





Corporate Brand Management II

Brand Development
From „Stöckli Ski“ to
„Stöckli Outdoor Sports“

Lecture of M. Casanova, University of Berne
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Objectives

- Presentation of the last remaining ski producing company in Switzerland
- Evaluation of the success factors
- Future challenges, development
- Recommendations concerning brand management



Motivation



Raphael Hauser

- Skiing, Telemark,
- Climbing
- Mountaineering



Peter Schmidli

- Skiing, Telemark, Snowboard
(Professional Instructor)
- Former Stöckli employee, team member



Caspar Zingg

- Skiing
- Ski Touring
- Mountaineering
- Former Sales Agent of Mountaineering Shop



Research & Sources

Secondary research:

- www.stoeckli.ch, www.stoeckli.ca, www.stoeckli.com
- Casanova, M.; lecture Corporate Brand Management I/II (2009/2010)
- Karobath, D.; Marketagent, Market research study, Brand Value Ski (2007/2010),
- Esch/Tomczak/Kernstock/Langner; Corporate Brand Management, Marken als Anker strategischer Führung von Unternehmen (2006)
- Esch/Bräutigam; Corporate- und Product Brands in die Markenarchitektur integrieren (2006)

Primary research

qualitative interviews with

- Christoph Zumbühl (Head of sales Stöckli, executive member)
- Silvan Niederöst (Product Manager Atomic, Amer Sports – Atomic, Salomon, Suunto...)
- Hans Peter Büttikofer (Head of Education Pool, Skiing ETHZ)
- Johan Anderson (Director Alpine Legends, Swedish Ski Touroperator)
- Andreas Eiselin (Director CEO of Eiselin Sport AG)
- Mario Matter (JO-Trainer, skiinstructor)



Agenda

1. Introduction
2. Stöckli (Facts & Figures)
3. Ski-Market
4. Brand Management of Stöckli
5. Conclusions & Suggestions



Key Figures

- Founded: 1935 by Josef Stöckli
- Legal form: public corporation (run by Stöckli family)
- Production: Malers (LU), 38 employees
- Sales: 45'000-50'000 skis/year
- Turnover: CHF 55 mio (1/3 with skis, 49 mio in 2005)
- market share (skis): 11% in Switzerland
- Employees: 230 (30 apprentices)
- Own subsidiaries: 8 (mainly central locations)
- Own rental centres: 5
- Licensed Retailers: 34 in Switzerland (mainly mountain resorts)
- Export: ~40% of production, 33 nations



Stöckli, the Evolution of a company



1. Introduction

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Stöckli, the Evolution of a company

- 1935** Josef Stöckli produces first skis (50 pairs, wood)
- 1945 first glued ski with different layers of woods with screwed flange
- 1957 first metal ski
- 1965 first compound- and synthetic ski
- 1967** change of distribution strategy (to direct distribution), now also selling of sports goods, trading goods
- 1981 opening of the first Stöckli subsidiary in Sörenberg (today 8)
Ski production in Malters
- 1991 member of “Lichtensteinischen Skipool”;
Marco Büchel (LIE) first WC Athlete



Stöckli, the Evolution of a company

- 1995** change in distribution strategy: Stöckli delivers exclusive to specialised stores
- 1996** launch of Stöckli mountain bike series; fist world cup victory in giant slalom (Urs Kälin)
- 1998** first Stöckli free ride ski “Stormrider”
- 2000** introduction of Stöckli bike team
- 2005** first Twintip Ski “Rotor”
- 2007** legal renaming to Stöckli Swiss Sports AG, new CEO Beni Stöckli Jun.
- 2009** rebranding to “Stöckli Outdoor Sports”
- 2010** Josef Stöckli dies, huge success in ski and bike competitions
5 olympic medals in Vancouver










Product development (Ski)



- Innovative process (2 years in advance min.)
- Mainly hand-crafted
- Labour intensive
- Good quality eg. expensive materials

Product range (Ski)

											
<p>SKIMAGAZIN: 4x Bestnote inkl. VIP-Auszeichnung</p>		<p>SKIMAGAZIN: 5x Bestnote</p>		<p>PLANETSNOW: 2x Testsieger «planetSNOW TPP»</p>		<p>DSV AKTIV: 2x Testsieger «DSV aktiv TIPP»</p>		<p>ALPIN: 1x Testsieger «Alpin Tipp» (Heft 11 2008)</p>		<p>ALPIN: 1x Alpin Testsieger (Heft 11 2009)</p>	
											



Product development (Bike, launch 1996)



- Assembled in Switzerland
- High quality of all parts
- Developed and designed by own engineers
- Fair und transparent
- Service & proficiency



Distribution Strategy

1935 At the beginning: direct to friends

1967 change from sales distribution to direct distribution

1995 Stöckli starts delivering to exclusive stores

Today:

- 13 own stores (shops, rental & service stations)
- 34 selected retails in Switzerland
- 33 export nations (40% of skis go abroad)
- Same prices everywhere in Switzerland



Market development



Market development

General:

- Rental business is growing
(in Switzerland 60% of pop. is skiing < 7 days/year, > 20% are renting skis)
- Production and sales

	Production 2010 (2005)	Sales 2010 (2005)	Difference 2010 (2005)
Worldwide	4.0 mio (5.5 mio)	3.6 mio (4.2 mio)	0.4 mio (1.3 mio)
Switzerland		240 000 (320 000)	

- Rivalry (sales area is growing while demand remains static)



Market research

- How important is skiing/ski touring in the sport market?

Country	Sample Total	Austria	Germany	Switzerland	USA	France
absolute	n=5.337	n=681	n=2.325	n=955	n=865	n=511
Swimming	58,9%	71,7%	58,2%	50,7%	59,8%	59,7%
Cycling/mountain biking	53,3%	64,2%	53,0%	49,5%	43,9%	63,4%
Skiing	42,1%	73,0%	20,6%	53,0%	56,2%	54,6%
Fitness/gymnastics	41,3%	41,6%	45,5%	36,5%	44,4%	25,6%
Jogging	41,1%	41,1%	40,2%	33,2%	49,5%	46,2%
Hiking/mountain climbing	39,9%	49,9%	33,5%	43,4%	49,1%	32,9%
Ice-skating	20,3%	34,8%	15,2%	16,1%	30,5%	14,9%
Cross country ski	16,8%	13,1%	9,4%	7,2%	45,5%	24,5%
Nordic walking	15,5%	16,3%	16,9%	12,6%	17,8%	9,2%
Snowboarding	12,6%	10,4%	5,8%	10,4%	32,0%	17,2%
Ski touring	8,2%	7,5%	4,4%	5,3%	18,0%	14,5%
None of these	7,7%	1,9%	11,4%	7,5%	3,8%	6,1%
Both: Skiing & Ski touring	7,1%	6,8%	3,3%	5,0%	15,4%	15,0%

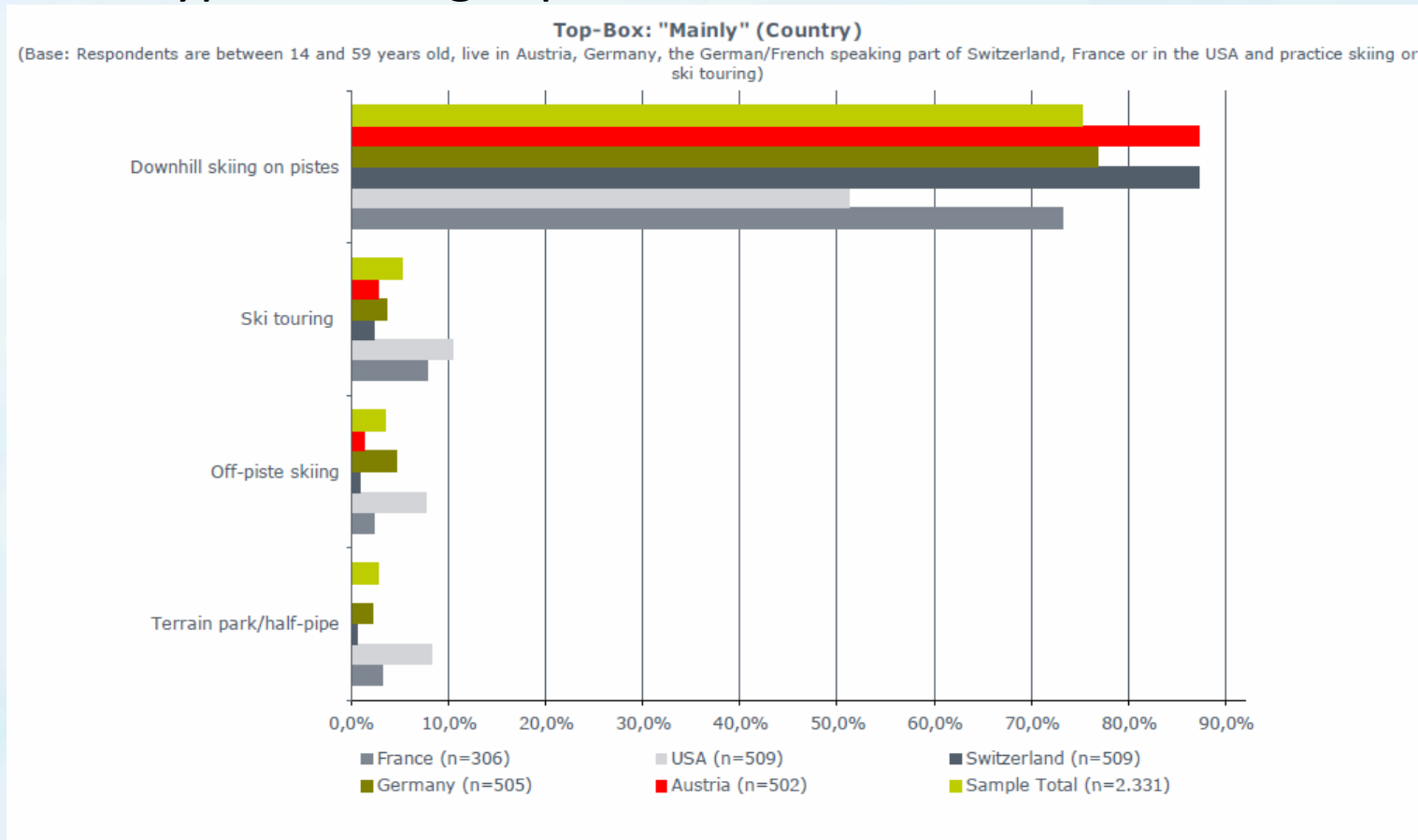
(Base: Respondents are between 14 and 59 years old and live in Austria, Germany, the German/French speaking part of Switzerland, France or in the USA)

Source: Karobath, D.; Marketagent.com, 2010



Market research

What type of skiing is practiced?

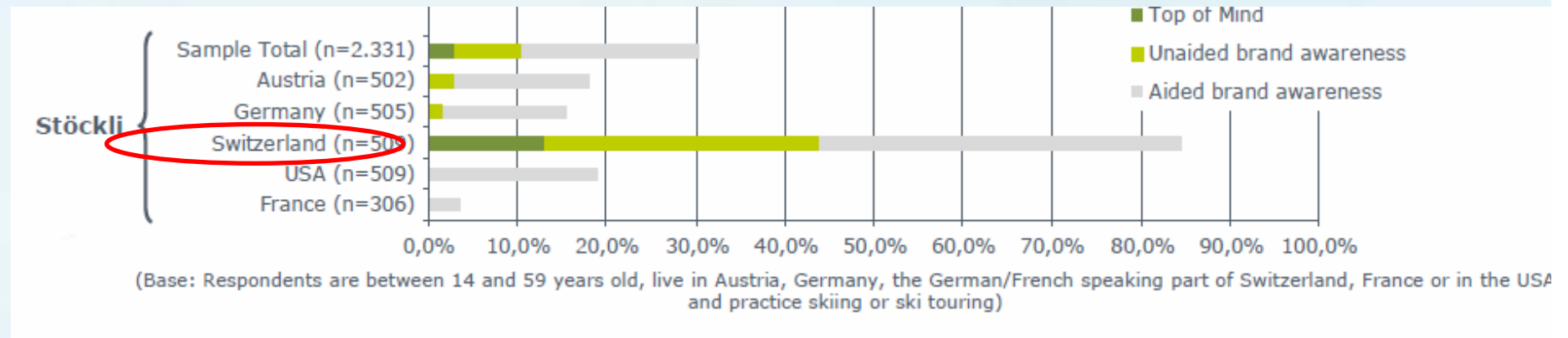


Source: Karobath, D.; Marketagent.com, 2010



Market research

Brand awareness of Stöckli



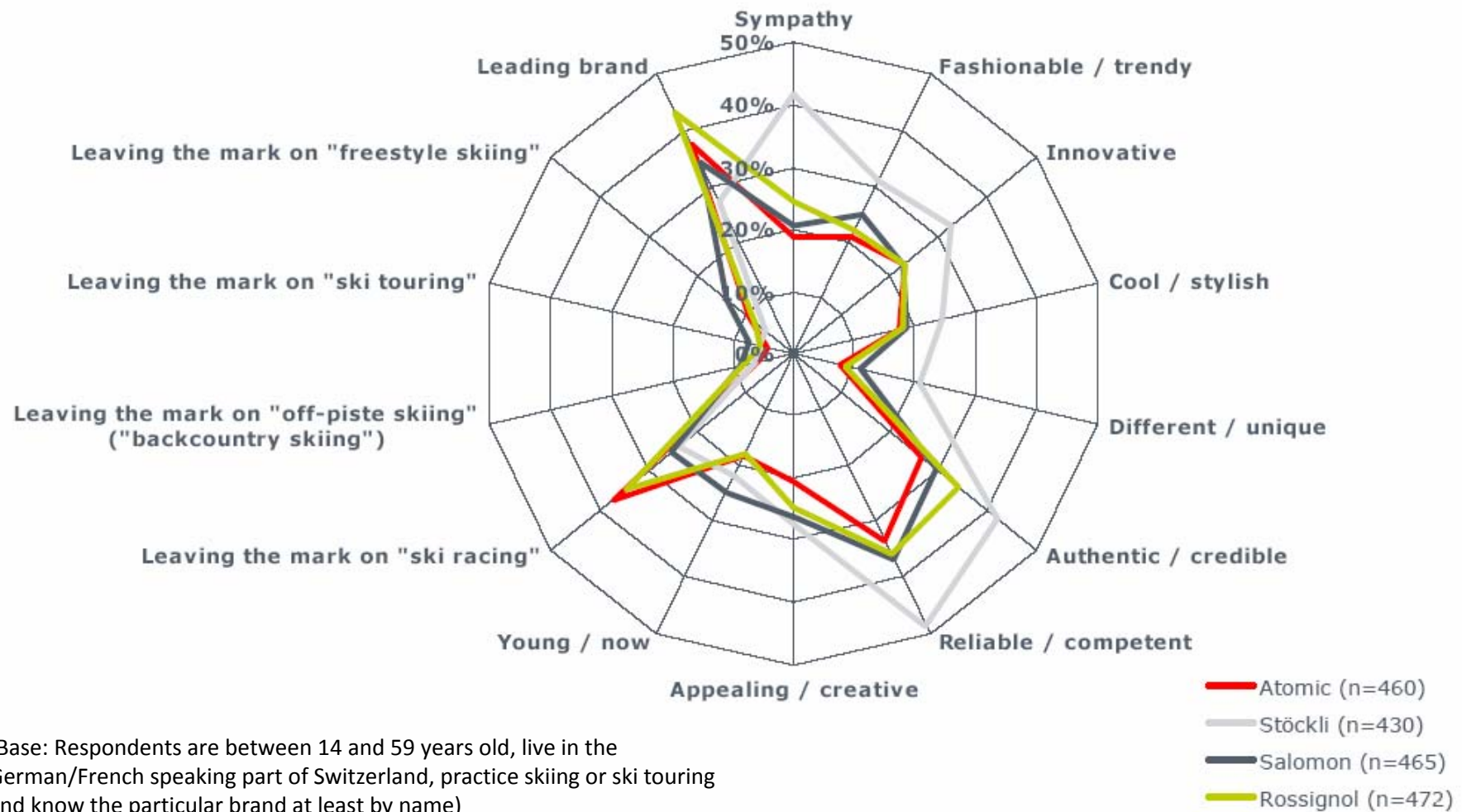
Brand preference, when renting Skis (how many prefer Stöckli ?)

Total	14-19	20-29	30-39	40-49	50-59
5.3%	2.6%	4.0%	7.7%	6.1%	3.3%

Source: Karobath, D.; Marketagent.com, 2010



Image: Top-Boxes (Switzerland)



Source: Karobath, D.; Marketagent.com, 2010



Market research

Stöckli is:

- worldwide among the 5 best liked ski brands
- liked (very) much by 32% (Switzerland 41%)
- seen as trendy by 25% (Switzerland 30%)
- seen as very innovative by 27% (Switzerland 32%)
- seen as different from other ski brand by 20% (Switzerland 21%)
- seen as authentic by 34% (Switzerland 42%)
- seen as reliable/competent by 40% (Switzerland 49%)
- seen as a brand which leaves their mark on racing by 21% (Switzerland 24%)
- seen as a brand which leaves its mark on off-pist skiing by 10% (Switzerland 7%)

Source: Karobath, D.; Marketagent.com, 2010



Stöckli Brand Management



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Stöckli Brand Management

Stöckli success factors:

- Quality of own brand(s)
- Quality of retail goods
- Relation to the customer
- Qualified employees

Target:

- Keep winter stable, grow in summer
- Stöckli implicates “sport”, sport “implicates” Stöckli

Target group:

- Outdoor affine people (28 to 55 year)



Brand Perception

Statements of professionals

Stöckli is a high quality brand and well known for skis and bikes. The awareness grow because of several successes in competitions. Young people however often prefer freestyle ski from Movement, Salomon or K2.

(Mario Matter, JO trainer, ski instructor, Laax and Davos)

Stöckli is typically Swiss. Very good quality but a kind of boring. They managed to grow from a ski producer to a outdoor provider. Movements to become more “cool” are critical as well as to big enlargement in their assortment. They should focus on their main values.

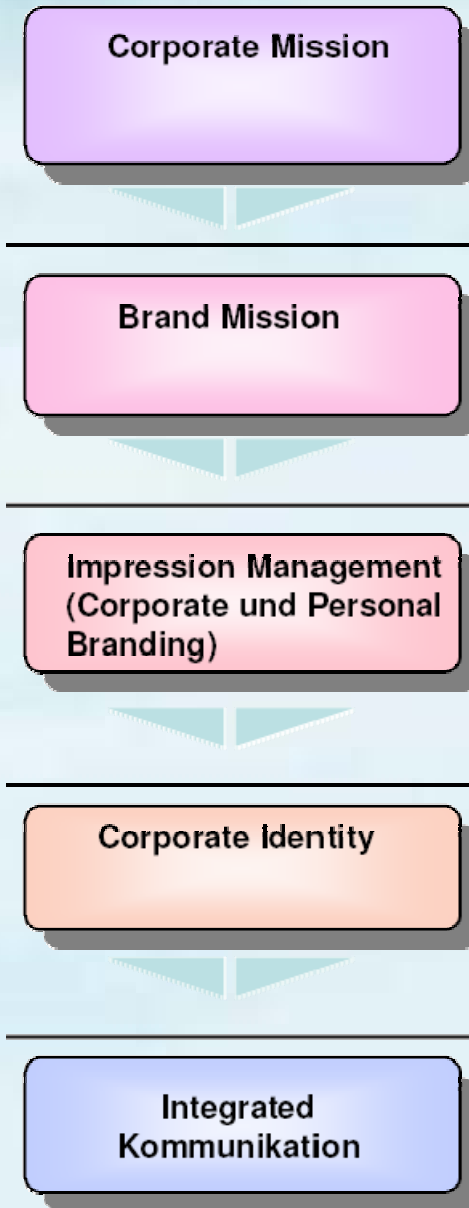
(Andreas Eiselin, CEO of Eiselin Sport AG, Luzern)



Brand Perception



Stöckli Brand Management



Corporate Mission:

(moving different) "bewegend anders,,

- The high quality sports gear of Stöckli allows people to be active and improve in their sports
- Not only selling but through passion and experience truly inspire people to run a „moving“ life



Stöckli Brand Mission



Stöckli Brand Mission

So sehen Sieger aus
Fabienne Suter und unsere Testsieger 2009/10

Stöckli Magazine, VIP, ALPINTIPP, ALPIN TEST SIEGER

WOLHUSEN | HEIMBERG | WÄDENSWIL | WIL/SG | ZUCHWIL | ST-LÉGER S/VEVEY | KLOTEN | ITTIGEN / BERN | SÖRENBERG | MELCHSEE-FRUTT | ENGELBERG | HOCH-YBRIG SEEBLI | HOCH-YBRIG LAUCHEREN

STÖCKLI
outdoor sports

www.stoeckli.ch



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Stöckli Brand Mission



Impression Management



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Impression Management



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Impression Management



Corporate Identity



2009/2010

+ STÖCKLI
the swiss ski

www.stoeckli.ch



SOMMER 2010

+ STÖCKLI
outdoor sports
75 JAHRE
1935-2010

www.stoeckli.ch

WOLHUSEN | HEIMBERG | WÄDENSWIL | WIL/SG | ZUCHWIL | ST-LÉGIER S/VEVEY | KLOTEN | ITTIGEN/BERN **NEU** | SÖRENBERG | ENGELBERG

+ STÖCKLI
outdoor sports

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Corporate Identity



75 YEARS
1935-2010



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STÖCKLI OUTDOOR SPORTS

- SKIS
- BIKE
- PRODUCTS
- TEAM SPORT
- ADVANTAGES
- NEWS
- RACING
- RENTAL
- COMPANY



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Corporate Identity



**15% RABATT
BIS 31.12.09**

Winterzeit isch Stöcklizeit!
Wir machen Sie pisten-
tauglich; dazu gibt's
15% Rabatt. Ein-
lösbar in unserer
Filiale am
Balsberg.

**50%
RABATT**

auf Ski- oder
Snowboardservice
(alle Marken).
Einlösbar bis 31.12.09 in
unserer Filiale am Balsberg.

(Coupon ist nicht kumulierbar. Gilt nicht auf reduzierte Artikel.)



DS-5.9M
Shimano SLX
verfügbare Grössen: 17", 19", 21"
~~CHF 2'990.-~~
nur CHF **2'399.-**

DS-9.9 CARBON
Shimano XT / Sram X9 /
DT Swiss Dämpfer und Lauftrad
verfügbare Grössen: 17", 19"
~~CHF 5'600.-~~
nur CHF **4'499.-**

DS-7.9L
Shimano XT / Sram X9
verfügbare Grössen: 15", 17"
~~CHF 4'100.-~~
nur CHF **3'199.-**

www.stoeckli.ch

Angabe gültig solange Vorrat.



Integrated Communications

- Service orientation is key
- Distribution channels (act as ambassadors)
- Long term relationship is more important than a quick sell
- Regular information of customer
- Presence through subsidiaries and events
- Testimonials
- Classical Promotion

Bruno Kern

MARKEN-BOTSCHAFTER
VON STÖCKLI OUTDOOR SPORTS



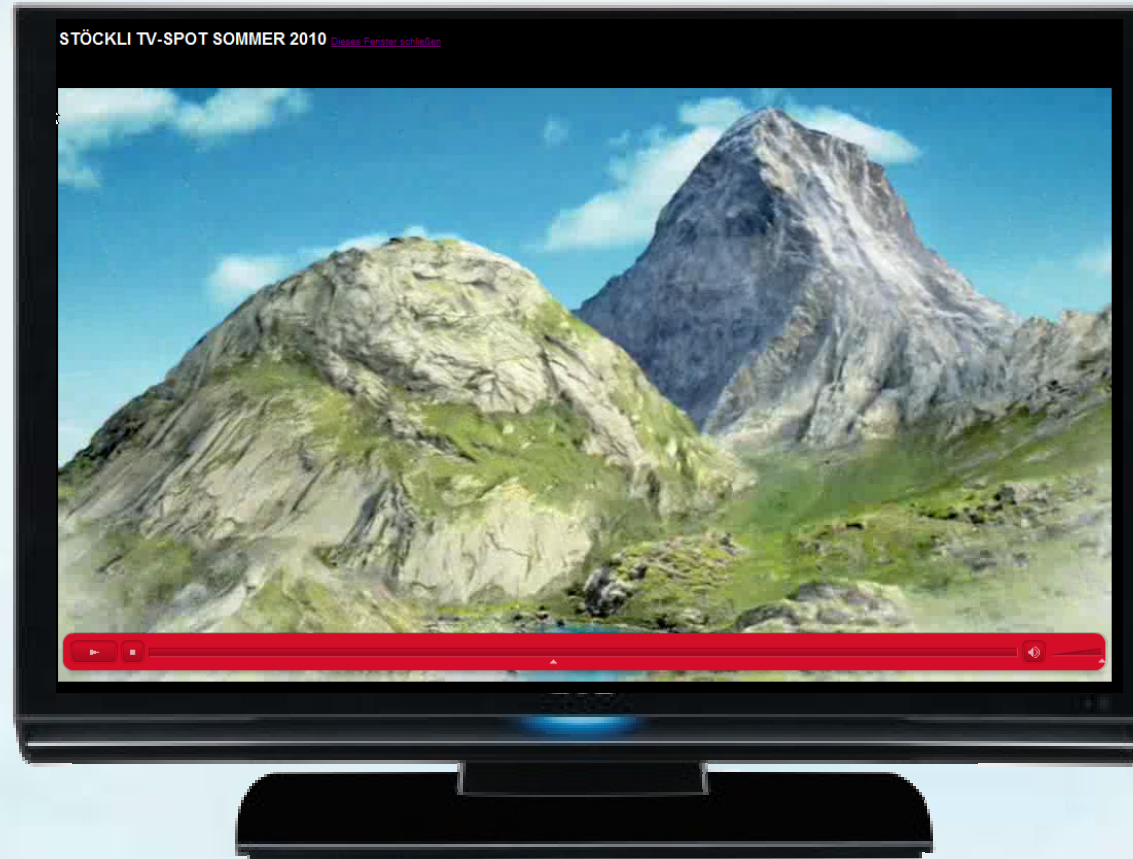
Neben dem Weltmeistertitel 1997 in Sestriere und dem dritten Rang an den Olympischen Winterspielen 2006 in Turin (beide Male in der Abfahrt) hat Bruno Kern weitere grosse Erfolge im Weltcup und an Weltmeisterschaften feiern dürfen.

Nach seinem Rücktritt vom Profisport im Jahre 2007 hat er ebenso erfolgreich seine zweite berufliche Laufbahn gestartet. Als Kamerafahrer des Schweizer Fernsehens ist er an Schweizer Weltcup-Rennen im Einsatz. Auch karitative Engagements und Berater-Funktionen sind Teile von Bruno Kerns Leben nach dem Profisport.

Der Outdoor-Spezialist Stöckli freut sich über die Zusammenarbeit mit Bruno Kern. Der ehemalige Weltcup-Fahrer Bruno Kern wird als Botschafter für die Schweizer Marke auf Skipiste und Biketrail unterwegs sein!

STÖCKLI
outdoor sports

Integrated Communications



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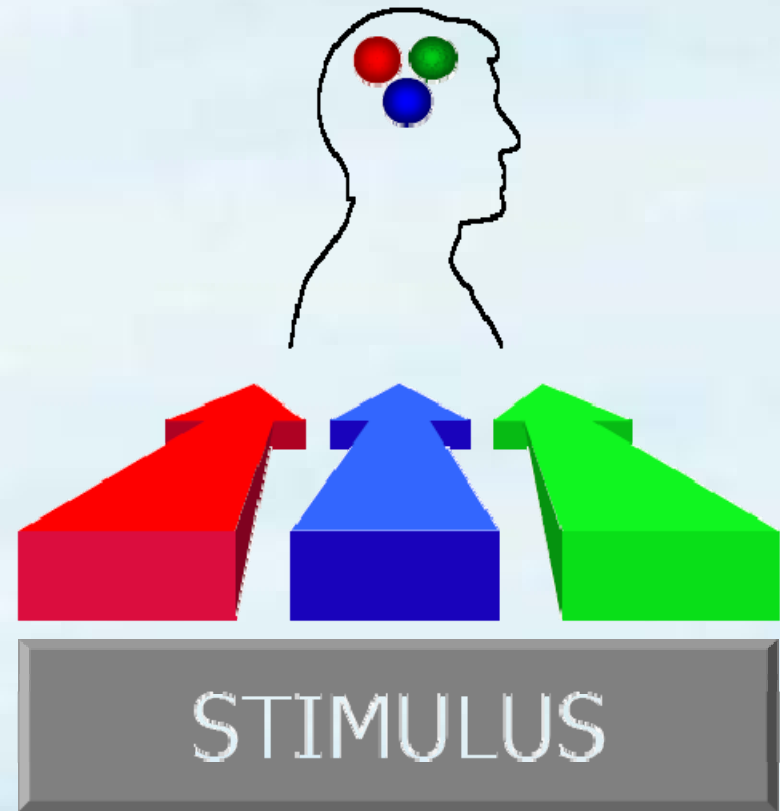
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The limbic cube – applied to Stöckli

„The feeling of desiring something only comes after the limbic system has long decided what ought to be done. The quintessence is that this system has the final decision about whether we do something or not.“

Prof. Dr. Dr. Gerhard Roth, Neurobiologist at the University of Bremen, Magazin für Wissenschaft und Kultur 01/1999



Source: Branding Institute, Casanova, 2007

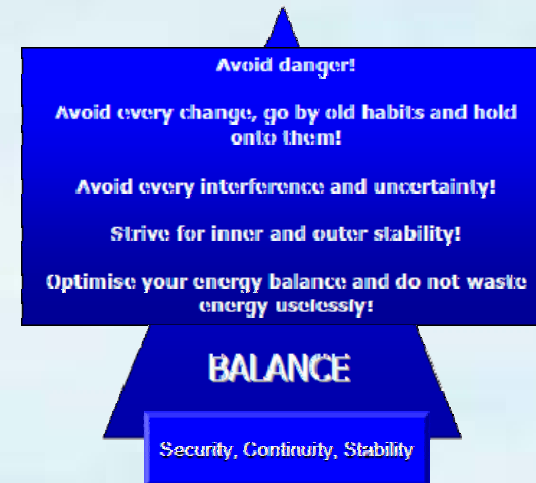
The limbic cube – applied to Stöckli (Balance)

Actual status

- Productline Laser
- No major changes in the last few years
- High performance ski
- Typical swiss values

Suggestion

- Focus strongly on Stöckli brand
- Communicate stöckli swiss ski in this field



Source: Branding Institute, Casanova, 2007



The limbic cube – applied to Stöckli (Dominance)

- Freeride = worldwide growing market
- Off-piste means “freedom”

Productline Stormrider

- Attributes:
 - Speed
 - Powder
 - Independence
 - Untouched snow

Suggestion

- Use of endorsed branding
- Move the brand “Stormrider” away from stöckli because of the actual image



Source: Branding Institute, Casanova, 2007



The limbic cube – applied to Stöckli (Stimulance)

- (so far?) Small market
- High Image Factor among opinion leaders
- Media Presence (Trendsport TV)
- Interesting for spillover of freeride segment

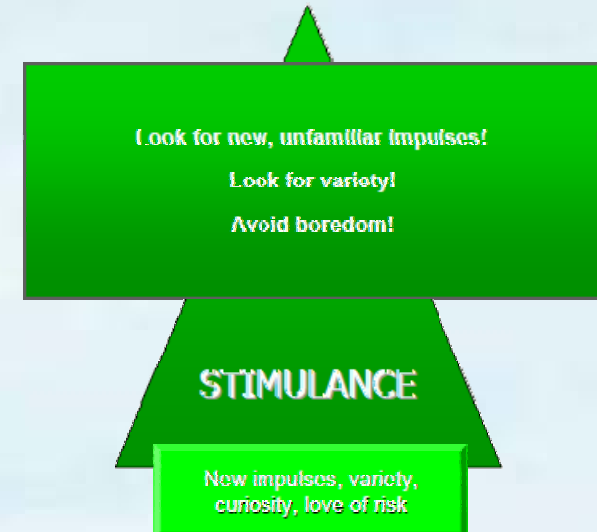
Product line: Rotor

Attitudes:

- Park, Pipe, Contests
- Yourself
- Trendy
- new tricks

Suggestion:

- Endorsed branding „Rotor“
- Improve brand image in this segment
- high quality niche player



Source: Branding Institute, Casanova, 2007



Conclusion & Suggestions



Conclusion & Suggestions



Conclusion & Suggestions



Conclusion & Suggestions

- No usage of WEB 2.0 in the actual meaning → Two way communication instead of just announcing the success
- Obviously no internet marketing efforts
- Especially for the markets UK, USA and Germany big potential

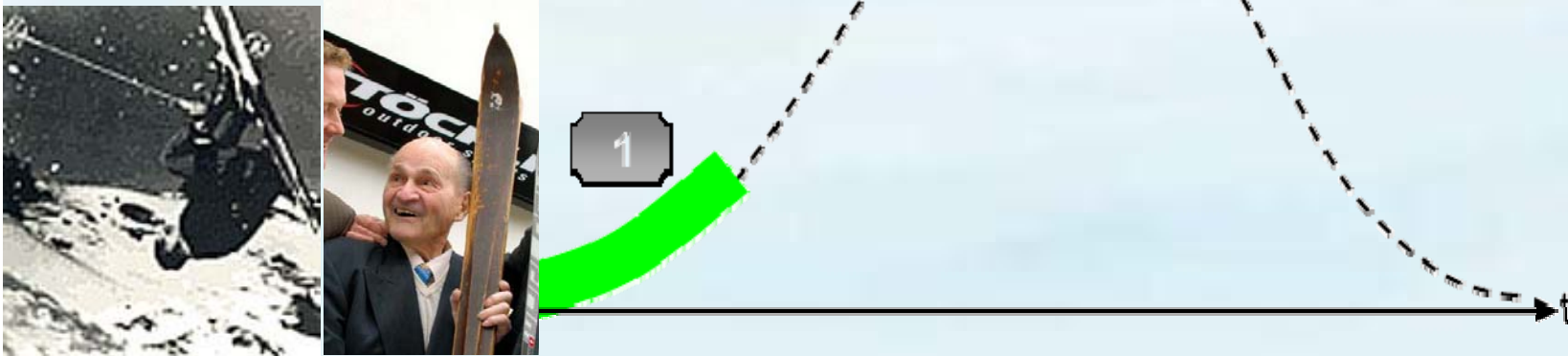
Main advice:

- Usage for idea generation, get in touch with the customer, Talk to them and they will talk to you



STÖCKLI
outdoor sports

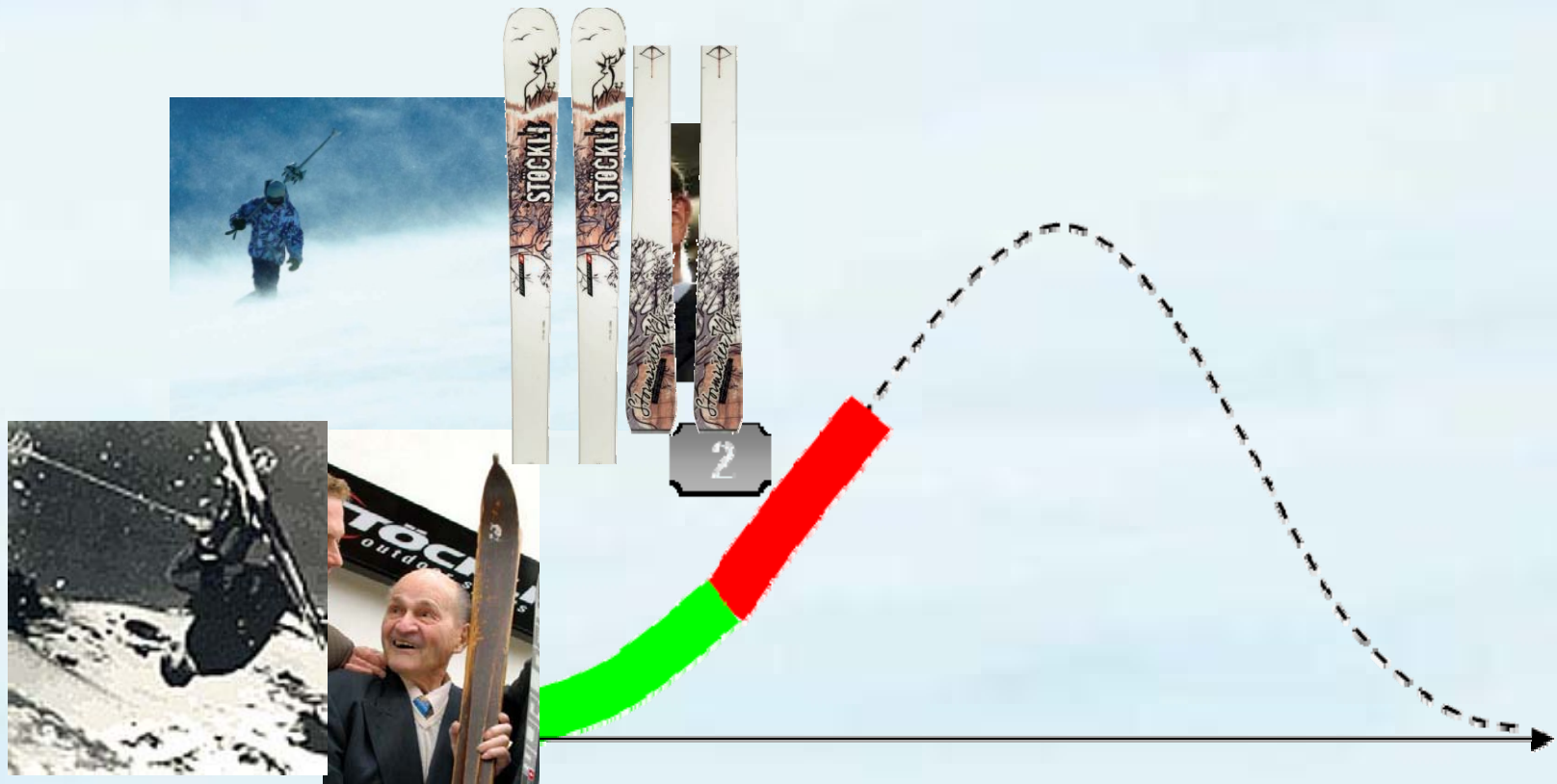
Conclusion & Suggestions



Source: Branding Institute, Casanova, 2007



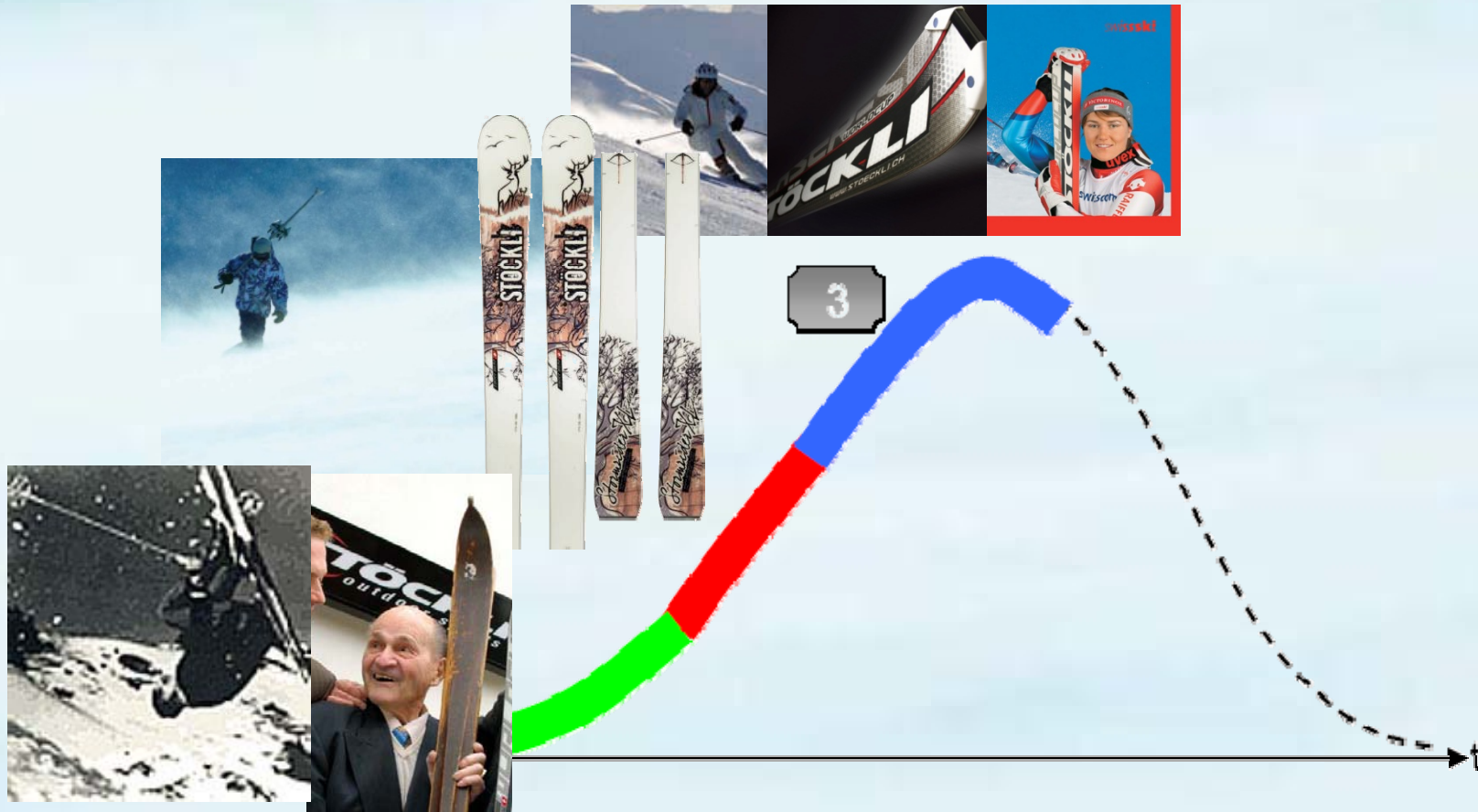
Conclusion & Suggestions



Source: Branding Institute, Casanova, 2007



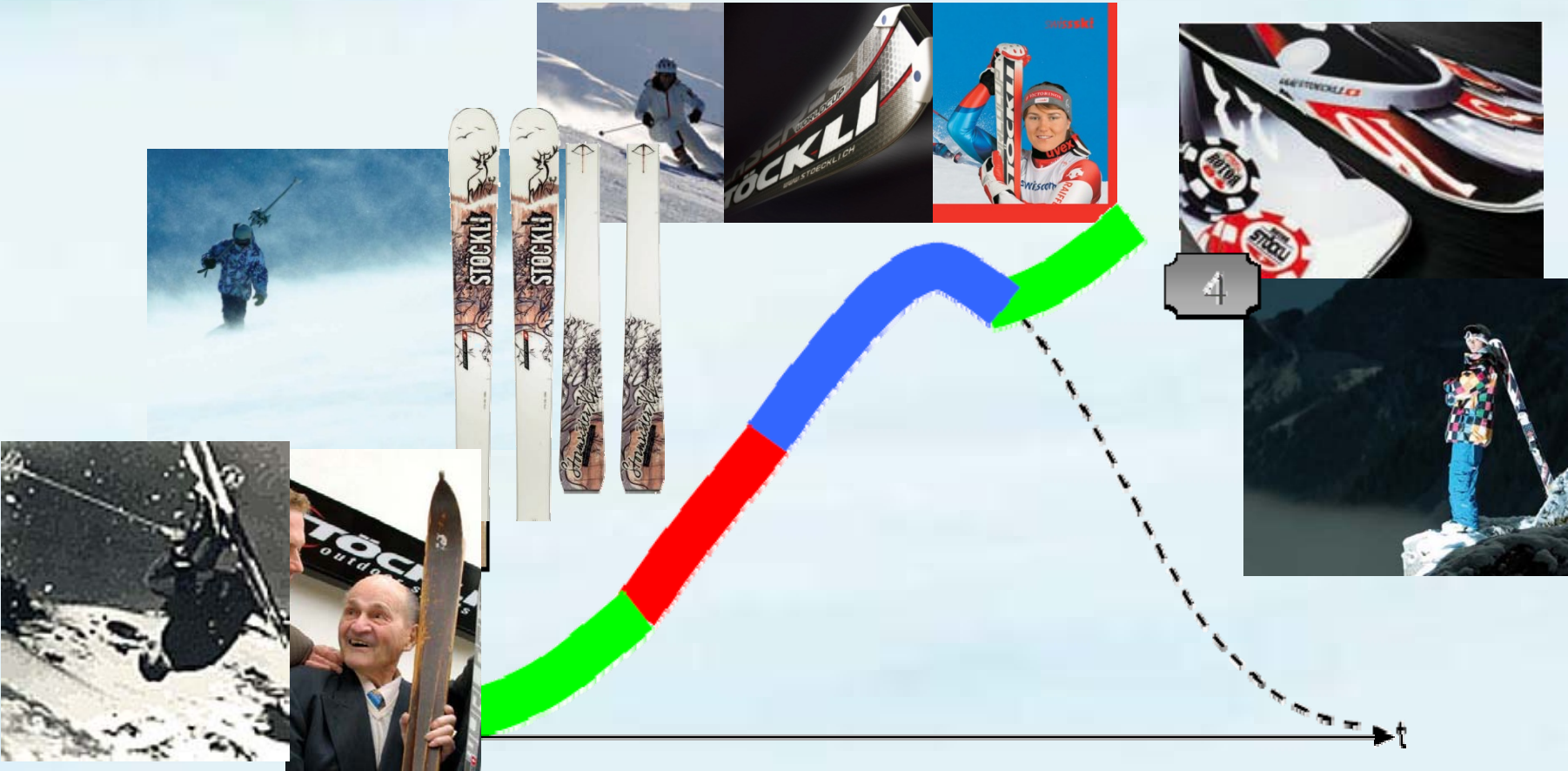
Conclusion & Suggestions



Source: Branding Institute, Casanova, 2007



Conclusion & Suggestions



Source: Branding Institute, Casanova, 2007



Conclusion & Suggestions





Thank you for
your attention

Q&A