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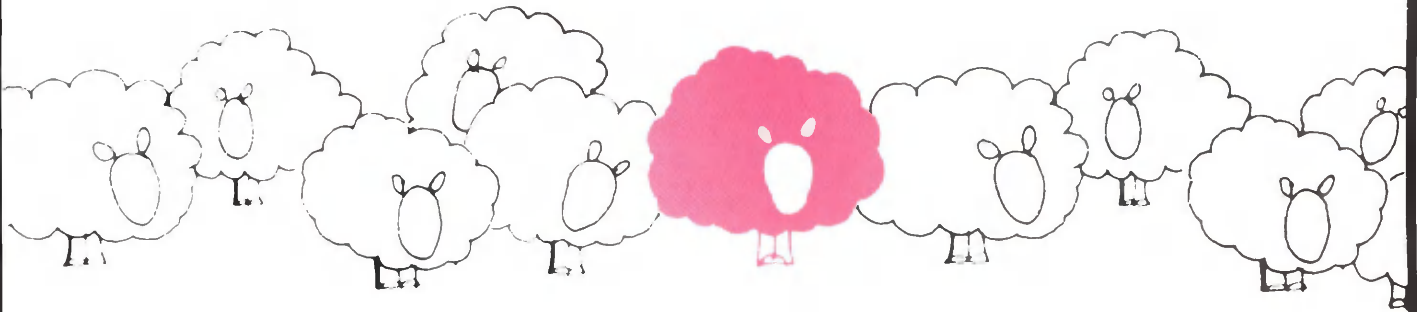


Packaging research issue

October, 1989

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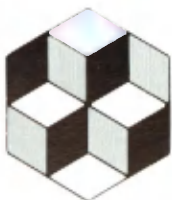
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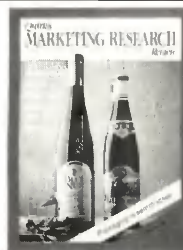


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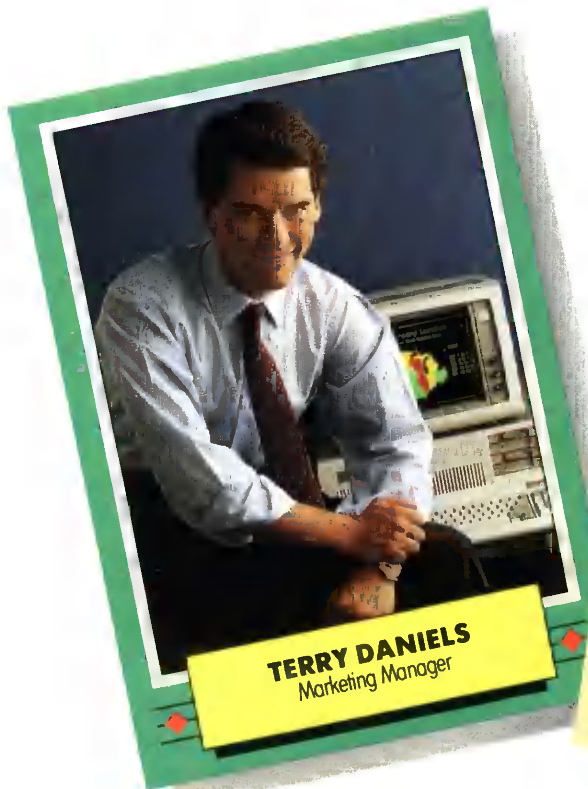
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# Changing with the times

by Joseph Rydholm  
managing editor

## *Research encourages a comprehensive re-design of Blue Nun packaging*

**T**hough it remains one of the most popular brand name wines in the world, Blue Nun has suffered from declining U.S. sales in recent years. Many of the American consumers who embraced the popular German *liebfraumilch* and other brand name wines during the 70s and early 80s have turned their attention to the rapidly expanding California varietal category.

"We lost a lot of business, not because people dislike the taste of our wine, but because there are more fashionable wine products to drink," says Ben Stone, vice president, product group director for Schieffelin & Somerset Co., the U.S. importer/distributor of Blue Nun.

One of the main problems, Stone says, is that as the California varietals (i.e. white zinfandel, chardonnay) have come into vogue, image-conscious Blue Nun drinkers no longer feel that ordering the German wine is a sure indication that they are knowledgeable about wine.

"I think a wine consumer's big fear is sounding uninformed when choosing a wine. Brands like Blue Nun have historically done well because a person can buy a bottle and know that he or she is getting a quality, well-crafted wine. But I think the branded wine business has changed, and now people will go into a liquor store or a restaurant and feel the same way



about ordering a California chardonnay—that 'chardonnay' has a magic ring to it, and that by ordering a Glen Ellen chardonnay they can sound like they have this wine thing pretty buttoned up," he says.

### **Label outdated**

Preliminary research showed that the wine's image problem carried over into other areas. For example, some Blue Nun drinkers said that though they still enjoyed the wine themselves, they no longer felt comfortable serving it to dinner guests or giving it as a gift because they felt the label was garish and outdated. "They would rather bring some other wine that made more of a statement about them as a fashionable, knowledgeable person," Stone says.

Blue Nun's status as an affordable, high-quality wine was further undermined by the new level of sophistication that the California varietals brought to wine packaging, which meant that a host of inexpensive, well-packaged wines began vying for shelf space and market share.

"These are inexpensive, almost entry-level wines that, on your table or when you give them as a gift, look as good as those that are much more expensive. The California wines offer very contemporary packaging that makes it difficult to tell the difference between a \$3.99 bottle and a \$13.99 bottle of California chardonnay," Stone says.

After numerous blind taste tests (in which Blue Nun consistently outperformed varietals such as chardonnays and zinfandels) confirmed that the problem lay with the Blue Nun package and not its contents, a re-design was deemed in order.

"It was a major decision, and a lot of heart searching went on before we did it. We decided to first do some extensive research to make sure that it wasn't a vocal minority (of Blue Nun drinkers)





1929



1933



1945



1957



1965



1980



1984

that felt this way. We wanted to make sure that a packaging change would ultimately help us out," Stone says.

Thus began an international effort which drew together Schieffelin & Somerset, Peter Sichel of H. Sichel Sohne (whose family-run firm makes Blue Nun), designers in Germany and the UK, and Mittleman/Robinson Design Associates of New York.

### Sold in casks

Initially, the wine which came to be known as Blue Nun was sold in casks as a house wine under the name of H. Sichel Sohne, to hotels, restaurants and wine merchants, who then bottled it using their own labels. Customers who asked for labels from the wine-maker were given an old-fashioned design created some 60 years earlier.

In the late 1920's, after customers requested a more modern label, H. Sichel Sohne commissioned a printer in Mainz who came up with a new design depicting nuns dressed in brown habits against a grey background. Though the only blue in the label was in the sky, the wine began to be known—and sold—as Blue Nun Label wine. It wasn't until after trade resumed following World War II that the nuns were finally clad in the blue habits that would remain their trademark for the next 40 years.

### Goal was clear

Stone says that to avoid stifling their creativity, the firms chosen to work on the re-design weren't given a great deal of explicit direction. But the goal of the project was clear: to come up with packaging that would capture the attention of the buyers of California varietals without alienating the loyal Blue Nun consumers.

"This is that tightrope that we always have to walk," says Frederick Mittleman, creative director, Mittleman/Robinson Design. "You don't want to lose your

present customers, but at the same time you want to attract new people who have never tried the brand. Advertising can help, and sales promotion can help, but it's what people see on the shelf that really decides. Packaging is the final silent salesman."

Mittleman says that a wide array of labels was created, ranging from those done in a heavily illustrated style similar to previous labels to those with a more contemporary look and feel.



In preliminary research, the old label (top) was perceived as outdated and garish. In subsequent focus groups and shelf tests, respondents said they felt the new label (bottom) and bottle design made Blue Nun more suitable for gift-giving and displaying on the dinner table.

### Focus groups

Armed with eight package variations, Schieffelin & Somerset held extensive focus groups with current and past Blue Nun users and competitive brand purchasers to pare down the number of possible choices. Initially, the participants were brought in to discuss their perceptions of wine and to talk about the wines they currently drank. They gave opinions on the old Blue Nun packaging and on that of several competitors, then they were shown the new Blue Nun package prototypes.

Participants were asked to place the different packages on a grid with horizontal and vertical axes, one indicating a price range from inexpensive to expensive, the other a taste from sweet to dry, to show what they felt each package did to their perception of the brand.

### Shelf tests

With the number of choices reduced to three, the research moved on to a series of simulated store shelf tests with over 1200 current, past, and non-Blue Nun users, who were asked make shelf selections in order of preference from a choice of Blue Nun and nine competitors. The competitive packages remained the same while the various Blue Nun packages were alternated in and out. After each individual made their selection, they were asked a battery of image questions on a one-on-one basis to find out more about their feelings on the package and what it conveyed to them.

As a safeguard against alienating current users with the re-design, Stone says that roughly half of the respondents were current Blue Nun drinkers. "Our biggest fear was making a package change that would appeal only to past users or non-users and that the current Blue Nun user would say 'Hey, they've changed my wine. I'm not going to drink it anymore.'"

continued on p. 27

# Using tachistoscope, semantic differential and preference tests in package design assessment

by Donald Morich

*Editor's note: The following article is taken from the book "Handbook of Package Design Research," edited by Walter Stern. Copyright 1981 John Wiley & Sons, Inc. Reprinted by permission of the publisher. Donald Morich is principal of Consumer and Professional Research, Inc.*

A consumer package normally goes through many tests before it gets out of the design laboratory and onto the production line. Much time, energy, and money is spent in completing routine tests to insure the package physically works for the product (i.e. it holds the exact amount of product required, it protects the product itself up to acceptable standards, it withstands certain strains and stresses, and it dispenses the product without difficulty). However, once the label is fixed to the package, further testing is often bypassed—the package is technically satisfactory and it looks “finished.”

It's the unusual company that takes the next step and consumer tests its finished or final stage packages. More often, a label design is judgmentally selected and the product/package is produced in quantity. Reasons generally cited for skipping the consumer test phase fall into one of these categories:

- There's no time. The people who have created the package have finished their job and the marketing group is anxious to get it to the marketplace.
- There's no money. Thousands and thousands have already been spent on package/label development.
- The package will work. It's mechanically well-constructed and the label was designed to tight specifications concerning the precise way in which the product will be positioned to the consumer.
- Label design is a creative endeavor. The design will influence consumers both consciously and unconsciously and therefore its total effect will be impossible to measure.

There is, of course, truth in all of these statements. But to use them as excuses for not undertaking a consumer research program is to underestimate the contribution a well-planned and well-executed consumer test can make to the package/label design development process. This final, consumer evaluation step should be part of this process, not an adjunct to it.

At the “moment of truth,” that point at which the consumer finally decides whether or not to purchase the product, the

package is the summation of the communications efforts the company has made on behalf of the product. It's at this point of sale that the package must accomplish several important things:

1. It must tell the prospective buyer what the product is called; it must communicate the brand name quickly and clearly.
2. It must tell the prospective buyer what the product is and what it does—the person looking at the package should be able to note quickly what type of product it is and what it's for (a non-aerosol spray antiperspirant that keeps you dry). It's also important to communicate clearly the ways in which this product is different/better than others the prospective customer may be considering—in other words, the package must “sell” itself to the consumer. These objectives are often accompanied by graphic treatment/design elements as well as words.
3. It must inform the prospective buyer how nutritious the product is, what ingredients it contains, and, in some cases, what each ingredient's purpose it.
4. The package carries the Universal Product Code, which tells the consumer nothing, and a price sticker or stamp which tells the consumers what they really want to know.

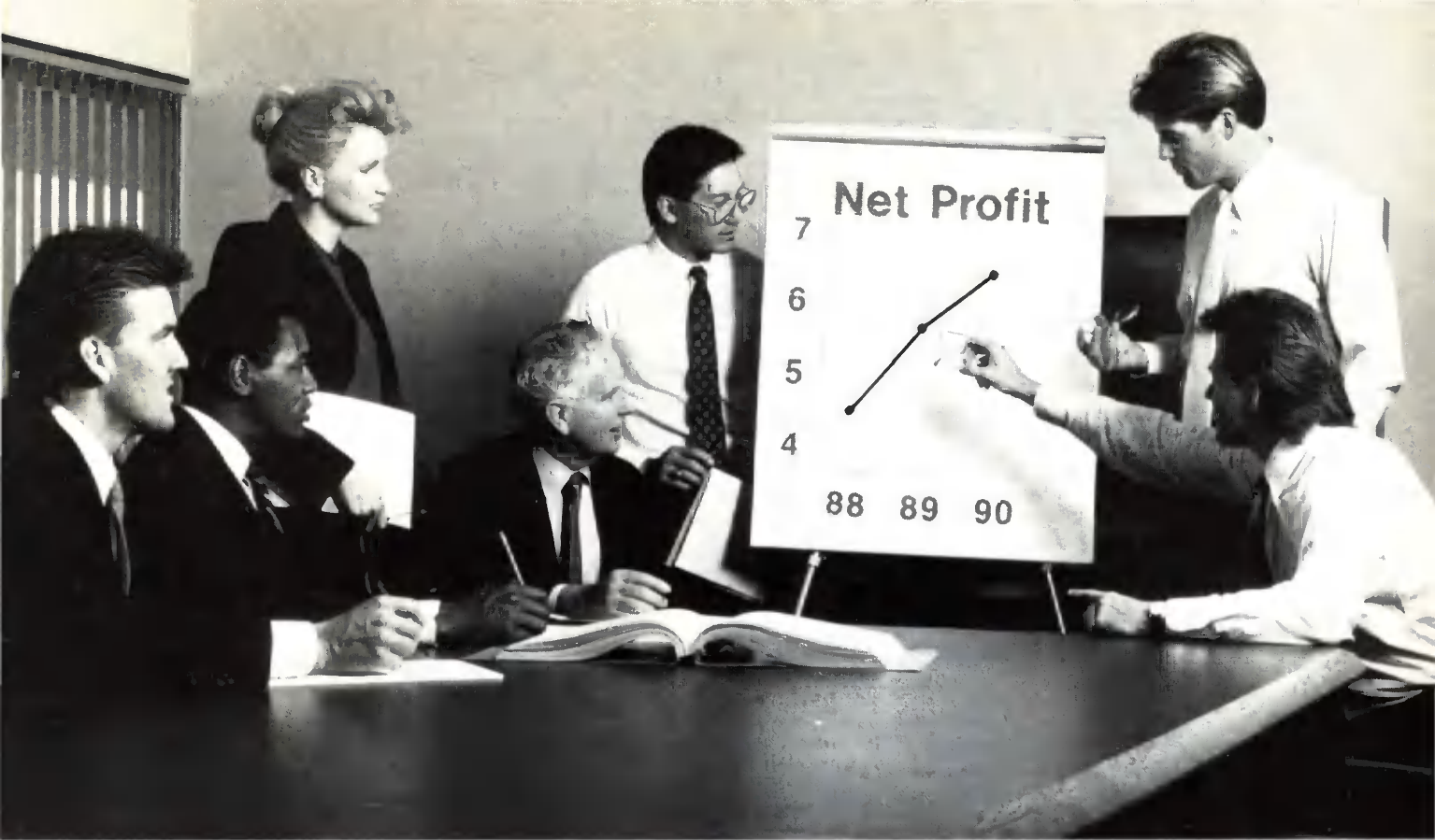
Thus, as a communications vehicle, the package/design must transmit a tremendous amount of information about the product to the prospective buyer, some of it spelled out in copious detail, some of it implied, but all of it consistent with the basic product positioning/level of performance built into the product and its marketing strategy.

At the same time, there are some constraints on package design development. A package is a means for consumers to recognize the products they know and use. One of the axioms in package design is that a new or revised package should not be drastically different from the label/package that consumers are familiar with. This is not to say packages should not be changed, rather that they should be modified on a gradual, step-by-step basis.

Quaker Oats oatmeal has had a number of significant package graphics changes over the years, yet each one maintained the integrity of the previous design—a design that consumers knew well and could easily recognize in the store. Even on those occasions when the product itself has undergone significant re-formulation and the marketer is anxious to have consumers

continued on p. 31





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## Getting the most from your paired preference testing

by Mark J. Moody

*Mark J. Moody is vice president/director the Consulting & Analytical Services Division of Burke Marketing Research. He has worked in marketing research and statistics for the past 12 years. His Ph.D. and Masters are from Ohio State University. Prior to working at Burke he was with the Marketing Information Dept. of Quaker Oats Company, and with Research Systems Corp.*

Thanks to the publicity surrounding the recent cola wars, many consumer respondents are familiar with the basics of blinded product preference testing. "Taste Product A, and then Taste Product B. Which do you prefer?" This sort of product testing is extremely common in marketing research, whether we are working on product reformulations, new product development or advertising claim substantiation.

The interpretation of such results, however, can be quite ambiguous at times. For example, assume we are testing two alternative formulations for a new brand of oatmeal. The sample involves 250 category users and the results favor Formulation A by a 55% to 45% preference. Using a rigid 90% confidence level statistic, we would conclude there is no significant difference. Formulation A would be our best bet, but lacking a "significant" result we may be unable to convince management to "kill" one of the alternatives. (See "Statistical significance testing may hinder proper decision-making," by Michael Baumgardner and Ron Tatham in the May, 1987 *Quirk's Marketing Research Review*.) Furthermore, it might be argued that since 45% prefer Formulation B, both should be offered in order to cover an apparently segmented marketplace.

In fact, the question of whether different segments exist with unique taste desires is impossible to answer from these results. It could just as easily be true that the near equal results occur because most people cannot discriminate between the two products. Lack of discrimination would lead to random preferences which make products approach a 50%/50% preference.

To resolve the issue of "segmented preference" vs. "random nondiscrimination" it is necessary to collect the data differently. There are many discrimination testing techniques available, but the one which deviates least from the basic preference test is to merely repeat the same unbranded pairing a second time with each respondent.

Repeat pair testing requires respondents to repeat the preference tests a second time somewhat later in the interview. Table 1 displays how these results might typically look. The key to understanding the potential of this procedure lies in the switching of preference that occurs. We see in this example 40 respondents switch from preferring A to preferring B and the

		First Preference	
		Prefer A	Prefer B
Prefer A	Prefer A	97 (40+57)	40
	Prefer B	40	73 (40+33)
Total Sample Preference		137	113
		54.8% <i>t</i> -value=1.52	n=250 45.2%
Preference Among Consistent Respondents		57.0% <i>t</i> -value=1.81	n=170 43.0%
Theoretical Preference Among Discriminators		63.0% <i>t</i> -value=NA*	n=90 37.0%

\* Discrimination = (90/250) = 36%

\* The proper significance test for the "theoretical preferences" is functionally a binomial test among consistent responders. Do not attempt a statistical test with the theoretical preferences.

same number shift in the other direction. A total of 80 respondents are inconsistent in their preference for some reason. The conventional wisdom is that they could not discriminate between the two products. By chance we would expect a similar number of non-discriminators to have consistently preferred one product or the other. Thus, our total estimate of nondiscrimination would involve doubling the number of inconsistent responders. In this case 160 (64%) of the 250 respondents apparently are unable to discriminate between the two formulations. (Respondents expressing "no preference" can be added to this figure.) Only 36% of the sample could discriminate, and

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among those we can estimate the theoretical preference for A to be 57 vs. 33 or 63.3% vs. 36.7%. The proper statistical test, however, does not involve these proportions (see below).

The logic of this approach is quite straightforward. But the assumption that as many non-discriminators are consistent by luck as there are inconsistent respondents is not necessarily true. Data collection issues such as respondents' attempts to please us, can perhaps help to exaggerate the inconsistent behavior. When product appearance differences are present, a respondent who at first picked A (though with little or no personal conviction) might wish at second preference to even the scales by switching to the other product. This possibility opens the door for more than half of the non-discriminators to be inconsistent. Solutions such as blindfolding respondents in taste tests have their own problems, since appearance may be a key component to product preference.

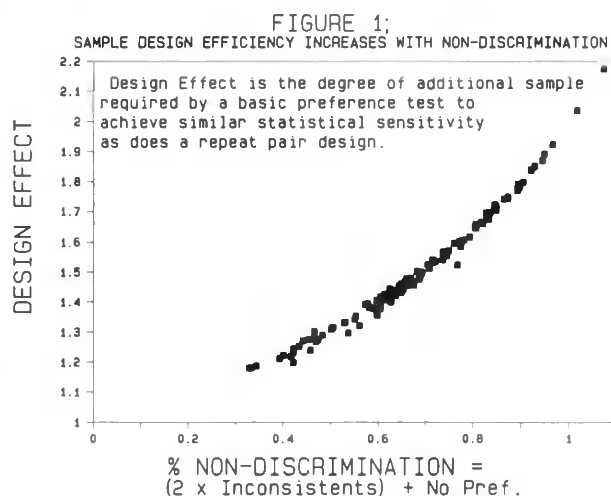
Fortunately it is not necessary to know precisely how many more non-discriminators are lurking in the consistent preference data in order to statistically test for a preference. The proper statistical procedure involves a simple binomial test among the subsample of all consistent respondents. In this case the sample size for the test would be reduced from 250 to 170 after discarding the 80 inconsistent respondents.

Researchers frequently are hesitant to reduce their sample sizes for fear of losing statistical sensitivity or power. It is difficult, however, to imagine how 80 respondents who can't keep their preference straight are going to help us find a reliably winning product. In fact, reducing the sample size by removal of the inconsistent respondents has the equivalent statistical

effect on sensitivity of increasing your sample size! In this example the new t-value is 1.83, significant at the magical 90% confidence level (see Table 1).

The precise amount of statistical sensitivity improvement which occurs by removal of the inconsistent respondents will depend upon how many are removed. In general, the more the better. The reason is that the inconsistent respondents' random behavior serves to water down real preference differences causing them to converge 50%/50%. The penalty for having the preferences converge to equality is greater than the cost of sacrificing some of the sample size.

To better understand the process of repeat pair testing we have compiled a database of over 100 studies conducted in the past several years. Normative knowledge is valuable, even in product testing. On average we have found that starting sample sizes of 250 can have the statistical efficiency of 375 (1.5 times as much) if we first discard the inconsistent respondents. This typically means removing about 80 respondents from the original sample of 250. While the average design efficiency is 1.5, Figure 1 shows how it varies with the percentage of respondents



who are estimated to be non-discriminators. The more inconsistent respondents there are to be removed, the greater the efficiency. Obviously if everybody can discriminate then there would be no added efficiency.

In our database of 119 tests we find that an additional 13 significant differences were found using the repeat pair logic, which would have been missed with more simple procedures.

The logic of removing inconsistent preferences is essentially an attempt to produce a naturally occurring "sensory panel." Most food manufacturers (and certainly all breweries) use expert taste testers at some point in their product evaluations. Respondents who are able to give a consistent preference between two products have shown themselves to be more worthy of our efforts to please them. Repeat pair testing offers a simple method for approximating some of the skills of a sensory panel, while still testing among the real world of consumers. The statistical sensitivity gains of this procedure should not be overlooked since we frequently find nondiscrimination levels in the 60-80% range. It can be frustrating to try to find a winner when most people cannot discriminate.

Finally, when two products really are interchangeable (i.e. cost reduction reformulation) it can be very persuasive to have not only similar preferences, but also an estimate of the nondiscrimination level. MRR

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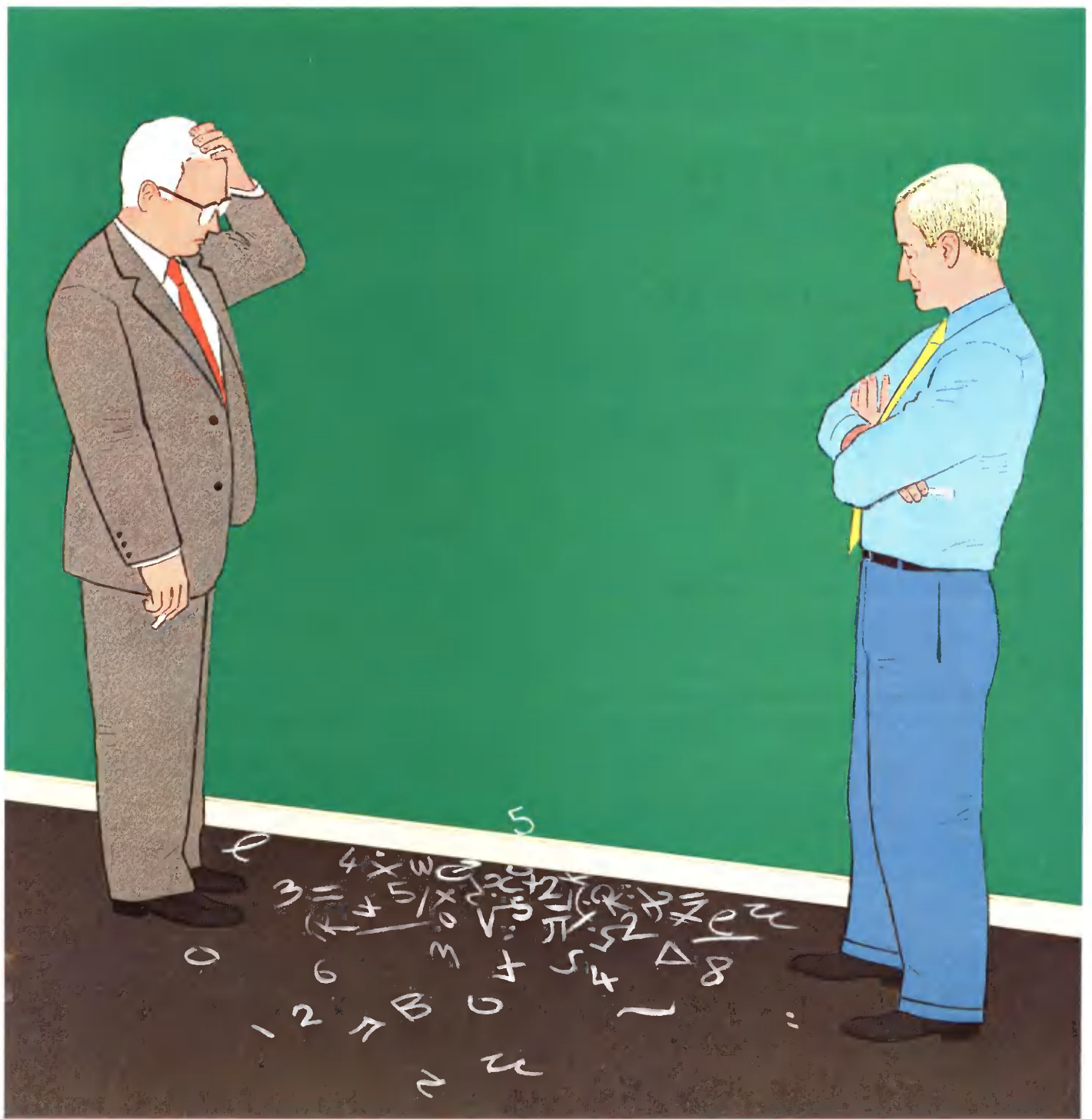
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# Nothing fishy about it

*A Mississippi trade organization uses research to help its farm-raised catfish catch on with consumers*

**B**ecause of a wide range of nutritional benefits, fish and seafood of all kinds, from lake trout to halibut to shrimp, enjoy a healthful image. The folks at The Catfish Institute (TCI) would like to add farm-raised catfish to that list.

TCI is a Mississippi-based organization formed in 1986 to stimulate demand for the state's farm-raised catfish. Unlike the catfish found in lakes and rivers all over the country, Mississippi farm-raised catfish are "grown" aqua-culturally like a cash crop in freshwater ponds.

Mississippi ranks first in catfish production with more than 85% of the total U.S. catfish production. Its 90,000 acres of catfish ponds contain some 600 million catfish. The farm-raised catfish industry has grown considerably, from 5.7 million pounds produced in 1970 to 295 million in 1988. Industry forecasts for year-end 1989 predict production will exceed 310 million pounds.

To put those figures into perspective, consider that, according to statistics from the U.S. Dept. of Commerce, and the U. S. Dept. of Agriculture "Catfish Report," the 280.5 million pounds of catfish produced in 1987 exceeded the landings of these popular seafood species: cod (229.7 million pounds), tuna (100.1 million), flounder (199.7 million).

The Mississippi catfish are fed a scientifically formulated mixture (in pellet form) of soybeans, corn, wheat, vitamins, minerals, and fish meal, that gives the catfish a mild, sweet flavor and keeps fishy odor to a minimum.

It's a highly efficient process. According to Institute data, the farm-raised catfish convert feed at yield of about 1 pound of fish for every 1.8 pounds of feed. The conversion ratio of other protein sources is much less efficient: beef is 1 pound of meat

per 8 pounds of feed; poultry is 1 to 3; and pork is 1 to 4.

Using an ongoing print ad campaign and a multi-pronged promotional effort, TCI has worked diligently to change the public's perception of catfish from a deep-fried staple of the southern diet to a nutritious and versatile addition to a healthy menu.

## Ongoing study

In 1986, to learn more about consumer perceptions of catfish—and in turn, to gauge the success of its efforts—TCI conducted the benchmark wave of its ongoing attitude, awareness and usage (AAU) study. The first wave of the study interviewed almost 800 heads of households aged 18 to 65 by telephone in a nine-state area (encompassing cities such as Chicago, Detroit, Houston, New Orleans, and Kansas City) which was labeled "the Heartland." Distribution data supplied by catfish processors identified this area as the location of the majority of consumption of Mississippi-bred catfish.

Another region, Los Angeles, (broken down county by county) was added in 1987. In 1988, the study was repeated

in both regions, and a new area called Coastal Clusters (including New York, Boston, Atlanta, Charlotte) was added.

The survey measured: aided and unaided awareness of fish and catfish in general; awareness of fish/catfish advertising; the source and content recall of catfish advertising; catfish's share of consumption versus selected other types of fish and seafood; and the importance of a variety of attributes, including price, nutrition, and freshness.

"We looked at consumer attitudes towards catfish and other fish to find out, in the mind of the consumer, what is the ideal





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Here, in a little corner of Mississippi, is a place quite unlike any other in the world. A place that provides just the right combination of sun, soil, and, of course, water. A place where we raise a fish high in protein, low in calories. One that halves or broils, Blanches or sautees. Grills or steers. Strips or fries. The perfect Catfish. Brought to you by fresh air, a warm climate, and a little ingenuity on the part of some folks from Mississippi.

**You too can become a Catfish chef!** Order our recipe cards just send your name, address and a check or money order for \$1.00 to: Catfish Recipes, Box 327 BH, Belton, MS 39038.

**Why is this man smiling?** Because he's a Catfish lover! He's also a Chef and cookbook author. Marvel Desautels of the Trellis Restaurant in Williamsburg.

Even if you caught your own fish, it would taste better than mine. Because Mississippi Prime Catfish are raised in man-made fresh water ponds and fed a gourmet diet of natural grains and proteins.

**MISSISSIPPI PRIME CATFISH**

The Mississippi Prime is a trademark quality product and quality source of protein for the poultry industry, with USDA inspection and certification. The following brands participate with our sea: America's Catfish, Catfish, Catfish, Delta Pride, Freshwater Farms, Golden Pond, Lake of the Pines, Louisiana Farm Products, Lakeview, Lakeview, North Beach Farms.

delicate flavor," "no fishy odor," and "inexpensive" increased from 1987 to 1988.

### Advertising campaign

The information from the first wave was used to develop an ongoing advertising campaign that began in 1987. Craig Premo, account supervisor with Dallas-based ad agency The Richards Group, says that the first wave of the study provided demographic information and also identified important areas for the advertising to focus on.

"We first found what they were looking for in an ideal fish and then we found what they thought about catfish, attitudinally, we also found out who our users were demographically and geographically. We then used this information to determine who to talk to and what to say to them. We're also able to zero in on the attributes we want to stress in our ad copy for any particular year," he says.

### Freshness important

Overall, the research identified attributes such as freshness, mild flavor, versatility, and nutritional issues such as low fat and low cholesterol as important to consumers.

"What we found is that catfish had the attributes that they were looking for, so all we had to do was tell the truth in our

Early ads were aimed at informing consumers about the methods used to raise the catfish...

fish product, what attributes does it have, and what do they want as far as odor, taste, flavor, delicacy, versatility, nutrition, and freshness," says Bill Allen, president of The Catfish Institute.

### Some findings

**Overall awareness.** Unaided awareness remained high in the Heartland area through both waves of the study; catfish was mentioned first most often in 1986 and 1988 when respondents were asked to think about types of fish available at stores or restaurants. In Los Angeles, halibut was mentioned most often, followed by red snapper and others in 1988. Awareness there remained flat between 1987 and 1988. Coastal Cluster respondents chose flounder first by a wide margin.

**Advertising awareness.** Unaided awareness of catfish advertising rose slightly in the Heartland in 1988 and was basically flat in Los Angeles. Catfish advertising was recalled more often in the Heartland than for any other fish. For the source of catfish advertising, in 1988, a higher percentage of Heartland and Los Angeles consumers recalled seeing catfish ads in magazines than in 1986 or 1987.

**Advertising content recall.** Recall of the phrase "farm-raised" in advertisements increased in the Heartland and Los Angeles and was the main message Coastal Cluster consumers recalled.

**Attitudes towards farm-raised catfish.** Farm-raised catfish performed best on the attribute of "raised in a controlled environment." In the Heartland, consumers' ratings for "mild,

**THINK OF IT AS A CHICKEN THAT DOESN'T CLUCK.**

Even though it may ruffle a few feathers, Mississippi Prime Catfish is showing up in more and more popular chicken recipes. Farm-raised and grain fed, its firm, flaky texture and delicate flavor make Catfish perfect for baking, broiling, grilling, blackening, even stir-frying. Like chicken, Catfish is high in protein, low in fat and cholesterol. But Catfish is lower in calories. So try it instead of chicken. Or anything else. We think you'll understand why Catfish has the competition squawking.

**Calories per 3 oz. serving\***

Farm-raised Catfish	145
Chicken Breast	170
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Pork Loin	245

\*Cooked, broiled - 600A

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Box 327  
Belton, MS 39038

...while later efforts targeted attributes such as versatility as overall awareness grew.

advertising," Allen says.

Craig Premo: "We used that information with our creative strategy to decide what we needed to emphasize in the advertising and promotion. That has shifted somewhat through the years as some attributes have improved as a result of the campaign and others have come to the fore."

For instance, early ads were more informational, focusing on educating consumers by explaining the process behind raising catfish in addition to showing that it could be prepared in many other ways than just by frying. As the research showed awareness picking up, other issues were emphasized.

"One of the things we found is that catfish is perceived as a fried fish by definition, and that's not particularly nutritious, so we slanted our ads to show the versatility of the product, to show the other ways to prepare it as well as fried," Allen says.

Later ads targeted beef, pork, and chicken, comparing and contrasting their nutritional make up against that of catfish as well as displaying some of the recipes catfish can be used in.

**Mississippi Prime**

All of the ads display the logo of the Mississippi Prime Program. This program, which monitors the quality of the state's farm-raised catfish, was created to directly address the issue of quality and freshness.

"Because there is no mandatory federal inspection of seafood, as there is with beef and pork, for example, we went into a voluntary inspection program to make sure we were putting

out a superior product," Allen says.

Eight Mississippi catfish processors participate in a program developed by TCI in conjunction with the U. S. Dept. of

*"We used that information with our creative strategy to decide what we needed to emphasize in the advertising and promotion. That has shifted somewhat through the years as some attributes have improved as a result of the campaign and others have come to the fore."*

*Craig Premo*

Commerce and the National Marine Fisheries Service that consists of regular weekly inspections as well as periodic surprise inspections. Only those companies who participate are allowed to display the logo on their packaging.

**Ocean pollution**

The issue of quality grew in importance in 1988 because of extensive media coverage on the problem of ocean pollution. Overall fish consumption declined noticeably in the last half of 1988, and after questions on this topic were inserted into the 1988 waves of the AAU study, it was discovered that over 50% of all respondents were extremely concerned with the issue of

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Concerned with ocean pollution issue			
	Los Angeles 1988	Heartland 1988	Coastal Clusters 1988
Base= Total respondents	(303)	(350)	(306)
Extremely concerned (4)	56.4%	51.4%	57.8%
Somewhat concerned (3)	35.0	38.0	37.6
Not very concerned (2)	6.6	7.7	3.6
Not at all concerned (1)	1.0	1.4	1.0
Don't know/no answer	1.0	1.4	-
<b>Total</b>	100.0%	100.0%	100.0%

ocean pollution. Of those who were extremely or somewhat concerned with the ocean pollution issue, over 25% in each sample said that they had reduced their overall consumption of fish and seafood.

As a result, Allen says: "We slanted our 1989 ads to assure the consumer that the fish is safe. We talk about clean water and the inspection program in an attempt to position ourselves as an ideal alternative to any seafood. But never once do we say that seafood is unsafe. We don't want to fan the flames, because if seafood consumption goes down, so does catfish consumption. We're in the seafood case and if people don't walk by the

continued on p.29



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Customer Satisfaction Research Using Disks-By-Mail  
Peter Zandan and Lucy Frost, IntelliQuest, Inc.

Context-Specific Choice Experiments for Multi-Featured  
Products: A Disk-By-Mail Application  
Shari Gershenfeld and Terry Atherton, Cambridge  
Systematics, Inc.

Moshe Ben-Akiva, MIT

Larry Musetti, AT&T Business Markets

##### PRACTICAL ISSUES IN COMPUTER INTERVIEWING

Maintaining Quality in Large Computer-Interactive  
Interviewing Projects  
Nancy L. Messenger, Burke Marketing

20,000 Computer Interviews a Year: Is This Insanity?  
Diane L. Pyle, Hallmark Cards, Inc.

##### CONJOINT ANALYSIS AS A TOOL FOR COMPETITIVE PRICING

Optimal Pricing Strategies Through Conjoint Analysis  
Mary Jane Tyner, Levi Strauss & Co.  
Jonathan Weiner, MACRO

Simulated Purchase "Chip" Testing Versus Trade-Off  
(Conjoint) Analysis - Coca-Cola's Experience  
N. Carroll Mohn, The Coca-Cola Company

Using C12 and ACA to Obtain Complex Pricing  
Information  
Greg S. Gum, US West

##### EMERGING TECHNOLOGY

Handwritten Data Entry Into A Computer  
Ralph Sklarew & Tim Bucholz, Linus Technologies, Inc.

The Missing Link  
Peter Schleim, Intercept Network Corp.

##### COMPUTER INTERVIEWING APPLICATIONS

Large-Scale Conjoint Data Collection at the Chicago Auto  
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Linda S. Middleton, Chicago Tribune Company

Computer-Interviewing Applications in the Navy  
Emanuel P. Somer and Dianne J. Murphy, Navy  
Personnel Research & Development Center

Computer Interviewing in Europe: What U.S. Researchers  
Need to Know  
Martin Steffire, PA, London, England

A Taste of Japan  
Ray Poynter, Sandpiper International Limited

##### PERCEPTUAL MAPPING

Using Perceptual Mapping for Market-Entry Decisions  
Richard H. Siemer, Dow Chemical Company

Evaluating Distribution Channels with Perceptual  
Mapping  
Bob Block, John Morton Company

##### Perceptual Mapping and Cluster Analysis: Some Problems and Solutions

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##### A Correspondance Analysis Approach to Perceptual Maps and Ideal Points

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Neil Allison, McKinsey & Company, Inc.

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Roger Moore, The Boston Consulting Group, Inc.

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Harla L. Hutchinson, John Morton Company

##### Bias in the First Choice Rule for Predicting Share

Terry Elrod and S. Krishna Kumar, Vanderbilt  
University

##### Assessing the Validity of Conjoint Analysis

Richard M. Johnson, Sawtooth Software, Inc.

##### CLUSTER ANALYSIS

##### New Findings With Old Data Using Cluster Analysis

Tara Thomas, Blue Cross and Blue Shield of Iowa

##### A Comparison of Clustering Methods

William D. Neal, SDR, Inc.

##### Reliability, Discrimination, and Common Sense in Cluster Analysis

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Charles Bolton, Consultant to P&G&E and Freeman,  
Sullivan & Company

##### Selecting CATI Software

Andrew Norton, ARC Professional Services Group

##### Designing the Facility

Richard Miller, Consumer Pulse

##### Staffing

Karla Haugan, Lawrence & Schiller

##### Impact on Management and the Bottom Line

Jane Thompson, The Research Spectrum

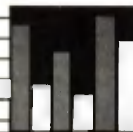
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## IRS study tracks tips

According to a study by the Internal Revenue Service, waiters in Italian restaurants in the U.S. receive the biggest tips from customers, while those in Mexican restaurants receive the smallest. The average tip in Italian eateries in 1986 was 15.8 percent, compared to 15 percent in Chinese restaurants and 14.8 percent in

Mexican restaurants.

But, patrons in Chinese restaurants were more likely to leave a tip—90 out of every 100 did—than in Italian restaurants, where only 88 chose to leave a tip. In establishments serving Mexican food, there were 86 tips per 100 customers.

The IRS investigation began because waiters are required by law to include tips in their earnings and pay income tax on them, and the underreporting of tip in-

come has long been a concern to the IRS.

The Survey Research Laboratory of the University of Illinois questioned families and individuals from nearly 13,000 households who kept records of their tips over two-week periods between 1983 and 1986. The study did not try to provide any reason for the differences, nor did it ask about restaurants that serve the food of other countries.

## Disney workers rate pay

In a recent poll among salaried Walt Disney employees, 21 percent rated their pay as "good," 35 percent rated it "average," and 40 percent "poor." Among hourly workers, 18 percent rated the pay as "good," 28 percent as "average," and 51 percent as "poor."

## Most homebuyers use real estate agent

A survey by the National Association of Realtors of 4,000 households that purchased homes during the last half of 1986 found that 80 percent of the purchases involved the use of real estate agents; 20 percent did not. Of those who used brokers, seven percent met the agent at an open house.

Fifty of each 100 respondents answered "agent" when asked "How did you first learn about the home you recently purchased?" 17 mentioned a sign, 15 saw a

continued on p. 47

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# NAMES OF NOTE

**Dr. John Iacoviello** has joined Princeton, NJ-based Opinion Research Corp. as an account executive.

**Gerald Cole** has been promoted to associate director of strategic planning and research at DDB Needham Chicago.

**Dr. Cynthia Weinman** has been promoted to senior vice president of New York City-based Oxtoby-Smith Inc.

**William M. Berg** has been named category research manager for Miller Brewing Company, Milwaukee.

**Allan W. Salkin** has been named director of Human Resources and Corporate Services for Princeton-NJ-based Total Research Corp.

**Dr. Greg Rennie** has joined Stillwater Research in Orono, ME as research director. Previously he was a project director with Markteam Associates/Doane Marketing Research, St. Louis.



Rennie

Beran

**David R. Beran** has been appointed director, marketing research and planning for Philip Morris U.S.A. Previously he was director, finance and planning with Philip Morris.

**Ronald L. Cohn** has joined the ICR Survey Research Group as vice president, client services. Previously he was vice president, client services at Bruskin Associates.

**Janet D. King** has joined Maritz Marketing Research Inc. as an account manager for the Agricultural/Industrial division. Previously she was with FMC Corp. as a sales representative in the Agricultural Chemical Group.

tural Chemical Group.

**Dr. Denise Winokur** has rejoined Radnor, PA-based Chilton Research

Services as an account executive. In addition, **Kathryn Lee Schulte** has been promoted to account executive.

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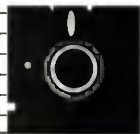
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## Telemundo and Univision enter agreement with Nielsen

Telemundo Group, Inc. and Univision Holdings, Inc. have signed a multi-million dollar contract with Nielsen Media Research for development of a national Hispanic television rating service using people meters.

The service will be launched later this year with a pilot in Los Angeles in 200 Hispanic households. The purpose of the pilot study is to evaluate the procedure to be used for recruiting Hispanic households to participate in the rating service.

A national rollout to 800 Hispanic households is anticipated to be in the latter half of 1990. This will be known as Nielsen Hispanic Television service.

Telemundo and Univision, two lead-

audience measurement system. After reviewing proposals from six research firms, the committee selected Nielsen.

The first phase of the two-phase Hispanic project will involve 200 households selected from the Los Angeles Designated Market Area, including Los Angeles, San Bernardino, Venture, Orange, and Riverside counties. A team of bilingual Nielsen field representatives will visit households to recruit a representative sample of Hispanic households for the pilot.

Once the Los Angeles pilot is complete, a national survey will be conducted, polling approximately 30,000 homes regarding demographics, country of origin, and language used. The survey results will be used to select the national sample of 800 Hispanic households.

## Nielsen Media Research

ing Spanish-language broadcasters in the U.S., established the Spanish Television Research Committee in May, 1988 to investigate the possibility of creating a technology-based national Hispanic



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## Demographic access program for PC

National Decision Systems introduces Infomark Express, which enables users to gather demographic and consumer expenditure potential information by using a "point and click" mouse to define the location, size, and shape of the de-



sired trade area on an on-screen map. Trade areas can be defined as radii, ZIP codes, census tracts, or any custom-shaped geography.

Information available includes current year estimates and five-year projections for population, households, income, age and sex, and populations by race. Also included are 1980 Census vari-



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ables, as well as estimated consumer expenditure potential information for major retail categories.

Infomark Express is available for every major MSA in the U.S. and the complete package for each market is delivered on diskette for installation on the computer's hard disk. The package utilizes Microsoft Windows and the new geographical interface technology developed by National Decision Systems. It operates on any IBM/PC AT, System 2 series, and 100% IBM compatibles. A PC/mouse and operating software are included with the first market order. For more information, call Randy Grimm at National Decision Systems, 619-942-7000.

## SPSS package for Macintosh

SPSS for the Macintosh, scheduled for release in the fourth quarter of 1989, contains the full functionality of SPSS, with over 50 statistical procedures, extensive data and file management facilities,

a programming language that enables the user to create customized routines or macros, and a report writing facility.

It incorporates features from both SPSS/PC+, the package for MS-DOS-based microcomputers, and SPSS for mainframes, minicomputers and workstations. The Macintosh program uses a version of the SPSS/PC+ menu system, including on-line help and a statistical glossary, in the familiar Macintosh "pull-down menu" format.

Add-on options include SPSS Advanced Statistics, SPSS Tables (which allows the user to create publication-ready stub and banner tables), and SPSS Trends, which performs forecasting and time series analysis.

The package runs on the Macintosh SE, SE/30, II, IIcx and IIx computers. It requires 2MB of RAM (4MB are recommended), a 20MB hard disk, System 6.0 and Finder 4.2. A math coprocessor is recommended.

For more information, contact SPSS, at 312-329-3300.

## Hispanic retail tracking service introduced

Market Decisions announces the introduction of Hispaniscan, a service focused initially on key Hispanic markets in the US. It reports packaged goods sales from large samples of Hispanic supermarkets and furnishes clients with overall category analysis as well as evaluations of specific advertising and promotions programs targeted to Hispanics. The service is designed primarily for the benefit of brand and marketing managers.

Concentrating initially on supermarkets, HispaniScan collects and formats scan data from major chains within the markets. It can monitor entire categories or selected products, giving clients retail activity profiles over short or long periods of time, and can optionally include back data.

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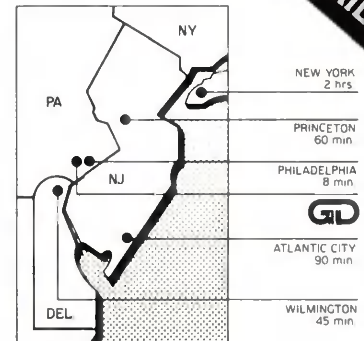
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## Blue Nun

continued from p. 7

### Results

During probing in the focus groups and shelf tests, it was discovered that current Blue Nun drinkers felt more warmly towards the nun motif than past or non-users, who had less patience with the old style. Although when offered a choice, even current users conceded that a packaging change was a good idea and that the brand would benefit from an updating of its image.

"That was the part of the research that made everyone feel very comfortable with the decision to change the package; even our current users felt good about the prospect of a packaging change. We all had personal feelings on the ones that we

*"Without research, I think they more than likely would have gone to a design that was closer to the original. That is probably the most valuable thing that any research can do for a consumer product; it can reassure a company that they can make a substantial change and still retain their present consumers and open up a whole new market."*

*Frederick Mittleman*

liked, but the research showed us that we could go very far away from the current package," Stone says.

Indeed, the design which was the most popular with participants is quite a departure from the pastoral scenes of old. Set on a taller, more slender bottle than before, the new label, done in a cream color and framed by a gold band, favors copy over illustration, emphasizing the brand name while placing a single nun in graphic form under its arched top.

"It was truly the way research, to me, as a package designer, should be used," says Frederick Mittleman. "It was extensive, they tested a lot of variations, and overwhelmingly the new design drew a very positive response, which was surprising

because it was the furthest away from what had been done previously.

"Without research, I think they more than likely would have gone to a design that was closer to the original. That is probably the most valuable thing that any research can do for a consumer product; it can reassure a company that they can make a substantial change and still retain their present consumers and open up a whole new market."





### More contemporary

Some interesting and unexpected ob-

servations came from the research. People felt that the new label and bottle gave the wine a much more contemporary feel, and they felt that Blue Nun was now much more appropriate to give or receive as a gift. It was perceived to be more expensive, and although no taste tests were involved, respondents felt that, based on the new packaging, the wine was drier—which was quite a surprise.

"German wines are perceived as sweet," Stone says. "It's a perception that we've tried to overcome and it's interesting that this package really conveyed something

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and helped us address an issue that wasn't on the agenda going in."

The US rollout of the new packaging should be completed this month, while the rest of the world will be introduced to it more gradually. For example, in the UK market, where Blue Nun has experienced less trouble, the packaging will be changed over time, an option which wasn't viable here in the U.S.

"We felt that we didn't have the luxury to quietly and slowly evolve this package. We needed to make a change quickly and the research was strong enough that we could make a more drastic change and hopefully try to rescue our business."

While it will probably be the middle of next year before it's clear how successful

---

*"We felt that we didn't have the luxury to quietly and slowly evolve this package. We needed to make a change quickly and the research was strong enough that we could make a more drastic change and hopefully try to rescue our business."*

*Ben Stone*

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the re-design is with American wine drinkers, Stone says the reaction so far from distributors and retailers has been very positive. "They're all signs that this is going to be successful. We've got our fingers crossed. We think it bodes well for the brand." MRR

## Attention readers:

We want to continue to provide the kind of editorial coverage you've told us you find most useful. If your company or organization has conducted a marketing research project that you think would be suitable as a case history similar to the one you've just read, we'd love to cover it! Please contact Joseph Rydholm, managing editor, at 612-861-8051, or at the address below.

*Quirk's Marketing Research Review*  
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## Catfish

continued from p. 16

seafood case they don't buy catfish."

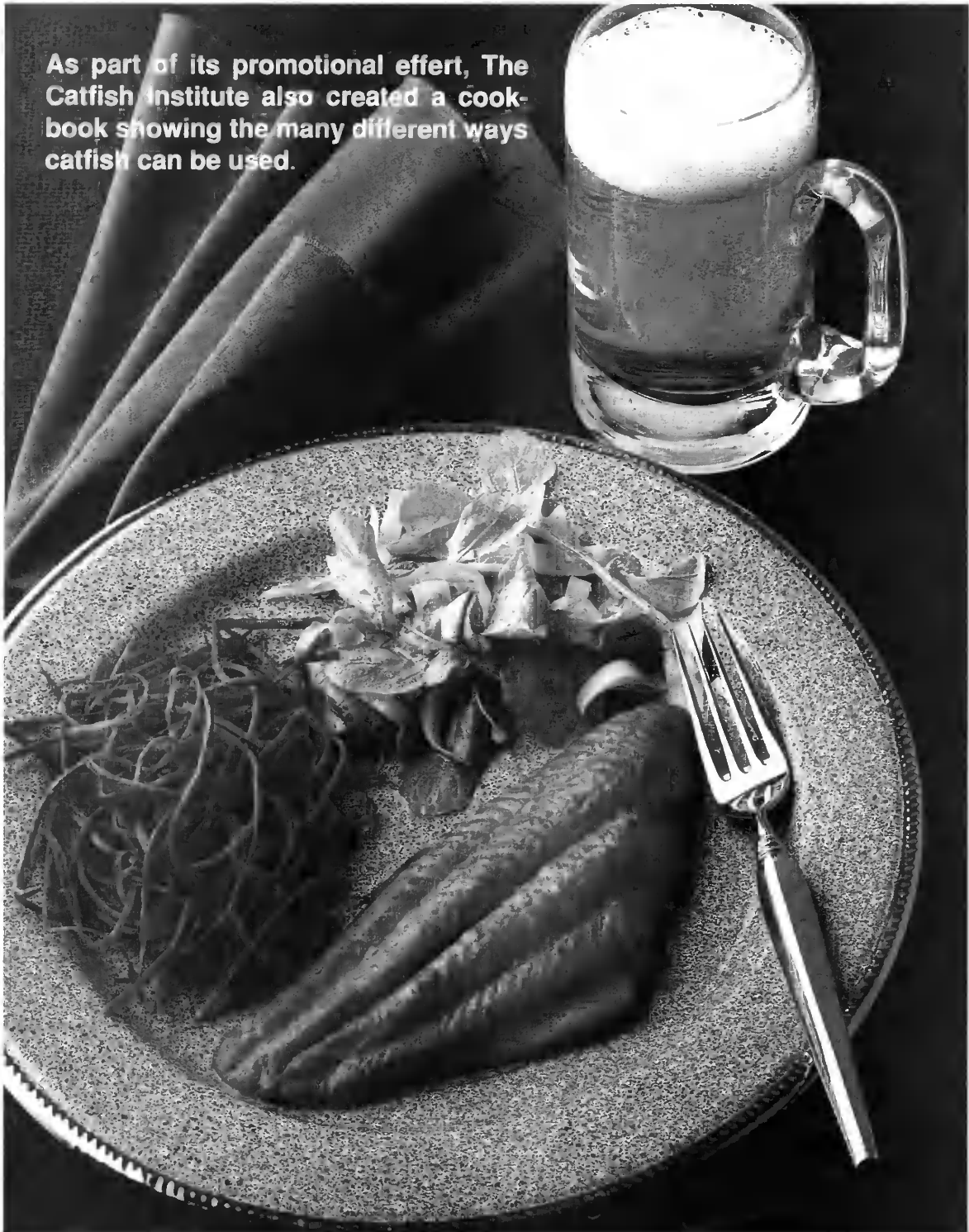
### Nutrient profile

To further enhance the nutritional image of farm-raised

catfish, TCI commissioned nutrition consultant Dr. Joyce A. Nettleton to conduct a study examining the nutrient profile of Mississippi Prime farm-raised catfish. Two main issues were addressed: the nutritional quality, and the safety of the fish in terms of environmental contaminants.

A number of positive findings came from the study. Not only is the Mississippi Prime farm-raised catfish an excellent source of protein, but it is also low in cholesterol and calories, and

As part of its promotional effort, The Catfish Institute also created a cookbook showing the many different ways catfish can be used.





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## Retailer surveys

In addition to consumer research, The Catfish Institute regularly surveys retailers in 12 markets across the country to get their prices on whole and filleted catfish. TCI also follows

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*"One of the things we found is that catfish is perceived as a fried fish by definition, and that's not particularly nutritious, so we slanted our ads to show the versatility of the product, to show the other ways to prepare it as well as fried."*

*Bill Allen*

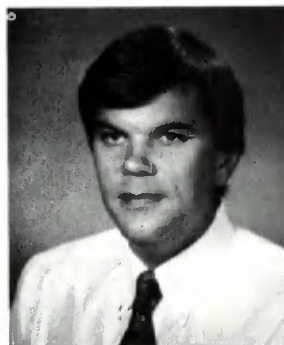
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prices at other levels of the distribution chain, from farmer to processor to distributor to retail.

"Tracking the pricing structure in the industry helps explain some of the month to month fluctuations, and you can also see how an increase or decrease at one level affects the other levels. We're always trying to upscale the image of our fish and we'd like to be able to charge a good price for it. Price tracking lets us know if we're having the right kind of effect in retail," Premo says.

## Focus groups

Though the advertising has been aimed primarily at consum-



Allen



Premo

ers, Premo says focus groups were held last year with chefs, food and banquet managers, restaurateurs, and caterers to measure their awareness of farm-raised catfish and find out more about the publications they read.

"The ad campaign had run for two years at that time and we wanted to see if they were picking up on it. We asked them what they look for when they're planning their menus, not only with fish but for all entrees, and how they felt fish and then specifically catfish stacked up. We found an increasing amount of acceptance in many very upscale restaurants. More and more people are recognizing catfish for its versatility." **MRR**

## T-scope

continued from p. 8

recognize they have a new reason to try the brand, a drastic design change is a questionable business tactic. It seems that consumers are willing to accept reformulation of the product as an important improvement, but they consider package/label design changes unnecessary.

Also, certain package configurations and/or colors are traditionally acceptable for certain products. Catsup, for example, illustrates this point. Virtually everyone instantly recognizes the shape of a catsup package, and in controlled use-test situations nearly everyone will agree that this type of container is extremely difficult to use. But the package configuration is traditional, it is catsup, and any other shape simply would not be suitable for the product.

It's generally agreed that the package is an extremely important element in the marketing mix for most consumer products. It has multiple functions to perform and, therefore, no single consumer research measure can do an acceptable job of evaluating the total effectiveness of a consumer package. There are at least three measures that are important considerations in evaluating consumer package/label designs:

- *Impact.* How intrusive is the package/label design; does the package have the ability to "jump off" the shelf and be recognized quickly?

- *Image.* What does the package communicate to consumers; what kinds of impressions and/or perceptions does the package create?

- *Preference.* Does the consumer like the package; is it aesthetically pleasing to the prospective customer?

In order to be maximally effective, these three measures must be in balance. They must work in concert to produce the kind of impact that's necessary for the brand to be noticed (quickly) on the store shelf without sacrificing those design elements that help communicate the kinds of positive product impressions (image) that are important to the success of the brand. It is entirely possible to have a tremendous amount of intrusiveness, to communicate certain product characteristics very effectively, or to have people generally agree that the package is attractive. However, if any of these are accomplished at the expense of the others, the wrong balance has been struck.

It's easy to get the wrong balance. For example, it's possible to achieve a high degree of impact using certain design devices—fluorescent ink colors or unusual package configurations will invariably produce high recognition. However, the use of these overt attention-getting devices may distract the consumer from the package's communications effort in other directions. Bright colors often are interpreted as harsh or too strong, and unique package shapes could prove difficult for consumers to handle. Or, as is the case with catsup, a new, different package shape might not be acceptable to a large proportion of consumers. Conversely, pastel colors and swirly, curly graphics often are interpreted as mild or gentle, but could well be so soft that the package would fail to achieve impact at the point of sale. Finally, simple consumer preference, often based on an individual's assessment of the attractiveness of the design, may have little or no relationship to which package the

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consumer will purchase—they want the product inside, not the package. They recognize this and so must we.

The effective package design, then, is the one that is most successful in integrating these three properties—impact, image, and preference. The consumer research test methodology must, then, be designed to measure these same properties effectively. We have developed a research methodology that measures consumer response to test package/label designs in terms of these three decision criteria.

This system is an experiment in the sense that the environment in which the package alternatives are studied is one in which the variables (stimuli) can be controlled and manipulated. The respondent is not in his or her normal context (a supermarket) but in a tightly managed interviewing station or facility. Also, s/he is often asked to react to stimuli that represent the actual package(s), for example, 35mm slides or photographs, rather than the packages themselves. This makes it possible to isolate and control key variables and to study the consumers' response to these variables. Since all package alternatives included in the test are exposed to this identical treatment, the absence of a real-life environment affects equally all packages relative to the others in the test scheme. By studying respondents' reactions as the test variables are manipulated, it's possible to make judgments concerning the extent to which these variables affect a respondent's perceptions of the packages being studied.

#### **Impact measure**

The first measure in this consumer research system is an impact measure. How intrusive is the package design? What elements of the design do consumers notice? How quickly do they notice certain package/label features? This is the kind of information developed in the initial section of the research methodology. An impact measure is the first step in the research, not because it is the most important element to consider, but because impact, in order to be correctly measured, must have a clean or uncontaminated exposure. Visual or verbal cues of any type have a tremendous influence on this measure, so much so that results tainted by prior cues are virtually meaningless.

A tachistoscope (T-scope) is used to measure the impact of salient visual elements of each test package. It is a device that precisely controls the amount of time a stimulus (package) is exposed to the respondent. By strictly controlling both the number of exposures and the length of time of each, the packages in the test are ensured equal exposure time. Thus any differences in the time required by respondents to pick out salient print or graphic elements is ascribed to the test variable, the package itself.

The T-scope used in this portion of the research is electronically controlled for increased accuracy and ease of operation. Each exposure interval is clearly marked and the control knob has a definite click stop point for each interval. Once the instrument is set up it can be operated even in total darkness.

The T-scope exposes the test package to the respondent a total of eight times. The first flash exposure is at a speed of 1/150 second and each succeeding exposure is lengthened until the maximum speed of 2 seconds is reached. The T-scope is set at the following speeds:

Exposure 1 1/150 second



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- Exposure 2 1/100 second
- Exposure 3 1/50 second
- Exposure 4 1/25 second
- Exposure 5 1/10 second
- Exposure 6 1/2 second
- Exposure 7 1 second
- Exposure 8 2 seconds

Immediately after each of the eight exposure intervals, the respondent is asked to report exactly what he or she saw. The verbatim comments are recorded, coded, and tabulated to form the basis of this portion of the analysis. The impact measure provides these types of information:

- Brand name recognition.
- Product description playback.
- Product/brand name misidentification.
- Recognition of symbols/logos.
- Identification of other salient graphics.

It's possible to calculate average recognition times or mean scores for each of the above points, and it's also possible to display the test results cumulatively to determine the pattern that respondents follow in viewing the test package(s).

Table 1 is an example of the brand name impact measure for four different test packages/brands. It shows the percentage of respondents in each test who were able to identify correctly the brand name of the package at each exposure interval. The Mean Recognition Score, the average length of time it took respondents in this test to identify correctly the brand name of the package, is also presented in the table.

The second way to examine results of the T-scope question-

ing series is to accumulate responses for each successive exposure interval. Table 2 shows the cumulative percentage of respondents who mention various visual elements of the package as the test progresses.

The T-scope device, administered and tabulated in this manner,

**Table 1** Correct Brand Name Identification

	Brand A	Brand B	Brand C	Brand D
Correctly identified package brand name at:				
1/150	52%	12%	10	-%
1/100	20	4	24	4
1/50	6	12	10	-
1/25	10	16	8	8
1/10	10	8	16	6
1/2	6	24	20	42
1 second	-	8	4	22
2 seconds	-	-	4	8
	100	84	96	90
Not correctly identified package brand name	-	16	4	10
	100	100	100	100
Mean recognition score (in seconds)	0.05	0.26	0.26	0.67

provides a total recognition profile of a test package, by time period. The analyst can use the results to identify which package

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elements are noticed more quickly and can also track the path or pattern the respondent is following in his or her attempt to complete this test successfully—that is, to report exactly what he or she sees at each exposure interval.

The technique is especially useful in comparing test package

**Table 2 Visual Response\***

	Exposure Time (in seconds)							
	1/150	1/100	1/50	1/25	1/10	1/2	1	2
A bottle	4%	18%	26%	28%	30%	30%	32%	32%
A bottle with a handle	12	18	20	20	20	22	22	22
A blue bottle	36	40	44	48	56	56	62	64
Correct product ID	4	6	18	18	18	18	20	38
Visual item 1	2	6	6	8	10	20	24	24
Visual item 2	4	8	8	10	22	32	36	40
Incorrect brand ID	40	46	54	58	64	68	68	68
Correct brand ID	12	16	28	44	62	76	84	84
Yellow color	4	16	22	30	34	38	48	48
White color	12	20	24	36	40	42	42	42
Red color	4	8	14	20	22	24	26	28
Blue color	10	12	20	26	28	28	28	28
Pink color	10	10	10	10	12	12	16	18
Copy point 1	-	-	-	-	2	10	22	30
Copy point 2	-	-	-	-	-	4	16	24
Copy point 3	-	-	2	4	6	20	50	76
Ounces of product	4	4	4	4	4	6	6	10

\*Selected responses.

alternatives for two important reasons—it produces consistent results in a test-retest situation and it is able to discriminate among test alternatives. If the same stimulus (package) is tested more than once, the results will, with a high degree of probability, be identical each time. Second, if the test packages are capable of producing different levels of impact or intrusiveness, this testing technique will measure the difference.

Table 3 illustrates the ability of this measurement system to replicate its findings. Brand Name Recognition Scores are shown for two consumer packages, each of which was tested on three different occasions with three different samples of respondents. The brand name recognition score is the average length of time, in seconds, it takes a sample of respondents to identify correctly the brand name of the test package. For Brand M, results differed by only 0.12 seconds in the three tests; for Brand S the scores differed by only 0.06 seconds in three successive tests. If the same packages are tested, it's likely the results of the

**Table 3 Mean Recognition Scores**

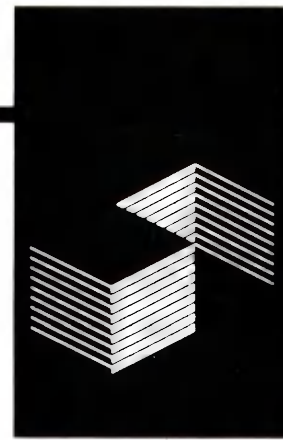
Brand M Package	
Test 1	1.03 seconds
Test 2	1.11 seconds
Test 3	1.15 seconds
Average	1.10 seconds
Brand S Package	
Test 1	0.76 seconds
Test 2	0.77 seconds
Test 3	0.82 seconds
Average	0.78 seconds

**Table 4 Mean Recognition Scores**

Test 1	
Brand A package	0.05 seconds
Brand B package	0.26 seconds
Brand C package	0.26 seconds
Brand D package	0.67 seconds
Test 2a	
Graphic X, brand name E	0.59 seconds
Graphic X, brand name F	0.25 seconds
Test 2b	
Graphic X, brand name F	0.25 seconds
Graphic Y, brand name F	0.07 seconds

impact measure will be the same. The table also indicates that the T-scope test is able to discriminate between different package designs. Brand S was correctly identified about 1/3 second sooner than Brand M (Average Recognition Score of 0.78 versus 1.10).

Another illustration of the test's ability to discriminate between packages is shown in Table 4. In Test 1, four packages from the same product category were tested. Results indicate Brand A was correctly identified five times faster than Brands



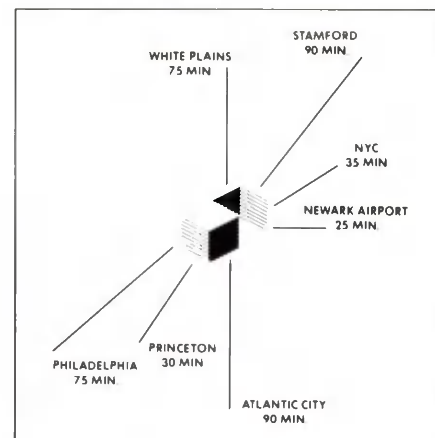
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B or C and 13 times faster than Brand D. Test 2a included two packages with identical label graphics but different brand names; Test 2b included two packages with identical brand names but different graphics. Results clearly show significant differences in impact. These test scores also show both brand name and/or graphics can influence recognition. With identical graphics Brand F was correctly identified about twice as quickly as Brand E; yet with identical brand names Graphic Y performed much better on the correct name recognition.

The conditions of the exposure of the packages to the respondents is always a point capable of generating long discussions. There are two basic conditions under which a package may be tested by using this T-scope impact measure:

1. An individual package, by itself, can be studied without reference to a competitive frame. The respondent is exposed to only a single package stimulus.

2. The test package can be studied as it relates to its competitive frame or environment. It can be shown to the respondent as part of a "typical" shelf array in which the test package is one of several brands/packages displayed and collectively viewed by respondents.

Results of previous tests indicate the more viable testing technique is to deal with a single package exposure rather than a multiple package situation. Exposing the respondent to only a single package generates results that go into more depth relative to the test package. In a single package test design, it is likely that information will be volunteered on the attention-getting characteristics of such design elements as:

- Colors and/or combinations of colors.
- Unusual or distinctive package shapes.
- Brand name recognition.
- Playback of product category description(s).
- Package graphic elements such as illustrations or photographs.
- Corporate symbols or logos.

It's also likely that test results from a single package testing technique could more readily identify elements of the package that are being misread or are in some way confusing to the consumers participating in the test.

In a shelf array test situation, respondents are asked to look at a number of different brands as well as a number of packages or shelf facings for each brand. This normally results in a display of 20 or more packages. When asked to concentrate on this type

	Fastest Time	Slowest Time
Single package (24 cases)	0.04 seconds	0.73 seconds
Shelf array (28 cases)	0.44 seconds	1.50 seconds

of stimulus, respondents tend to focus their attention on picking out the brand name of each group of packages shown. They will be sure they have correctly identified the brand name on one set of packages, then move their attention to the second set, then on to the third until they are confident they have correctly noted each separate brand in the shelf array. In a practical sense, this procedure leaves respondents little or no time to comment on any other aspects of the packages displayed.

Also, since there are a large number of packages to look at, respondents tend to be a bit cautious about relating what it is they see until they are reasonably sure of themselves—thus their recognition for correct brand name identification is usu-

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Finally, the most compelling argument in favor of using a single package mode rather than a shelf array exposure is that

	Single Package	Shelf Array
Brand A	0.05 seconds	0.44 seconds
Brand B	0.26 seconds	0.90 seconds
Brand C	0.26 seconds	1.10 seconds
Brand D	0.67 seconds	1.35 seconds

test results are parallel for both situations. If several different brands are included in a test, the "winner" is likely to be the same brand/package in both situations, the nearest competitor would be in second position in both testing schemes, and the slowest recognition speeds would probably be the same packages. The rank order of test results, in terms of speed of brand name recognition (impact), would probably be the same.

Thus if two test designs do an equally adequate job of measuring the speed of brand name recognition of one test package relative to other test packages within one test series, but one of the testing modes also provides information concerning the impact of other package elements, the methodology that can generate the additional information is the logical choice.

Table 5 shows the similarity of results for four brand names/packages tested under both a single package mode and a shelf array situation. Clearly, Brand A "wins" in both methodologies, Brands B and C are distant seconds and Brand D does the least effective job of gaining correct brand identification.

The next point to consider in completing this type of package design research is the actual physical form the stimuli (packages) used in the test should be. There are three basic considerations. 1. In what form is it practical to produce the package/design alternatives for testing purposes? 2. Will the materials used to execute the test allow for geographical flexibility? 3. Can the test be easily administered in the field or does it require

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ally much slower than in the single package stimulus tests. As a result, the dispersion of mean recognition scores is not as great in the single package test mode. This point is illustrated by the above chart of Mean Recognition Scores.

In the 24 Single Package T-scope tests, the fastest time recorded was just under 1/20 of a second, nearly 20 times faster than the slowest mean recognition time recorded. In the 28 Shelf Array T-scope tests, the fastest time recorded for correct brand name identification was just under 1/2 second, about three times faster than the slowest score of 1 1/2 seconds.

Another point in favor of selecting a single package mode for testing the impact of packages is that this system better handles the built-in bias that consumers have for brand names they know well. Packages that carry familiar brand names tend to achieve much higher recognition scores than packages with brand names that are less well-known by respondents. Thus tests in which some of the packages carry new names will invariably indicate that the established brands achieve faster recognition scores. This will of course occur in both single package format and in shelf array test situations. The single package scheme does have greater ability, however, to discriminate between test packages and is more likely to show which of the new brand name/package alternatives included in the testing scheme has the most impact.

Finally, the most compelling argument in favor of using a single package mode rather than a shelf array exposure is that

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A testing methodology that utilizes 35mm slides to represent the test package is usually a good choice. This method is portable, takes little mechanical aptitude to operate, and requires no special equipment other than a T-scope device and a 35mm projector/viewing screen. Most important, 35mm slides can represent accurately the actual test packages in terms of color reproduction and are much less expensive to produce than tight, mock-up packages. For example, if a new product package is under consideration, only one of each of the test packages need be produced. That model can be photographed and the test can be completed in several markets simultaneously without fear of destroying the prototype model.

Yet the testing system must be flexible enough to vary from this methodology when it's appropriate. If, for example, one or more of the test packages in the research use fluorescent ink colors, it would not be possible to use 35mm slides because these inks cannot be reproduced adequately in full color photography. In fact, the only way to represent this type of test package accurately would be the test package itself. In one testing situation in which these types of packages were included as alternatives, a shadow box was built, and the T-scope procedure was modified so that the actual package inside the shadow box was illuminated in a controlled fashion.

A final consideration prior to conducting this type of impact/image/preference test relates to sample selection. A package test is not unlike any other form of market research investigation in the sense that sampling methods and selection criteria are important to the successful completion of the study. For the

majority of consumer package tests the sample should be structured to include a high percentage of product category users. Establishing a subquota of users of certain brands is also a good plan. It was noted that brand familiarity influences how quickly respondents are able to recognize brand names. Familiarity/experience with the brand also influences a consumer's image perceptions of the product. Thus it is important that this sampling variable be controlled from test cell to test cell. If one-half the respondents in Test Cell A are users of the test brand, one-half the respondents in Test Cell B should also be users. Since the package test is essentially an experimental design, the researcher can tightly control the sampling procedures to be more certain that important differences that are noted in the test results are traceable to the package variations, and not the result of sampling variation.

The physical place in which the T-scope portion of this testing system is completed is almost always a small conference room setting in a central location interviewing facility. The room is arranged so that the 35mm projector is set up to flash approximately "life size" sequential exposures of the test package or the viewing screen.

Respondents who meet the sampling eligibility requirements and agree to participate in the test are brought into the room and seated about six feet in front of the screen. Participants are told they will see a picture flashed on the screen very rapidly and will be asked to report exactly what they saw each time a picture appears on the screen. If they normally wear glasses or contacts while shopping, they are asked to wear them during this test. The interviewer in the room with the respondent controls the T-scope mechanism and also records each respondent's verbatim commentary after each package exposure.

This type of impact measure is a purely physical measure of how quickly respondents can pick out or notice characteristics of the test package shown to them. Thus mechanical variations in the test setting can greatly influence the test results. For this reason, this portion of the test must be closely controlled and monitored. As much as possible, the physical characteristics of the test environment should be identical for each location or city used in the test. Instructions given the respondents are quite detailed and are read, word for word, to each participant.

In this type of T-scope methodology, respondents begin to "learn" the technique as the subsequent exposures are shown to them. They try to win the game in the sense that the first few exposures have taught them what to look for on the screen. For this reason, exposing any single respondent to more than one test package (or shelf array) in this type of testing system is not an acceptable procedure. To do so would only introduce a bias into the test that could well blur the results. It is much wiser to deal only with respondents who have not been preconditioned to the mechanics of the test procedures.

A series of eight T-scope exposures seems to be the optimal number for this testing procedure. The fastest speed, 1/150 second, is the starting place because it is the point at which a few people can actually pick out certain package elements—speeds quicker than this are just a flash to respondents. The slowest speed, 2 seconds, is long enough for all salient package graphics to be noticed—slowing it down further only results in redundancies. Dividing this 1/150 to 2 seconds range into eight intervals provides a reasonably high level of discrimination between the points.

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The absolute scores generated via this T-scope methodology are only useful when a number of packages are tested and their scores are directly compared. The emphasis of this measurement is on how well each test package performed relative to others included in this or previous tests. Knowing a test package achieved a Mean Brand Name Recognition Score of 0.39 seconds doesn't mean much unless norms or other directly comparable impact scores are available.

After the respondent has seen the eight exposures of the test stimulus, the T-scope impact measure is complete. Each participant is then asked to move to a second interviewing station, and an entirely different set of questions are administered.

### Imagery analysis

The objective of this section of the testing system is to determine what types of images and or impressions are communicated by the package/label designs being tested. This is done by having each respondent rate the test package on a long series of attributes or dimensions that might be used to describe the package/product. Normally 25-30 of these attribute statements are included in this semantic differential rating scale technique.

These attributes are designed to reflect the opinions consumers may have about the test package/brand. The list may be generated from prior consumer market research studies such as focus group sessions on the brand or product being tested. New product concept studies or product positioning studies are also a useful source for constructing this attribute list. Ultimately, however, brand management and the research analyst have the responsibility to anticipate the consumer's response to the

brand/package and to be certain the final list reflects these possibilities as well as those dimensions known to be important to consumers in deciding to buy/not buy the test brand/product. The importance of the attribute list cannot be stressed enough. It forms the basis of the imagery analysis portion of the package research study. If the "right" attributes are not included in the list, the "right" consumer response pattern will never be measured.

The attribute list should cover three broad dimensions:

1. Product efficacy dimensions. These attributes measure the extent to which respondents believe the product inside the package will live up to performance expectations. Examples of these types of attributes are:

- Cleans pots and pans without scrubbing.
- Makes silverware sparkle.
- Rinses off easily.
- Especially effective in removing grease.

Other product-related dimensions focus on things such as:

- Would be economical to use.
- It's convenient to use.
- It's a modern product.

2. Dimensions related to aesthetic assessment of the package:

- It's an attractive package.
- The colors are cheerful.
- It's an eye-catching design.
- Sprays on easily.

3. Statements of a self-referral nature that reflect the respondent's personal interest in the product:

- It's my kind of product.



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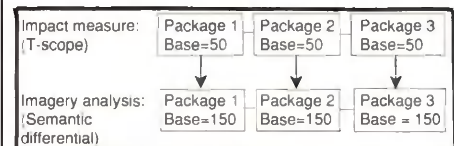
In this section of the test the actual package makes an ideal stimulus. Respondents can hold it, shake it, and examine it, front and back, straight up and upside down. However, it is often not practical to work with actual packages or package prototypes. In these instances,

full-color 8x10 inch photographs of the test package can be used. This is an inexpensive means of reproducing original designs. It can be done quickly, and respondents can generally accept photography as a reasonable substitute for the real thing. The only proviso is that the photographs must reflect the original

package/label design accurately. Colors must be very close to the original design specifications, and the size of the single package in the photograph should come close to the actual size of the package.

The impact measure (T-scope) portion of this testing system places emphasis on purely physical measurement. The imagery measure emphasizes consumer opinions/perceptions—to what extent does the test package communicate certain attributes or dimensions. In the first instance, sampling error, in a statistical sense, tends to stabilize relatively quickly and a sample size of 50-60 respondents is adequate. The imagery measure requires a large sample base before the test results begin to stabilize. A base of 150 respondents is the minimum sample requirement.

Unlike the impact measure, where each respondent can view only one test package, this section of the test can accommodate up to three package exposures. Previous studies have shown that a consumer's opinions of one package do not strongly influence his or her opinion of a second or third package. Thus if each respondent is asked to rate three packages in the imagery section of the study, it's possible to keep the two sections of the package test in balance in terms of sample base requirements. Reliable test results will still be generated for both the impact and imagery measures. The test design takes this form:



If more than three test packages are included in the test design, rotations can be established so that each alternative gets equal exposure. This approach is preferable to having each respondent rate four or more packages in the imagery section. The latter approach is too time-consuming, and respondents could easily lose interest in the process. If that happens, results are suspect.

The actual form of the scale that is administered in the imagery analysis section of the questionnaire is the next consideration that must be addressed. The options are almost limitless. Many companies already have strong preferences about the exact form/wording of rating scales used on their consumer research

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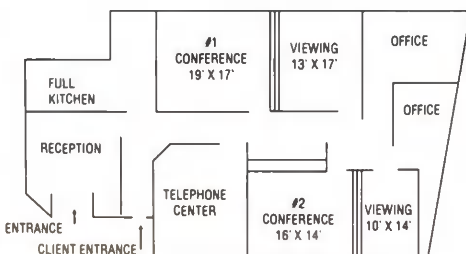
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Cleans pots and pans without scrubbing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Have to scrub to get pots and pans clean				
	Definitely Agree	Probably Agree	Probably Do Not Agree	Probably Do Not Agree	Probably Do Not Agree	Probably Do Not Agree	Definitely Do Not Agree				
Rinses off easily	4	3	2	1							
A modern product	Absolutely True ( )	Mostly True ( )	Somewhat True ( )	Somewhat False ( )	Mostly False ( )						
Sprays on easily	True 10	9	8	7	6	5	4	3	2	1	Not True
My kind of product											

studies. As a consequence, several scale variations have been used in this section of the study—all with good results. This simply means that consumers understood that the scale was designed to place a direction and intensity to their opinions, and these scales were sensitive enough to pick up differences in consumer perceptions between package design alternatives. The five examples above are semantic differential scales that effectively measure consumer attitude in terms of both direction and intensity.

Thus the key considerations in choosing a scale are:

- Do respondents understand the scale?
- Is the scale sensitive enough to measure different opinions?
- Does the company have a track record or norms for the scale?

Once a scale rating device has been selected, the administration of that device in the field is essentially the same for all scales. The interviewer reads the list of statements and has the participant respond with his or her rating for each item on the list. It's a good idea to have the actual scaling device printed on a separate card so the respondent may refer to it as each statement is read. Having the field interviewer administer these scale ratings, as opposed to having them self-administered, has several advantages:

- It's faster.
- Rotations and/or starting points can be used.
- Respondents are less likely to mark the same rating point for all attributes; the presence of an interviewer seems to force participants to be more thoughtful and

consider their responses more carefully.

- Much fewer "No Answers" are recorded.
- It avoids misinterpretation and misunderstanding.

After the respondent has rated each of the 25-30 attributes for one package alternative, the process is repeated until a maximum of three packages are rated on

this attribute list. These ratings form the basis of the imagery analysis portion of this package test system. Mean scores are calculated for each attribute and these

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scores are profiled, or compared, among the test alternatives included in the study. Variations in these rating scores are indicative of each package's ability to convey different impressions to those consumers seeing it.

There are occasions in which the use of mean scores will not tell the entire story. In a situation where the distribution of a particular response is skewed (i.e., a normal frequency distribution curve would not properly describe the response pattern of consumers on a particular attribute or statement), the analyst can use

**Table 6** Image Profile Scores\*  
Percent marking "top-box"

	Brand A	Brand B-1	Brand B-2
Reduces static cling	72%	19%	15%
Softens clothes	69	31	25
Clothes have a clean scent	72	17	17
Has a pleasant fragrance	66	13	11
Convenient to use	57	52	44
Works in any cycle	28	41	43
Has a unique advantage	27	42	42
A versatile product	25	47	41
Economical	43	13	21
Lasts a long time	42	14	15
Worth the money	46	7	7
Attractive package	69	46	47
Modern	64	51	50
For my family	69	23	32
Necessary for my home	54	37	44

\*Selected responses.

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a "top box" score rather than the mean score in reporting and/or analyzing test results. For example, if the scale ratings for many of the attributes included in the study show a bilateral distribution pattern (concentrations of responses at both ends of the scale) a mean score would be misleading. In this instance, the reporting of the percentage of respondents marking the attributes at the highest scale rating point (the "top-box" score) provides a more accurate picture of the consumers' response to the package being studied.

The scale rating results developed in this section of the study provide two important pieces of information:

1. They pinpoint those attributes that are highly consistent with the respondents' attitude toward the product/package design. Attributes that show a high degree of agreement are indicative of those properties of the product/package that consumers will accept as truthful and realistic product claims. Conversely, those attributes that are scored low by consumers are dimensions that respondents find hard to believe about the package/product being tested. It would, for example, make little sense to position the product as a high quality or expensive entry if the product's package clearly conveys a low cost/low quality image.

2. They provide a profile of one test package versus the other test packages included in the test. By examining the scores on a side-by-side basis the analyst can identify the areas on which consumer perceptions of the packages differ. The decision as to which package is the best fit for the product positioning has to be made on the basis of a thorough examination and understanding of these profile scores.

There are, of course, no right or wrong answers in interpreting these imagery



analysis scores. The data must be analyzed in concert with what the stated objectives of the package test are. What have the packages/labels been designed to communicate? How well does each package perform in light of these criteria? These are the key questions addressed by the imagery analysis section of the package test system.

Table 6 is an example of the tabular detail generated via this questioning sequence. Brand A is the leading seller in the product category, Brands B-1 and B-2 are design variations of one of the other newer brands in the category. Notice two things: First, there is a reasonably wide range of agreement/disagreement with the attributes listed on the chart (the "top-box" scores range downward from 72 to 7%), an indication that the scale rating device is measuring differing consumer opinions/perceptions relative to these attributes. Next, the scaling technique is able to differentiate between packages tested—Brand A clearly has a different profile than either Brand B-1 or B-2, and even among these two alternatives a somewhat different attitude profile is evident.

Throughout the test, respondents are asked to deal with the test stimulus (packages) on a monadic basis. In the impact portion of the test they are exposed to only one package. In the imagery analysis portion they do handle three alternatives, but only one at a time. At no time are they asked to directly compare the relative merits of the test packages.

Careful study of the impact and imagery measures will often supply sufficient consumer feedback to make solid judgments concerning the effectiveness of the test package(s).

One useful analytical device is to review the results for each package tested in terms of the four quadrants of Grid 1.

On occasion there are situations when the test scores for particular packages are very similar. In these instances, it is useful to try to exaggerate whatever small differences do exist in the minds of consumers. This is accomplished by asking respondents to "pick a winner" from among the alternatives presented.

#### Direct comparison preference

In this section of the study, each of the respondents is asked to compare directly the test packages for the first time. A limited number of statements or dimen-

sions related to their impressions of the "image" communicated by each package are read to them, and they are asked to select the one package/label design alter-

most economical product, most effective product, most attractive package, highest quality product.

It's important to keep in mind that this

#### Grid 1

Strong Impact Measure Scores  
Correct Imagery Perceptions  
No Changes Necessary

Weak Impact Measure Scores  
Correct Imagery Perceptions  
Reappraise Impact

Strong Impact Measure Scores  
Incorrect Imagery Perceptions  
Reappraise Imagery

Weak Impact Measure Scores  
Incorrect Imagery Perceptions  
Significant Changes Needed

native they prefer for each statement. This list often includes such factors as:

questioning technique tends to force respondents into choices that they might

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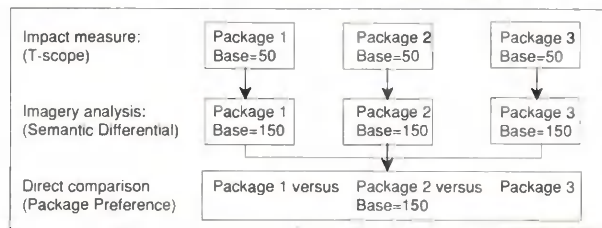
not otherwise be in a position to make. It's not likely a consumer will ever see

exist. When read in conjunction with the other information collected in the testing

spondents are asked to distribute a total of 11 votes among the packages in the test.

**Table 7 Package Preference**

	Package Preferred (%)			
	Package 1	Package 2	Package 3	Package 4
Safest product	39	18	23	20
Most effective product	33	19	24	24
Easiest to use	37	20	26	17
Best overall product	36	20	23	21
Most expensive product	17	12	38	33
Most attractive package	24	15	33	28
% Constant sum scale votas	28	20	28	24



three different packages for the same brand on sale at the same time. The intention of these questions is not to determine a "best choice," but to magnify the differences in consumer perceptions that may

system, the discrimination produced by this questioning technique can produce meaningful information.

A final preference question is normally included in this section of the study. Re-

Votes are distributed on the basis of how strongly each respondent feels his or her preferences are—it's a measure of the intensity of preference. It's possible one package is so well-liked it gets all 11 votes, or votes may be more evenly distributed across the alternatives, an indication that preference for one package versus another is very slight.

Table 7 is an example of this question sequence. Four alternatives of the same brand were tested. Package 1 clearly is preferred on those dimensions related to product performance (safer, more effective, easier to use, and best overall), but it is not the most attractive package nor is it the most expensive package in the test. Though the individual preference scores for each dimension are quite strong, the constant sum scale question shows the actual intensity of preference to be quite weak. Package 1 and Package 3 are, in fact, equal in terms of consumer preference, with the other two alternatives not far behind.

**Summary**

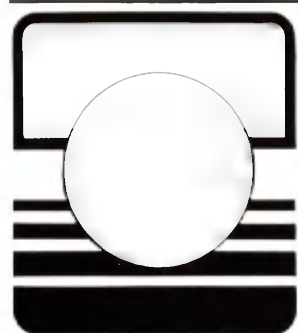
This article has discussed a model for testing consumer packages or label designs. It is a reliable, proven methodology for evaluating consumer response to different packages using three separate criteria:

1. Impact (T-scope technique).
2. Imagery (semantic differential).
3. Preference (forced choice).

Incorporating these three discrete measures into one single testing system offers the opportunity to examine and analyze the test results in an integrated, systematic way. The methodology is flexible, both in terms of geography and in terms of type of packages that can be studied, and the time and financial commitment on the part of the sponsor is modest. The test design is summarized in the chart above.

When read in concert, these measures provide a maximum amount of information on which to base important packaging decisions for consumer brands.

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## Trade news

continued from p. 18

newspaper ad, eight used a friend, six knew the seller, one saw the home in a magazine, and two mentioned other sources.

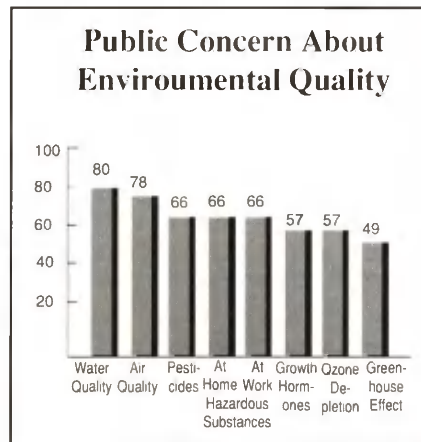
## Americans express fear of environmental hazards

A recent survey by Opinion Research Corp shows that as many as 80% of Americans are very concerned about certain environmental hazards, and that one-fifth of the public believe that they or a family member have already suffered damage to their health due to poor air quality, ozone depletion, or exposure to hazardous materials at work.

As a result of this apparent high level of anxiety over the environment, many Americans support tougher environmental regulations even if it means higher prices for consumer products or higher taxes.

At least half of the public say that they

are very concerned with each of eight potential environmental threats that they were questioned about, with the largest majorities expressing anxiety about the environmental hazards that have been



given publicity over a long period of time.

Three environmental problems are of considerable concern to the public:

- Four people in five say that they are very concerned with water and air quality.

- Two-thirds of the public see pesticides, or hazardous substances in the home or workplace, as being areas of particu-

larly pressing environmental concern.

- Just over half express strong concern about three environmental issues that have emerged more recently as major foci of media attention: growth hormones in meat, ozone depletion, and the greenhouse effect.

People may be hypersensitive about environmental threats of all types following the Exxon Valdez oil spill. Many indicate a willingness to dig into their own pockets to pay the costs of stricter environmental regulations. A slight majority (57%) are willing to accept higher-priced products as a side effect of stricter regulations, and two out of five state that they would pay higher taxes to cover the costs of tougher environmental controls.

However, many consumers draw the line at putting the nation's overall economy in jeopardy. Even in the wake of the catastrophic Valdez oil spill, two people in three would oppose stricter regulations that would make America more dependent on foreign oil. Three out of five would also oppose regulations that cost some workers their jobs, and a slight majority would be in opposition if the regulations made it more difficult to compete against foreign firms.

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## Names of Note

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**Dr. Robert K. Schnee** has joined Tarrytown, NY-based BAI, a marketing consulting and research firm, as vice president. Previously he was senior vice president at Oxtoby-Smith.

**Warren Spence** will assume sales manager responsibilities for a new unit of the SAMI Advertiser/Retailer Services division of The Arbitron Co. to be built around health and beauty aids clients.

**Myra R. Ebner** has joined Kimberly-Clark Corp., Roswell, GA, as marketing research project specialist.

**Ann Kane** has been named manager at Consumer Opinion Services' (COS) new mall intercept facility in Boise Towne Square, Boise, ID. In addition, **Judy Riha** has been named manager at COS' new intercept facility at Lakewood Mall in Tacoma, Washington.

**Gary L. Fehlhaber** has been named consumer research analyst, senior, for Miller Brewing Co. In addition, **Lloyd A. Strauss** has been named marketing research manager.

**Rick Greenfield** has been promoted to senior vice president, research at Minneapolis-based Miller Meester Advertising.

**Jeffrey L. Riffkin** has joined The WATS Room, Inc. and Telespecs Research Services as director of marketing.

**Judy Green** has been promoted to a supervisor of strategic planning and research at DDB Needham Chicago.

**Gerald P. Oberkofler** has joined Marketing Systems Group as director of database services. Previously he was director of MIS at RH Bruskin Associates.

**Glenn Weissman** has joined Schlesinger Associates, Edison, NJ, as vice president-client services.

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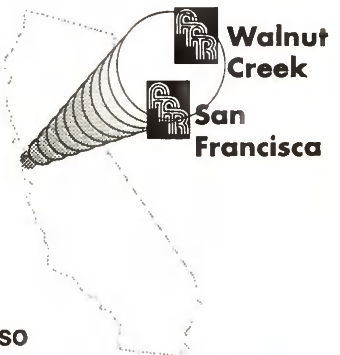
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## Trade Talk

continued from p. 54

bage—yet.”

Geographic factors exert a strong influence on consumer awareness of waste disposal, Opatow says. The more populous areas naturally generate more garbage, and thus their residents are more likely to be involved in recycling programs, for example, and exposed to extensive media coverage on the issue.

Much of the difficulty lies in inconsistent consumer definitions of the types of packaging that are environmentally problematic. It is agreed that plastic bottles and garbage bags pose a threat, but some consumers don't seem to consider other convenience-oriented packaging as hazards.

“When they are asked, consumers accustomed to the convenience of heat-and-serve microwave products are surprised that the disposability of the ‘next-to-nothing’ tray is being questioned. Fast food and take-out customers appreciate the convenience of leak-proof and grease-proof containers, especially the ones that retain heat. When they are asked about it directly, these people do not think take-out containers are a problem,” Opatow told the Packaging Institute International.

In general, she says, most consumers will provide socially acceptable answers when questioned about the waste disposal problem, but when asked about solutions, they are unable to provide pat, easy answers, reflecting the sense of confusion surrounding the issue.

“One of the critical problems is that the experts haven't agreed on what's good and what's bad. It's all well and good to say you can't have any more plastics, but there are some paperboard containers that are worse in terms of their disposability.”

That confusion also clouds the issue of disposal. No one is sure what is the safest and most efficient disposal method. Everyone agrees that the waste must be disposed of, but no one wants to have a garbage incinerator or landfill in their back yard. And they don't always believe that the government bodies who administer the disposal efforts are trustworthy, Opatow says.

“It's hard for the average person to know what's right and what isn't. The ‘government’ used to be an unimpeachable

source. It no longer is, so there is a certain amount of skepticism.”

Opatow says that in the near future, the following issues will influence packaging innovation:

- “Continuing consumer demand for safety (including tamper evidence).”

- “Consumer demand for convenience. This demand will be tempered by considerations related to price and to waste disposal.”

- “Profits will continue to motivate manufacturers' choices of packages and packaging materials, but companies will have fewer options.”

- “There will be a move to legislate standardization of certain types of packages in terms of materials to accommodate to recycling, plus shapes and configurations to reduce the amount of packaging and lower the volume of waste.”

- “The recent attempts to use packaging as product enhancers will be re-examined...to determine tradeoffs between convenience and quality image on the one hand, and economical disposability on the other.”

- “All of this will result in products with less packaging and more recyclable packages. As a result, there will be new challenges for package developers, especially for graphic designer and those in the printing industry. As containers become standardized, there will be fewer opportunities to differentiate one brand from another by means of packaging structure, materials, or inner and outer wraps. Instead, graphic design and copy will have to carry a larger share of the burden of image communications and the execution of printing will become an even more important quality indicator.”

It's the area of convenience that seems to be the stickiest. Opatow says that consumers will either pay more or sacrifice convenience to ease the pollution problem, but they will not do both.

“Consumers already pay more for what they perceive as convenience, but to pay more and not get the convenience would be a difficult idea to sell, because we've become a country where we're used to science solving our problems. I think it will take a while to sink in that maybe this is something that science doesn't have an answer for yet.”

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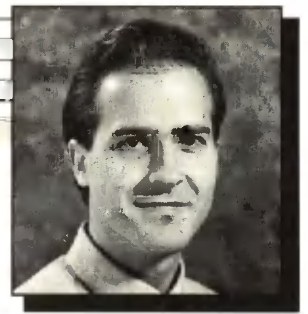
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by Joseph Rydholm  
managing editor

## Consumers unsure how to solve packaging waste problems

**A**s this issue of *QMRR* is devoted to packaging research, I've been thinking quite a bit about topics related to the subject of packaging; particularly, in light of certain local and national developments, about the problem of packaging waste disposal.

Here in the Twin Cities, local government bodies have recently taken steps towards banning the use of certain types of packaging (plastic soda bottles, styrofoam fast food containers,

etc.), and within months downtown Minneapolis will see the start-up of a controversial garbage incinerator located on the edge of its warehouse district.

Events such as these are being repeated all over the country. As it was decades ago, pollution has become a hot topic. With trash piling up and space for landfills running out, solutions to the waste disposal problem, from outright banning of certain non-degradable materials to other alternatives such as incineration and recycling, have become hotly debated issues.

It's become clear that more and more companies, and not just packaged goods manufacturers, will have to pay attention to consumer attitudes on pollution, recycling, and other packaging issues. Some already have; for example, degradable trash bags are now on the market, and so are degradable diapers.

To get some insight into how consumers feel about the problem, I contacted Lorna Opatow, president of Opatow Associates Inc., who's investigated that area for 20 years in the course of performing research in the once-disparate but now converging areas of public issues and packaging design.

My curiosity was piqued after receiving a copy of a presentation Opatow gave to a meeting of the Packaging Institute International earlier this spring, which traced the course of consumer attitudes on pollution over the past two decades.

Opatow says that consumers are involved in waste disposal issues, but unlike the consumer-led anti-pollution movement of the 1970's—which attacked litter and got phosphates removed from detergents—in general, as with the container banning effort here in the Twin Cities, it is the local governments that are taking the lead in acting on the problem, because they are the ones confronted daily with managing waste disposal.

"I think consumers are becoming more aware of waste issues, and that packaging is a part of it. But they feel there is a limit to what they can do about it. In the past, the pollution problems have been citizens' problems—turning on your faucet and getting soap suds, for example—but this is something where citizens aren't responsible for getting rid of their own gar-

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Partial schedule of seminars October 1989–March 1990

<p><b>101. Practical Marketing Research</b> Los Angeles ..... Oct. 2-4 New York ..... Oct. 23-25 Phoenix ..... Nov. 13-15 Cincinnati ..... Dec. 11-13 Atlanta ..... Jan. 8-10 Boston ..... Jan. 29-31 Cincinnati ..... Feb. 5-7 Chicago ..... Feb. 28-Mar. 2 New York ..... Mar. 26-28</p> <p><b>104. Questionnaire Construction Workshop</b> San Francisco ..... Oct. 23-24 Boston ..... Dec. 4-5 New York ..... Feb. 27-28 Cincinnati ..... Mar. 26-27</p> <p><b>105. Questionnaire Design: Applications and Enhancements</b> Boston ..... Dec. 6-7 New York ..... Mar. 1-2 Cincinnati ..... Mar. 28-29</p> <p><b>106. Computer-Assisted Questionnaire Design &amp; Data Collection</b> Cincinnati ..... Mar. 30</p> <p><b>201. Focus Groups: An Introduction</b> San Francisco ..... Oct. 25-26 Toronto ..... Dec. 11-12 New York ..... Feb. 12-13 Boston ..... Mar. 6-7</p> <p><b>202. Focus Groups: An Applications Workshop</b> Toronto ..... Dec. 13-14 New York ..... Feb. 14-15</p> <p><b>203. Focus Group Moderator Training</b> Cincinnati ..... Oct. 10-13 Cincinnati ..... Nov. 7-10 Los Angeles ..... Nov. 28-Dec. 1 Cincinnati ..... Dec. 5-8 Chicago ..... Jan. 9-12 Cincinnati ..... Jan. 30-Feb. 2 Cincinnati ..... Feb. 20-23 Cincinnati ..... Mar. 13-16</p> <p><b>204. Qualitative Marketing Research with Children</b> Toronto ..... Dec. 15 New York ..... Feb. 16</p> <p><b>301. Writing Actionable Marketing Research Reports</b> New York ..... Oct. 26-27 Los Angeles ..... Jan. 10-11 Chicago ..... Feb. 1-2 Cincinnati ..... Mar. 19-20</p> <p><b>302. Effective Oral Presentation of Marketing Information</b> Cincinnati ..... Oct. 2-4 Cincinnati ..... Dec. 18-20 Cincinnati ..... Jan. 22-24 Cincinnati ..... Mar. 21-23</p>	<p><b>401. Managing Marketing Research</b> Cincinnati ..... Oct. 2-3 Hilton Head ..... Nov. 9-10 Boston ..... Feb. 1-2</p> <p><b>501. Applications of Marketing Research</b> Los Angeles ..... Oct. 5-6 Cincinnati ..... Dec. 14-15 Atlanta ..... Jan. 11-12 New York ..... Mar. 29-30</p> <p><b>502. Product Research</b> New York ..... Nov. 14-15 Cincinnati ..... Feb. 6-7</p> <p><b>503. New Product Forecasting</b> Cincinnati ..... Feb. 8-9</p> <p><b>504. Advertising Research</b> Cincinnati ..... Nov. 2-3 New York ..... Jan. 25-26</p> <p><b>505. Positioning and Segmentation Research</b> Cincinnati ..... Oct. 31-Nov. 1 New York ..... Jan. 23-24</p> <p><b>506. Customer Satisfaction Research</b> Hilton Head ..... Oct. 10-11 New York ..... Nov. 16-17 Cincinnati ..... Jan. 18-19 Los Angeles ..... Mar. 15-16</p> <p><b>507. Pricing Strategy &amp; Tactics</b> Cincinnati ..... Feb. 22-23</p> <p><b>601. Tabulation &amp; Interpretation of Marketing Research Data</b> Cincinnati ..... Nov. 13-14 Chicago ..... Feb. 12-13 Boston ..... Mar. 12-13</p> <p><b>602. Tools and Techniques of Data Analysis</b> Cincinnati ..... Nov. 15-17 Los Angeles ..... Dec. 18-20 Chicago ..... Feb. 14-16 Boston ..... Mar. 14-16</p> <p><b>603. Practical Multivariate Analysis</b> Cincinnati ..... Dec. 4-6 New York ..... Feb. 7-9 Chicago ..... Mar. 19-21</p> <p><b>604. Using Multivariate Analysis: A P.C. Based Applications Workshop</b> Cincinnati ..... Dec. 7-8</p> <p><b>606. Practical Conjoint Analysis</b> Cincinnati ..... Nov. 20-21 Chicago ..... Mar. 22-23</p> <p><b>701. International Marketing Research</b> Cincinnati ..... Mar. 29-30</p> <p><b>801. Planning Marketing Strategy &amp; Tactics Using Actionable Research</b> Cincinnati ..... Jan. 16-17</p>
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