors' Retail Store Locations Worldwide

Key Project Details

A leading retailer required a detailed database of all of its top competitors' store locations throughout the world.

- We started with an intense project design phase, utilizing a variety of experts on the Plunkett Research team.
- We wrote a 36-page store research guide.
- We selected and assigned individual researchers in major markets. The researchers had to be intelligent, diligent and highly accurate. In many cases, they were multi-lingual.
- We designed a unique database in Microsoft Access, and programmed forms, reports and data analytics tools within the database.
- We gathered accurate data on thousands of stores throughout all of Asia, including China; all of Europe; North and South America; as well as the Middle East and North Africa.

Synthesis & Recommendations

- ✓ By utilizing Plunkett Research's expertise in analytics and coding, we were able to create reports that showed hundreds of neighborhoods worldwide where competitors are beginning to cluster new stores, thus pointing to new store development opportunities.
- ✓ By carefully designing the database before research began, we were able to ensure data accuracy and standardize the data format.
- ✓ By carefully crafting research guidelines, and utilizing multi-lingual researchers, we were able to gather all needed data, even when working in locales such as China, Brazil and Japan.

CASE STUDIES

Project Objective: Determine the R&D Activities, Engineer Employment Levels and Facilities Locations of Top Technology Companies.

Key Project Details

A global technology company required an analysis of 18 top US technology companies and their engineering, research and development team locations and activities.

- We gathered total R&D employment in America for each firm.
- We listed R&D/Engineering locations, labs and offices.
- We estimated R&D/Engineering employee counts at each facility.
- We also provided a listing of specific Research and Engineering activities at each facility.

Synthesis & Recommendations

- ✓ We completed the project on-time and on-budget.
- ✓ We reported exacting information on research and engineering staff, their locations, their employee count and their projects.
- ✓ The report's format enabled the client's top executives to quickly scan and compare metrics at competing firms.
- ✓ They were enabled to better plan their own facilities expansion and recruiting strategy.



DATA IS EVERYTHING!

It's one thing to gather data – it's another to understand how to use it!

CASE STUDIES

Project Objective: Conduct an In-Store Survey of Merchandise and Pricing in Apparel Stores in the US, Asia and the EU

Key Project Details

Plunkett Research was asked to conduct an intense in-store survey of apparel merchandising and pricing in a select group of retail stores in the US, Asia and the EU. The goal was to compare pricing for certain types of merchandise across a broad array of brands. The resulting data was utilized in a sophisticated computer analytics process to look for trends and opportunities.

- We started with an intense project design phase, utilizing a variety of experts on the Plunkett Research team.
- We created a 12-page research guide, in four different languages.
- We selected and assigned individual researchers in major markets. The researchers had to be intelligent, diligent and highly accurate. Some of the in-store researchers had deep retail backgrounds; others were MBAs or MBA candidates.
- We carefully selected a large number of store locations to be studied, based on type of neighborhood and size of the store.
- We trained the research team, so that they carefully observed our strict privacy and trade secret policies. We were careful to adhere to local regulations.

Synthesis & Recommendations

- ✓ By carefully designing a mystery shopping project, we were able to gain vital market information in a legal and effective manner.
- ✓ Extensive team member training was required.
- ✓ We were able to gather tens of thousands of data points, which were then processed using data analytics programs in order to determine merchandising trends and pockets of opportunity.
- ✓ The result was a highly-effective program, completed on-time and on-budget.



HOW TO GET THE MOST FROM AN ONLINE SURVEY OF CONSUMERS OR EXECUTIVES

Due to the great sophistication of today's online panels, it's possible to efficiently survey exactly the segments of the population that you need. The internet has opened up a new world of people who are willing to be surveyed at a time and place of their own choosing, and the latest software makes it possible to identify and target exactly the people you need to reach. Our experts can help you identify a high quality survey panel in the Americas, Europe, Asia/Pacific – anywhere in the world. We can design a terrific plan to survey consumers, business people – even top executives and managers.

COMMUNICATION: Carefully craft the right questions.

The way that a question is asked can skew the way someone might respond. The right questions will draw out the information you need in an unbiased manner. Use a mixture of yes-no and multiple-choice questions. Then add a few open-ended questions that require a short, written answer from the interviewee.

TIMING: Surveys can be lengthy. In many cases, however, the most meaningful and relevant responses can be attained with a survey length of less than 15 minutes, but surveys of up to 30 minutes are possible.

DESIGN: Your survey has to look inviting and easy to use, and it must be scaled correctly for use on a variety of devices, especially smartphones.

THE RIGHT PANEL: Get an expert to select the best panel and the best possible respondent characteristics. The right option has to be selected with great care. There are excellent panels available: business people, consumers, domestic and global. Each panel has its own unique advantages and characteristics to be taken into consideration.

DATA: Utilize a market research firm that understands how to map and analyze the responses that you receive. It's one thing to gather data – it's another to understand how to use it!

WHAT COMES NEXT?: After your online survey is completed, consider a follow-up focus group or video interview of a small number of people who responded to the original survey. This strategy can enable you to drill even deeper with a lengthy interview of 8 to 12 people, after you have gained insights from your primary survey.

Only a few years ago, most surveys were conducted by telephone or snail mail. Today, the internet and smartphone have changed everything: online surveys are fast, efficient and cost-effective.



CLIENT COMMENT:

“THANK YOU SO MUCH!!
This information is very helpful.
Thanks to you and your team!!”
- WELSPUN

PLUNKETT RESEARCH DATA AND INSIGHTS are relied upon daily by the world's leading companies, consultancies and investment firms.

SELECTED PLUNKETT REPORTS are included in world-class data platforms, including: Refinitiv/LSEG, AlphaSense, Capital IQ and Factset. Let us show you how we can solve your own special data needs.

OUR MISSION IS TO DESIGN AND EXECUTE THE BEST POSSIBLE RESEARCH PROJECT TO SUIT YOUR SPECIFIC NEEDS.

Contact Plunkett Research to Discuss Your Unique Research Project. Or, submit your Request for Proposal (RFP)

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