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Services

News

BOI Labs

BOI Labs Bitterballen

Source: Canva

Partners



Theme



Volume



Edition



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Researchers



Objectives and Research Design

Research Objectives	<ul style="list-style-type: none">✓ See what is thought and known about bitterballen✓ Quantify the associations, its potential and marketing input using a convenience sample✓ Finding out the preference for either the Krokky brand or the real Dutch bitterballen✓ Mapping thoughts, attitudes and expectations about bitterballen	
Methodology	Quantitative (Online survey) Qualitative (IDI & FGD)	Sampling Area Quantitative n=129 Qualitative 4 respondents Jakarta
Respondent Criteria	Bitterballen consumer	Time Period Quantitative: 19 June – 7 July 2015 Qualitative: 17 April - 29 April 2015

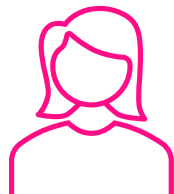
Respondent Profile

base: all, n = 129

Gender

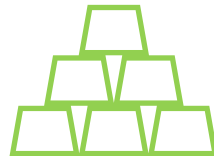


53%



47%

Household Expenditure



> 7.5 mio	32%
5 - 7 mio	19%
3 - 5 mio	22%
< 3 mio	26%

Age



< 25 tahun	30%
26 - 30 tahun	27%
> 31 tahun	27%

Area



Jakarta	54%	Bekasi	3%
Bandung	8%	Depok	3%
Surabaya	7%	Bogor	2%
Yogyakarta	6%	Others	8%
Tangerang	5%		
Medan	4%		

Where do you/ your family usually get your groceries?



Hypermarkets (e.g. Giant, Carrefour, Hypermart)	87%
Traditional markets (e.g. Pasar Minggu)	50%
Convenience stores (e.g. Indomaret, Alfa Midi)	48%
Super markets (e.g. Hero, Foodhall, Ranch Market)	44%
7/11	1%
Others	2%

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Summary



Product

Bitterballen are pretty well known. Only 1 in 5 respondents don't know bitterballen. With 2 out of 3 also able to correctly remembering its name. The net promotor score is 16%. A third of the respondents would recommend bitterballen to friends and/or family. Not only are bitterballen well known, of all the respondents two-third has eaten bitterballen before.

Those who have eaten bitterballen associate the taste with **risoles and ragout**. According to respondents who have eaten bitterballen the best assets of bitterballen are the **crispy outside, the meat and the filling**. Most respondents describe bitterballen as delicious, savory and crunchy. While respondents who have never eaten bitterballen assume the taste will be comparable with **kroket or nuggets**.

Respondents mostly see bitterballen as something that can be eaten by everyone as a **snack** or sometimes it can be considered an **appetizer**. The most ideal moment to eat this snack is during **hangout/relaxing with friends, at night or accompanied by coffee or tea**. The best place to consume bitterballen is either in **cafes, coffee shops, and /or restaurants**. Especially higher income respondents like to eat them in cafes.



Packaging

Almost half of the respondents would like to see frozen bitterballen to be available in packages ranging from **12 to 20 pieces in the supermarkets**.

Almost all respondents would like to see prepared bitterballen in portions of **6 pieces in the places like cafes, coffee shops, and /or restaurants**.



Price

When it comes to price, respondents prefer **12 frozen bitterballen for around Rp36.000**. While the price of a prepared **portion of 6 should cost around Rp30.000**.

The packaging of frozen bitterballen should have **bright colors like red, yellow, or orange**. When presented with examples of existing packages, most respondents prefer the **Van Dobben packaging or Albert Heijn**. The package should look more **luxurious**, since the product is considered a **premium product**, especially by the low- and higher-income groups.

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Recommendation (1)



Product

There seems a lot of potential for bitterballen since only 2% says they do not want to buy them at all.

There is already substantial product awareness, but this can be improved by build on the existing awareness of the product and willingness to promote bitterballen among existing consumers to improve name recognition.

When it comes to taste, bitterballen will be easily accepted by Indonesians. Position bitterballen as a delicious crunchy premium, or other taste variations are needed for consumers. snack that is ideal for eating with family and friends of all ages. Emphasise the crispy outside, the meat and delicious filling.

It is also advised to do extra product testing to see whether the real Dutch bitterballen should be made bigger or not. Also test if extra cheese, or other taste variations are needed for consumers.



Packaging

Capture the market for prepared bitterballen with portions of 6 bitterballen. Increase availability at selected cafes and coffee shops. Improve availability and awareness of availability.

The Van Dobben package is a good example to have a premium look for the package. Typical colors or icons that refer to the Netherlands will make the package attractive and recognizable. Hire professionals when designing the package and coming up with a name. It is a vital part of the future success and does not require a lot of investment.

Use a similar font to conveys elegance. The product brand name will also play a big role in this. "Oma" is a good name that Indonesians associate with something authentic Dutch and traditional. It is important to place bitterballen pictures and names on the package. There cannot be any doubt that it is maybe bakso, ragout, nuggets, kroket or risoles.

It needs to be clear for people that it is prepared and eaten as a snack. Since 33% has not eaten bitterballen before, describe the preparation with the help of easy to grasp graphics.

Recommendation (2)



Price

The price range of 6 bitterballen should be between Rp19.000 to Rp30.000. Given the premium nature of the product, it is advised to put the price closer to Rp30.000.

After product awareness and consumption of bitterballen has increased, work on availability of frozen bitterballen in hyper- and supermarkets with packages of 12 to 20 bitterballen. Ideal colours for packaging bright colours like red, yellow and orange.

The price range of 12 frozen bitterballen should be between Rp24.000 to Rp36.000. Just like with the prepared bitterballen it is advised to price the premium bitterballen closer to the upper limit of the range: Rp36.000.

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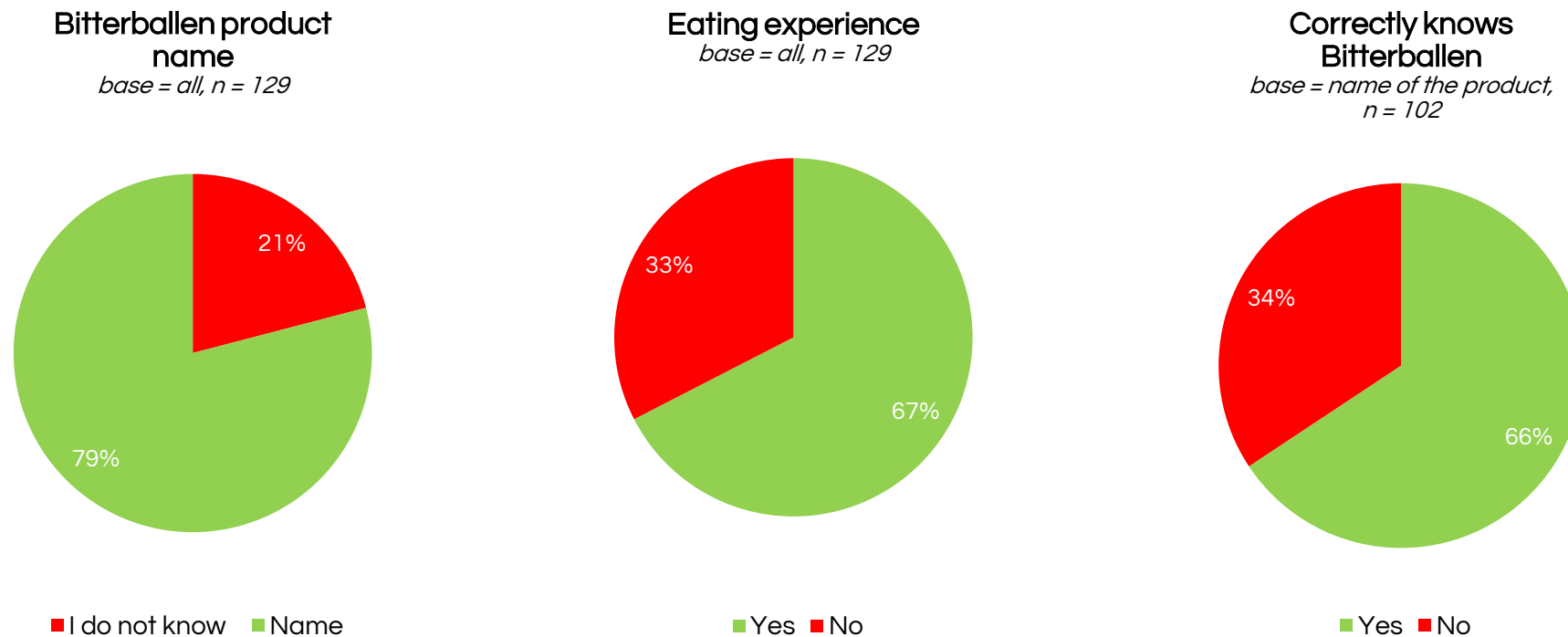


Product Familiarity

Almost anybody recognizes bitterballen, and those who do, a fast majority can name the product correctly.

67% of respondents has eaten bitterballen before. When the respondents were asked about the name of bitterballen, 79% of all respondents answered with a name, 66% gave the right answer.

That means there are still some respondents who have eaten bitterballen but didn't give the correct name of the product.



Q1 What is the name of this product?

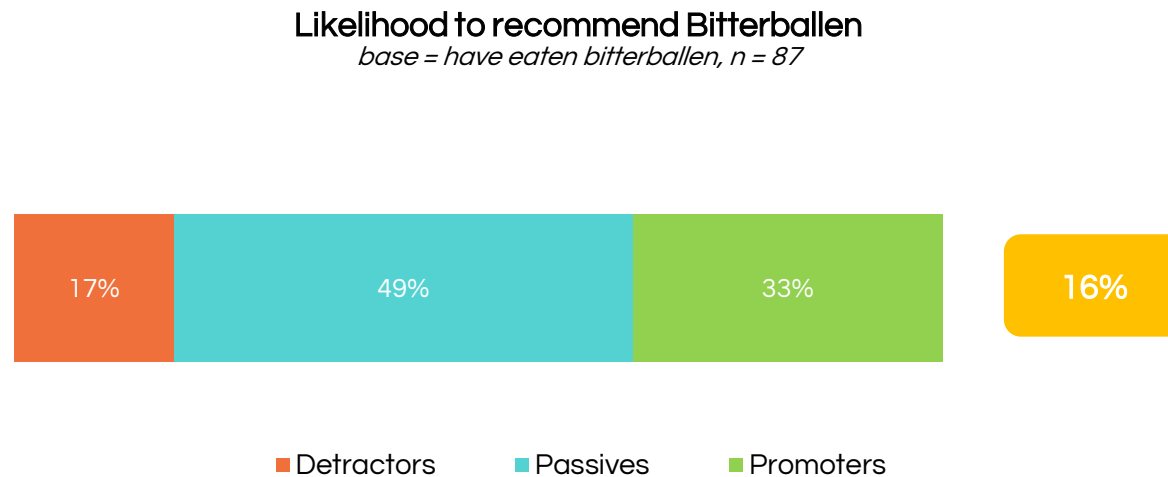
Q2 This product is called bitterballen and originally a Dutch product. Have you ever eaten this product?

Q1_correct Did the respondent give the correct name?

Net Promoter Score

Quite a few respondents who have eaten bitterballen promote the product (33%). Almost half of the respondents who has eaten bitterballen is passive in promoting the product, while only 17% would not promote bitterballen at all.

The result is a net promoter score of 16%.



Product Association and Taste

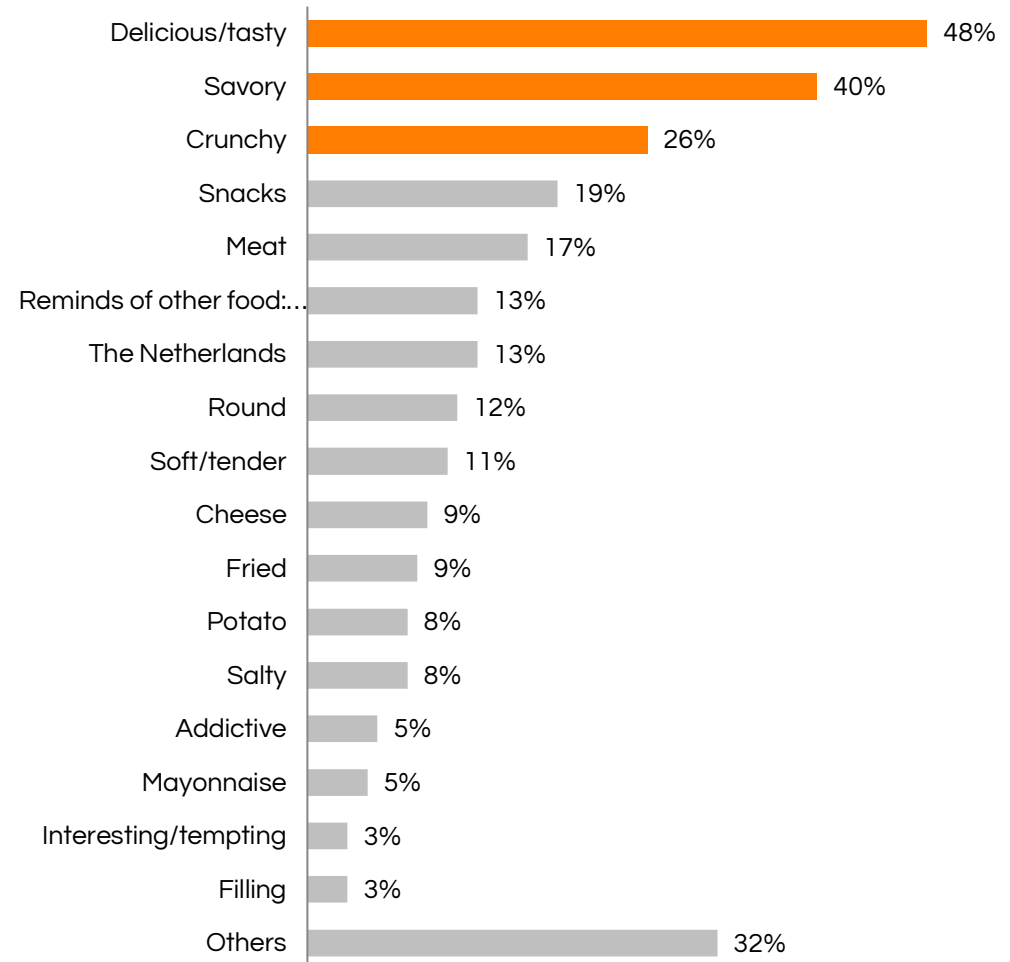
The associations with bitterballen are overwhelmingly positive. Respondents describe bitterballen as delicious/tasty (48%), savory (40%) and crunchy (26%).

Respondents who have never eaten bitterballen say that bitterballen reminds them of other food, like *perkedel*, *bakso*, and/ or *kroket* (26%), while respondents who have eaten bitterballen before hardly mention the similarities with *perkedel*, *bakso*, and/ or *kroket*. 7% who has eaten bitterballen answers these three other products.



Top 3 words related to Bitterballen

base = all, n = 129



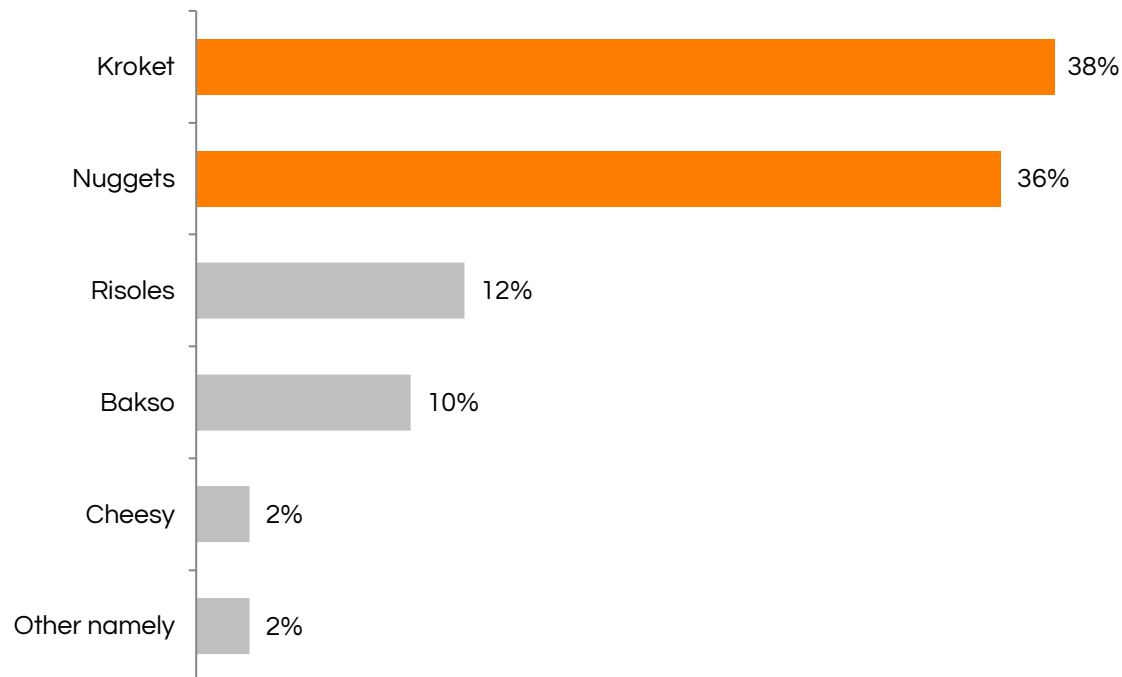
Product Association and Taste

Respondents who have eaten bitterballen associate the taste with *risoles* and ragout. As is shown in the chart 60% of them says that bitterballen has a similar taste with *risoles* and 56% says bitterballen has a similar taste with ragout.

More than three quarters of the women (76%), say bitterballen have similarities with ragout. While a lot of men (71%) say bitterballen tastes similar with *risoles*. 38% of the respondents who have never eaten bitterballen think that bitterballen will taste like *kroket*, another 36% thinks that bitterballen will taste like nuggets.

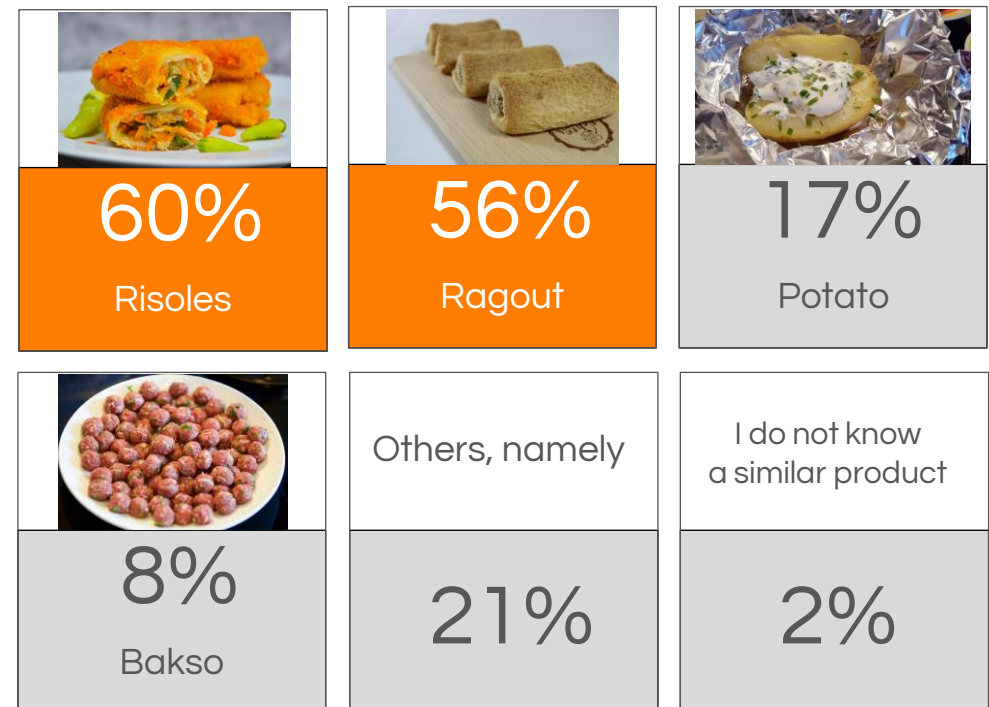
Taste association

base = not eaten bitterballen, n = 42



Products with similar taste

base = have eaten bitterballen, n = 87



Product Association and Taste

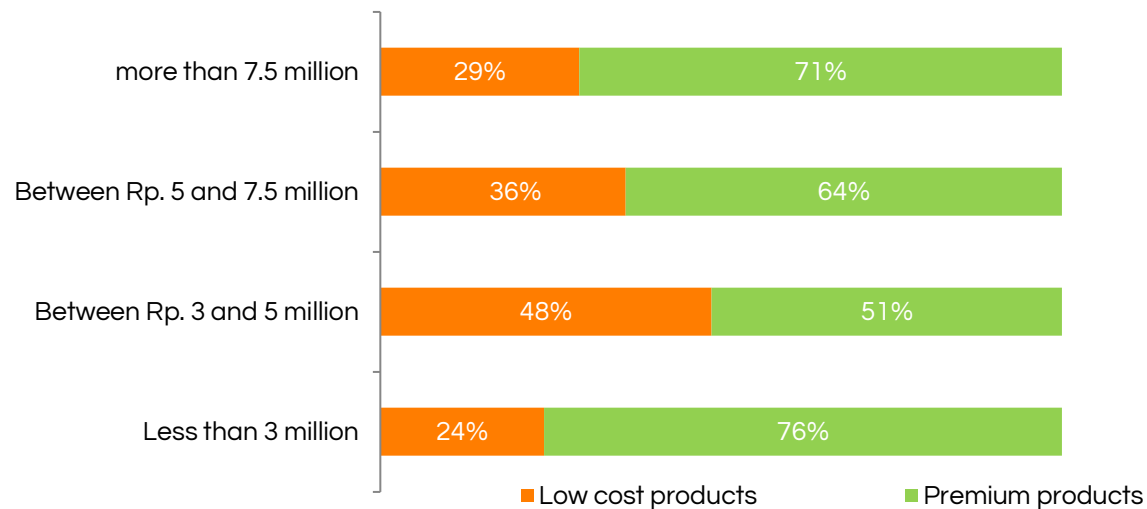
Most respondents see bitterballen as a premium product. 66% of the total number of respondents sees bitterballen more as premium product.

26 to 30 years old respondents is the group with the highest percentage, 40%, that see bitterballen as a more low cost product.

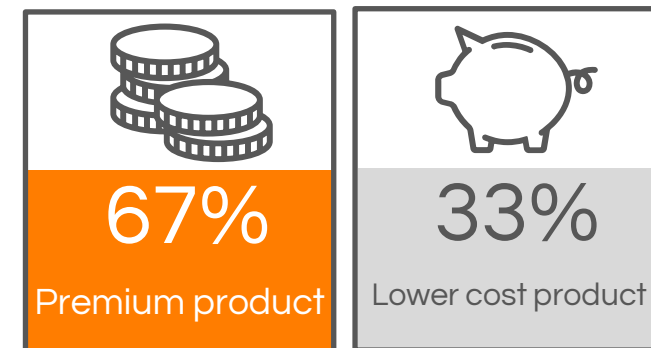
Whereas the youngest age group (25 years or younger) perceive bitterballen the least as a low cost product (23%).

Respondents with a monthly expenditure of less than Rp 3 millions mostly see bitterballen as premium product. Respondents with Rp 3 to 5 millions monthly expenditures don't see bitterballen as either a premium or low cost product.

Products prestige
base = all, n = 129

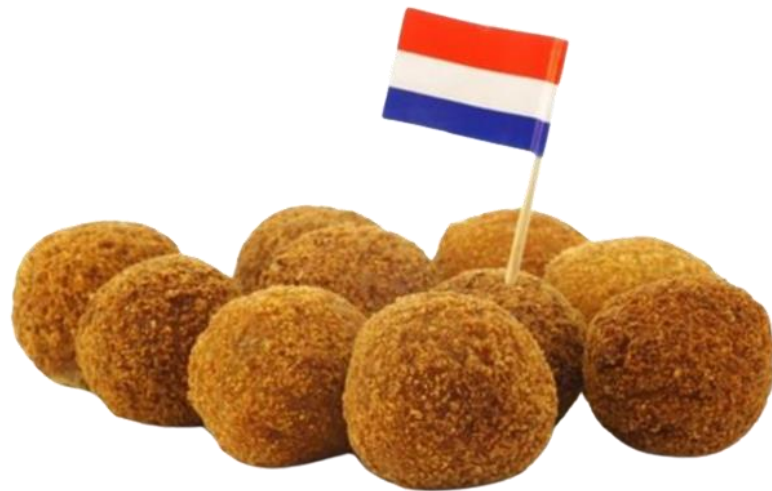


Products prestige
base = all, n = 129

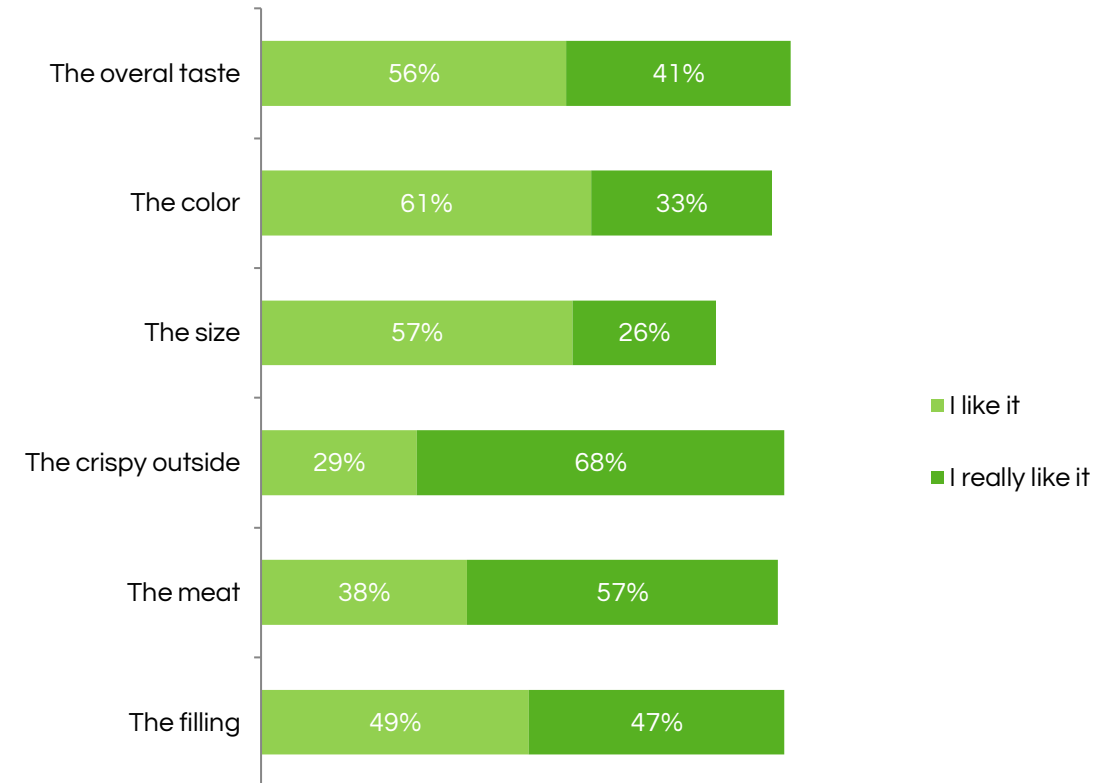


Product Association and Taste

Respondents especially like the crispy outside of bitterballen (68% really like it). But also the meat (57%) and the filling (47%) are aspects that make bitterballen a product these respondents like.



Favorite part of bitterballen
base = eaten bitterballen, n = 87



Moment

When asked about who bitterballen would be suitable for, the majority thinks it is for everyone. There is no age limitation. This applies to all segments within this research.

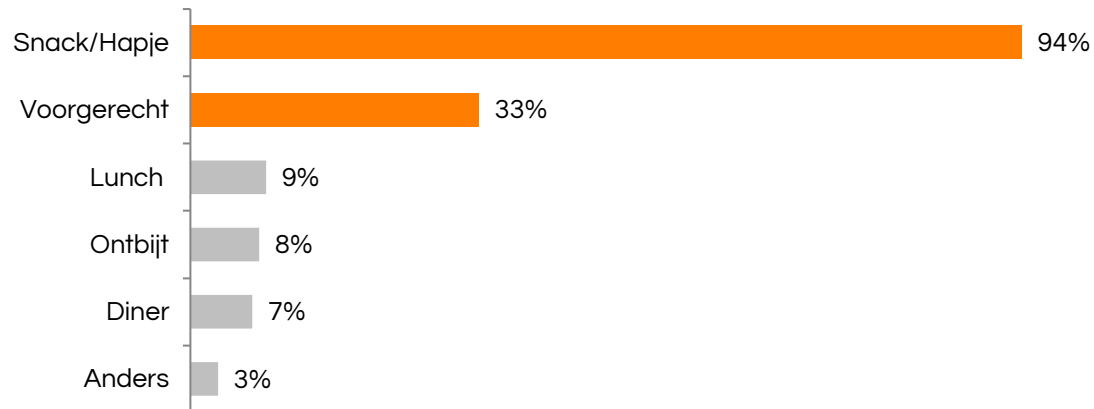
When looking at differences for the expenditure groups it can be seen that the second most suitable group is young children according to the group with the highest expenditure (32%).

Interestingly, respondents of the FGD consider students and youngsters as a suitable group to eat bitterballen. These two groups are often interested in trying new things, which is why they would most likely also give the bitterballen a chance.

Most respondents (94%) associate bitterballen as a snack / finger food. 14% of the respondents who have never eaten bitterballen associate this product with (a part of) dinner, which is significantly higher than the respondent who have eaten bitterballen (3%).

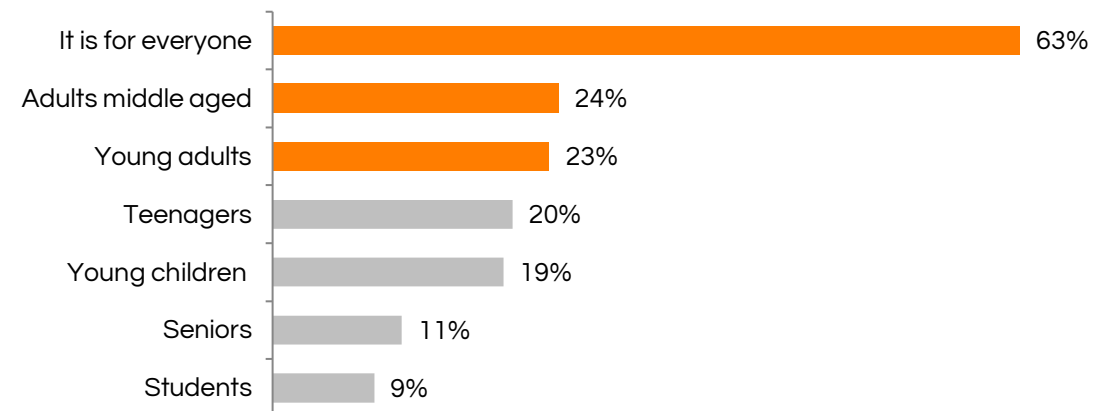
When to eat Bitterballen

base = all, n = 129



Bitterballen target consumer

base = all, n = 129



Occasion

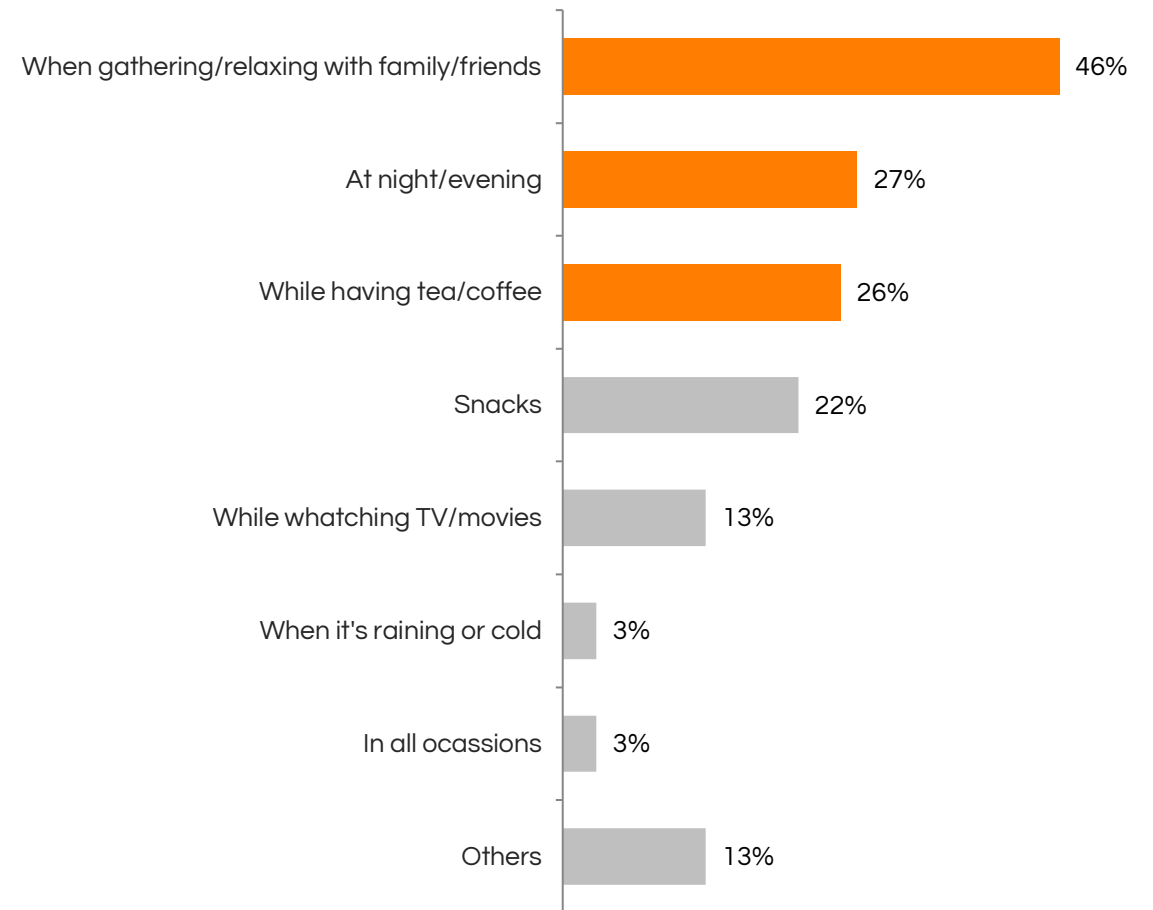
46% of all respondents think they should eat bitterballen when gathering/relaxing with friends.

The older respondents like to eat bitterballen more at night/evening than the other age groups. Meanwhile, 28% of the respondents with a monthly expenditure Rp 3 to 5 million think that bitterballen should be eaten while watching TV/movies, which is significantly more than the respondents with a monthly expenditure of more than Rp 7 million.

Respondents from the FGD also consider the movie theater as a good occasion to eat bitterballen, as an alternative to popcorn.

Occasion to eat Bitterballen

base = all, n = 129



Serving method

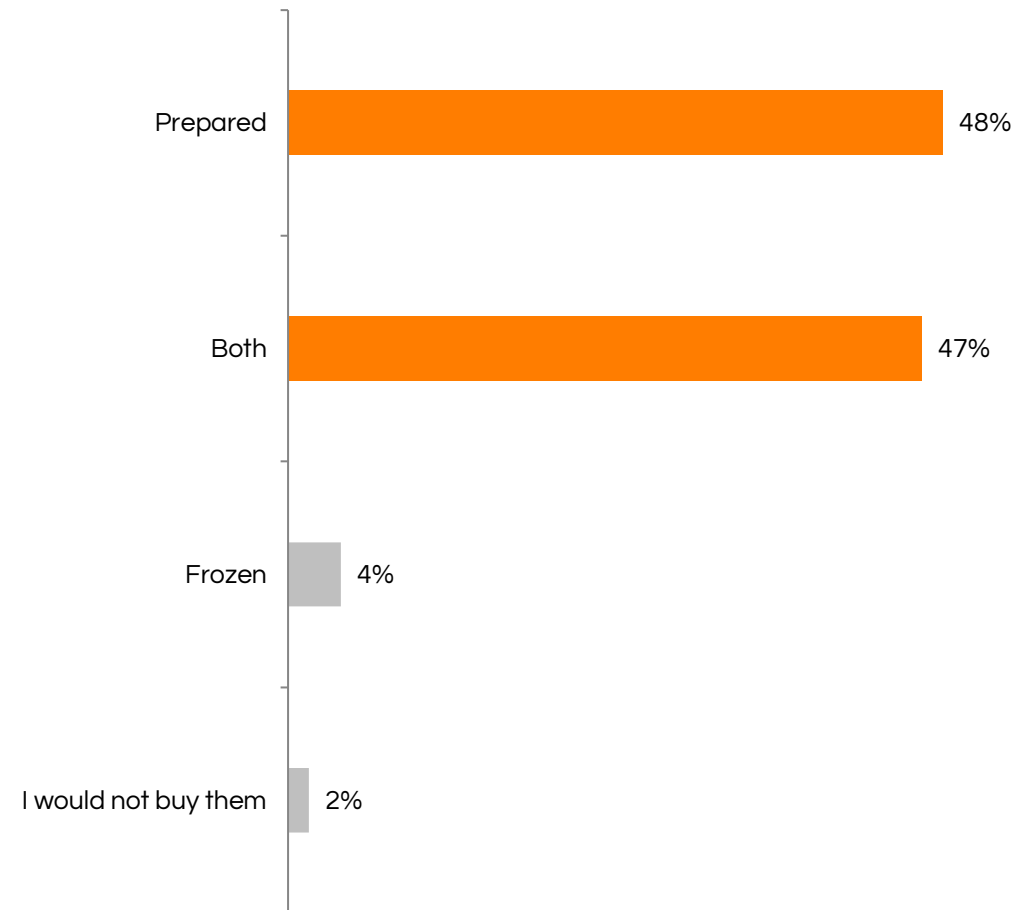
Almost all respondents prefer to buy bitterballen as prepared products (95%). Only 4% would only buy the bitterballen if they are available frozen. 2% of the respondents would not buy bitterballen at all.

Those who have eaten the product prefer to buy it prepared, those who have not, would try them either way. At the same time, ten times more than those have eaten bitterballen, buying them frozen is the preferred way (10%).



Serving form for Bitterballen

base = all, n = 129



Place

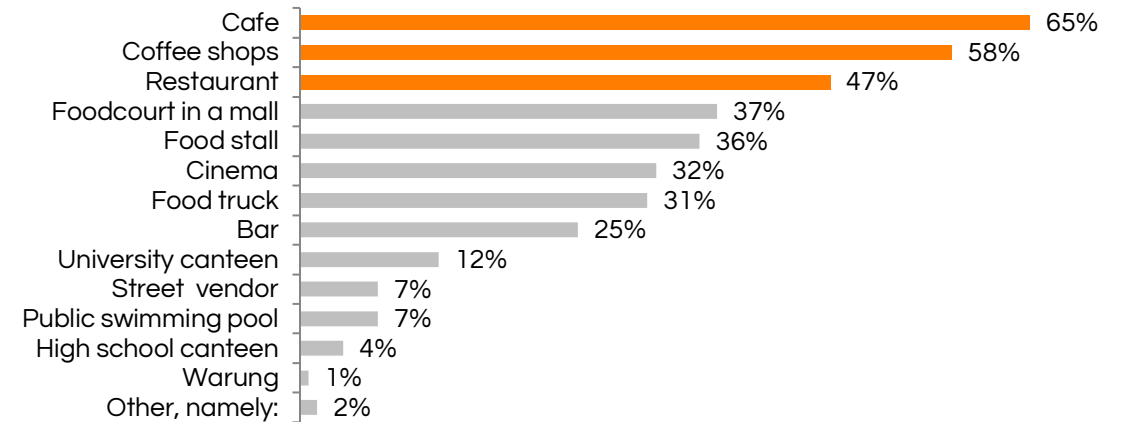
When it comes to prepared bitterballen, the respondents think that a cafe and coffeeshop are the best place where prepared bitterballen should be available. This applies to all expenditure levels of Rp 3 millions and up. Respondents with less than Rp 3 million monthly expenditure more often prefer bitterballen to be available at a food stall (56%).

Of the oldest age group of respondents, 59% likes prepared bitterballen to be available at a restaurant.

While 32% of male respondents would like bitterballen to be available at a bar, compared to 16% of the women.

Place to serve Bitterballen

base = all, n = 129



	Total	Household expenditure				Age			Gender	
		Less than 3 million	Between Rp. 3 and 5 million	Between Rp. 5 and 7.5 million	more than 7.5 million	25 years old or younger	26 to 30 years old	31 years old or older	Man	Woman
Hypermarkets	71%	79%	62%	72%	71%	81%	64%	68%	68%	75%
Super markets	53%	38%	55%	56%	63%	51%	58%	51%	51%	56%
Convenience stores	39%	44%	41%	48%	27%	35%	33%	49%	43%	34%
7/11	11%	9%	10%	12%	12%	9%	20%	2%	13%	8%
Others	3%	0%	7%	0%	5%	0%	2%	7%	4%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	178%	171%	176%	188%	178%	177%	178%	178%	179%	175%
	129	34	29	25	41	43	45	41	68	61

Place to buy

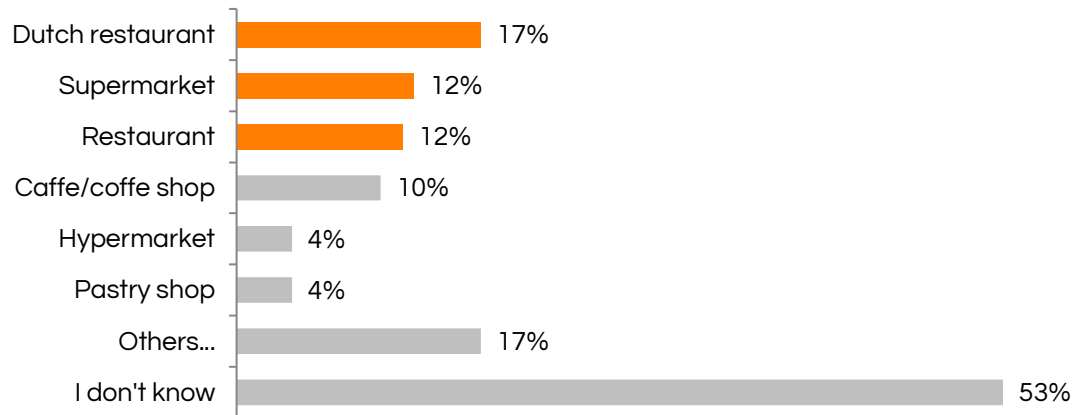
The majority of respondents, especially those who have never tried bitterballen, are not familiar with where they can purchase them. Among the places that were mentioned by respondents were Dutch restaurants and supermarkets, where they can buy bitterballen either in frozen or prepared form.

Regarding the availability of frozen bitterballen, 71% of respondents suggest that hypermarkets should carry them, followed by 53% who prefer supermarkets. However, only 38% of respondents with a monthly expenditure between Rp 3 to 5 million expect frozen bitterballen to be available at supermarkets.

On the other hand, over half of the respondents who have previously eaten bitterballen believe that frozen bitterballen should be available at supermarkets. Furthermore, respondents who reside in Jabodetabek (15%) more frequently prefer frozen bitterballen to be available at 7/11 stores, as opposed to respondents who live outside Jabodetabek (2%).

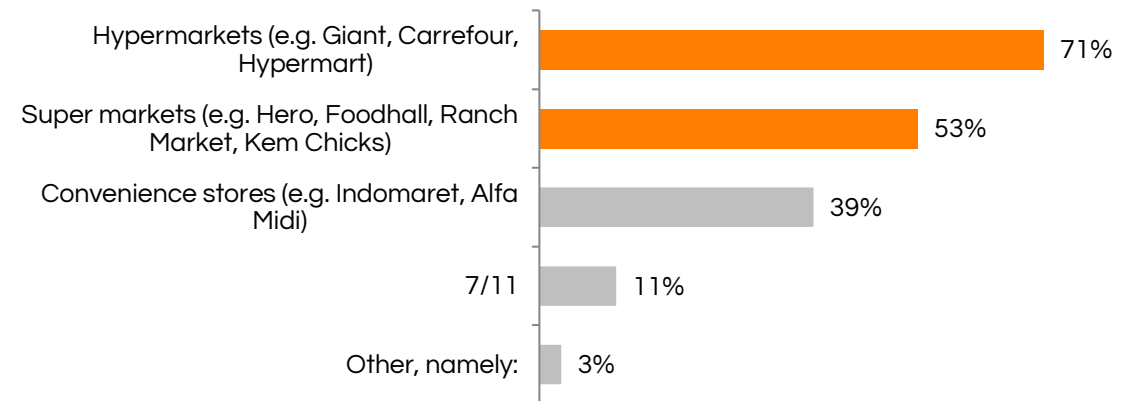
Places to buy Bitterballen

base = all, n = 129



Places to buy frozen Bitterballen

base = all, n = 129



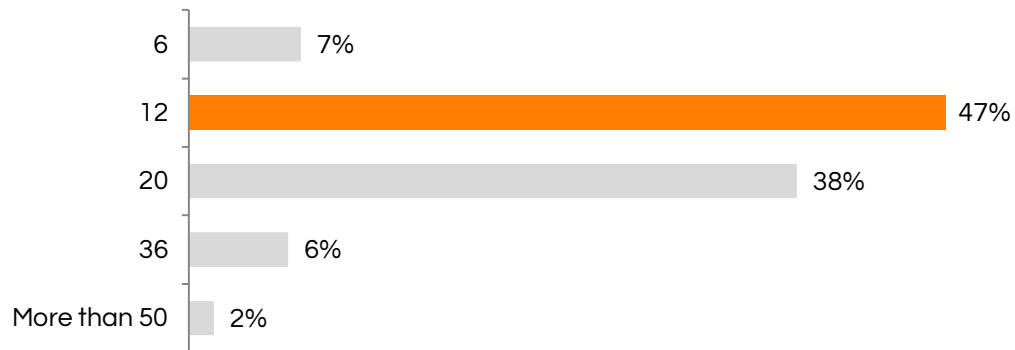
Quantity

When it comes to the quantity of bitterballen, there is a notable difference between the frozen and prepared variants. The majority of respondents prefer that prepared bitterballen be sold in portions of 6 pieces. However, the group of respondents with a monthly expenditure between Rp 3 and 5 million tend to prefer a larger portion size of 10 bitterballen (38%) compared to the overall average.

On the other hand, frozen bitterballen are commonly preferred to be sold in quantities ranging from 12 to 20 pieces. This is a view shared by some respondents in the FGD. In fact, some respondents suggest that a quantity of 20 bitterballen would be ideal, as it would make it easier to share with family and friends.

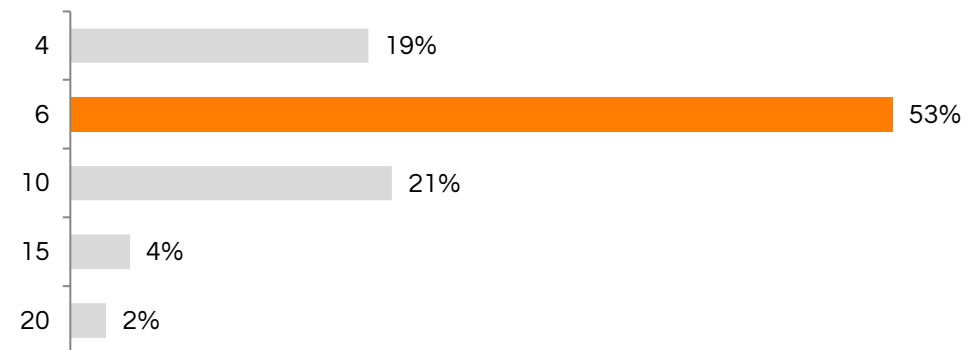
Amount of bitterballen in a frozen package

base = all, n = 129



Amount of bitterballen in a prepared package

base = all, n = 129



Q21_1 If you buy frozen bitterballen in a supermarket, how many bitterballen would you like to have frozen in a package?

Q25_1 If you buy prepared bitterballen in your chosen venues above, how many bitterballen would you like to have prepared?

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Packaging

Besides knowing what price bitterballen should be, who should buy it and what exactly should be bought, it is important to know how to present it.

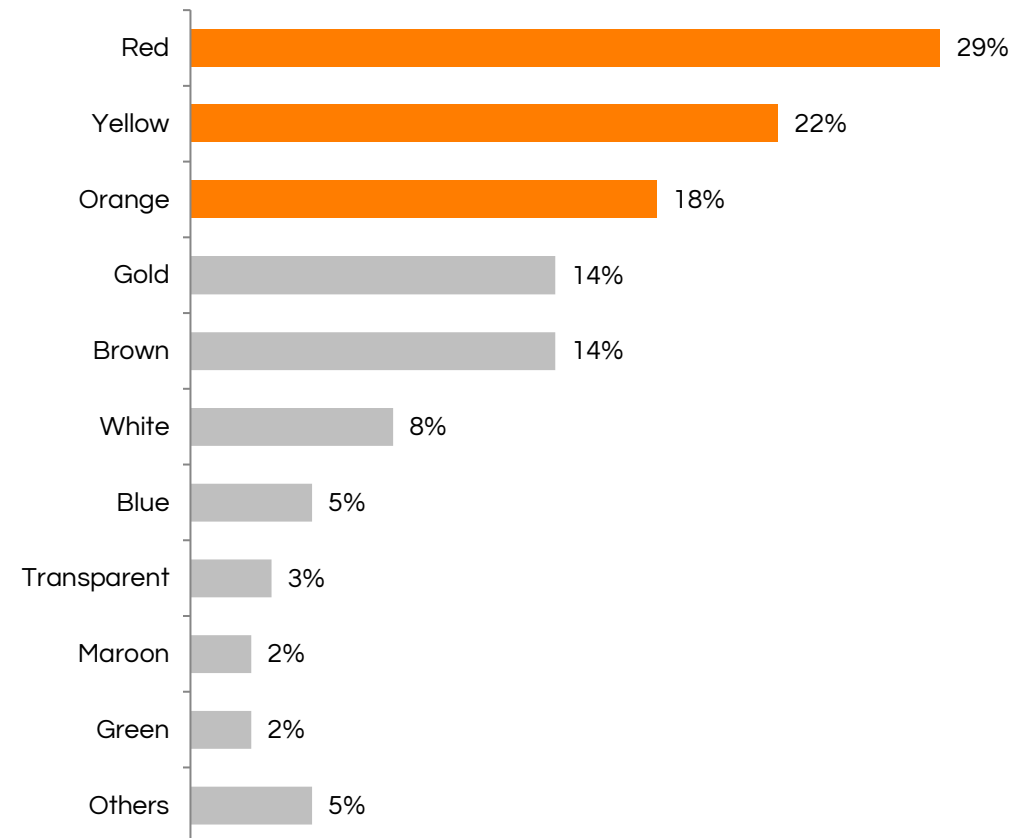
First consumers were asked what color they would prefer for the package. The results show red is the favourite color.

The reason why red is the favourite seems to be because it increases appetite, attracts attention, fits with the color of bitterballen and is a typical color of the country of the origin of the product (Netherlands). The last statement especially applies to orange. Gold is also associated with bitterballen, because it looks luxurious.

Respondents of the FGD consider bitterballen as a luxurious product, but do not see gold as the preferred color.

Color for frozen packaging of Bitterballen

base = all, n = 129



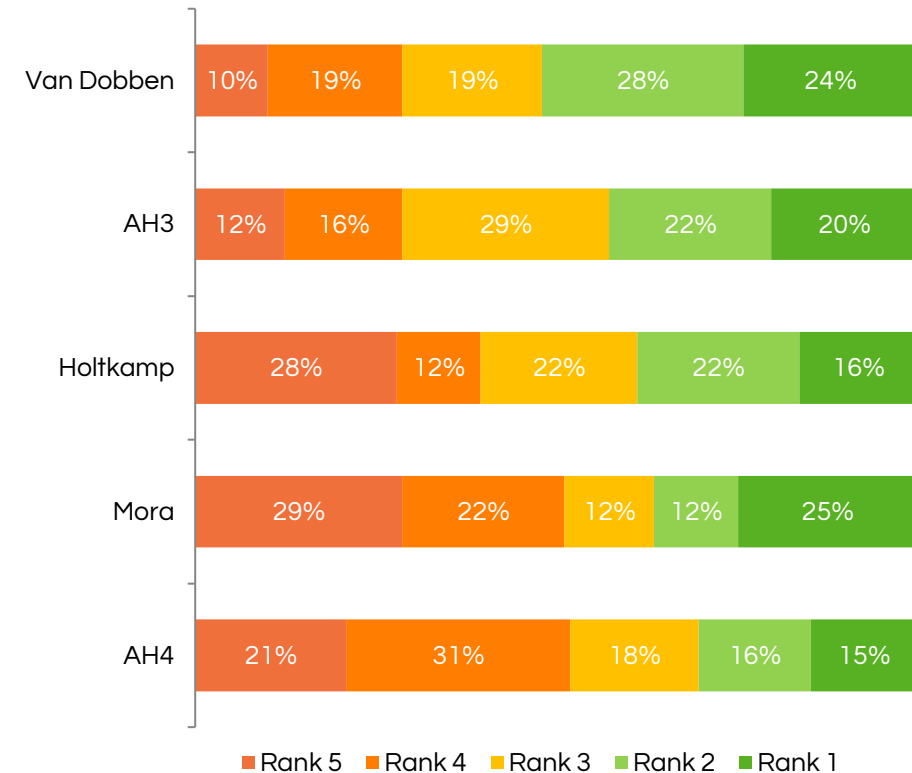
Packaging

Secondly, 5 different types of packaging were asked to be ranked. De package of Van Dobben comes out on top, only those who have not eaten bitterballen before like it less. They opt for the package that overall was ranked last. For the Van Dobben package the colors red and white are used. This coincides with the colors people say they like.

Note that although orange was also one of the favourites, people apparently do not like it when it is dominant as in the Mora package. Brown on the other hand does seem to be liked more while it ranked lower when looking at the choice for colors.

Most attractive packaging

base = all, n = 129

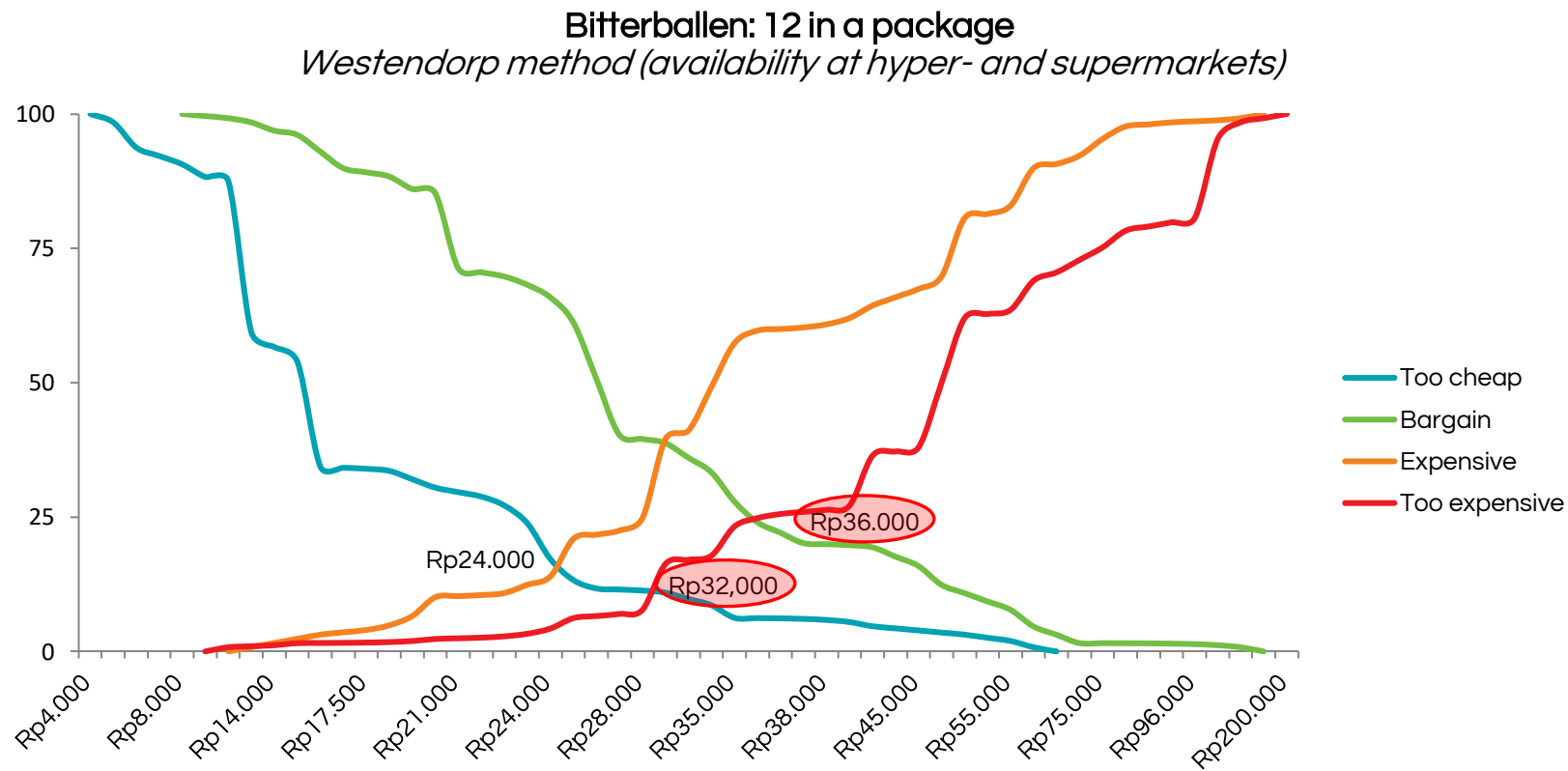


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Price

What is the price range that consumers are willing to pay for Bitterballen if it's sold in hypermarkets and supermarkets? The survey showed that there's a 10% difference in the price range, which is between Rp 24,000 to Rp 36,000. The optimal price point for all respondents is Rp 32,000. Nonetheless, due to Bitterballen being considered a premium product, the ideal price would be Rp 36,000.



Q22_8_1_TEXT What price would be so low that you would feel the quality couldn't be very good?

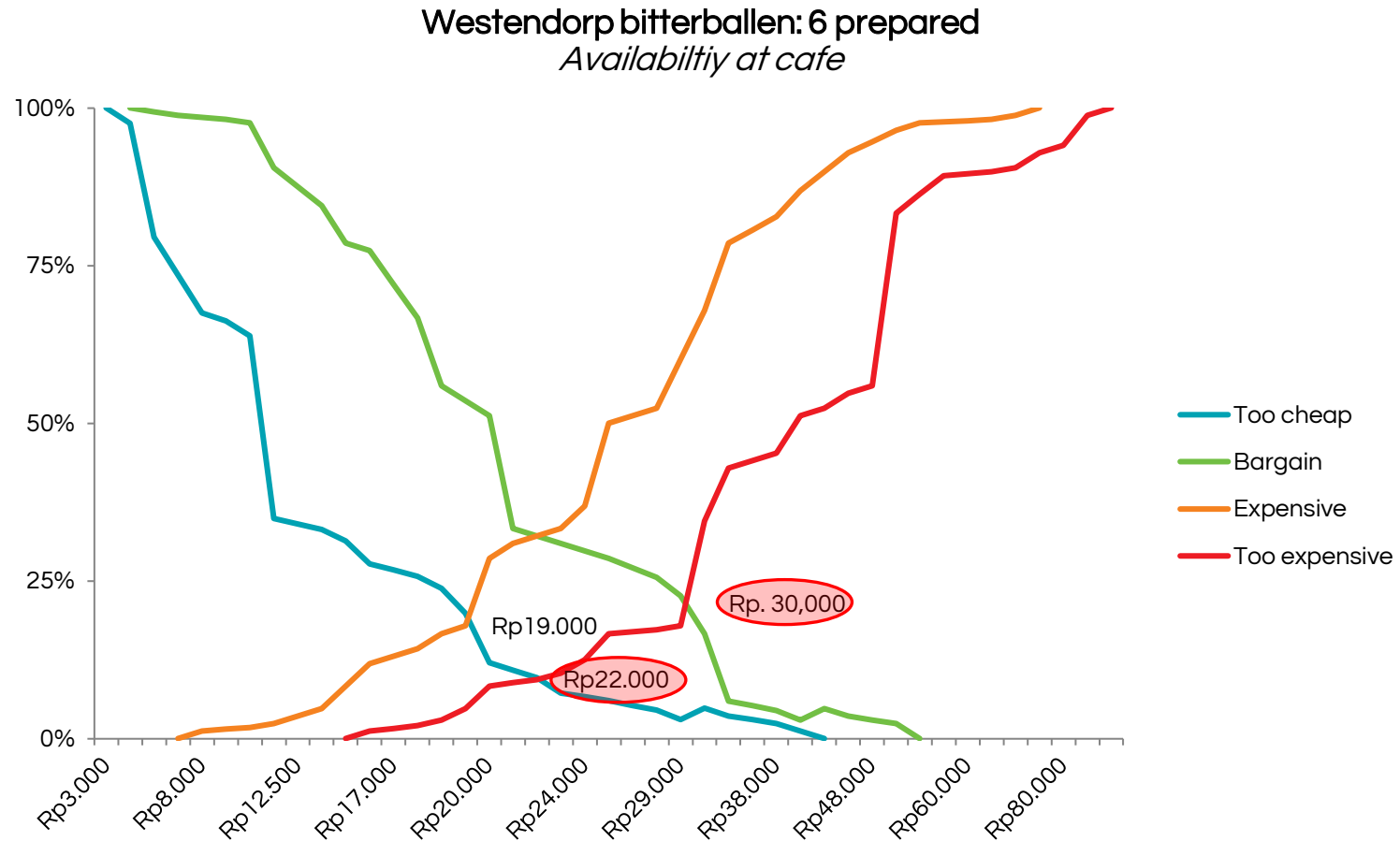
Q22_4_1_TEXT What price would be a bargain; a great buy for the money?

Q22_2_1_TEXT What price would be starting to get expensive, but you would still consider buying it?

Q22_1_1_TEXT What price would be so expensive that you would not consider buying it?

Price

The optimal price point for 6 prepared bitterballen is Rp 22.000. Just like with the frozen bitterballen, it is advised to position the product as a premium one. Which makes it advisable to set the price at Rp. 30.000



Q26_3_1_TEXT What price would be so low that you would feel the quality couldn't be very good?

Q26_4_1_TEXT What price would be a bargain; a great buy for the money?

Q26_2_1_TEXT What price would be starting to get expensive, but you would still consider buying it?

Q26_1_1_TEXT What price would be so expensive that you would not consider buying it?