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Mountain bike manufacturer uses research to test new ad campaign

March, 1990

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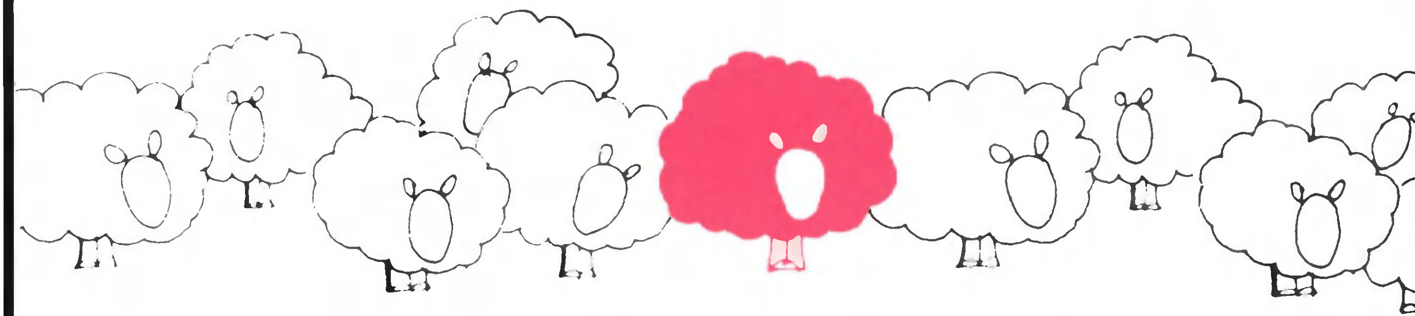

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Cover

Specialized Bicycle Components, Inc. used focus groups to investigate the needs of the expanding mountain bike market. Photo courtesy of Specialized.

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Breaking away from the pack

Focus groups tell a California-based mountain

by Joseph Rydholm
managing editor

Designed to carry their riders from busy city streets to deserted logging trails, mountain bikes, with their swollen frames and fat, knobby tires, look very different than their sleek, fragile cousins, the road bikes commonly called "ten-speeds." When first introduced in the early 80s, mountain bikes were considered an aberration, but they quickly became a phenomenon.

According to recent statistics, the mountain bike category now accounts for nearly two-thirds of all bikes sold in the U.S., generating $1.6 billion in retail sales annually.

At the forefront of that market is Specialized Bicycle Components Inc., a Morgan Hill, California-based company that began mass producing mountain bikes in 1981, the first company to do so. In addition to mountain bikes, the company also manufactures a full line of road bikes and riding accessories.

The company was founded and is staffed by bicycle enthusiasts (both mountain bike and road bike), many of whom join company President Mike Sinyard on a daily 20-mile ride over lunch. That close involvement in the sport has been a key to the company's growth and success, says Erik Eidsmo, executive vice president of Specialized. Since the company shares the passion of its customers, it has been able to make products that the market wants.

"Our strategy, from a product development perspective, is really from a user's perspective—not people who ride 300 miles a week, but people who are recreational riders. They provide the base from which a lot of our product development and strategic development comes from. To some degree, the company and the people that work here function as a lab. We are not only the end user, but to we are probably the best proxy that the end user has," Eidsmo says.

Mass appeal uncertain

At first, because Specialized manufactured a comparatively new product whose mass appeal was seen as uncertain, the company operated on the fringe of the market.

"We were the first to commercialize the production of mountain bikes, so people really left us alone out there, until they realized that we were on to something."

bike maker its ad campaign is a winner

With the company's success and the growth of the category came a host of companies bent on grabbing a share of the mountain bike market, and now, Eidsmo says, an industry shake-out appears imminent.

"This industry is at the first maturation cycle. I think there will be some significant consolidation both at the wholesale and at the retail side of the business. And that is the point, from a marketing perspective, that you need to send a message to the industry about what you feel is your position within the industry."

Preliminary research

The chosen vehicle for that message was advertising. True to the Specialized style, Eidsmo conducted preliminary research within the company, asking employees at all levels what they thought about mountain bike advertising in the industry magazines.

"As I started to reach around the company, one of the things that became apparent to me in doing the one-on-one interviews with the employees was that they felt that the advertising in bicycling magazines had become an indistinguishable blur. It used to be something they looked at, but now they have stopped because everything looks the same."

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The company's brochure used this photo of one of its bike frames holding up an apartment roof toppled by the recent San Francisco earthquake as graphic evidence of the quality of Specialized products.

Part of the team

Advertising research plays an integral role in the success of Fallon McElligott ads

by Tim Huberty

Editor's note: Tim Huberty is advertising research manager with Minneapolis-based Fallon McElligott advertising agency. He is also an adjunct instructor in the graduate programs in management at The College of St. Thomas, St. Paul.

Over the past decade, the Fallon McElligott (FM) agency has won more awards than any other agency in the United States. Its creative product has been praised extensively in both the trade and popular press. This distinctive style of advertising has given rise to a "Minneapolis school" of advertising. In fact, Minneapolis, as an ad community, is so hot, that multi-billion dollar advertising agencies have gone so far as to open satellite offices in the Twin Cities.

What's the secret of this success? Why does Fallon McElligott continue to win awards year after year? Actually, there isn't any secret to FM's success. Instead, it's just a matter of common sense teamwork.

Working together

One of the secrets of FM's success obviously lies in teamwork. But creativity is not a process or a possession of a single department, but all departments working together.

The agency's creative inspiration does not spring forth accidentally. FM's crea-

continued on p. 10

Here are just a few samples of Fallon McElligott's distinctive and highly praised advertising

for such clients as Timex, Hush Puppies, Penn tennis balls, and Minnesota Federal.

Fallon McElligott

continued from p. 8

tives do not sit around, waiting for lightning bolts of creativity to strike them. Instead, they work with everyone else in the agency to create advertising that not only wins awards, but, more importantly, sells the client's product. When a creative wins an award at FM, everyone celebrates.

Realizing that the first step of marketing research lies in secondary research, FM has two full-time secondary research people. A complete set of SMRB volumes is on file in the Research department (a second set is in the Media department). Besides subscribing to several database services, FM maintains an extensive list of periodicals that are routed to people throughout the agency. Finally, the FM library has hundreds of marketing-related texts as well as subject folders filling more than 25 file drawers. FM's creatives take ample advantage of all of these sources. They do their homework upfront, immersing themselves in a subject area before putting pen to paper.

As part of the creative process, writers and art directors frequently sit down and bounce ideas off account people—and even research folk. For example, when preparing print ads for a marketing research company (several of which have appeared in this magazine), both the writer and art director presented several preliminary ideas to the agency team—which included a research person. This "what do you think, are we headed in the right direction?" attitude helped produce ads that have been recognized in several award shows.

Pre-testing copy—who needs it?

FM does not pretest its advertising. First of all, no research methodologies have proven capable of predicting success in the marketplace. In addition, "big ideas" are all-too-often eliminated because they don't fit the norms of a test methodology.

This is not to say that several copytesting companies have not courted FM's cooperation. The physiological, the psychological, and the mechanical copytesting services have all offered—at their expense—to test FM's creative to "prove" that their systems work. A few years ago, a "galvanometer skin response" company tested several pieces of FM's pro bono work and determined that the "weakest" ad was a commercial which had been produced for a local children's guidance center. Instead, "real market" results repeatedly demonstrated that the *testing technique* was one of the "weakest."

The availability of a vast array of secondary research information, and the concept of teamwork, virtually eliminates the need for pretesting any copy. Instead, creatives and account people alike adhere to one of the agency's founding principles, i.e., that research dollars can be most effectively invested upfront, in identifying market opportunities, attitudes, segments, trends, competitors, etc. and evaluating creative concepts and positions. These upfront investments allow the advertising professional to develop "big ideas" that break through and provide creative leverage. FM believes that upfront investment in research leads to strong, well-directed strategies than can then produce on-target, effective advertising.

Fallon McElligott believes that upfront investment in research leads to strong, well-directed strategies than can then produce on-target, effective advertising.

Testing communieation hy measuring empathy

FM does use research to refine its advertising, to make great creative even better. These tests are referred to as "communications checks." After the ads have been produced, a communications check determines what the ads' strongest points are, in order to use these strengths in the development of future creative.

These communications checks are also referred to as "Empathy Testing." It's a form of communications research that gives agencies—and clients—the opportunity to get inside consumers' heads via a series of diagnostic questions.

As in many systems, respondents are asked a series of upfront, open-ended questions about the ads they see. However, rather than settling for an eight to ten word sentence fragment, we follow up respondents' initial statements with extensive probing. More comprehensive than a five-minute interview, Empathy Testing is a 25-30 minute interrogation that enables us to pinpoint what works in the execution, why it works, and how it works. We get inside consumers' heads to discover what they are feeling and why they are feeling that way.

The real key, however, is in how that information is used. Respondents' actual verbatims are featured extensively in the research presentation and written report so that the client, account team, and creatives can share and identify with the consumers' feelings. They can feel and hear what consumers have to say in their own words.

Empathy Testing combines qualitative information with a quantitative sample. The system can tell anyone what percentage of respondents recognized an ad's main idea. But those percentages tell only half of the story; respondents tell the other. Extensive use of respondent verbatims gives the client, account team, and creatives the best of both possible worlds—cold, hard numbers and warm, soft feelings.

Respondent comments

Advertising is a subjective process. It is only through careful reading of respondents' own comments that we can determine whether or not the advertising has not only captured consumers' attention, but has actually moved them.

A year ago, FM produced an ad for one of its financial services clients that presented a bank account for consumers 55 years and older, billed as the bank account "you've waited your whole life for." The ad showed pictures of a man at four stages in his life, including a photo taken while he was in the military. To ensure that the ad would have an impact, we felt that the target audience had to "internalize" the ad. It certainly did, as

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Perceptual mapping and cluster analysis: some problems and solutions

by Charles I. Stannard

Editor's note: The following article was adapted from a presentation made at the 1989 Sawtooth Software Conference. Charles Stannard is senior vice president, director of research and marketing at the Bloomfield Hills, Mich. office of D'Arcy Masius Benton & Bowles.

This article will discuss some common problems and issues analysts have to deal with in studies using perceptual mapping and cluster analysis. It will describe the problems and the various ways we dealt with each of them in specific studies.

The first problem, common to much marketing and advertising research, is how to deal with owners and nonowners of a brand. The context for this discussion is a large study of the appliance category. The second issue concerns evaluating segments based on cluster analysis. The data are also from the appliance study. The third issue concerns the use and interpretation of maps in advertising research. Here the data come from a study of the automotive category.

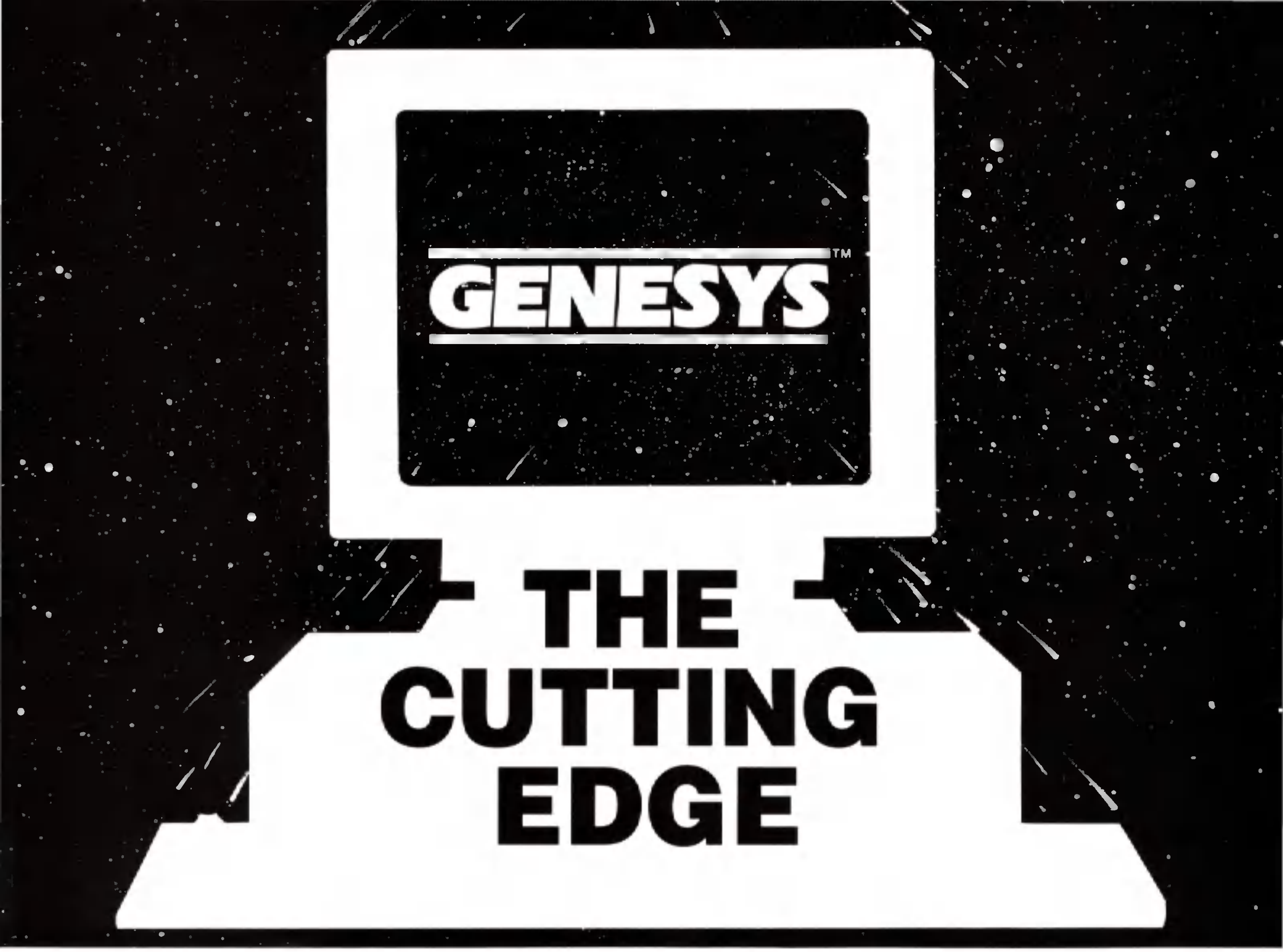
Dealing with owners and nonowners

The context for the discussion of owners and nonowners is a large positioning study conducted for a major maker of appliances. The study was done a year ago to assist the development of image objectives for the brand. We wanted to understand the characteristics (attributes and benefits) by which purchasers of major appliances distinguish manufacturers, and to determine the importance of these characteristics in the purchase decision. The project had two phases: a qualitative phase to learn which attributes and benefits consumers use to differentiate among manufacturers, and to understand qualitatively the process by which consumers purchase major appliances; and a quantitative phase in which we quantified and tested what we learned in the qualitative phase.

Any time we seek information from consumers, the problem of to whom do we talk confronts us. This problem is very similar to the problem confronting anthropologists studying a strange culture. In anthropology it is called the problem of the informed informant. Whether we are anthropologists in New Guinea or market researchers in the United States, the problem is the same; while just about everyone we question will respond with an answer, not all "answers" are equally valid and valuable. Naturally we want good answers, but since the canons of objectivity, not to mention feasibility, prevent us from ruling on the "goodness" of each and every answer, we move from evaluating answers to evaluating "answerers."

In choosing to whom we talk, we estimate whether it is reasonable to expect that a given person will provide us with good answers. The key criterion we use to judge whether a person can give us good answers is whether he or she is likely to be knowledgeable about the subject we are investigating. Typically, we make these judgments based on whether a person can indicate experience with the subject in which we are interested. An important indicator of experience is ownership or use of specific products or brands. We codify the criteria for judging the likely value of a respondent in the qualifications he or she must meet to enter the study.

The major appliance category (refrigerators, ovens and ranges,



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dishwashers, clothes washers, dryers, and microwaves) has several characteristics that determined the requirements people had to meet to participate in the study. The first is that the repurchase cycle is quite long—10 or more years. Moving and remodeling can shorten the cycle, but typically consumers are only sporadically in the market, usually after a long absence. Second, while consumers frequently have several different brands of appliances in their homes, they often cannot list them by brand when asked in an interview. Finally, except for moving or remodeling, it appears that many purchases are unanticipated, being a quick response to the actual or expected failure of the product.

These characteristics indicate that most consumers have little current knowledge about manufacturers and brands. They become interested in the category when they are about to purchase one or more appliances. Sometimes, as in remodeling and moving, the purchase is foreseen and the search for information about products and manufacturers can be leisurely and thoughtful. In other instances, when a current product fails, the search process is much more hurried and even haphazard. In either case, we think people move from a state of relatively low awareness and knowledge of manufacturers and their product offerings to one of relatively high awareness and knowledge in a short period of time, which is characterized by a comparatively vigorous search for brand and product knowledge.

For our purposes, therefore, we wanted a sample of people who would have greater than average knowledge of and involvement in the appliance category. They would better represent those people who are in the market for an appliance and thus would provide a better picture of the market from their point of view. Therefore, in addition to the usual demographic, appliance and brand ownership qualifications, we wanted people who were recently in the market for a major appliance, or anticipated being in the market in the near future. They best represented the state of mind and knowledge of consumers at the time of purchase and are the target of the advertising and marketing efforts.

In addition to choosing the right people, we also have to ask them the right questions. In a positioning study, we typically ask respondents to do two things. First, we ask them what attributes are important in distinguishing between brands. Then we have them rate brands on the attributes. Choosing the right questions means asking them to rate brands they are familiar with on attributes that are important to them in choosing between brands in the purchase decision. Since the number of attributes and brands of interest was too large—7 brands and 28 attributes—for any one person to rate all combinations of brands and attributes, we had each respondent rate 4 brands on 12 attributes. The brands and attributes were selected as follows: Each person rated the client's brand and three other brands with which he or she was familiar. The attributes were classified a priori into six categories based on their content. Each person rated two attributes in each category. The specific attributes were the two he or she rated most highly in each of the six categories.

The major part of the analysis of the appliance market involved producing a map of the market that located brands and attributes. The advantages of maps are well known. They provide an economical summary of a great deal of data on brands and attributes, in our case 7 brands and 28 attributes. Another advantage of maps is that the audience, usually managers, often finds them easier to understand, more revealing, and certainly more interesting than other ways of presenting the same data. From the analyst's and presenter's points of view, maps are often easier to present and interpret for an audience than are complex tables of numbers and coefficients.

Having thoroughly considered—or so we thought—the important issue of product and brand ownership, we were chagrined to discover that our initial map did not make a great deal of sense. In analyzing it we found much less discrimination among brands than we expected, and what appeared to be some odd juxtapositions of brands. We found some of the large, middle-range brands were positioned very close to smaller, expensive and high-quality brands. Everything we knew about the market suggested that consumers perceive the smaller brands as different from the larger/middle range brands.

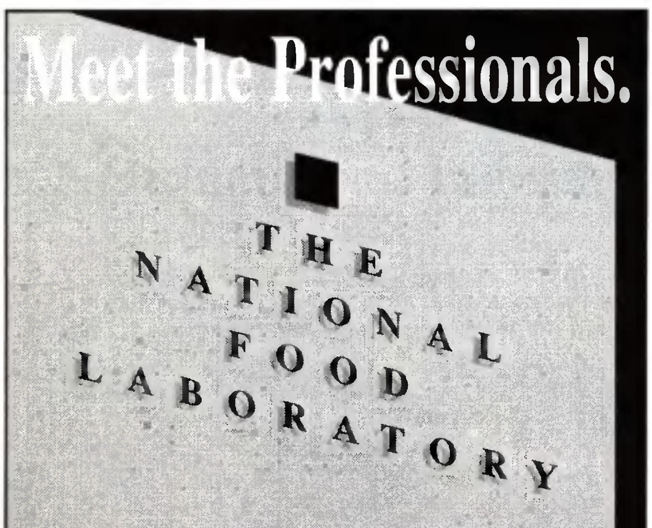
Thus, instead of shouting "Eureka!," we invoked the first rule of nonsensical analysis: whenever we find something truly new and unexpected in an analysis, look for an error—either in the logic of the analysis or in the data themselves. We know from experience that the odds favoring an error are much greater than those favoring the discovery of something truly new.

We identified two related aspects of brand ownership as possibly causing the strange map. First, the proportion of the sample owning specific brands varied greatly, mirroring the reality of the marketplace. Second, as is usually the case, people rated more highly the appliance brands they owned than the brands they did not own. In fact, the differences between brand owners and nonowners were greater in many instances than the differences among brands, when ownership was controlled. In combination, these two aspects of brand ownership in our sample could be the reason the larger brands ended up in close proximity to some of the smaller, more expensive and higher-quality brands.

The obvious solution, if these were the cause of the problem, was to separate owners and nonowners. We did this by creating 14 brands, seven as seen by owners and seven as seen by nonowners, and estimated the space using 14 brands—the seven original owner brands plus the seven nonowner brands. This approach has the advantage of using all the information (i.e., the total sample of ratings) in the sample, rather than a portion of it, as would be the case if the space were created using only owners. The disadvantage is that it can be difficult to create mutually exclusive and exhaustive groups of owners and nonowners when there is extensive multiple ownership of brands.

We then re-estimated the space, this time using the 14 brands. The first function or dimension captured the differences between owners and nonowners. It grouped at one end the owners of the various brands and placed the nonowners of the brands at the other end. Furthermore, there was no overlap between brand owners and nonowners of the brands. In effect, the first dimension accounted for the effects of ownership on the brand ratings.

We based our map on the next two dimensions, which successfully described the marketplace. One dimension was price/value. Brands at one end of the dimension were characterized as offering the lowest prices for comparably featured appliances; brands at the other end of the dimension were seen as saving money in the long run. The third dimension described quality in two different ways. One was called "promised quality." Brands offering promised quality were highly recommended by others and promised to honor warranty claims without hassle or difficulty. The other end of the third dimension was "experienced quality." Brands offering experienced



quality were seen as a pleasure to own and extremely durable and long lasting.

Thus, we eliminated the negative effects of brand ownership by creating brands to represent nonowners, estimating the space with the owner and nonowner brands and discarding the first dimension. This worked because owners rate their brands higher than they rate brands they do not own, and these differences, in addition to being consistent, are also substantial, generally being greater than the differences among brands. This explains why it was the first dimension. The fact that in most categories owners rate their brands higher than do nonowners suggests that what we did in the appliance category may have greater utility and generality as a solution to the problem of owners and nonowners.

Segments in positioning research

In addition to mapping the usual groups or segments of consumers like users and non-users, men and women, and so on, it is also possible to map segments derived from psychographic data. The latter segments emerge from the data in cluster analysis, as opposed to the former, which are predetermined according to explicit criteria. Because the segments in cluster analysis are based on psychographics, they can provide richer and fuller explanations of behavior and market structure. That is, instead of saying, based on the interpretation of a map, people choose brand A because it is low priced and readily available, we can, in the ideal case, elaborate on the reasons people choose Brand A. For example, we might find that the people choosing Brand A really make up two different segments, one which is very price sensitive because of low family income, and another which has very little interest in the category and therefore opts for the low-priced, convenient brand in this category. Of course, this is the promise of psychographically-based segments. In reality, though, we know promises are not always kept.

In our appliance positioning study we also included 12 psychographic statements relating to appliances and shopping in addition to the 28 appliance manufacturer attributes. The psychographic statements included items like "In buying major appliances the reputation of the store is more important than the brand name," "When buying appliances, it pays to buy the best model even though it is more expensive," "It is more important to have good appliances in the home than good furniture."

Clustering the items produced four consumer types. We named them "Flashy Flora and Fred," "Needy Nan and Neil," "Classy Carl and Cristy," and "Apathetic Al and Ann." The demographic and psychographic portraits of the groups appeared to have integrity and make sense. For instance, Needy Nan and Neil, as their name implied, had the lowest total family income, with 46 percent of them having total incomes of less than $25,000. Concomitantly, they were the least educated, with 40 percent having a high school education or less. They also had the largest families and were the second youngest of the clusters.

Their attitudes towards appliances fit their demographics. Nan and Neil were very price sensitive. They wanted to buy the lowest priced appliances from among similar makes and models. At the same time, they had to have appliances that lasted, more so than any of the other clusters. Their extreme price sensitivity created a problem for them. They could not rely on the brand name—an important indicator of quality and durability—to help them choose the best and lowest-priced brand of appliance. As a result they had to look to other sources of information to help them choose among brands. They, more than the other segments, relied on two sources to help them do this. One was *Consumer Reports*. The other was whether they thought the manufacturer was a specialist in kitchen or laundry appliances. They took specialization as an indication of durability, an important attribute in appliances for them.

Classy Carl and Cristy, by way of contrast, were the wealthiest segment. They had the highest household income (73 percent were over $35,000), were the oldest on average, and had the largest homes as indicated by the number of bedrooms and bathrooms. This segment also had the largest number of college graduates of any segment. Their views about appliances were quite different from Needy Nan and Neil's. Classy Carl and Cristy were not very price sensitive. They were the least likely of all segments to look for the least expensive brand of appliance. Rather, they thought it paid to buy the best model appliance, even though it was more expensive. For them, however, having appliances that were a pleasure to own was also very important, as were appliances that were easy to clean and keep clean. Their attitudes towards appliances were echoed in their views about their kitchens: they were very proud of them and the way they looked. Indeed, it is likely that Carl and Cristy judged kitchen appliances for the looks as well as for their quality and features. Perhaps because they bought the best appliances, Carl and Cristy, of all the segments, had the most positive attitudes towards appliance makers. This was manifest in their agreement with those statements that implied a willingness of manufacturers to value customers and stand behind their products.

While the portraits that cluster analysis creates can be interesting and plausible, it is important that they relate to product ownership and usage in intuitively meaningful ways. In the appliance category, we expected to find sharp differences among the clusters in brand penetration. For instance, we expected to find penetration of the more expensive brands to be greater for Classy Carl and Cristy than for Needy Nan and Neil. And we expected the opposite penetration for the lower-priced brands.

In fact, however, we did not find the expected pattern of brand penetration among the segments. Instead, we found that brand penetration was relatively flat among the segments. This was puzzling and demanded an explanation. In thinking about the purchase process, however, an explanation of the lack of differential brand penetration suggested itself. The explanation focused on two aspects of the retail side of the appliance business. First, retail sales are increasingly dominated by "power retailers" that continually have sales featuring specific brands. Second, appliances are as much sold as they are bought. Salespeople often receive "spiffs" or special sales inducements above the regular commission from manufacturers for sales of their brand or specific models of their brand. When this occurs, salespeople work hard to steer people toward these brands, with a fair amount of success, according to them. When we take these two aspects of the market into account, the lack of differential brand penetration among segments in brand penetration might reflect a retail reality which is working against the manufacturers' efforts at creating and sustaining brand character and differentiation.

This certainly was a plausible explanation of our findings. The question now was whether to show the segmentation results in conjunction with the perceptual maps. After some

discussion we decided not to show the segmentation results. We though that they would be hard to interpret; essentially explaining the absence of differences is much harder than showing and explaining differences. In this case, it would be even harder since the argument was both long and subtle. And, since the results of the segmentation added little to our overall understanding of the appliance, not presenting them could be done with little loss.

Parenthetically, I would argue against advancing very subtle explanations of data except when absolutely necessary. While we may appreciate our subtlety and cleverness in teasing our implications and formulating explanations, they can be lost on our audiences and can confuse them as well.

Assessing advertising with perceptual mapping

Perceptual mapping is often used to determine the actual or desired positioning of brands. The results of such analyses, as was the case in the appliance category, frequently become the basis for efforts at repositioning a brand in consumers' minds. We use perceptual mapping much less often to assess whether advertising is in fact positioning brands in the desired ways. This section will present results from a study that uses perceptual mapping to assess how advertising is positioning manufacturers.

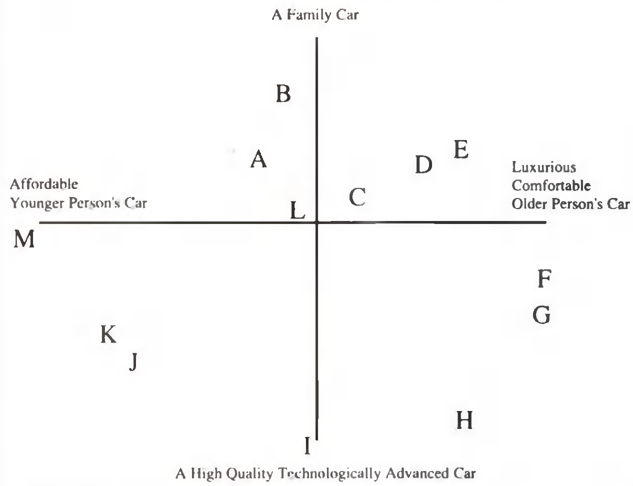
The data come from an ongoing study of the automotive category. The study is designed to assess the effect of advertising on the images or positionings of various manufacturers. The aim of the study is to determine in which direction on a map the advertising for specific manufacturers is moving the images of these manufacturers. Of course, not all directions are equal; the desire is that the advertising will move in a direction consonant with the desired and agreed upon positioning of the specific manufacturer, and this will be the only manufacturer moving in that direction.

In the study, respondents first rate several automobile manufacturers on 15 image attributes (quality, sporty, technologically advanced, and so on). They then see six commercials and read two print ads for several manufacturers and rate each manufacturer based on what the commercial or ad communicates about the manufacturer. The research is unique in that it attempts to assess simultaneously the effects of many campaigns, as opposed to individual commercials and ads, on the perceptions of many manufacturers.

There are two ways to determine the impact of advertising on the images or positions of automobile makers. Both ways begin

Figure 1

PRE-ADVERTISING MARKET STRUCTURE



with a map showing the structure of the market prior to exposure to the advertising. The structure is shown in Figure 1.

This map shows that people distinguish among manufacturers in the following ways. On one dimension they see cars that offer value and appeal to younger people; M best exemplifies this type of manufacturer. At the other end of this dimension they see cars that appeal to older people and offer more power and luxury; E is an example of such a maker. The other dimension has "technologically-advanced" and "high-quality" as its defining characteristics on one end, and family cars on the other end of the dimension. Both the dimensions and the placement of the makers make sense to people familiar with the automotive category. From the map it appears as though consumers have fairly clear pictures of a number of cars. Where there is confusion in images, it is primarily among the American manufacturers who are the largest producers in the United States market and have had the greatest difficulty in differentiating the many models and brands they produce. The classification analysis bears this out. Overall we correctly classify 33 percent of the respondents, but the correct classification by maker varies from 13 percent for a domestic manufacturer to 74 percent for a foreign maker.

It is after exposure to the advertising that we have alternative ways of looking at and portraying the structure of the market. One option is to apply the original structure to the post-advertising ratings of each car; the other is to re-estimate the structure using only the post-advertising ratings. We have done

READER SERVICE CARD 3/90

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Send me more information on the items circled

600	601	602	603	604	605	606	607	608	609	610	611	612	613	814	615	616	617
618	619	620	621	622	623	624	625	626	627	628	629	680	681	682	683	684	685
686	687	688	639	640	641	642	643	644	645	646	647	648	649	650	651	652	653
654	655	656	657	658	659	660	661	662	668	664	665	666	667	668	669	670	671
672	673	674	675	676	677	678	679	680	681	682	683	684	685	686	687	688	689

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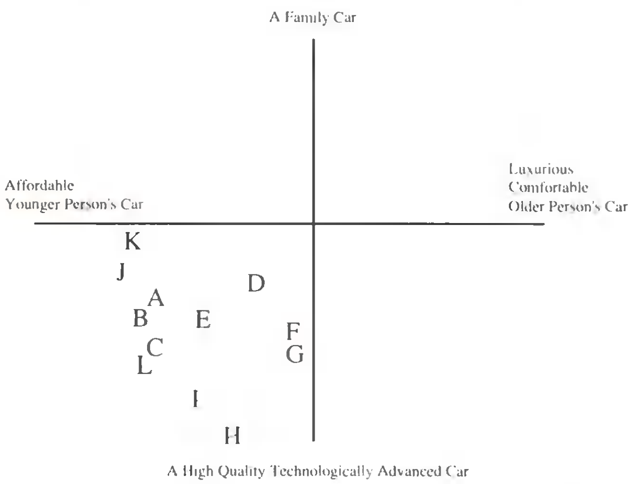
this and the results of these two options are quite different.

Figure 2 presents the results of applying the original structure

Figure 2

POST-ADVERTISING MARKET STRUCTURE



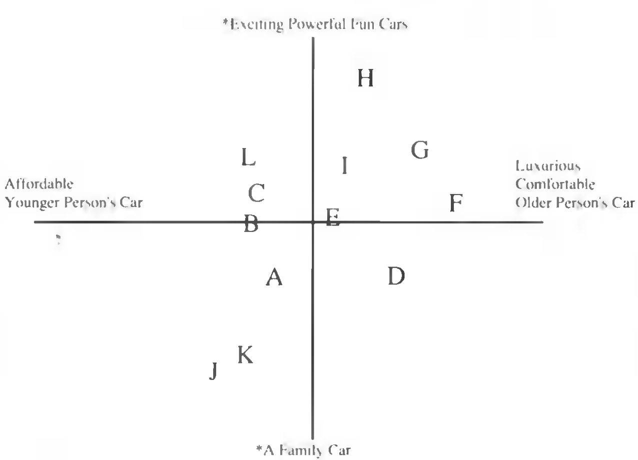
to the post-advertising ratings. This map is radically different from the market represented in Figure 1. All of the makes are now located in the lower left quadrant, whereas originally only makes I, J, K, and M were there. Clearly, drastic changes have occurred, changes that most advertisers would not be pleased with. Figure 2 implies much less differentiation among brands based on the advertising.

This is apparent when we look at our ability to correctly classify people based on their post-advertising ratings of manufacturers. Whereas originally we could correctly classify 33 percent of the respondents, our ability drops to 6 percent based on the post-advertising ratings. Looking at the map it appears as though every maker's advertising is directed against the same strategy and communicating the same message.

Figure 3 presents the results of re-estimating the structure

Figure 3

POST-ADVERTISING MARKET STRUCTURE



** New Functions*

using the post-advertising ratings. This produces a very different picture from Figure 2. There is greater dispersion among the manufacturers than in Figure 2. With the exception of maker I, which in the original map was away from the center and closest to H, the general pattern seems similar to the original map. At least, we could all agree that this one might be based on the original structure, whereas we would be much harder pressed to agree with this statement regarding Figure 2. And our ability to correctly classify makers is not different from our ability in Figure 1, 34 percent versus 33 percent.

What do these two very different maps tell us? Should we use both to understand what is happening, or should we choose between them? I think each tells us something important about what the advertising is communicating about manufacturers and how it is working.

Figure 2 tells us two things. First, it says that the original structure does not adequately describe the market based on the exposure to the advertising. There is virtually no differentiation among makers, and only 25 percent of the space is being used. At the same time, this map tells us something very important from a marketing sense. It says that everybody seems to be singing the same song about their cars. Everybody wants people to think their cars are youthful, offer good value for the money, and are technologically advanced and high quality. The net result is that manufacturers are blurring, rather than sharpening, their images.

Figure 3 tells us how the structure has changed based on the advertising, and thus provides insights into how the advertising is working. The horizontal dimension, the first dimension in this and the original solution, remains basically the same, describing characteristics of cars that are seen to appeal to older and younger people.

It is the second dimension that changes after advertising. Instead of being a family/affordable car versus high quality and technologically advanced car dimension, it changes to family/affordable car on one end to exciting, powerful quality car on the other end. This suggests that the advertising is attempting to change the relative importance of the criteria people use to judge cars. Another way of saying this is that the model of advertising as agenda setting appears to describe the way advertising is working in the automotive category.

By examining both maps, we have learned some important things about automotive advertising. There may be a lesson in this for mapping studies that are repeated at regular intervals. The lesson is that perceptual mapping can demonstrate the direction of change as well as the changes in the underlying structure of consumers' perceptions of the marketplace. Each complements the other and adds to our understanding of consumers and the structure of the marketplace.

Summary

This article discussed three different issues in positioning research. It offered a way of dealing with the potential problem of owners and nonowners producing spurious or misleading maps. The solution was to create owner and nonowner brands and estimate the space using owner and nonowner brands. We suggested that it was likely that one dimension would differentiate owners and nonowners and thereby eliminate their effects from the other dimensions. The article also discussed using segments based on cluster analysis in maps. The example discussed showed that there may be occasions when it is better not to display the segments. Finally, the article showed how maps can be used to assess advertising. ❑

Survey finds TV best vehicle for new product introduction

According to a majority of adults, corporate advertising managers should put their money into television when introducing new products. R.H. Bruskin Associates recently presented a hypothetical situation to the American public concerning the possible advertising of a new product. The respondents were asked how they would react to the following scenario:

"A company is bringing out a new product and is interested in describing it as completely as possible to consumers. Their intent is to impress people and, above all, make them interested enough so that they will want to buy the product. The company has a choice of advertising the product in many different ways; they can use newspapers, magazines, radio, TV, direct mail, billboards, or any other type of advertising.

"In thinking about what might have the greatest influence on you, what type of advertising do you feel they should use, and why do you feel that way?"

ADVERTISING PREFERENCE

	TOTAL	MEN	WOMEN
TV	61%	62%	60%
Newspapers	11%	11%	11%
Radio	8	9	8
Magazines	8	8	8
Direct Mail	6	5	8
Billboards	2	2	2
All Others	1	1	1
Don't Know	2	2	2

The results, based on a national telephone study of 1,002 interviews among men (502) and women (500), indicate a strong preference for television. This is true among both men and women, people in all age groups, all income groups, and all sections of the country. Here's how the overall results look among men and women:

The major reasons for choice are shown below, but only for the four types of advertising which yielded a large enough base for analysis—TV, newspapers,

continued on p. 32


ASTAIRE

NAMES OF NOTE

Decision Analyst, Inc., Arlington, TX, has named **Dr. Ming-Hong Huang** director of statistical services.

Huang **Raub**

Michael A. Raub has joined the Minneapolis office of *Maritz Marketing Research* as account manager. In addition, **Steven D. Wolf** has joined the New York City Maritz office as account manager.

Jeffrey W. Hine has been named marketing research manager for *Home Shopping Network*.

Karen Peterson has been elected to a three-year term as a member of the Board of the *Council of American Survey Research Organizations (CASRO)*, the national trade association for the survey research industry. She is president of Davidson-Peterson Associates, Inc. a full-service research company based in York, ME.

The NPD Group, Port Washington, NY, has named **Helene Sashin** director of project staff for the Home Testing Institute, NPD's custom research division. Previously she was director of business intelligence at Dunham & Marcus, Inc., New York.

Leslie S. Joseph has been named research director at Dallas-based *LLH Enterprises*.

Jeffrey C. Greenberg has been promoted to executive vice president at the Wayne, NJ office of *Information Resources, Inc.*

Wight Adams has joined *New South Research*, Birmingham, AL, as research associate.

Sherry Burford has joined the East Coast office of Minneapolis-based *Custom Research* as research manager. Previously she was a research executive at Opinion Research Corp.

Douglas R. Berdie will head quality and customer satisfaction research for Minneapolis-based *Carlson Research Co.*

Thomas L. Hegedus has been named managing director of *Opinion Research Corp. International*, a new, London-based international subsidiary of *Opinion Research Corp.*, Princeton, NJ.

Arthur Savitt has joined Southampton, PA-based *Attitude Measurement Corp.* as executive vice president, client services.

Total Research Corp., Princeton, NJ, has named **Tom Nolte** to the position of senior research analyst. In addition, **Marilyn Heebink** has been named project manager.

New GIS tool kit

TerraLogics announces TerraView, an object-oriented cartographic toolkit that provides geographic information systems (GIS) display and manipulation capabilities. It is a library of cartographic functions which facilitate the creation of applications that present and manipulate spatial information. It provides a means of integrating and visualizing user data with maps. Applications developed using TerraView can simultaneously overlay, display, and operate upon User Data, Census TIGER, ETAK, USGS-DLG, GBF/DIME, Rand McNally and other specialized map data. TerraView enables programmers to treat maps and user data as objects without being concerned about screen graphical operations or disparate map data formats.

Terraview functions can be called directly from many programming languages, facilitating the integration of mapping functionality into existing applications. Applications may run on numerous platforms ranging from PCs to mini-computers to workstations and may run under MD-DOS, VAX/VMS, UNIX, ULTRIX, MS-Windows, or X-Windows. For more information call 603-889-1800.

U.S. female population data available

A compilation of data specific to the female population of virtually any U.S. market area is now available from National Planning Data Corp. (NPDC). The "Women's Report" is a three-page, customized report that includes such information as age, fertility, selected Major Diagnostic Categories (MDC), and Diagnosis Related Groupings (DRGs). The data are useful to providers of healthcare services for women, such as obstetricians, gynecologists, and geriatric specialists, as well as providers of breast cancer screening and post-menopausal care. In addition, the report can be used in site evaluations, in developing marketing plans, and in forecasting market potential and share for services targeted to women.

Specifically, each report includes 1980 census counts, 1989 estimates, and 1994 projections of females by age, as well as counts of females 18 to 44 years of age by race or Spanish origin. It also includes national fertility rates (total births per 1,000 women 18 to 44 years of age) by race or by Spanish origin from the Bureau of Census' Current Population Report

(June, 1988) and 1989 estimates and 1994 projections of numbers of cases, as well as cases per 1,000 females, for selected MDCs and DRGs.

The Women's Report is available on-line, or by using NPDC's phone-in service. It can be obtained for any U.S. market area, for standard geographies such as census tracts, ZIP codes, counties, and metropolitan areas, as well as areas defined by rings and polygons. NPDC can also provide color-shaded maps of selected data by census tract and ZIP code, and diskettes containing the same information for use with the company's PC-based MapAnalyst mapping software. For more information, call 607-273-8208.

Mapping system for Canadian market

Sammamish Data Systems announces the distribution of a new product for the Canadian market, called GeoDOM, that combines proprietary geographic information systems (GIS) software, databases, and boundary and street files for the entire nation of Canada. GeoDOM lets users encode, analyze, and display multiple data layers derived from various internal and external data sources. The system comes equipped with the entire Statistics Canada database (the equivalent of the U.S. Census information) on one CD-ROM optical disk as the main source of marketing information. Subareas within Canada can be purchased separately.

GeoDOM incorporates official census data (updated every five years, rather than ten years as in the U.S.), street addresses, and area boundary files into an interactive geographic information system. GeoDOM's data can be combined with any other internal or external data sources for enhanced analysis.

The database function of the system lets users create, evaluate, and interactively change the demographic profiles of geographic areas as they are displayed. Multiple "what if" scenarios can be created before commitment to final changes. When the changes are finalized, the results are saved and detailed maps and reports can be prepared.

Users can display areas from the entire country down to individual streets, as well as everything in between. Multiple layers of relationships within data from different files can be analyzed. This information can be displayed simultaneously within various levels of geographic detail (such as postal codes, political boundaries and streets).

In addition to the mapping software, GeoDOM includes GSReport—a custom report generator, GSPlot—for outputting maps to files, plotters, and laser printers, and Gateway—for importing ASCII, dBase, or Lotus 1-2-3 files into GeoDOM. For more information call 206-867-1485.

Interface for A-CROSS and ACS QUERY

In conjunction with its acquisition of the marketing rights to Strawberry Software Inc.'s A-CROSS cross tabulation software program, Analytical Computer Service, Inc. (ACS) has developed an interface between A-CROSS and ACS-QUERY, called Q-LINK, which loads the answer text and card column definitions from an ACS-QUERY questionnaire into A-CROSS and creates tables and a dummy banner for each question. For more information, contact Amy Yoffie at ACS at 201-232-2723.

Opinion Research Corp., Princeton, NJ, has formed a new international subsidiary headquartered in London. Thomas L. Hegedus will be managing director of the firm, known as Opinion Research Corp. International.

◆

Focus Research, Mission Viejo, CA, recently opened a new residential focus group facility. Contact Jeanne Harris at 714-380-1612 for more information.

◆

Consumer Sciences Inc. (CSi) announces the re-opening of the Wayne Town Center in Wayne, NJ, where CSi maintains one of its testing centers. Anchor stores include Neiman Marcus, Loehmann's, Fortunoff, and J.C. Penney. For more information call 800-227-0666.

◆

Market Facts, Inc., has purchased a three-story office building in Arlington Heights, IL, which will be used as the company's new corporate and operations headquarters. The building, located at 3040 Salt Creek Lane in Arlington Heights, contains approximately 120,000 square feet and is situated on slightly over 200,000 square feet of land. The property is fully leased until September of 1991, with an existing tenant's option to extend the lease for six additional months.

"This new facility should meet our projected needs for the next decade," says Verne Churchill, chairman and CEO of Market Facts, "and will permit us to consolidate our Chicago and Oak Park operations. The timing is ideal. Our present leases will expire about the same time that the Arlington Heights space will become available. We believe this new, combined facility will improve our productivity and will be economically beneficial for the company."

Fallon McElligott

continued from p. 10

illustrated by this respondent's comment:

"Yeah, I remember that time. Everybody was united for a single cause. Those were the days. That's when I married Grace. You know, we had seven kids. I guess it ain't too late to be saving, is it? I'm a (bank name) customer, you know. I didn't know they had an account like that."

Empathy Testing allows us to tap into respondents' feelings, to measure an ad's strength by how much it is being internalized. Several copytesting services focus too extensively upon the negative aspects of an execution. An ad is often killed if it generates any amount of dislike. However, by reading respondents' comments, the ad agency—and the client—can discover how powerful, painful, and effective "negative" feelings can be.

Recently, FM produced a pro bono television spot for an organization dedicated to increasing awareness of Sudden Infant Death Syndrome (SIDS). Intended to emphasize the fact that a cure hasn't been found for SIDS, the ad features several seconds of a baby crying in the background, until, at the end of the ad, the crying abruptly stops. A printed message tells the story: "Until we find a cure, we'll have to keep them awake." The target audience, young mothers, certainly recognized that message:

"I thought about the fear that we all have that this might happen to us. I go through this every time my baby sleeps longer than he should. "Until we find a cure, we'll have to keep them awake." That's profound. It is a drastic measure. You want to find out if there's something you can do."

Testing advertising by tracking advertising

Perhaps the greatest amount of advertising testing done by FM is done via tracking advertising. Virtually every one of FM's clients conducts advertising tracking, either with the agency or via their own internal research departments. Tracking studies are conducted for most of FM's clients to monitor awareness as well as to measure the staying power of a campaign.

Tracking is conducted in two ways: at regular intervals or immediately prior to and immediately following a wave of advertising. More importantly, FM's advertising tracking measures shifts in attitudes rather than just shifts in awareness for both its clients and their competitors.

Periodic tracking is conducted at six month intervals on the recreational product of an FM client. Respondents are drawn from a list of subscribers from a magazine in which the advertising is placed. In a 20-minute interview, respondents are asked about their awareness of the various brands and their advertising. But that's not all. Respondents are also asked to rate those brands on such attitudinal items as durability, price-value, and brand name. Both awareness and attitudinal scores are carefully analyzed and the advertising is issued its biannual "report card" (with actual letter grades).

At the same time, a form of empathy testing is also used. The importance of respondents' own verbatim comments cannot be overestimated. Both the client presentation and final report make extensive use of these verbatim comments. For example:

"I remember the ad with the lemon. It says, "Spot the lemon before we do." That really gets your attention. And you stop and try to find it. Those are great ads—for a great product."

When tracking is conducted immediately prior to or after the advertising has run, it is performed via mail questionnaire or telephone interview. An example: a paper products manufacturer ran a series of ads in several magazines. Before any of these ads were run, randomly selected subscribers to each of the magazines were sent questionnaires asking them to rate this brand and its competitors on familiarity as well as several attitudinal items. The day after the last issue in the advertising wave had been circulated,

By measuring attitudinal shifts, we see how advertising works more subtly to change long-entrenched attitudes towards our client.

a second mailing of the questionnaire was sent to a different group of subscribers. The results of the two waves were then carefully evaluated. Once again, both shifts in awareness and attitudinal scores were carefully examined.

Why the emphasis on tracking attitudes rather than just awareness? We feel attitudes are a truer indicator of the long-term impact of the advertising. More often than not, awareness scores are merely measures of media weight and/or a brand's long-term equity. Throwing media money into the marketplace is no measure of an ad's effectiveness. Rather, measuring attitudes allows us to determine whether or not a campaign is moving people, instead of just determining which company is spending the most media dollars.

One FM client, an apparel manufacturer, spends most of its media dollars in the period right before the new school year begins. So does every other apparel company. Furthermore, our client does not have the media war chest of the category leader. In fact, the category leader outspends our client so dramatically that respondents reflexively mention the leader when asked to name the "first brand that comes to mind."

However, by measuring attitudinal shifts, we see how advertising works more subtly to change long-entrenched attitudes towards our client. Our client's "top of mind" awareness may never overtake the category leader's, but shifts on such attitudinal items as "fit," "make me look good" and "comfort," truly measure the impact of the client's advertising.

Summary

Advertising research is alive and well at Fallon McElligott. As noted earlier, outstanding teamwork is the key ingredient to producing outstanding ads. The research plays an integral role in that process. The contributions of research come via checking communication by measuring consumer empathy and tracking advertising's impact by monitoring awareness and attitudes. This process has been a successful one, and will continue as FM continues to win awards—and clients. ❑

Survey Monitor

continued from p.24

radio, and magazines.

The consumer public has a strong perception that TV is where advertisers should put their money when introducing a new product. Their feelings are based initially on their own habits—time spent with TV, a feeling that TV is the most popular medium, and that showing the product in action provides an advertiser with greater advantages and the public with a better overall picture of the product.

MAJOR REASONS FOR PREFERENCE MEDIA	TOTAL	TV	NEWSPAPERS	RADIO	MAGAZINES
BASE:	(979)	(612)	(108)	(83)	(82)
Spend more time with this than with any of the others	30%	36%	11%	58%	13%
Most popular; everyone uses; everyone has	29	42	4	15	3
Better visually; can see the product in action, better picture of the product	11	16	1	—	7
More eye catching; attracts your attention	8	7	6	—	5
Reading is more effective; more time spent in learning of product	7	—	30	—	46
Sticks with you more; makes more favorable impression	6	7	6	6	4
More detailed explanation; tells more of product	5	6	6	3	5

Visits to sit-down restaurants decreased last year

A recent Maritz AmeriPoll found that while eating out continues to be a popular American pastime, the number of trips to sit-down restaurants decreased last year. (Sit-down restaurants exclude fast food chains).

Twenty-nine percent of respondents said they are eating at sit-down restaurants less often than a year ago. That figure was offset somewhat by the 14% who are visiting such restaurants more often—but still indicates a net drop of 15 percentage points. The majority (56%) of those interviewed said they are eating at sit-down restaurants with the same frequency as they were a year ago.

The survey also discovered that Americans have an increasing preference for variety in the sit-down restaurants they frequent. Twenty-eight percent of those surveyed said the number of different restaurants they visit increased last year. Seventeen percent of respondents cut the number of restaurants they use, while 52% said the variety of restaurants they visit is unchanged from a year ago.

When asked about items they would like to see improved in the restaurants they visit most often, 22% of the respondents cited price, followed closely by quality of service (21%). Nineteen percent mentioned quality of food. Other items on the list of improvements are smoking policy (13%), atmosphere (5%), and location (5%). Nine percent of people are completely happy with the restaurants they visit most often and would change nothing.

According to AmeriPoll, most visits to restaurants were apparently unplanned. Nearly 2/3 of respondents said they are "very likely" or "likely" to make the

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Areas of Research Interest (Check All That Apply)

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☐ Consumer Durable ☐ Business-To-Business ☐ Other (Specify) ______________

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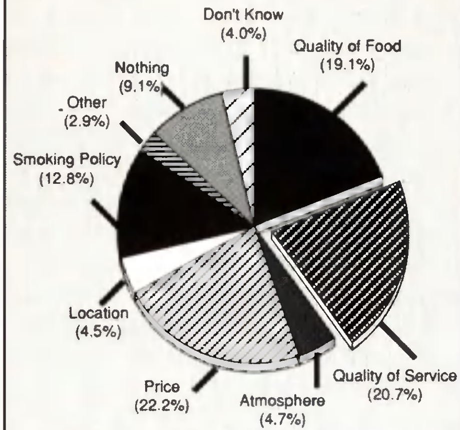
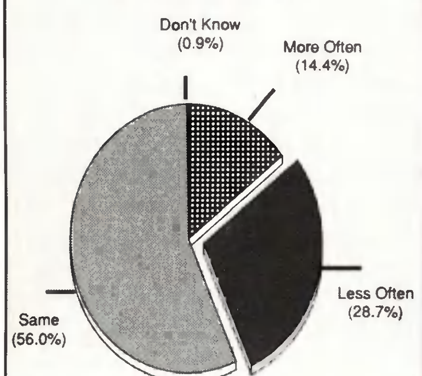
IMPROVEMENTS PEOPLE WOULD MAKE AT RESTAURANTS



decision to eat out at the last minute. Conversely, 1/3 said they are either unlikely or very unlikely to make a spur-of-the-moment decision. Thirty-four percent of women said their decisions are very likely last minute, compared to 29% of men. Twenty-one percent of men, on the other hand, claimed they are unlikely to make their decisions at the last minute, contrasted to 16% of women.

AMERICANS ARE EATING LESS OFTEN AT SIT-DOWN RESTAURANTS THAN A YEAR AGO



Super Bowl interest increases

Although San Francisco's thrashing of Denver in January may change some people's minds about future Super Bowls, a pre-Bowl survey by R.H. Bruskin Associates found that 44% of all adults had "much more" or "somewhat more" interest in the Super Bowl than in years past. Thirty-three percent said they were "much less" or "somewhat less" interested in the game. About 19% reported no change in interest, and 4% had no opinion.

Among men the differences were even more dramatic; 49% expressed greater interest, compared with only 30% who indicated less interest (19% same, 2% no opinion).

Fans of professional football (43% of the total sample) reported a significant increase in interest; 66% are now more interested, compared with only 20% who said their interest has declined. The balance, 14%, indicated that their interest has remained about the same.

Of those more interested, 18% attributed it to greater parity of teams, more competitiveness, and the game being more interesting and more exciting. An additional 14% said their increased interest was based on a better understanding of football (17% of women said this). Other important factors resulting in increased interest include: 23% identified the Super Bowl as a family affair, and 18% said that they enjoy the sport of football more now than in the past.

Among those who reported decreased interest, the reasons centered around little or no interest in football (22%), a general decrease in interest in the sport (18%), and a feeling that football has become too commercialized, with the players only concerned about money (17%).

Specialized

continued from p. 7

Eidsmo says the company's own messages were in danger of being lost in the clutter, due to imitators in the industry.

"We were the first to do color advertising in the category, and to do lifestyle-oriented, hip advertising. And now (other companies') communication efforts have started to emulate ours. So not only is our message being duplicated but to a great degree, our look, our style, our whole way of approaching it was being emulated.

"We decided that we needed to do something beyond what the industry had always done, and make a statement about Specialized and its personality that conveyed some sort of attitude about who we were and what we wanted to represent to the industry."

After extensive market analysis with its advertising agency, San Francisco-based Goodby, Berlin & Silverstein, Specialized decided that one of the most important goals of the advertising was to create messages that appeal to current mountain bike enthusiasts as well as to people who might be considering entering the sport.

The size of this latter group, says Barry Breede, group director, Goodby, Berlin & Silverstein, holds tremendous growth potential for the mountain bike category.

"If (it) was really going to realize that kind of growth, it had to be marketed in ways that hadn't been done before, at the same time keeping enthusiasts in the fold and finding a way to reach the audience of non-enthusiasts, which is enormously larger. We needed to find a way to get to those people and get to them in a relevant way."

20-page insert

The first step in that process is a 20-page color advertising insert that appears in bicycling magazines this month. Why 20 pages? Because bigger is better, Eidsmo says.

"In bicycling, as in most enthusiast markets, the consumer publications are also the trade publications. And the retailers equate the amount of support you're giving them with the amount of advertising you're doing. So by being the biggest and most impactful, we send a very clear message to the retailer."

Aimed at both current and future mountain bikers, the insert also addresses those who use the company's many road bike products. Eidsmo says that tailoring the brochure to get through to each of those groups was the most difficult aspect of creating the piece.

"The challenge became what I call the 'high-wire act' of convincing the enthusiasts that we're still a cool, hip company but doing it in a way that makes technology friendly for the non-enthusiast. We wanted it to be usable for the newcomer but still edgy enough that it fits the psyche of the enthusiast," Eidsmo says.

Deftly walking that high-wire, the brochure is part attitude vehicle, part product showcase. Each section has a paragraph of product information presented in a wry style that conveys much about the company's attitude towards itself and its customers. The approach is substantive enough for tech junkies to appreciate yet simple enough for the rest of us to understand.

And if the text doesn't get the point across, the accompanying photograph will. For example, set across the page from a paragraph on the strength of the company's bike frames is a shot documenting an actual event from the recent San Francisco earthquake: a bent-but-not-broken Specialized Rockhopper Comp bicycle held up a portion of an apartment roof that was toppled by the 7.1 quake.

Eidsmo says that targeting part of the message to the mountain bike enthusiast is important not just because they are ongoing customers but also because they are a major source of information and referrals for those thinking about taking up the sport. The enthusiasts provide information and advice, and can be a potent sales force for a product they respect and believe in.

"If you're going to buy a bike, you'd probably ask an authority figure, such as a salesperson or someone you known who's an avid cyclist. Those people will probably influence your purchase decision more than any other single factor."

Focus groups

To get a better handle on the psychological make-up of current and prospective riders, and to test the effectiveness of the brochure--which is slated to run in non-bicycling related publications in the future--with target audiences, focus groups were held last fall.

The participants were recruited to fill three categories:

- fringe enthusiasts—who aren't currently riders but who are involved in other athletic activities such as hiking, running, and swimming, and who also have the necessary disposable income,
- mountain bike enthusiasts—who own a mountain bike and ride at least four times a month,
- road bike enthusiasts.

The mix also included a number of Specialized bike owners, who were contacted through warranty card information. Some names were also obtained from the reader service cards of bicycling magazines.

In the first phase of the groups, participants were shown reprints of advertising for Nike athletic shoes and asked to discuss their feelings towards the footwear maker's attitude-driven advertising.

"The cycling industry is very product-driven, as is the advertising. Most people don't realize that Nike's advertising is almost all concept and no product, and somehow they've been able to bridge that in a very effective manner.

"We felt that if we could match up the attitudes about Nike, we could cross the same bridge by having concept-driven advertising that pays off in the consumer saying 'I want to be involved with this.' "

Barry Breede: "We wanted to create an attitude that people who hadn't ridden bikes could relate to by making it friendly and not so technically driven, but still presenting the technology in ways that would make it clear to the enthusiast that Specialized makes good products."

The second phase, which examined participants' attitudes on and reactions to samples of current bicycle advertising, drew very aggressive responses from some mountain bikers, who were offended by the overly technical tone of some of the ads.

"The ads typically show a side view of a bike with a list of specifications that looks like it was done by the research and development department," Eidsmo says. "And the respondents said 'What am I supposed to do with this information? Where can I go to get this translated?'

"It showed us that we're in an industry that is literally talking to itself, because the people that put the bikes together understand them in technical terms, but the riders may not be interested in that."

(Breede says that the research also highlighted the fact that road cyclists tended to look down on the mountain bikers.

"To use an automotive analogy, the road bikers saw themselves as formula one drivers, and saw the mountain bikers as stock car drivers. That's because the two groups take different things out of their sports. The road biker says, 'I've got to race X amount of miles and I have to do it in X amount of time, or else I haven't done my job. They are very technically driven.

"The mountain biker is far different. Like backpackers on wheels, they're want to get out and see nature, and rediscover bicycling like it was when they were a kid, when they could jump curbs and ride wherever they wanted to.")

The third phase examined respondent impressions of the insert and what it communicated about Specialized as a company. The response was tremendous across all segments. Watching a videotape of the focus groups, it's clear that the participants were excited by what they saw in the insert. Some respondents said they wanted to "get up and go riding right now," and "get down to the store and check out these bikes."

"It was the kind of stuff that you hope to hear in focus groups but hardly ever do. I knew we had a home run," Eidsmo says.

Breede says that as the promotion program progresses, the information obtained from the groups will be used with future research to pinpoint the best ways to reach the all-important fringe enthusiasts.

"There will be a lot more research being done as we get into this further and further, which, as far as I can tell is something new for the cycling industry. Because there have been some general studies done, but it hasn't been a category that's lived and died by research. The upside of that is, if we can apply some process and structure to the whole thing, I think we're going to get great rewards from it."

Other promotional efforts

In addition to its function as an advertising insert, the brochure will also be used extensively in other promotional efforts, on the retail level—for in-store distribution by retailers and as part of point of purchase displays--and at the racing events the company sponsors. It will also be sent to Specialized customers who have returned warranty cards, to let them know what the company has planned for the future.

"Your customers are some of your best salespeople, so we're trying to keep them in the information loop and make them proud that they own our products," Eidsmo says.❑

FROM THE PUBLISHER

New book could help you avoid first-time focus group problems

by Tom Quirk

In 1970 I conducted image studies for an animal feed manufacturer. It was a quantitative project using telephone and direct mail. The results were to be presented at the annual meeting of the regional sales managers. At a planning session prior to the presentation the director of marketing for the feed manufacturer told me that the company was discussing the feasibility of adding a line of horse feeds to their product mix. He requested that I make a research proposal which included the use of focus groups, with me doing the moderating.

I was somewhat surprised that the marketing director was aware of focus groups, as they were not widely used at the time. And I was even more surprised regarding his choice of moderator. Although I was aware of focus groups and had a general understanding of them, I had neither seen one nor had I ever discussed them with a moderator or participant. My proposal did include the use of focus groups but with the suggestion that the moderator be someone who had experience with the technique. The marketing director accepted the proposal only on the proviso that I conduct the groups. He never gave me his reasoning but assured me he recognized the risks of using an untrained person.

Our research group began planning for the project. We were unable to find any significant literature that helped determine how to proceed with the focus groups. We purchased a reel-to-reel tape recorder, wrote a questionnaire to be used as a discussion guide, and began recruiting participants. The first meeting was held in a restaurant, as there were no suitable focus group facilities available. The director of marketing was not there but three of his associates were. Only seven of the twelve people who had been recruited were on hand at the start of the meeting.

The meeting started badly. My extemporaneous attempt to explain the purpose of the focus group session was confusing and took too much time. I over-emphasized the presence of the tape recorder and microphones and my group became intimidated. I was uncomfortable, therefore the participants were uncomfortable and thus were hesitant to speak. They volunteered nothing. Every piece of information had to be extracted from them. Side conversations between participants began taking place and I did not know how to stop them and get these people back into the mainstream. I wasn't sure what a productive focus group should be like, but I knew this wasn't one of them.

After the session ended, the director's associates made no comment to me regarding their feelings but I could tell they thought their superior had erred in choosing me to moderate the groups. I had to agree with them. But on the bright side I knew there were some things we could do to reduce the chances that the next meeting would be another disaster.

The second meeting was held a few days later, with the marketing director in attendance. This time we mailed details regarding the time and place of the meeting to everyone who had accepted an invitation. Then we followed up with a phone reminder. One hundred percent attendance was achieved. This time I wrote my opening explanation and was able to complete the entire introduction in less than five minutes. The microphones were mentioned, briefly. I paid little attention to them and so did the participants. I felt much more comfortable than the first night, the people at the table sensed it and acted accordingly.

Success still wasn't guaranteed but at least the meeting wasn't over before it began. It helps to have some luck, and that is what happened on this second night. One of the gentlemen at the meeting began the discussion immediately after I mentioned the topic. He was an excellent facilitator because once he made his comments the others joined in. The advantage we had was that the participants were enthusiastic about the subject, the health and nutrition of pleasure horses. The only interruptions came when one of the subject areas had been sufficiently covered and it was time to move on. Here again it seemed every time I was ready to make a switch to a new area it would be mentioned in the discussion and I would be able to interject naturally by asking more about that item to change the direction of the conversation. In about 90 minutes all of the important issues had been sufficiently covered and we concluded the meeting.

After the participants had left, the director of marketing told me that he was very satisfied with the session. He apparently had not been told the details of the first meeting. I accepted his accolades while noticing one of the marketing director's associates with a smirk on his face. He knew the results of the meeting were not due to expertise on my part but rather to a lot of good luck.

This second meeting made me a believer in the value of focus groups. I enjoyed moderating and decided our company should add it to research techniques we would offer. Because we were not aware of any formal training programs available we learned as we went along. We did a few practice (free) groups, tried various approaches to improve our techniques and began to market this new found expertise. We were among the first to introduce focus groups in our primary market, agriculture.

To encourage greater use among those who were reluctant to invest in this type of qualitative research we even did multiclient focus groups. Up to four noncompeting firms could have their advertisements tested in each of five focus group sessions. Each firm would have 30 minutes time per group and the order of firm participation would be rotated. Initially, the cost per firm for the five sessions was $500. We did not make money on the project but we did introduce the methodology to a number of companies that had never previously considered the technique. And we continued to improve our skills.

In looking back on the more than 500 groups I moderated during a 17 year period (1970 through 1986) I realize how much easier it could have been if the training programs and literature now available were in existence then. It would not have been necessary to reinvent the wheel.

These reminiscences are my way of introducing you to a recently published book by Thomas L. Greenbaum called *The Practical Handbook and Guide To Focus Group Research*. It is a hands-on, easy-to-read primer that is must reading for those who are planning to be involved in their first focus group programs. And it should be a handy reference for those of us who have had longer-term involvement with the technique and occasionally need to go back and review the basics.

For more than 20 years Mr. Greenbaum has been involved with focus group research as a client while at Procter & Gamble and Church & Dwight, as a consultant with Glendenning Companies directing clients in the use of focus groups, and as a moderator with Connecticut Consulting Group. With this background he is able to provide a broad perspective not only on the mechanics needed to put together a focus group session but also on the broader issue of the proper role of focus groups in the marketing research process.

The 191-page book starts with a brief overview of both quantitative and qualitative marketing research techniques. From there, a step by step process guides the reader deeper and deeper into the intricacies of focus group techniques. The problems offered as examples are typical of what one can encounter, either as a client or as a moderator, and the author

continued on p. 48

Reports assess effectiveness of business publication advertising

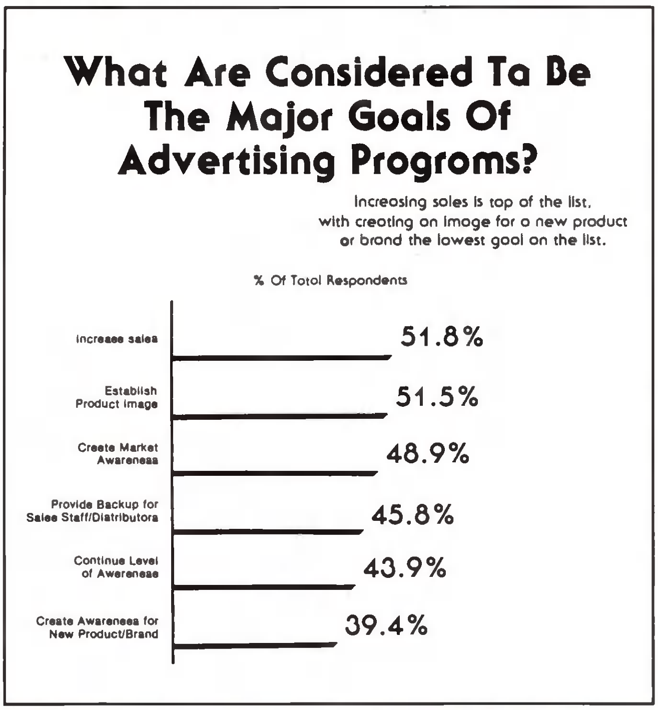
Editor's note: The following story uses information taken from the Cahners Advertising Research Reports, a continuing series on the effectiveness of advertising in business publications.

What are considered to be the major goals of advertising programs?

Purpose: To determine what are considered to be the most important objectives in advertising.

Methodology: Cahners Research surveyed 2,000 recipients of Cahners Advertising Research Reports (CARR). Included in the survey was the question: "What are your major advertising goals?"

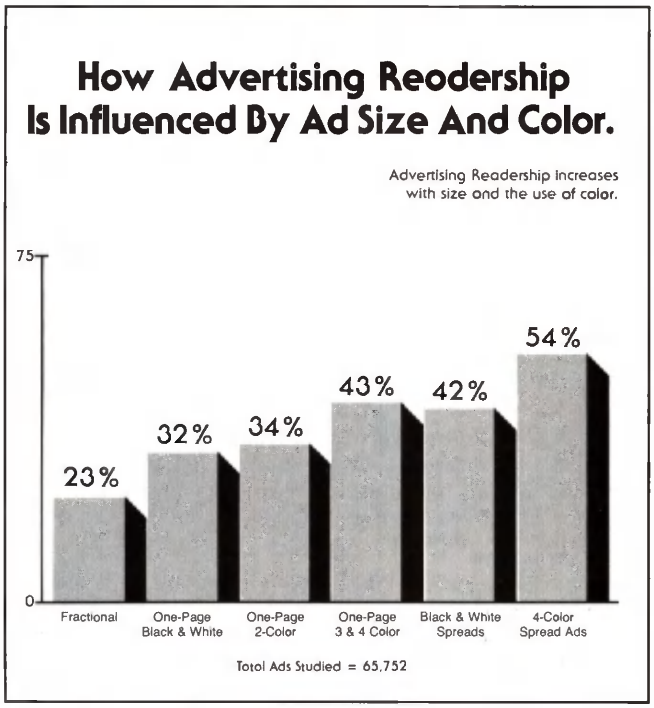
Conclusion: 742 replies were received, representing a response rate of 37.1%. Respondents considered increasing sales to be slightly more important than all other goals listed. Creating awareness for new product/brand was significantly lowest on the list.



How is advertising readership influenced by ad size and color?

Purpose: To show the effect of size and color on "Remember Seeing" readership scores.

Methodology: This analysis used all half page or larger ads run in 16 Cahners publications from 1972 to 1986. The 65,752 ads were divided into categories by size and color. Median noted scores were then tallied, and comparisons made. Noted scores indicate the percentage of readers who remembered seeing the ad in the issue surveyed.



Cahners Advertising Readership Surveys are conducted by mail among a random sampling of 300-550 readers per issue. Noted scores for this analysis represent results from among 288,000 readers over a 15-year period.

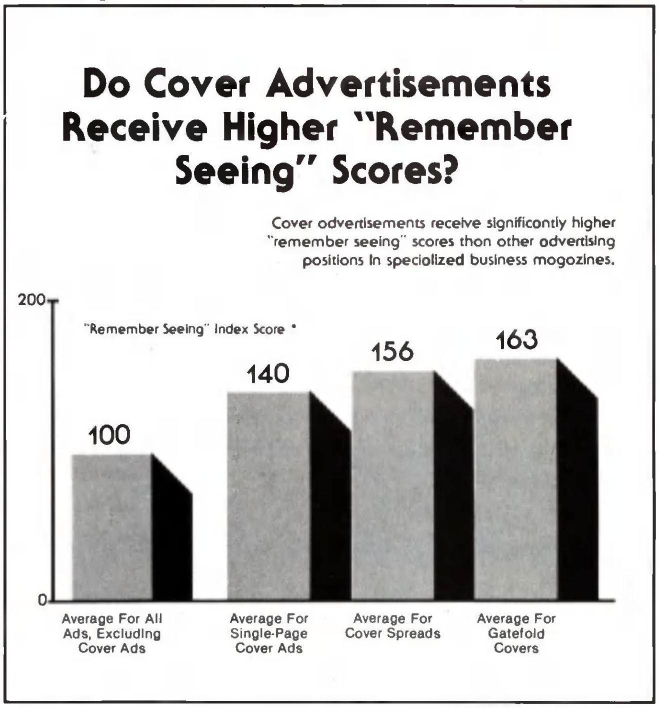
Conclusion: An advertiser can expect higher readership from larger full color advertisements.

Do cover advertisements receive higber "Remember Seeing" scores?

Purpose: To determine the advantages in cover position advertisements appearing in specialized business magazines.

Methodology: Cahners Research conducted a study which included 108 issues of Cahners publications. Overall readership scores were determined in Cahners Audits of Readership.

Cover positions include the inside front cover, inside back cover, and the back cover of the magazine. Cover spreads are two-page advertisements which include the inside front cover and the first page of the magazine. Gatefold covers are three-page advertisements in which the cover extends outward.



Conclusion: Single-page cover advertisements receive 40% higher "Remember Seeing" scores than all other advertisements appearing in specialized business magazines. Cover spreads and gatefold covers were 56% and 63% more effective respectively, than other advertisements.

How effective is the readership of half-page spread advertisements?

Purpose: To determine the readership of half-page spread advertisements.

Methodology: Cahners Research analyzed 7,331 advertisements via Cahners Audits of Readership. "Remember Seeing" index scores for half-page spreads were averaged against index scores for half-page and one-page advertisements.

Conclusion: Half-page spreads and one-page advertisements are equal in readership. Half-page spreads are 44% more effective than half-page advertisements.

Is advertising readersbip influenced by tbe use of inserts?

Purpose: To determine the effect of the use of inserts on "Remember Seeing" readership scores.

Methodology: Cahners Research analyzed 66,296 advertisements of fractional size or larger, run in 16 Cahners publications from 1972-1986. Cahners Advertising Readership Surveys are conducted by mail among a random sampling of 300-550 readers per issue. Noted scores for this analysis represent results from among 288,000 readers.

Conclusion: Insert advertisements receive 58% higher "Remember Seeing" readership scores than full-run advertisements.

Do coupons influence advertisement awareness?

Purpose: To determine if the use of coupons in advertisements influences advertisement awareness.

Methodology: Cahners Research reviewed 108 issues of specialized business magazines studied in Cahners Audits of Readership. "Remember Seeing" index scores for advertisements using coupons were averaged against all other advertisement scores. A total of 456 advertisements using coupons were studied.

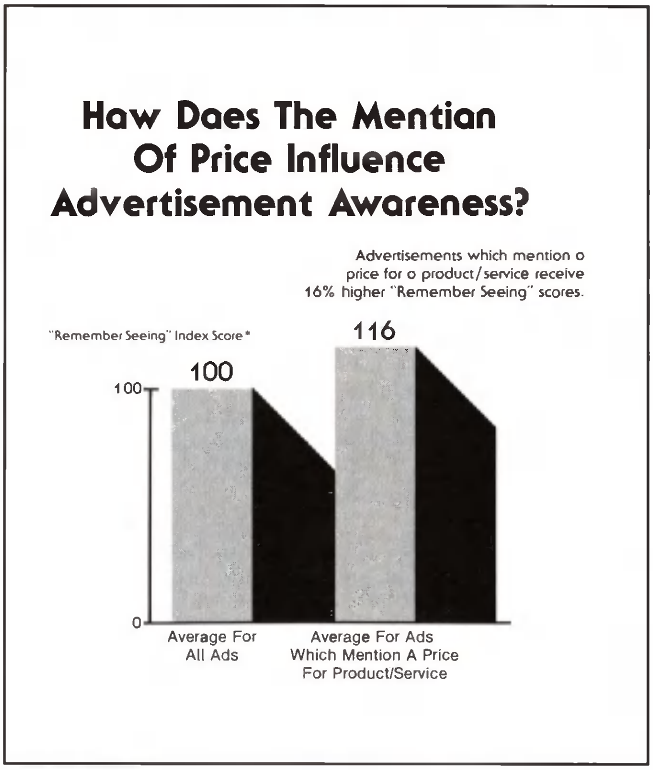
Conclusion: "Remember Seeing" scores are 13% higher for advertisements using coupons than advertisements without coupons.

How does the mention of price influence advertisement awareness?

Purpose: To determine if advertisement awareness is influenced when a product/service price is mentioned in an advertisement.

Methodology: Cahners Research reviewed 108 issues of specialized business magazines studied in Cahners Audits of Readership. "Remember Seeing" index scores for advertisements with a product/service price were averaged against all other advertisement scores. A total of 361 advertisements with a product/service price were studied.

Conclusion: Advertisements which mention a price for the product or service receive 16% higher "Remember Seeing" scores.



QUALITATIVE RESEARCH / FOCUS GROUP MODERATORS

Listed below are names of companies specializing in focus groups. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. 612/861-8051.

ADI Research, Inc.
8044 Montgomery Rd., Suite 625
Cincinnati, OH 45236
513/984-2470
Contact: Michael L. Dean, Ph.D.
Cincinnati's most modern and convenient facilities

Alpha Research Associates, Inc.
P.O. Box 28497, North Station
Providence, RI 02908
401/ 861-3400
Contact: Anthony Pesaturo
FullSvcQual/Quan.Analysis./ Consltg&MktRes/Since 1976

American Public Opinion Survey & Market Research Corp.
1324 South Minnesota Ave.
Sioux Falls, SD 57105
605/338-3918
Contact: Warren R. Johnson
Established 1960—Full Service Group—National & Internat'l

The Answer Group
11161 Kenwood Rd.
Cincinnati, OH 45242
513/489-9000
Contact: Maribeth McGraw
Consumer,HealthCare,Prof., Focus Groups,One-On-Ones

Brand Consulting Group
17117 W.Nine Mile Rd./Ste. 1020
Southfield, MI 48075
313/559-2100
Contact: Milton Brand
Consumer,Advertising Strategy, New Product Strategy Research

Cleveland Field Resources, Inc
6501 Wilson Mills Rd., Suite J
Cleveland, OH 44143
216/473-9941
Contact: Daniel McCafferty
Modern Facilities on East & West Sides of Cleveland

Saul Cohen & Associates, LTD.
Suite 102, 30 Eliot Lane
Stamford, CT 06903
203/322-0083
Contact: Saul Cohen
Specializing in All Qualitative Methodologies

Concepts In Marketing Research (CIMR)
400 North Robert St.
Saint Paul, MN 55101-2098
612 / 228-5667
Contact: Kara Marx
Consltng., Qual.Rsch., Fac/ Recruit / Moderation/Analysis

Consumer Opinion Services
12825-1st Ave. South
Seattle, WA 98168
206/241-6050
Contact: Jerry Carter
Consumer,Business Groups and One-On-Ones

Creative Marketing Solutions, Inc.
P.O. Box 568
Langhorne, PA 19047
215/357-3655
Contact: Larry Schwarz
Experienced Specialists in Qualitative Research Techniques

Creative Research Associates,Inc.
500 N. Michigan Ave.
Chicago, IL 60611
312/ 828-9200
Contact: Stephen Turner
Twenty-Five Years of Leadership in Qualitative Research

Cunninghis Associates
43 Middleton Lane
Willingboro, NJ 08046
609/877-5971
Contact: Burt Cunninghis
37 Years Exp., Moderator & Moderator Training

Datatactics, Inc.
555 Presidential Blvd.
Bala Cynwyd, PA 19004
215/668-1660
Contact: Phyllis Rosenberg
Prof & Cons Segments, incl. Doctors. Applied Psych. Meth.

Decision Research
99 Hayden Ave.
Lexington, MA 02173
617/861-7350
Contact: Peg Marrkand
Over 25 Mods. Avail., Bus/Cons Grps., Offcs: NY,LA,SF,Atlanta

DeNicola Research, Inc.
325 Greenwich Ave.
Greenwich, CT 06830
203/629-3323
Contact: Nino DeNicola
Consumer,Healthcare,Financial Services, Advertising

Direct Marketing Research Assocs.
4151 Middlefield Rd., Suite 200
Palo Alto, CA 94302
415/856-9988
Contact: Michael Green
Catalog, Direct Mail, Bus-to-Bus, Space, Databases

Dolobowsky Qual. Svcs., Inc.
94 Lincoln St.
Waltham MA 02154
617/647-0872
Contact: Reva Dolobowsky
Experts In Idea Generating Groups,In-Depth Interviews

Doyle Research Associates,Inc.
919 N. Michigan/Ste. 3208
Chicago, IL 60611
312/944-4848
Contact: Kathleen M. Doyle
Specialty:Children/Teenagers Concept&Product Evaluations

DTW Marketing Research Group
395 Pleasant Valley Way
West Orange, NJ 07052
201/325-2888
Contact: Richard Wetzel
Healthcare:MD,RN,RPh,Pts,Hosp; Full Service Quan/Qual, Facility

Elrick and Lavidge, Inc.
10 S. Riverside Plaza, #1730
Chicago, IL 60606
312/726-0666
Contact: Melanie S. Payne
Have Senior Moderators in CHGO / ATL / SF / St. Louis

Far West Research, Inc.
1315 23rd Avenue
San Francisco, CA 94122
415/564-8923
Contact: Cliff Levy
Product/Pkging Advg & Social Concepts / 30 Yrs. Prof. Exp.

Findings International Corp.
1641 S.W. 87th Avenue
Miami, FL 33165
305/ 266-9798
Contact: Orlando Esquivel
Bi-Lingual/Cultural Serving Major Markets with Ofcs . in Puerto Rico

First Market Research Corp.
1111 W. 6th Street, Suite 220
Austin, TX 78703
800 / FIRST-TX (347-7889)
Contact: James R. Heiman
High Tech,Publishing, Bus-To-Bus, Colleges

First Market Research Corp.
121 Beach St.
Boston, MA 02111
617/482-9080
Contact: Linda M. Lynch
Consumer,Retail,Banking, Health Care

First Market Research Corp.
121 Beach St.
Boston, MA 02111
617/482-9080
Contact: Jack M. Reynolds
Banking,Health Care,Ad Testing,Consumer,Executive

Focus America
1140 Ave. of the Americas, 9th Fl
New York, NY 10036
212/302-1808
Contact: David Schreier
Mid-Manhattan Loc/ State of the Art Fac. / 15 Seat Viewing Room

Focus Plus
79 5th Avenue
New York, NY 10003
212/807-9393
Contact: Elizabeth Lobrano
Impeccable Cons. & B-B Recruiting/Beautiful Facilities

D.S. Fraley & Associates
1205 East Madison Park
Chicago, IL 60615
312/536-2670
Contact: Diane S. Fraley
Full Qual. Specialty:Child/Teen / In-Home/Observational Rsch

Lynn Greenberg Associates
36 Country Ridge Road
Scarsdale, NY 10583
914 / 723-3121
Contact: Lynn Greenberg
Strategic Qualitative Marketing/ Research Consulting

Greenfield Consulting Group,Inc.
274 Riverside Ave.
Westport, CT 06880
203/221-0411
Contact: Andrew Greenfield
Qual./Quan. Rsch, New Product Dev., Finc Svcs,Toys/Games.

Grieco Research Group, Inc.
743 North Avenue 66
Los Angeles, CA 90042
213/ 254-1990
Contact: Joe Greico
Marketing and Advertising Focus Groups

Hammer Marketing Resources
12 Maymont Court
Timonium, MD 21093
301/252-5757
Contact: William L. Hammer
New Product,Consumer & Indust-rial/Commercial,Executive

Hispanic Marketing Communication Research
1535 Winding Way
Belmont, CA 94002
415/595-5028
Contact: Dr. Felipe Korzenny
Hisp. Biling./Bicult.Foc Grps Any-where In U.S./Quan. Strat. Cons .

D.S. Howard Assoc., Inc.
307 No. Michigan Ave. #1214
Chicago, IL 60601
312/372-7048
Contact: Dennis S. Howard,Ph.D.
Expert Guidance In Design, Implementation And Analysis

Huelskamp & Associates
7734 Via De Fonda
Scottsdale, AZ 85258
602/443-8708
Contact: Henry J. Huelskamp
Extensive Background and Experience

JRH Marketing Services, Inc.
29-27 41st Avenue
New York, NY 11101
718/786-9640
Contact: J. Robert Harris, II
Experience Counts: Check out the rest but USE THE BEST

K C A Research
701 Howe Avenue, Suite H58
Sacramento, CA 95825
916 / 920-2841
Contact Lynne Cunningham
Experts: Health Care and Senior / Adult Care Givers

Kennedy Research Inc.
405A Waters Bldg.
Grand Rapids, MI 49503
616/458-1461
Contact: Mary P. Tonneberger
Cons. & Ind.,Telecom.,Health, Office Systems,Chemicals,Drugs

K S & R Consumer Testing Center
Shoppingtown Mall
Syracuse, NY 13214
800/ 289-8028
Contact: Lynne Van Dyke
Qualitative /Quantitative, Inter-cepts, CATI, One-on-One

LaScola Qualitative Research
3701 Connecticut Ave.,N.W.
Washington D.C. 20008
202/363-9367
Contact: Linda J. LaScola
Public Affairs,Healthcare,
Telecommunications,Financial

Marketeam Associates
555 No. New Ballas Rd.
St. Louis, MO 63141
314/569-1324
Contact: Richard Homans
Financial Services,HealthCare,
Consumer,Pkgd Goods,Agric.

Market Navigation, Inc.
Teleconference Network Div.
2 Prel Plaza
Orangeburg, NY 10962
914/365-0123
Contact: George Silverman
Telephone Focus Groups for
High-Level Respondents

Market Views Research, Inc.
1215 Hightower Trail, D-150
Dunwoody, GA 30350
404/992-1289
Contact: Dan Brown
Advertising, Decision Makers
Marketing Quality Circles

Martin Research Inc.
P.O. Box 8595
Roanoke, VA 24014
703/342-1970
Contact: Frank Martin, III
Focus group facilities in Norfolk,
Roanoke, Winston-Salem

MedProbe Medical Mktg. Rsch
7825 Washington Ave. S.,Ste 745
Minneapolis, MN 55435
612/941-7965
Contact:Asta Gersovitz, Phrm.D.
MedProbe Provides Full Service
Custom Market Research

Menendez International
7951 S.W. 40th St./Ste. 208
Miami, FL 33155
305/266-0550
Contact: Teresa Menendez
Hispanic/Gen Market-15 Years
Qualitative/Quantative Exp.

Michelson & Wender, Inc.
335 Scenic View Drive
Atlanta, GA 30339
800/633-1523
Contact: Mark Michelson
The Retail Specialists,
Experienced, Insightful/Thorough

Moosbrugger Marketing Research
901 W. Hillgrove Ave.
LaGrange, IL 60525
312/354-5090
Contact: Mary C. Moosbrugger
Expertise in Healthcare,Food,
Agriculture,Banking

Murray Hill Center
205 Lexington Ave.
New York, NY 10016
212/889-4777
Contact: Susan Mender
3 Rm Full Svce Facility;Effic-
ient,Beautiful,Competitive Price

PACE, Inc.
28535 Orchard Lake Road
Farmington Hills, MI 48018
313/553-4100
Contact: Peter J. Swetish
Full Service Vehicle Specialist-
OEM and Aftermarket Experience

Product & Consumer Evaluations
28535 Orchard Lake Road
Farmington Hills, MI 48018
313/553-4100
Contact: Paul Johnson
Expert Moderators on Staff.
State of the Art Facility

Performance Focus
P.O. Box 723
Addison, Tx 75001-0723
214/380-6575
Contact: Judi P. Levy
Strategic Market Research/Con-
sulting;Bus:Bus,Consumers,MD,RN

Reid Qualitative
2149 S. Grape Street
Denver, CO 80222
303/758-6424
Contact: Michael Reid
Consumer,Tech/Indust., New
Prod., Concept Test/Refinement

Research Arts, Inc.
1300 Iroquois/Ste. 100
Naperville, IL 60540
312/420-2064
Contact: Francesca Jaskowiak
Qualitative Firm,5 Moderators
on Staff. Own Facility

Rhode Island Survey and Research Service, Inc.
690 Warren Avenue
East Providence, RI 02914
401/438-4120
Contact: Patricia Shakel
First in New England.
Established in 1962.

Rockwood Research Corp.
1751 W. County Rd. B
St. Paul, MN 55113
612/631-1977
Contact: Dale Longfellow
High Tech,Executives,Bus.-To-
Bus.,Ag,Specifying Engineers

James M. Sears Associates
48 Industrial West
Clifton, NJ 07012
201/777-6000
Contact: James M. Sears
Business-To-Business And
Executives A Specialty

SMS Research & Marketing Services, Inc.
1042 Fort Street Mall/Ste. 200
Honolulu, HI 96813
808/537-3356
Contact: Sheila M. Sanders
Since 1960,Full Service, Bus.,
Tourists,Intercept,One-On-One

Sources For Research, Inc.
170 West End Ave., Ste PHC
New York, NY 10023
212/787-8810
Contact: Phyllis Morrow
Diff 'Exec/Prof/Tech Rspd Natwd
New Prd Dev Implmt/Analysis

Southeastern Institute of Research, Inc.
2325 West Broad St.
Richmond, VA 23220
804/358-8981
Contact: Rebecca H. Day
Est. 1964, Full Service Qualitative
and Quantitative Analysis

James Spanier Associates
120 East 75th St.
New York, NY 10021
212/472-3766
Contact: Julie Horner
Focus Groups And One-On-Ones
In Broad Range Of Categories

Dwight Spencer & Associates
1290 Grandview Avenue
Columbus, OH 43212
614/488-3123
Contact: Betty Spencer
4'x16' Mirror. Viewing rm seats 8-
12. In house audio/video equip.

Strategic Marketing Services
148 Middle Street
Portland, ME 04101
207/774-6738
Contact: Patrick Murphy
20 yrs Broad Based Exper.
Nationwide. Full service

Strategic Research, Inc.
4600 Devonshire Common
Fremont, CA 94536
415/376-1924
Contact: Sylvia Wessel
400 groups Hi-Tech/Medical/
Financial/Transportation Svcs.

Sweeney International, Ltd.
246 Federal Road, Suite B22
Brookfield, CT 06804
203/775-8507
Contact: Timm Sweeney
Qualitative Research. Member:
QRCA/AMA/Advt. Club

Thorne Creative Research Services
10 Columbia Place
Mt. Vernon, NY 10552
914/699-7199
Contact: Gina Thorne
Ideation, Teens, New Product, Ad
Concepts, Package Goods

Paul A. Warner Associates, Inc.
3355 Lenox Road, NE Suite 665
Atlanta, GA 30326
404/239-0101
Contact: Robin S. Salter
25 Years of Experience in Design,
Moderation & Analysis

Lucy Warren & Associates
3619 29th Street
San Diego, CA 92104
619/295-0342
Contact: Lucy Warren
Understands/Meets Business
Needs With Quality/Experience

Weiss Marketing Research
27 Manor Hill Road
Summit, NJ 07901
201/273-3952
Contact: Debra R. Weiss
Strong Client Side. New Products
Background

The Winters Group, Inc.
14 Franklin St.
Rochester, NY 14604
716/546-7480
Contact: Susan Morrison-Vega
InfoThatWorks. Svces Incl
Pri/Sec Rsch, Cnsltg, TeleMktg

Wolf/Altschul/Callahan,Inc.
171 Madison Ave.
New York, NY 10016
212/725-8840
Contact: Ed Wolf
All Consumer/Business-To-
Business Qualitative Needs

Yarnell, Inc.
1 Anita Drive
East Hanover, NJ 07936
201/593-0050
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From Tbe Publisber

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provides practical and easily understood solutions.

The chapters are written so that the book can be used as an overview of focus group research techniques or as a reference using individual chapters. The only material which may be already outdated is the survey of focus group research suppliers. There has been a vast improvement in the quality of facilities since the survey was conducted (4th quarter, 1986) making much of the information obsolete.

As a first choice for obtaining an in-depth view of the focus group technique I would recommend attendance at a training program sponsored by one of the firms specializing in marketing research education. If this is impossible, I would strongly recommend obtaining a copy of Mr. Greenbaum's book. My regret is that it was not written 20 years earlier. ❑

The Practical Handbook and Guide to Focus Group Research *by Thomas L. Greenbaum is available for $41.95 ,which includes shipping and handling, from: Clarion Marketing and Communications, 340 Pemberwick Rd., Greenwich, CT 06831.*

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Trade Talk

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"Our feeling has been that if there was a greater understanding of the market that they're trying to reach, the marketplace would expand more quickly. All of the surveys we've done over the past few years indicate that that's the case. But for the most part, (these organizations) are working without any kind of current and relevant information for that kind of decision-making."

During the 20-minute telephone survey, respondents are asked about their interest in and purchase of religious products, to find out how much they spend, what types of products they buy, where they buy, and how they find out about them (direct mail, TV, etc.).

The most recent study found that while household incomes among the group surveyed increased substantially, there was very little growth in the amount of money being spent on religious books, compared to five years ago. There was also virtually no brand loyalty to any of the product makers.

"One of the things we looked at was people's recognition of the names of publishers, and for the most part, recognition levels were very low. What people are more attuned to are the topics that are being written about, or the author, particularly if it was an author whose material they had read before and really appreciated," Barna says.

Barna's firm also performs research for a number of private companies as well as other Christian organizations such as individual churches and parachurch organizations.

One study, America 2000, is designed to keep these organizations informed on trends in lifestyles, values, attitudes and behavior related to church activity and religious beliefs, and what these trends mean for the future.

"We're trying to tell the churches, 'Things are changing, and you need to change too if you want to stay relevant and effective.' We try to outline some of the things they need to start doing to keep pace with that change."

Measuring religious preferences

Barna says that through many surveys, the company has developed a standard series of questions to measure respondents' religious beliefs and activities. These questions are designed to define more precisely the nature of the individual's beliefs, because the term "Christian" means different things to different people.

"One of the things we know is that 80% of the people in this country call themselves Christians, but the word 'Christian' has become a generic term. In many cases it doesn't have anything to do with one's beliefs or spiritual practices, so we're trying to focus in on what the original intent of the word was."

As might be expected, he says many respondents are reluctant to speak openly about their religious preferences, so the surveys approach the issue carefully.

"It's very different than the consumer product research we do. In those studies, people will talk all day long about VCRs or their television viewing habits and think nothing of it. But if you're doing a study that's focused on (religious preference), you can't just jump right into it. You have to ease people into the whole topic. You have to be very cautious about how you broach the subject."❑

by Joseph Rydholm
managing editor

Company preaches value of research to Christian products industry

Though sales figures for Christian products such as books, cassettes, and CDs run into the billions of dollars each year, the industry as a whole does very little marketing research, says George Barna, president of the Barna Research Group.

Barna's Glendale, California-based company is one of a small number of companies doing research in the Christian products industry. He says that he frequently encounters resistance from prospective clients to the idea of performing research on the Christian market because many people in the Christian-oriented companies and organizations come out of ministerial—rather than business—backgrounds.

"Our company spends as much time educating people about research as it does actually doing research. Because if you look at a lot of the people running the organizations, they basically come out of a ministry background, so they don't understand business, and they have no training in or exposure to research. So the thought of spending tens of thousands of dollars just to get information doesn't sit very well with them. They see it as a risk rather than an investment."

One tool Barna is using to change that perception is the Christian Retail Products Survey. Released for the first time in 1984, the survey was performed again last year. The survey is designed to assess, among other things, the size potential of the market for Christian products, to make clients such as book publishers, bookstore owners, and makers of musical products aware of what's out there.

"That's one of the reasons we do the survey, because by and large, these organizations are not doing that kind of research on their own. They put out materials that they hope will be helpful or useful to the target population, but without any kind of information base, there's no way of knowing if they are."

While acknowledging that the Christian product industry has an important spiritual component, Barna says he tries to remind clients that it is also an industry that needs to understand its market and its audience's needs if it is to grow.

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