Quirk's
MARKETING RESEARCH
Review

Research shapes packaging of 3M wood care product line

Packaging research issue

October, 1991

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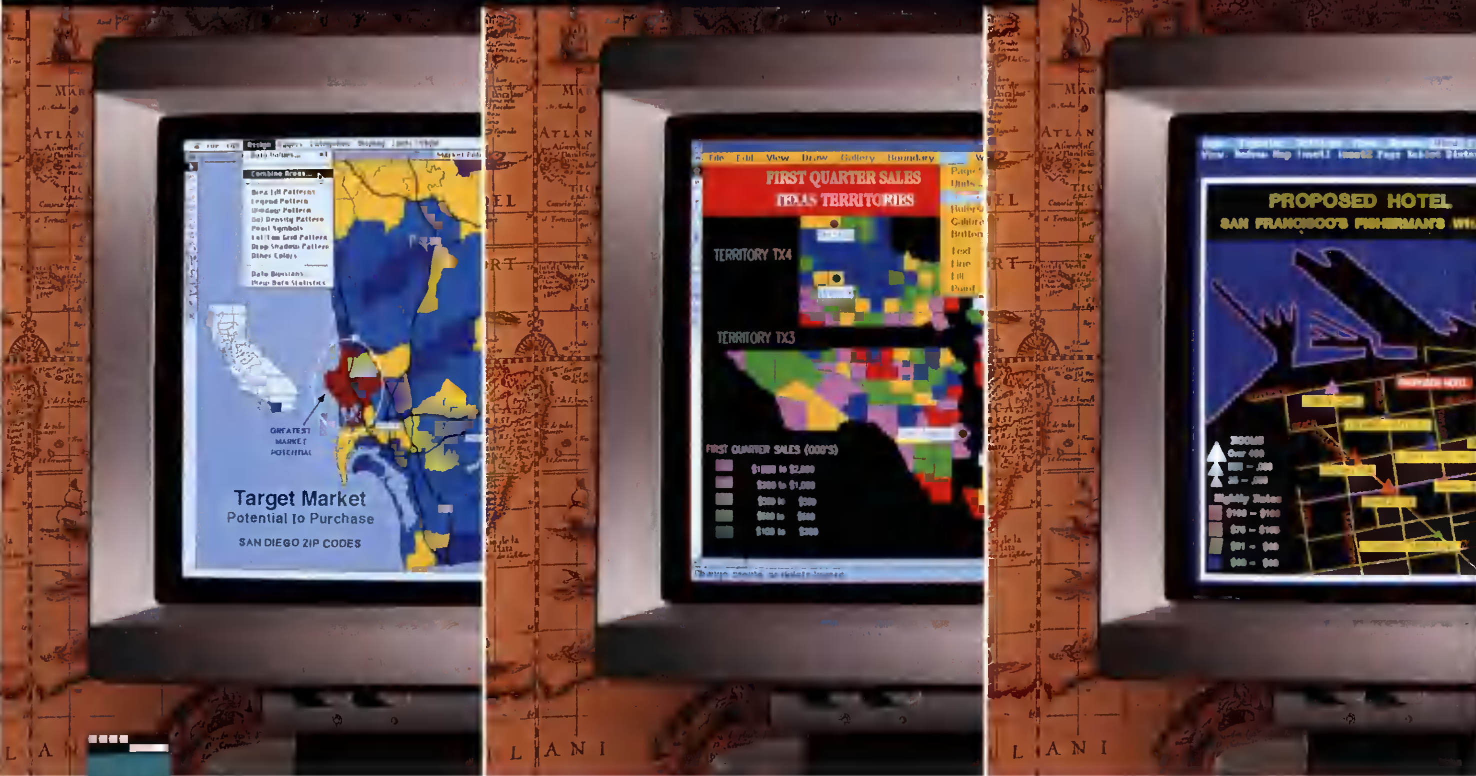

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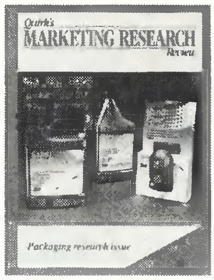

Cover
3M used packaging research to help position its line of refinishing products. Photo courtesy of Coleman, Lipuma, Segal & Morrill, Inc.

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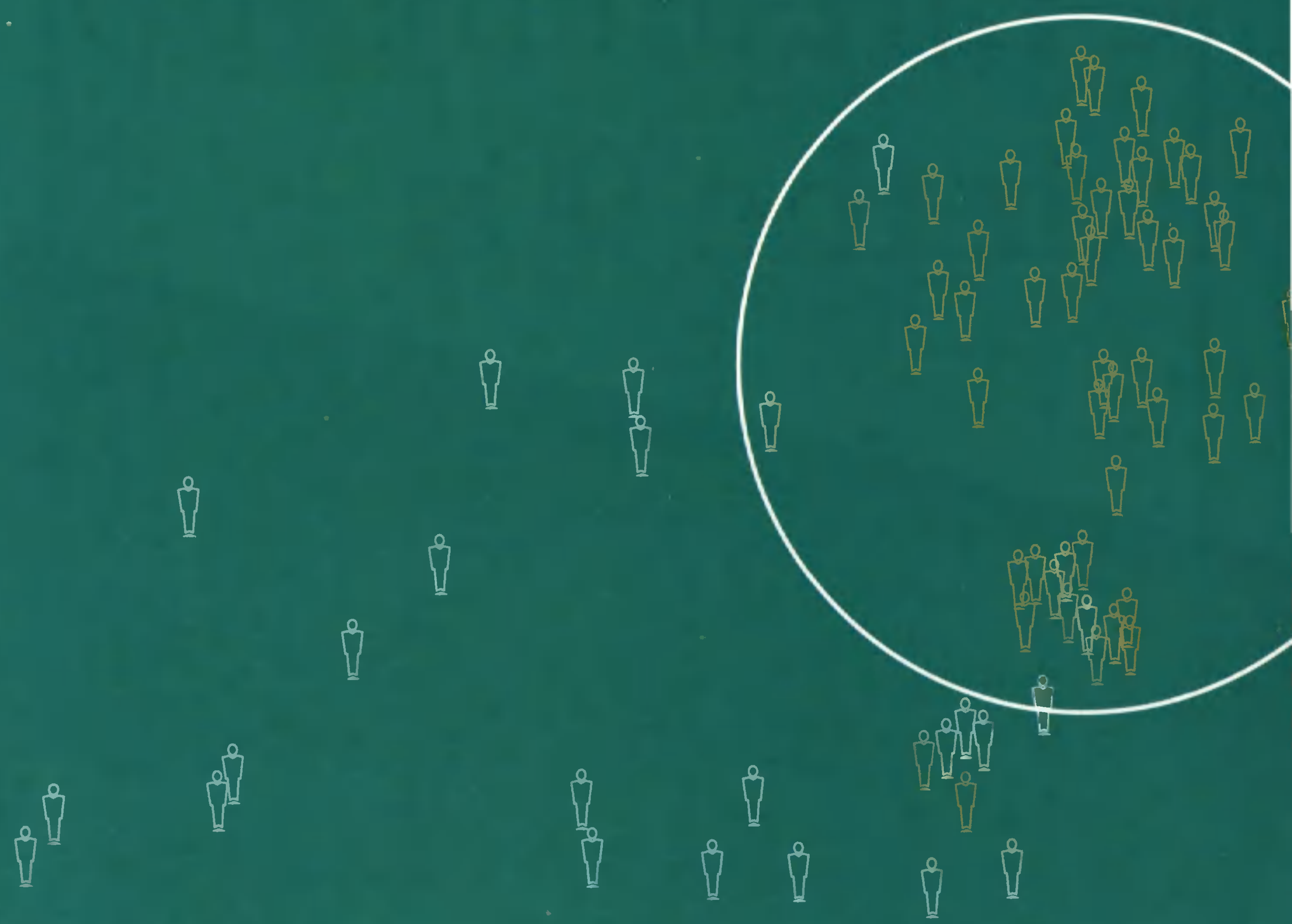

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Craftsmanship for the 90s

Designers used research to test several elements of the packaging of 3M's wood care products line, from the label information to the color and choice of material for the containers.

Packaging research guides positioning of 3M's innovative line of wood care products

by Joseph Rydholm
managing editor

Of the many tasks do-it-yourselfers take on, stripping old paint or varnish from wood surfaces has long been one of the most difficult and time consuming. Using scrapers and sandpaper to remove a surface in minutes that was meant to last for years takes patience and stamina. The advent of liquid strippers has made the job a bit easier, albeit more dangerous, thanks to the powerful chemicals that now do most of the removing for you. Not only can these concoctions burn skin on contact, they also emit harmful vapors, so gloves and proper ventilation (preferably in the form of gale force winds) are a must when using a liquid stripper.

That is, they used to be,until about two years ago when St. Paul-based 3M introduced an innovative line of 24 wood care products designed to make doing it yourself simpler and less hazardous to your health. The centerpiece of the line--which includes a variety of sandpaper and refinishing products--is a product called Safest Stripper, a liquid paint and varnish remover that can be used without gloves and without fear of harmful fumes.

From left, John Chrzanowski and Owen Coleman of Coleman, Lipuma, Segal & Morrill, Inc. and 3M's Linda Keefe review a proposed package design theme for the 3M wood care products line.

To incorporate its innovation and the more time-honored aspects of woodworking, 3M envisioned positioning the line as "craftsmanship for the 90s," says Owen Coleman, president of Coleman, Lipuma, Segal & Morrill, Inc. (CLS&M), the Manhattan-based package design firm that created the packaging for the 3M wood care line.

"3M realized that working with wood is a traditional thing with an old fashioned kind of feel to it. But at the same time, they didn't want the products to look old fashioned like those of competitors. They wanted something for the 1990s, something high-tech and more contemporary."

To make sure that the packaging would communicate these ideas and the product line's benefits to both novice and experienced woodworkers, a number of designs were tested with do-it-yourselfers (DIYers) of all levels of ability.

The designs, created on computer, experimented with different names for the products (such as Safe Strip, Strip Safer) and informational taglines below the product name to explain the product benefits ("No ventilation required," "Penetrates for superior protection").

"The packaging had to carry tremendous amounts of information because (the stores that cater to the DIYer) don't have a lot of help in terms of personnel, so the package has to communicate and educate and tell you everything about the product. We needed to know the consumer's order of priority for that

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Walking a fine line

Stiefel Laboratories hopes updated packaging will attract new users to its Oilatum soap without alienating current consumers

by Joseph Rydholm
managing editor

In the nearly 40 years since its introduction, Oilatum soap has never had a bad year. Recommended by dermatologists to patients with dry, sensitive skin as a gentle cleansing agent, the brand has earned a loyal user base. Though the brand doesn't benefit from splashy ad campaigns—its maker, Stiefel Laboratories, promotes the soap primarily through physician referral—Oilatum continues to compete in pharmacies and drug stores against brands with much more marketing muscle behind them.

In recent years, despite Oilatum's steady performance, Stiefel began having inclinations that a packaging change might be worthwhile. First, it had been nearly ten years since the last packaging change, and Stiefel had questions about the aesthetic appeal of the current box, a functional, medicinal-looking light blue container that prominently displays the Oilatum brand name and the line "For dry, sensitive skin."

Second, questionnaires inserted into Oilatum packages over a two year period revealed that a percentage of the soap's users bought the soap on impulse and not as a result of a doctor's recommendation and Stiefel suspected that a redesigned package might attract more impulse purchases, says Michael Martinolich, marketing and advertising services manager, Stiefel Laboratories.

"Because such a high percentage of patients use Oilatum over and over again, we didn't want to change the package so drastically that they couldn't find the product on the shelf."

"The package insert questionnaire indicated about a ten percent impulse purchase, and we thought that if we could enhance the packaging we could increase that impulse purchase even more. If we could do that with a minimum of an investment in packaging, we thought that would be advantageous, even though the ethical promotion of our products through dermatologists would remain our thrust. We're in an odd situation, because most of the competing products are consumer-oriented products and that means that packaging is changed quite frequently. But our decision to change packaging wasn't a reaction to competitors. We just felt that it was time to do it," Martinolich says.

New designs

In the Spring of 1990, a research project was undertaken to test two new designs against the existing package. In updating the packaging, Stiefel had to walk a fine line to avoid alienating current users while attracting new ones. "Because such a high percentage of patients use Oilatum over and over again, we didn't want to change the package so drastically that they couldn't find the product on the shelf," Martinolich says.

Data from the questionnaire indicated that the typical Oilatum user is a woman, 30+ years old, with sensitive skin. Respondents from this group—half Oilatum users and half non-users—were

Questions about the aesthetic appeal of the existing packaging for Oilatum (bottom) were part of the reason Stiefel Laboratories had new packaging (top) created.

recruited in mall intercepts for the research.

Joan Treistman, partner, Treistman & Stark Marketing, Inc., Edgewater, New Jersey, designed the research for the Oilatum project. She says that because of the multiple objectives involved in the packaging change the research employed multiple methodologies. Some of those objectives included: keeping current users happy, gauging any potential downsides that might result from a packaging change, and increasing the aesthetic appeal of the packaging.

"We put together a methodology that would treat each of the issues individually while at the same time giving us the option of examining everything from a holistic point of view as we put the data together," Treistman says. "We used eye-tracking to document the attention dynamics of the package on the shelf in terms each design's ability to direct consumer attention to specific elements on the package. We used the t-scope to determine the speed and accuracy of brand and product information registration. And then we used a verbal interview to uncover each package's effectiveness in terms of aesthetic appeal, brand imagery, and purchase interest."

Simulated store shelf

Each of the designs were tested in a simulated store shelf planogram to determine how quickly the Oilatum box was seen and how long respondents looked at it. Second, consumers viewed the designs separately to determine the points on the packaging they noticed first, second, etc.

> ***"The focus of the analysis was to make sure that the high level of commitment that users had was maintained by any new package."***

"The focus of the analysis was to make sure that the high level of commitment that users had was maintained by any new package," Treistman says. "It's not unusual for people, particularly in a product category such as this, to have very high standards and strong feelings for the product. Any change to the packaging was bound to have some influence on the current franchise and Stiefel had real concern not to generate any downside risk with the current franchise. We looked for any falloff as a consequence of a new package and we were satisfied that that didn't occur."

Treistman says that testing the product on the shelf in a competitive environment is crucial. "I don't think oftentimes that marketers recognize the context in which the package performs. If more of the people who make decisions without the benefit of research were to look at their package on the shelf in a competitive environment, they'd have a more realistic sense of what the package has to achieve if it's going to break through the clutter and direct attention to the information that the marketer has decided is vital to

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Using conjoint analysis for price optimization

by Richard D. Smallwood

Editor's note: Richard Smallwood is president of Applied Decision Analysis, Menlo Park, California. This article is adapted from a presentation made at the 1991 Sawtooth Software Conference.

One of the dramatic lessons of the collapse of the communist economic system in the Soviet Union and Eastern Europe is the importance of the marketplace as the final judge of pricing decisions. In the expanded international economy resulting from these economic and political upheavals, pricing decisions will become even more important. Understanding the sensitivity of the market to different pricing policies is essential to successful participation in the high stakes game of international marketing.

To the manufacturer with multiple products in a complex market, setting the prices of all the products in the portfolio can be an imposing task, particularly if the products compete with one another. Moreover, any adjustments in the price of the product portfolio will undoubtedly cause changes to the competitor's prices. In the face of such complexity, it is not surprising that many companies choose to use ad hoc methods and to set each product as a separate decision.

There are of course analytical aids that can help with these complex decisions. To use them, we need to understand how the sales of a product, or portfolio of products, will depend on the prices of the products. The specification of this demand function, particularly as it depends on the interactions among many products, is often the most difficult part of an analytical approach to deriving an optimal pricing policy.

This article will demonstrate how conjoint analysis can help in the specification of the multi-product demand function. This leads to the development of techniques for deriving the optimal pricing policy for a portfolio of products within a competitive environment.

Finding the demand function

Let's imagine a situation in which our client has one or more products competing for sales with competitor's products in the market. Suppose further that we have conducted a conjoint analysis survey over a sample of customers in this market. This will produce for each respondent in the survey the following:

- The utility for price, $u_i(p)$, where the index i refers to the ith respondent.

- The utility of all the other attributes for each product in the market; let's call this utility for the ith respondent and the jth product u_{ij}.

- The number of customers represented by each respondent; w_i will denote this "weight" for the ith respondent.

Notice that the first two quantities are measurements resulting from the conjoint analysis survey, while the third is determined by the sampling plan used to recruit respondents.

With these three quantities it is possible to estimate a demand function over the products in the market. To do so we need an additional model to describe how respondents' ultimate choice of products depends on the measured utilities. The two most common models for this purpose are the logit and probit choice models. If we use the logit model, the demand function for the products in the market becomes:

$$D(k)= \sum_i w_i \mathrm{Exp}[u_i(p_k)+u_{ik}]/\sum_j \mathrm{Exp}[u_i(p_j)+u_{ij}]$$

Equation 1

Where D(k) is the total demand for the kth product, p_k is its price, and Exp[.] denotes the exponential function.

The purpose of this equation is to illustrate the intuitive notion that the utilities resulting from a properly administered conjoint analysis can be used to form a demand function over the products within a market.

Estimating sensitivities to price

The availability of an analytic demand function is a powerful tool for pricing analysis. For example, with the demand function it is now possible to calculate each product's elasticity with respect to price. Since the elasticity of demand to price is just the percentage change in demand per percentage change in price, the elasticity, E(k), for the kth product is just:

$$E(k) = p_k[dD(k)/dp_k]/D(k)$$

where the quantity in brackets is the derivative of the demand for the kth product with respect to its price. This can be calculated analytically from Eq. 1 above, and so it is possible to provide price elasticities as a direct output of the conjoint analysis.

Price elasticities are an important source of information about how a market is likely to react to changes in price. They can be used to determine which products will have large changes in demand and which will have relatively small changes for a fixed percentage change in price.

This idea can be taken one step further. Suppose that our client has several products in the market and wants to estimate how changing the price of one will affect the demand of another. This cross-pricing effect can be represented as a cross-elasticity, defined as the percentage change in the demand of one product per percentage change in the price of another. If E(k|j) is the cross-elasticity of the demand of the kth product to the price of the jth product, then we have:

$$E(k|j) = p_j[dD(k)/dp_j]/D(k)$$

where the bracketed term is the derivative of the demand of the kth product with respect to the price of the jth product. These cross-elasticities can be calculated analytically from the demand function in Eq. 1 and so can be reported as a direct output of the conjoint analysis study.

In practice it is often more intuitively appealing to report out the derivatives, $dD(k)/dp_j$, themselves rather than the cross-elasticities. The derivatives represent he change in demand for a change in the price of a single product, and so have the following physical interpretation. Suppose we raise the price of one product and observe that its demand has decreased by some number of units. The derivatives of demand with respect to its price illustrate how the product's losses will be reallocated by the market to the other products.

Finding the optimal price

The availability of a multi-product demand function along with elasticities and cross-elasticities raises the possibility of calculating an optimal price. Let's consider the single product situation first. If the variable cost of the product is c, then the total variable profits for the product are:

$$V = D\,(p - c) \qquad \text{Eq. 2}$$

and so we want to know the price that maximizes this quantity. The change in variable profits per change in price is just:

$$dV/dp = [dD/dp](p - c) + D \qquad \text{Eq. 3}$$

and this quantity can be calculated analytically from the demand function in Eq.1.

Finding the optimal price is just a question of finding the price that causes the expression in Eq.3 to equal zero. There are many sophisticated techniques in the arsenal of operations research for solving this type of problem.

The problem becomes more interesting and somewhat more difficult if we seek to optimize the prices of a portfolio of products. In this case the variable profit expression in Eq.2 must be expanded to include the sum over all the products. Techniques are equally available for solving the multi-product version of Eq.3 to find the optimal portfolio of prices.

Including competitive effects

The discussion in the preceding section assumed that the competition will make no changes to its prices in response to our attempts to optimize prices. This is, of course, not realistic. To include competitive effects in the optimization of prices requires some explicit statement about how the competition will respond. For example, if we raise our prices by 10% will the competition raise theirs by 10%, or by 5%, or not at all?

The best approach is to build a simple model of how the competition will respond. This competitive response model can then be incorporated into the optimization of prices. If there is uncertainty about the competitive response, then this can be included in the model so that a probabilistic competition model results.

Once the competitive response model has been constructed, sensitivity analyses can be conducted over the uncertain elements of the model. In most cases, there will be a few key factors about competitive responses that significantly affect the optimal price settings. Once identified, attention can be focused on resolving the uncertainty about these key factors.

Limitations of the approach

The optimization scheme proposed above is based on several simplifying assumptions, each of which can be relaxed at the expense of increased complexity. Some of these assumptions are discussed below:

Logit choice model

The logit model in Eq.1 has the obvious advantage of analytical simplicity. Other choice models such as the multivariate probit could be used instead, although the probit model in particular requires considerably more complex numerical computations.

Preference model

Regardless of the form used, the demand function of Eq.1 only describes customer preferences for products rather than actual sales. It is quite feasible to add a separate module to the above structure that describes those aspects of the market not contained in simple preferences. Examples of issues that might be included are the distribution network, manufacturing capacity constraints, sales force coverage and effectiveness, and customer reluctance to change.

Linear cost model

The formulation of the optimal pricing problem above assumes in Eq.2 and 3 that the incremental cost of each additional product sold is constant. If there are significant economies of scale over the range of demand considered in the demand function, then the cost model can be modified to include these effects.

Homogeneous market

The formulation of the demand function in Eq. 1 assumes implicitly that the size of the market to be distributed among the products is constant. As the prices of products change it is reasonable to expect that customers will enter or leave the market in response to the overall price level. To include this effect requires a separate model of the total market size and its dependence on overall price levels.

Designing the survey

If the utilities from a conjoint analysis survey are to be used to estimate optimal prices, care must be taken that the utilities adequately represent customer attitudes toward product prices. There are four issues that require particular attention:

Form of the price utility

The utility for price, $u_i(p)$ in Eq.1, can in general be either discrete or continuous valued. Continuous valued price utilities are analytically more tractable and allow the analyst to test the appropriateness and different non-linear functional forms. It is even possible to let different respondents within the same study have different functional forms for their price utilities depending on their answers to the trade-off questions.

Choosing price differentials

Each price trade-off question requires a difference in the prices used for each side. If this price differential is too small, respondents will always choose the higher cost side thus producing unrealistically low price sensitivities. Similarly, a price differential that is too large will cause respondents to choose the lower cost side. The problem is complicated by the differences among respondents; what is too large for one respondent may be too small for another. If a computer-based interview is used, the computer can alter the price differential based on previous answers by the respondent. For paper/pencil conjoint analysis, pilot test results can be used to adjust price differentials. These alterations of price differentials are much easier to accomplish if the price attribute is continuous-valued.

Adapting the price range to the individual

In some pricing studies individuals will have very different ideas about the range of prices that is appropriate for the product. For example, in choosing a personal computer one person may be thinking about a small computer in the $1000-2000 range while another may want a more powerful unit in the $4000-6000 range. To make the interview credible the respondent must trade-off prices that are realistic. A computer-based interview can accomplish this easily with a few questions at the beginning of the interview. For paper/pencil studies it is sometimes possible to establish a reference price at the beginning of the interview and then use phrases such as "Reference price + $200" in the trade-off questions.

Adapting pricing units to the individual

In some situations different respondents may think of price in different units. The most common example of this occurs for expensive items in which some respondents may base their purchase decision on the total price while others may use the equivalent monthly payment. For computer-based interviewing this can be handled easily with a few questions prior to the trade-offs. It is even possible to include financing attributes such as down payment and loan length, if that is important. For paper/pencil studies this can be handled by asking one or two questions during recruiting and then sending different questionnaires depending on the responses.

Conclusions

Conjoint analysis is a data collection and processing technique that can bring some of the simple ideas and techniques of microeconomics to the market planner. Specifically it allows for the estimation of a multi-product demand function in which price is an explicit attribute. When combined with the concepts and tools of modeling and optimization, it can yield new insights into the complex portfolio pricing decisions facing modern corporations. ❑

Dollars and scents

How men view, choose and use their fragrances

by Jim Schwartz and Gale Muller

Editor's note: Jim Schwartz, Ph.D., is marketing research manager with Newsweek magazine. Gale Muller, Ph.D., is vice president with the Gallup Organization.

In our high-tech age, it is difficult to imagine a major industry without a wealth of marketing data to guide decision making. Yet there are exceptions. From next-to-nothing 15 years ago, men's fragrance is now a one billion dollar industry annually. With new brands coming to market every year, industry expectation is that retail sales of aftershave and cologne will continue to be strong.

Despite that positive outlook, the men's fragrance market has been proceeding fortuitously with minimal marketing information, for indeed little marketing research has been conducted to help guide the industry.

Recognizing this gap, *Newsweek* and six other magazines, in association with the Fragrance Foundation, commissioned the Gallup Organization in 1990 to conduct a landmark survey, the first and only one in the public domain, on the way men buy and use fragrance.

This case study provides an opportunity for considering ways in which marketing research may be used to better understand and sell to a "new" market. Among the questions we wanted answered were:

- How can the fragrance market be described?
- How is its success explained?
- What can be done to increase industry profits?

The results are presented in this article in three sections: market descriptors, purchase motivations, and marketing implications.

1) Market Descriptors. Information about usage patterns, purchase patterns, and general demographic profiles was collected. These data provide a foundation for ongoing market research within this emerging category.

2) Purchase Motivations. In addition to descriptors, marketers want the "reasons why" consumers buy a product or service. Our survey addressed the issue of what motivates, or drives, a purchase. Thus, it provides the initial "psychographic" baseline for future, more sophisticated research. In exploring motivations, the research uncovered a unique and critical market segment. These motivations could serve as the basis for future marketing hypotheses—which may be tested by additional market research or by measurement of actual sales in the marketplace.

3) Marketing Implications. The data collected in this survey suggested a wide variety of implications for the fragrance industry concerning ways to market its product better for increased sales.

In this study, data were collected through telephone interviews in April 1990 with a representative sample of 808 men in the key marketing target: Ages 18-49 (hereafter the sample will be referred to as "men" without adding the age qualification).

Market Descriptors

A user scheme

We hypothesized at project inception that there were either three or four levels of fragrance usage, with heavy usage being defined as five or more days per week, as a function of the work schedule. In fact, five fragrance usage levels emerged from this research. Especially surprising was learning that one-third (33%) of all men are "extra-heavy" users who wear fragrance every day of the week. In addition, 17% of the men are "heavy" fragrance users, wearing it five or six days each week. Thus, half of all men in the key target market wear fragrance at least five days every week.

The data collected in this survey suggested a wide variety of implications for the fragrance industry concerning ways to market its product better for increased sales.

The three other user levels are "light" users who wore fragrance one to four days each week (36%), "infrequent" users who wore fragrance in the last six months but not during the past week (3%), and "non-users" who have not worn any fragrance in the past six months (11%).

In sum, overall usage of aftershave and cologne is extremely high, with nine out of ten (89%) men qualifying as users.

Brand loyalty

Fragrance brand loyalty is not high. Sixty percent (60%) of all fragrance users started using their current "favorite" brand within the last three years. Nearly half have tried a new brand within the last year. Most impressively, over one-fourth (28%) of all fragrance purchasers bought a new brand the last time they made a fragrance purchase. These data indicate that the men's fragrance market is "fluid," especially among men who are the heaviest users.

Seasonality

A growing number of women's fragrances are sold on the basis of being seasonally appropriate. This phenomenon has not reached the men's market, for only four percent (4%) of the men change their brand of cologne or aftershave from "season to season."

Storage

The majority of fragrance users (58%) store their fragrances out in the open at

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Consumers waiting before they fly

Forty-one percent of air travelers have been flying less often since January, according to an AmeriPoll survey by Maritz Marketing Research Inc. But, while the threat of terrorism has been a deterrent to some (16%), the study shows economic factors are the chief reason that 23% have reduced flight schedules. Other reasons the industry is in a crunch: 21% of respondents say they have no need to take a trip; 18% are waiting for vacation; 2% are concerned about airline safety.

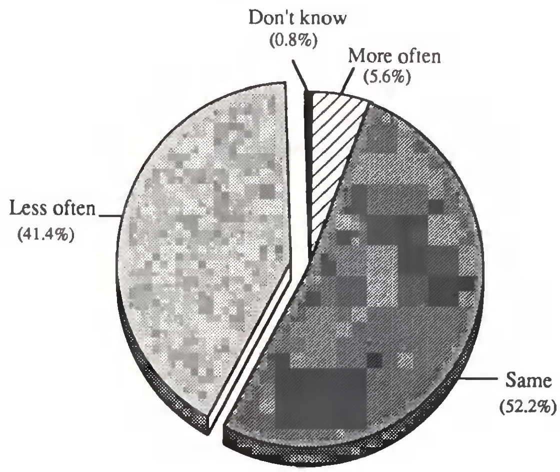
"Even though the war is over, many passengers may not resume a normal travel schedule until the economy improves and ticket prices go down," says Beth Nieman, Maritz research manager.

The AmeriPoll finds the following conditions must exist before travelers return to pre-war schedules:

- ticket prices have to come down (21%)
- vacation time needs to be available (16%)
- the economy improves (15%)
- have a need to travel (12%)
- threat of terrorism has to be reduced substantially (10%)

Since airport security measures have been strengthened, 55% of air travelers feel more secure; one-third feel as safe now as before; only 4% think they are less secure. Even though the new procedures are more time consuming, an overwhelming number of respondents (86%) say they should be continued.

Many air travelers have been flying less since the beginning of the year



Fifteen percent of those who participated in the survey fly for business only. Twenty-six percent use the airlines for both business and pleasure, and 58% take to the air for pleasure only. The majority of air travelers surveyed (58%) fly more than one round-trip commercial flight per year.

Telemundo poll finds U.S. Hispanics troubled by quality of life issues

A large portion of U.S. Hispanics are deeply concerned about their quality of life and cite crime, drugs, poor education, faulty health care and discrimination as nagging problems in their communities, according to a recent Telemundo Hispanic Opinion Poll.

The 1990 Census estimates the Hispanic population to be as high as 24.1 million or nine percent of the U.S. total. The poll, sponsored by Telemundo, the Spanish-Language television network, also sampled Hispanic views on the Bush administration, U.S.-Mexico free trade, affirmative action and Puerto Rico statehood.

Hispanics surveyed rated crime first and drugs second—over unemployment, education, the environment and discrimination—as the most pressing problems in their communities. Four out of ten Hispanics feel that crime in their neighborhoods has worsened in recent years with 63% calling the situation "serious." More than 50% of re-

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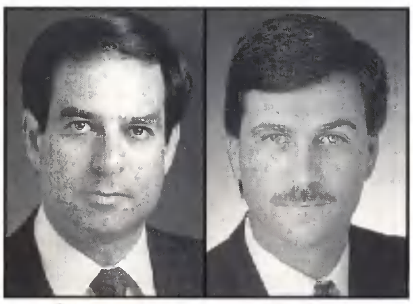
NAMES OF NOTE

Joel Raphael, director of market research at AT&T, has joined *Guideline Research Corp.*, New York, as senior vice president in charge of technical service and product studies, customer satisfaction and business-to-business research.



Raphael Kerins

Jack Kerins has been named senior vice president of Systems & Technology with the *ICT Group*, a Langhorne, PA-based provider of telephone marketing and market research services.

Thomas O. Jukan has been named director of *Pro Research*, a subsidiary of *IntelliQuest Inc.*, Austin, TX.

Port Washington, NY-based *Heller Research Group* has named **Alan Levine** executive vice president/marketing director and **Arnold Diamond** executive vice president/research director.

Branton White has been promoted to market research project manager at *Intertec Publishing Corp.*, Overland Park, KS.

Edward M. Fielding has joined the electronics and computer marketing research department of *Cahners Publishing* in Newton, MA. Previously he was a manager of quantitative studies with Consumer Science, Inc., Peabody, MA.

Donna Van De Water has joined the Chicago office of *Cramer-Krasselt* advertising as a research supervisor. Previously she was with Young & Rubicam, Chicago.

Kelly Quehl has joined *Quality Controlled Services*, Minneapolis, as qualitative manager.

Kathleen Gutkowski has joined *Michael Blatt & Company*, Los Angeles, as operations manager. Previously she was with Computers for Marketing Corp., San Francisco.

Arthur S. Goldberg, Ph.D., has been appointed senior vice president of the New York office of *Schulman, Ronca, and Bucuvalas, Inc.*

Two research companies—*RMC Research Corp.*, Hampton, NH, and *MarketVision Research*, Cincinnati—have been recognized for their "exemplary use of resources to face challenges and emerge stronger" as a part of a national program to enhance American competitiveness. The program, called the Blue Chip Enterprise Initiative, is sponsored by Connecticut Mutual Life Insurance and endorsed by the U.S. Chamber of Commerce and Nation's Business magazine. It was launched last September to help small businesses of all kinds compete more effectively through the exchange of insights and strategies for success.

Barbara P. Watson has joined Charlotte, NC-based *FacFind, Inc.* as account executive. In addition, **Kathryn E. Dancy** has been named business development director.

Watson Dancy

Christopher Jaworski has joined *Response Analysis Corp.*, Princeton, NJ, as a vice president.

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Claritas Corp. and National Planning Data Corporation (NPDC) have announced plans to merge operations by year end. The new firm, **Claritas/NPDC** will be headquartered in New York City at the offices of VNU Business Information Services, its parent company. Sales and service offices will be maintained in Alexandria, VA, Chicago, Dallas, Ithaca (NY), Jenkintown (PA), Los Angeles, and New York.

◆

Creative Marketing Enterprises, Inc., a full service custom marketing research company, has moved its headquarters to new, expanded offices at 1546 Dartford Rd., Maumee, OH, 43537. Phone 419-867-4444.

◆

Seaport Snrveys has opened a new focus group facility, *Financial Focus*. While specializing in executive recruiting and focus, the facility is equipped with full kitchen facilities to handle consumer groups as well. The facility is located at 34 Cliff St., New York, NY, 10038. Phone 212-608-3100.

◆

Marketing Horizons, Inc. has moved to new facilities at The Oaks, 1001 Craig Rd., Ste. 100, St. Louis, MO 63146. Phone 314-432-1957.

◆

Downtown Foeus Center, a new focus group and conference facility, has

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PRODUCT AND SERVICE UPDATE

Directory of computer industry

Mentor Market Research has published The Computer Industry Directory, which contains information on over 6,400 organizations in the computer industry. The directory lists vendors by type of product, location, and alphabetically by corporate and/or division name. The product listing section classifies each company by 14 major business categories, including application software, systems software, hardware, professional services, maintenance services, processing services, systems integrator, retailer, wholesaler, value added reseller, supplies, and telecommunications. Products are further classified into over 400 more specific categories. The listings also show the type of computer system and industry to which the product is sold. The principal product name and description are provided for most listings.

The geographic listings are arranged by city, state, and country. Companies are sorted alphabetically within each locality and includes type of business. The alphabetical listings have toll free 800 numbers as well as local telephone numbers. Street addresses and P.O. boxes are both listed. Up to three top officers are listed for one-third of the companies. As many as three products, industries, and system types are shown in this section. For more information, call 408-268-6333.

New release of StatPac Gold

StatPac Inc. has released StatPac Gold IV, a statistical software package designed for market researchers. The package produces tables and graphics for basic analytical procedures, including frequencies, tabs and banners, open-ended response coding, multiple response, descriptives, breakdowns, correlations and t-tests.

StatPac Gold IV offers batch and interactive processing with a full spectrum of reporting options. It handles surveys containing up to 500 questions and 32,000 respondents. The package also offers extended labeling for page headings, titles, variable labels and value definitions and contains full transformation capabilities including sorting, weighting, recoding, and computing new variables. StatPac Gold IV works with Windows and comes with a complete tutorial. For more information, call 612-822-8252.

Data now available for use with mapping software

Strategic Mapping, Inc. (SMI), a developer of PC and Macintosh-based mapping software, has obtained the data from some of the world's largest data companies and reformatted and reorganized the data to adapt it for personal computer users. Data sources include Equifax Marketing Decision Systems, National Planning Data Corp., Dun & Bradstreet, CACI, and the U.S. Census Bureau.

Called the Atlas Data series, the files enable users of the company's Atlas mapping software to obtain data market intelligence tailored to their industry, geographic area of interest, and competitive situation. The Atlas Data Series includes three data sets: demographic, business, and vertical markets, each of

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Survey method uses fax to boost response rates

by Scott Davis

Editor's note: Scott Davis is senior associate with Kuczmarski & Associates, a Chicago-based management consulting firm.

Kuczmarski & Associates (K&A) has developed and successfully used a surveying process, the Phone-Phax©, to help achieve high response rates, provide our clients with results in a month or less and secure higher quality information relative to mail surveys.

The Phone-Phax incorporates a number of research techniques including: conducting up-front research to help design the survey; developing a "user-friendly " survey; calling respondents in advance to explain the nature of the study; administering the survey through the fax machine, and; following up as necessary.

We have successfully used the Phone-Phax for research projects ranging from gathering client performance feedback and securing product specification information to designing a new customer service program. The success of each project was due, in large part, to the increased control over and enhanced quality of information afforded by the Phone-Phax.

We believe three reasons attribute to the success of Phone-Phax:

1. It's immediate--Sending the survey in a timely manner helps precondition respondents to the importance and relative urgency of the study.

2. The fax mystique--The impact of receiving a fax is still enormous. Managers agree they look at a fax before

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Finding the hot buttons: a scientific approach to motivational research

by Betsy Goodnow

Editor's note:
Betsy Goodnow is president of Market ACTION Software, Clarendon Hills, Illinois.

A promotion for a brand is more effective if it appeals to the motivations driving purchase behavior. The purpose of this article is to demonstrate a scientific approach to identifying motivations for buying a specific brand. An example shows how to elicit motivations with in-depth interviews and how to summarize them using correspondence analysis. Instead of using a means-end chain, this new approach to laddering relates brands, features, benefits, and values using a perceptual map.

One of the goals of marketing research is to identify motivations for purchasing a brand. These motivations are the "hot buttons" that drive purchase behavior. Promotions that appeal to these motivations are more effective in increasing sales than promotions that merely emphasize the features or benefits of the brand. Motivations indicate why the brand is valuable to the user — why he is willing to spend money on one brand rather than on another.

However, motivational research is difficult to conduct. Most respondents are not able to verbalize their subconscious motivations for purchasing a brand without structured probing by an interviewer. Although unstructured interviews may elicit reasons for purchasing, these reasons may be colored by social expectations and may not be their real motivations for purchasing the brand. Furthermore, such open-ended responses elude objective analysis. The analyst's subjective view of reality may color their interpretation of the responses.

The purpose of this article is to explain how to disclose motivations for buying a brand and how to scientifically analyze the responses. It explains structured procedures for eliciting purchase motivations, coding these responses, aggregating and crosstabulating the data, visually summarizing relationships in the table, and interpreting the results.

Data collection

Motivations are revealed through structured in-depth interviews involving triadic comparisons of competitive brands. The client can easily identify the three to twelve brands that compete most strongly with his brand. The results are more valid if only the strongest competitors are included in the analysis, if the respondents are familiar with all of the competitive brands, and if a hundred or more respondents are interviewed.

The objective of the interviewing is to identify the values, the underlying motivations for buying the brand. Salient features are the brand's comparative advantages, benefits are instrumental uses of the brand, and values are the life style identity or basic needs that are satisfied by the brand. Subsequent stages of the interview delve progressively deeper into the respondent's subconscious.

TABLE I

BRANDS, FEATURES, BENEFITS, AND VALUES

	FEATURE					VALUE		
	Quality	Guarantee	Style	Total	%	Leadership	Safety	Love
BENEFIT:								
Status	30	20	25	75	34%	35	15	10
No Risk	15	35	15	65	30%	10	40	10
Conformity	15	20	45	80	36%	20	10	50
Total	60	75	85	220	100%			
Percent	27%	34%	39%	100%				
BRAND:								
Brand A	35	20	30					
Brand B	25	40	25					
Brand C	15	25	30					
Brand D	20	20	30					

The interviewing technique is called laddering. Each respondent is asked to compare three brands that have been assigned to the respondent on a random basis. The respondents decide which two of the three brands are most similar and then describe why they are similar yet different from the third. Then each respondent explains the benefits derived from each feature and why each benefit is personally valuable to him. The interviewer keeps probing until the respondent has nothing more to add. The analyst compiles the open-ended responses in a structured manner. Each response is classified as either a brand, feature, benefit, or value. Similar responses to each of the four variables are coded as belonging to the same category.

The coded responses are then aggregated and crosstabulated as shown in Table I. The table links brands with features, features with benefits, and benefits with values, but does not directly link brands with values. However, correspondence analysis of the table does link brands with values, thus revealing the underlying motivations for purchasing each brand.

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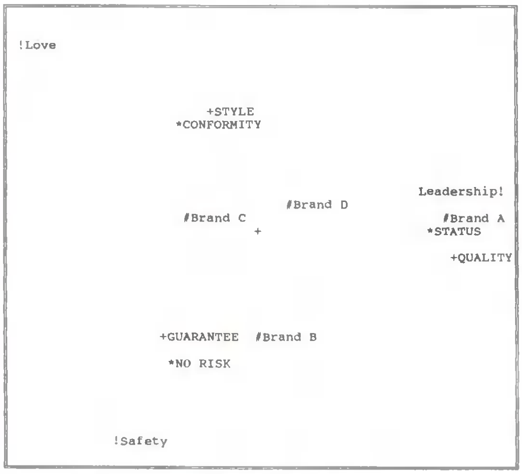
FIGURE I

MAP OF BRANDS, FEATURES, BENEFITS, AND VALUES



Sign. = .05 Axes are switched.

Variance Explained: X Axis =.67 Y Axis =.33

Code

= Brand + = Feature * = Benefit ! = Value

3M

continued from p. 7

information. The idea was to find out which design best communicated to someone who knew a lot about DIY and someone who knew very little," Coleman says.

The research found that DIYers not only vary in experience, they also vary in demographic make-up. Along with the older men who work with wood as a hobby, older women and young couples also participate. "There are a lot of women out there who do this and know a lot about it. In the research, it came out that women initiate the purchase decision and then the men actually execute it. A lot of the purchase decisions are made by the woman though the man may use the product," Coleman says.

Eye-tracking

The main research methods used were eye-tracking and one-on-one interviews. Eye-tracking, in which a beam of light tracks a respondent's eye movements, was used to determine which packaging elements did and didn't get each respondent's attention.

Using the eye-tracking, designs were tested with respondents in mock shopping situations. Consumers viewed simulated store shelf planograms that showed the 3M products next to those of competitors.

"A beam of light focuses onto the person's pupil looking at the planogram and as the eye moves the beam registers what points the eye is looking at on the image you're showing the person. That is then plotted so you have a computer printout of what elements were seen first or more frequently held the person's attention," Coleman says.

"In the simulated shopping experience, the customer is told, 'You're going to go into a simulated store to buy a stripper product, how quickly can you find it amid the clutter of the shelf setting with the competitors' products. What gets your eye first? The name? Color? Picture?'"

Responses probed

In one-on-one interviews after viewing the planograms and sample designs, responses to the packaging were probed through questions on purchase intent, pricing, attitudes, etc.

"We wanted to make sure that there was enough shelf impact and impression, so when we created these designs we put them into a computerized planogram next to competition. With the eye-tracking procedure you're able to see if the packaging stands out and if the key words and brand names read well," says John Chrzanowski, vice president of Coleman, Lipuma, Segal & Morrill.

Elliot Young, president of Perception Research Services, the Englewood Cliffs, New Jersey-based firm that performed the eye-tracking research, says that eye-tracking allows marketers and designers to address the question of shelf visibility.

"We can watch how people shop displays and see which things get their attention, and which things they ignore. What you see is the power of the graphics and the colors of the packaging to

Working with the various options for the packaging of the 3M wood care products line on computer gave designers tremendous flexibility during the design and research processes. It allowed them to work easily with several design choices, to quickly incorporate research findings into design modifications, and to create realistic prototypes of the individual packages.

pop off the shelf. It gives us the first dimension of shelf impact. Then we move into the label design and the eye-tracking shows if the consumer is willing to read and if you've laid out the key

"The package does a lot of things that ultimately lead to purchase—or rejection. What you do from a research point of view is look at every key area that can either stimulate or hinder sales."

elements on the package in a manner that will get people's attention.

"The package does a lot of things that ultimately lead to purchase—or rejection. What you do from a research point of view is look at every key area that can either stimulate or hinder sales. A person may be turned on or turned off by any number of things. If they're in the store and they're shopping quickly and the product doesn't get attention on the shelf, you're in trouble. If they do zero in on the labeling you want to make sure they understand what's inside the container. And if you get that far you want to make absolutely sure they realize it's a quality product."

Plastic instead of steel

Because its chemical formula allows Safest Stripper to be packaged in a plastic container—instead of the steel containers used by competitors—respondents were asked if they felt the black plastic packaging meant that the product was less effective than its competitors.

Consumers said that they liked the designer's choice of the color black and that the container's sleek, high-tech look was in keeping with 3M's image as a technological innovator and communicated that the product was different than the other chemical strippers. They indicated that if the stripping product came in a more traditional container, they would perceive it as similar to other products on the market.

Another point of difference between Safest Stripper and its competitors is the fact that gloves aren't required while using the product. So package designs were tested showing a bare hand applying the product. To novice users, this might not mean anything, but experienced DIYers might be confused because they know stripping products usually contain powerful chemicals. The research showed that the hand conveyed the right information without confusing people.

3M name important

The research found that though the process of purchasing a stripping product is task-driven, not brand name-driven, the 3M name was an important element, Coleman says.

"That is why the product line has the product name as the single biggest element. If I'm going to strip something I need to find a stripper, I don't need to find 3M. That's why the (3M logo) was below the product name and one of the big reasons why the product name is Safest Stripper, because indeed it is safe. In the range of names of all these products, that was the name that played through as communicating safety and what the product does.

"The power of the 3M name was almost like an insurance policy. It wasn't the main thing that people wanted to see on the package, but it had to be there, sort of as a seal of approval. Consumers said, 'The 3M name wouldn't make me buy the product on its own, but it's important as an assurance of quality.' "

Choosing the correct name was also an issue with the product designed to finish and protect the wood. The water-based product uses Scotchgard to form a protective bond with the wood rather than sitting on top of the wood surface in a protective layer like a varnish. Various names were tested, such as Wood Shield, but in the end, consumers said that because Scotchgard is already a well-known fabric and carpet protectant, simply calling the product Scotchgard For Wood was the best way to communicate the product's protective properties.

Find products quickly

Consumers indicated that when they were planning a refinishing project, they wanted to be able to go into the store and quickly find the products they need. The packaging had to tell them what the product does, how it is applied, and any other important information regarding application and use.

"The power of the 3M name was almost like an insurance policy. It wasn't the main thing that people wanted to see on the package, but it had to be there, sort of as a seal of approval. Consumers said, 'The 3M name wouldn't make me buy the product on its own, but it's important as an assurance of quality.' "

To facilitate ease of selection the product labels were designed so that each of the 24 products would be color coded depending on which of the three steps in the refinishing process it was intended for: blue (for stripping), yellow (for surface preparation), red (for finishing). This enabled the creation of a separate point of sale display that assembled the three product groups into a one-stop refinishing center.

"Most manufacturers of refinishing products don't make the consumer's job easier by telling them what they need to complete the task and that's the reason for the center, to help guide the consumer through the process of refinishing," Coleman says.

Tremendous flexibility

Working with the various packaging options on computer gave the designers at CLS&M tremendous flexibility during the design and research processes, Coleman says. It allowed them to work easily with several design choices, to quickly incorporate research findings into design modifications, to create realistic prototypes of the individual packages and put the packages in computerized planograms to see how they compare to the competition.

"Computers help make the designs more relevant by allowing us to place them in situations next to the competition. It's not just a design on a gray background, it's in a store setting."

200 percent

For 3M's line of wood care products, listening to consumers has paid off—sales are 200 percent ahead of projections. More and more manufacturers are starting to acknowledge the value of testing new packaging or changes to existing designs before they hit the market, says Perception Research's Elliot Young.

"How can you go out and make a multi-million dollar decision with no input from the person or persons who will ultimately decide success? Companies are realizing that the packaging is crucial, for one fundamental reason: because no matter how much you spend on promotion, somebody will outspend you. The assumption used to be, if I have enough advertising dollars, I can do whatever I want, I can move whatever product I want. Now everyone is realizing that clutter is such an enormous problem that the packaging has to be one of your primary sales vehicles. And if your packaging is inferior to your competition, you are in deep, deep trouble."

But, Young says, a packaging change isn't something that can be undertaken lightly. "You have to realize that when you get into a packaging change, it's a multi-year investment and in many instances, such as products like 3M's wood care line, they're not reliant on advertising. The packaging is your primary sales and communication vehicle so it has to be right. You can't change it every year the way you can change an ad campaign. You have to be in it for the long haul." ❑

Names of Note

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Peter C. Pfeiffer has joined *Booth Research Services, Inc.*, Atlanta, as an account executive. Previously he was manager, marketing research at Westat, Inc., Rockville, MD.

Newton Frank has joined *Lieberman Research, Inc.* as vice president.

William R. Winters, formerly marketing manager for NFO Research Inc., has joined New York-based *Audits & Surveys Inc.* as vice president in the Survey Division.

Opinion Research Corp. has named **Nigel Taverner** as managing director, UK, for its London office.

Lawrence E. Marks has been named market research manager with Rosemont, IL-based *Donahoe & Purohit Inc.*

Backer Spielvogel Bates Inc., New York, has named **Jerrold H. Gottlieb** executive vice president and **Larry Chiagouris** strategic planning & research director.

Kirk Tyson International has appointed **Donald C. Ebel** as vice president and managing director North America. Previously with FIND/SVP, Ebel will establish the New York office of Tyson Int'l.

Jill Falk, associate director, project development at *Dataquest, Inc.*, has been presented with the Joie Award by the San Francisco Bay Area Chapter of the American Marketing Association. The Joie Award is presented annually in conjunction with the Marketer of the Year Award. It is given to the volunteer deemed to have made the most significant contribution.

Joanne Orlandi joins *Healthcare Communications, Inc.*, Princeton, NJ, as director of client services.

Paul Donato has been named president of *Simmons Syndicated Studies*, New York.

Biniak

Robert J. Biniak has been appointed marketing vice president of *NFO Research, Inc.*, Greenwich, CT.

Douglas Ranshous has been elected vice president of the *Ehrhart-Babic Group*, Englewood Cliffs, NJ. He was previously director of corporate marketing. In addition, **Teresa Mahnami** has joined the firm as an account executive.

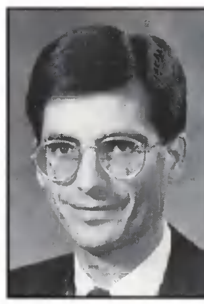
Krishnakumar S. Davey, Ph.D., has been selected as first-place winner in the 1991 American Marketing Association Doctoral Dissertation Competition. A consultant with Princeton, NJ-based *Opinion Research Corp.*, Dr. Krishnakumar's winning thesis is titled, "Predicting Shares from Preferences for Multivariate Alternatives."

Mary Ann Smith-Janas has joined *Epley Marketing Services Inc.*, Cedar Rapids, IA, as project analyst. Also, **Steve Knier** has been promoted to project analyst.

On July 1, **William Neal** assumed chairmanship of the Board of Directors of the *American Marketing Association*. Neal is co-founder and senior executive officer of *SDR, Inc.*, Atlanta.

Laura L. Hinze has been promoted to president of *Conversational Voice Technologies Corp.*, Gurnee, IL.

Scott T. McGurn has been promoted to assistant vice president and market research manager at the corporate headquarters of *First Citizens Bank*, Raleigh, NC.



McGurn **Westcott**

Bruce Westcott will head *Guideline Chicago*, the new Midwest division of New York-based *Guideline Research Corp.*

Thomas Keels has rejoined *Schulman, Ronca & Bucuvalas, Inc.* as vice president, financial services research. He returns to the New York-based market and opinion research firm after spending four years at financial institutions and as a consultant.

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.

Access Research, Inc.
8 Griffin Rd. No.
Windsor, CT 06095
203/688-8821
Contact: Robert C. Platkin
Group Health/Pens. P/C, Alc. Bev/Food, 15 min Airpt.

ADI Research, Inc.
(See Matrixx Marketing)

Alpha Research Associates, Inc.
395 Smith St.
Providence, RI 02908
401/861-3400
Contact: Anthony Pesaturo
Full Svc. Qual./Quan. Analysis/ Consltg. & Mkt. Rsch./Since 1976

Analysis Research Limited
4655 Ruffner St., Ste. 180
San Diego, CA 92111
619/268-4800
Contact: Arline M. Lowenthal
All Qual. Needs: Eng. & Span. Recruit/Moderate/Analysis

The Answer Group
11161 Kenwood Rd.
Cincinnati, OH 45242
513/489-9000
Contact: Lynn Grome
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

Chamberlain Research Consultants
12 East Olin Ave.
Madison, WI 53713
608/258-3666
Contact: Sharon Chamberlain
Full-service marketing research. Business & consumer studies

Clarion Marketing and Comm.
340 Pemberwick Road
Greenwich, CT 06831
203 / 531-3600
Contact: Thomas L. Greenbaum
Clarion Offers Unique Approach To Groups; Call to Find Out Why

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

Consumer Qpinion 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 487
Lahaska, PA 18931
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

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

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

Doane Marketing Research
1807 Park 270 Drive, #300
St. Louis, MO 63146
314/878-7707
Contact:David Tugend
Agriculture, Veterinarian Products

Dolobowsky Qual. Svcs., Inc.
94 Lincoln St.
Waltham MA 02154
617/647-0872
Contact: Reva Dolobowsky
Experts In Ideation & focus groups. Formerly with Synectics.

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

D/R/S HealthCare Consultants
3127 Eastway Dr., Ste. 105
Charlotte, NC 28205
704/532-5856
Contact: Dr. Murray Simon
Specialists in Research with Providers & Patients

Equifax / Quick Test Opinion Ctrs.
5430 Van Nuys Blvd., #102
Van Nuys, CA 91401
213 / 872-1717
Contact: Louise Kroot-Haukka
Consumer/Pkg Goods/Advertising Heavy Experience in Fast Food

First Market Research Corp.
2301 Hancock Drive
Austin, TX 78756
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

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

Gilmore Research Group
2324 Eastlake Ave. E., Ste. 300
Seattle, WA 98102
206/726-5555
Contact: Carolyn McKernan
Exp. Prof. Moderators to Meet Your Needs.

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
179 Inverness Rd.
Severna Park (Balt./Wash.), MD 21146
301/544-9191
Contact: Bill Hammer
23 Years Experience - Consumer, Business & 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 Ascts., 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

Hughes Marketing Communications
341 Farnum Road
Media, PA 19063-1605
215/ 566-6542
Contact: Warren B. Hughes
Moderate Focus Groups; In Depth Interviewing.

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

Keeffe Research
24 Liberty St.
San Francisco, CA 94110
415/647-2265
Contact: Jeffrey Keeffe
Auto, Tobacco, Cons. Prod, Pkg. Gds., Advtg., New Prod.

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

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

Leichliter Associates
252 E. 61st St., Ste. 2C-S
New York, NY 10021
212/753-2099
Contact: Betsy Leichliter
New Ideas, New Solutions, Call For Consultation. Offcs. in Chicago

The Looking Glass Group
401 Henley St., Suite 10
Knoxville, TN 37902
615/525-4789
Contact: Dick Nye
Groups, In-Depths, etc.
Heavy Ad/Mktg./Publ. Experience

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

Manhattan Opinion Center
369 Lexington Ave.
New York, NY 10017
212 / 972-5553
Contact: Jana Warren
3 Room Focus Group Facility/ Quality Recruiting

Marketeam Associates
1807 Park 270 Drive,#300
St. Louis, MO 63146
314/ 878-7667
Contact: Richard Homans
Financial Services,HealthCare, Consumer,Pkgd. Goods,Agric.

Market Navigation, Inc.
Teleconference Network Div.
2 Prel Plaza
Orangeburg, NY 10962
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Product and Service Update

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Vertical Market data is available immediately for the health care industry, and sets designed for the financial and retail industries will ship this Fall. For more information, call 408-985-7400.

Service measures global herbicide usage

Directed Research, Princeton, NJ, in association with Agricultural Information Services, London, announce the development of a global multi-client non-crop market measurement service for herbicides. The service will measure herbicide usage in twenty countries. It will be provided biennially, rotating with a similar insecticide/fungicide study to be launched in 1992.

According to Lew Knickerbocker, founder of Directed Research on retirement as American Cyanamid's market research manager, "This will be the first study measuring the non-crop segment of the herbicide market which is designed to integrate non-crop market data with crop data. This is important since sales of most herbicides are not restricted only to the crop or non-crop marketplace, just as they are not restricted to national borders." The integration will be provided through arrangements made with Agrobase Ltd., France, which currently provides an integrated crop pesticide database service to many of the agrieultural chemical global marketers.

Subscriptions may be purchased either on a global basis or by geographic regions. For more information, contact Lew Knickerbocker at 908-359-2435.

Guide to marketing in the EC

Bemis Communications Group has published the 1992 edition of the "European Community Marketing Guide," which offers information to businesses looking at the European Community to export services/products, as well as comprehensive data to firms already expanding there. The five topic sections of the guide are: general information, geographic information, demographic/social data, major daily newspapers and economic/industry data. For more information, call 800-457-1711.

Firms develop health care database products

National Planning Data Corporation and Healthcare Knowledge Resources have jointly developed two health care database products, "DRG Demand" and "ICD-9 Demand." Both products have been designed for use by: hospitals, outpatient clinics, other health care providers and consultants, pharmaceutical companies, and medical supply manufacturers and distributors. The information is intended for use in: strategic planning, market analysis and segmentation, site location, allocation of resources, development of new product lines, filing of Certificates of Need, evaluation of acquisitions or facilities expansion, and territory analysis.

The two databases provide current year estimates and five-year projections on occurrences of disorders, diseases, and procedures. DRG Demand contains information on 470 Diagnosis Related Groups (DRGs). ICD-9 Demand includes data on over 15,000 ICD-9-CM (International Classification of Diseases-Ninth Revision-Clinical Modification) categories and their groupings. Statistics on the numbers of cases, cases per thousand, patient days, and average length of stay are available from each data product.

As with most NPDC products, the health care information is available on-line via NPDC's MAX3D system, in printed reports through the company's MAXpress express order service, and on magnetic tape or diskette. The data can be provided for geographies as small as census tracts or in rings or polygons for custom defined market areas. For more information, call 800-876-NPDC.

Firm distributes product samples to Hispanics

Sampling En Espanol is a new firm devoted to offering marketers the chance to put their products directly into the hands of the Hispanic population. The New York-based firm will distribute the products nationally using controlled distribution and its own fulfillment department. Sampling will take place at major Hispanic events, street fairs and other events with an Hispanic theme. Everyone who receives a sample product will first be required to fill out a sample request card, which is presented in Spanish. For more information, contact Stan Pearlman at 212-679-8640.

Consumer Expenditure Survey data now available on CD

The latest (1989-90) Bureau of Labor Statistics (BLS) Consumer Expenditure Survey is now available on CD-ROM for IBM PCs and compatibles from Hopkins Technology. The CD-ROM contains all the tape data provided by BLS as well as the summary data normally obtainable on diskette from BLS. In addition, selected statistics from the Federal Reserve Bank are also included.

The Consumer Expenditure Survey program provides a continuous and comprehensive flow of data on the buying habits of American consumers. The CES is made up of two separate components: 1) a Quarterly Interview panel survey in which each consumer unit in the sample (5,000 units) is interviewed every three months over five consecutive quarters and 2) a Diary or record-keeping survey completed by the sample consumer units for two consecutive one-week periods with the sample spread across a 12 month period. For more information, contact Carol Dunn at 612-931-9376.

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Oilatum

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influence brand sales."

Direct and indirect competitors

Oilatum has direct competitors within its product subcategory (a complexion bar soap intended for dry sensitive skin) but it also vies indirectly with soaps designed for more general use, such as Neutrogena, Treistman says. "On specifics, some of those other brands might not consider Oilatum a competitor but it is part of the mindset. It's not the kind of product that all people necessarily come to the store looking for. The point of sale is a key area for a product such as this to generate initial trial and as a consequence that made the visibility of the package on the shelf that much more of an important criterion in the evaluation of the results.

"For the consumer, the package represents the product, for better or for worse, and any of its benefits. So for Stiefel, that package may be the only piece of communication they have with the consumer."

Therapeutic image

Though the intention was to modernize the design, Treistman says that Stiefel and the designers were careful to preserve the soap's therapeutic image. "You don't want to give up the notion of the product's effectiveness when you change the package, so that becomes a pivotal area when you do the research. You don't want to tamper too much with the brand's image and lose any of the value of what the original package said to consumers about the product's capabilities."

It was important to determine that the new package was easily read and that the brand name, content, and main benefits of the soap were communicated clearly. "We were concerned with two issues: one, that consumers would get to that information and two, that that information would register quickly and accurately. Beyond that we wanted to be certain that the packages communicated the image of the brand that was desired by management, consistent with marketing strategy and in addition that the package had aesthetic value and ultimately that it stimulated purchase.

"You don't expect going in that the non-user is going to rate the product as highly as the user will, but what you want to see is that the new packaging generates a stronger appeal among non-users and the new package doesn't put off the current franchise. The results

"You don't want to tamper too much with the brand's image and lose any of the value of what the original package said to consumers about the product's capabilities."

told us that we were indeed able to meet those standards."

Modern-looking

Stiefel gave designers latitude to create designs that were clearly different from the existing package. The only prerequisite was to keep the Oilatum name in a similar script style. Ten possible designs were submitted and through meetings, that number was cut to the two designs that underwent testing with consumers.

The design that "won" and is now on the shelf with some slight modifications is a contrast to the previous design. It's a modern-looking, peach colored package that features the Oilatum name in striking blue script similar to the typography used on the old box. In addition, the Stiefel brand name is much more prominent. Previously it was tucked in the upper left hand corner of the box. On the new design, the Stiefel logo is in gold in the center of the front face. "The new package will give Stiefel the opportunity to create more brand equity. The gold seal works very nicely because it adds something to the image of the product. In the research we investigated whether that seal was a distraction from other information and as a result some changes were made so that it doesn't detract from other information," Treistman says.

The new box is also more in harmony with the peach colored bar of soap it houses, which was another of the manufacturer's goals. "Stiefel felt that they had a very handsome soap bar that wasn't complemented by the original exterior package. One of the important steps in the research was to show people the bar of soap and find out how consistent they felt the package was with the impression that the soap bar gave them," Treistman says.

Change not necessary?

For a time, it appeared that a packaging change might not be necessary, as the existing package was scoring a close second in the testing. In the end, the research showed that one of the newer packages did better in the shelf setting than the other two designs.

"The research told us that the position of all these different elements on the front panel is very important to how the customer reads the package. Since we didn't want to upset our current users, the Oilatum logotype is the biggest element in the center of the box and right above that is the corporate logo. The older package said the product was for 'dry, sensitive skin' but the research showed that the phrase 'moisturizes dry sensitive skin' was more meaningful for people," Stiefel's Michael Martinolich says.

100% improvement

Because the new package was introduced in January of this year, Martinolich says it's a bit early to tell from sales how the change has affected Oilatum. "But the physicians we have talked to have said that the new package is a 100% improvement over the old design, which gives the physician a feeling that they're recommending a better product." ❑

Survey Mouitor
continued from p. 16

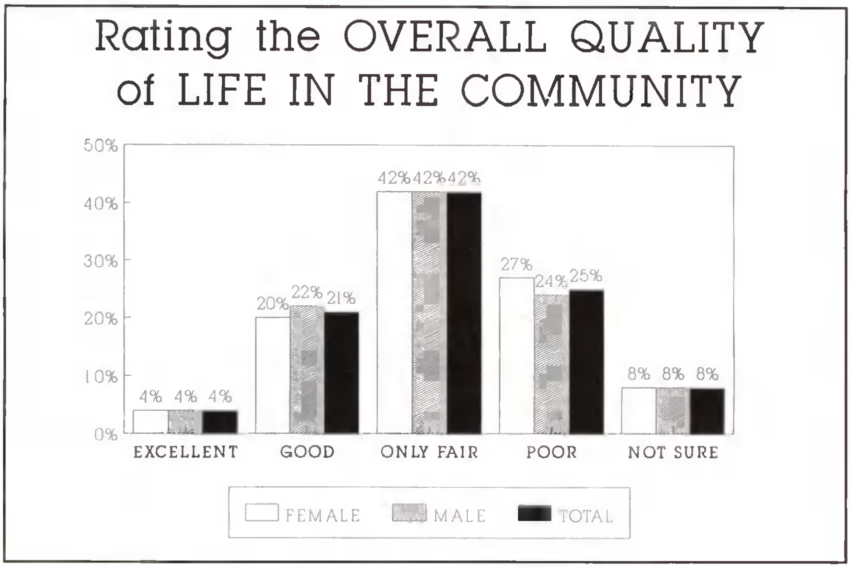
spondents said that Hispanics receive worse treatment in the hands of police than other community members.

"Fair to poor" is how 54% of Hispanics polled view education standards in their communities. 84% believe that bilingual education is "very important" to their children's future. The quality of health care in their neighborhoods received a similar rating.

Hispanic views on quality of life issues as revealed by the Telemundo Poll compare disproportionately to the results of a recent independent general market survey. Only 25% of participants in the Hispanic poll rate their quality of life as "good to excellent" versus 70% in the non-Hispanic study.

Similarly, 32% of Hispanics polled gave the quality of education a good-to-excellent rating as compared to 56% of the general population. Thirty-six percent of Hispanic respondents versus seven percent of the general sample regard the crime situation as "very serious" with more Hispanics than non-Hispanics citing a noticeable worsening during the last two years.

Hispanics surveyed were divided in their views on President Bush's economic performance, with a slight margin in favor of the job he is doing. Concerns regarding the nation's economy were evident in the respondents' views on job stability: 43% reported being "somewhat to very concerned" that someone in their household may lose a job in the next six months. Most respondents said that their present financial situation has not improved in recent years. However, 74% praised Bush's handling of foreign policy.

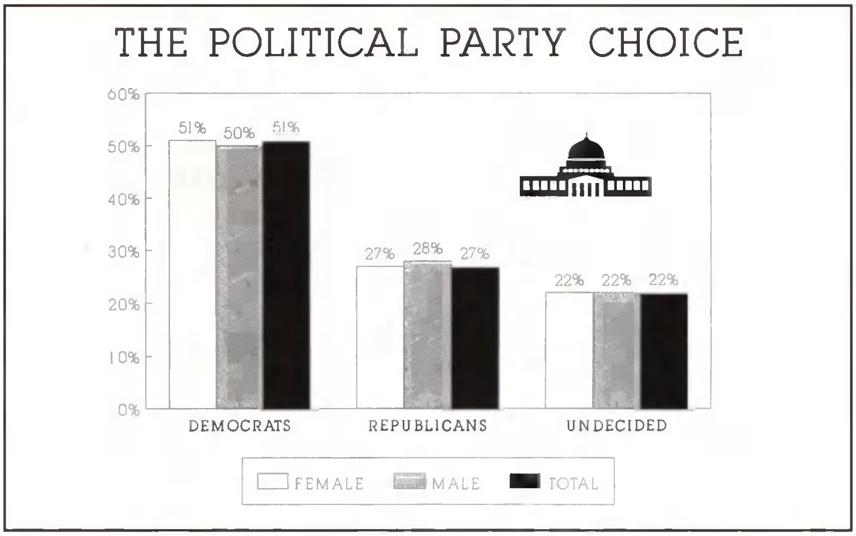


The poll shows a majority belief among Hispanics that government intervention is needed to enforce EEO guidelines and that affirmative action policies are necessary to ensure equal treatment in the workplace.

Sixty-two percent of those polled who are registered voters consider themselves democrats or aligned with the party's platform. Yet 57% of those who took part in the last presidential election voted for George Bush.

The poll results point to a strengthening of Hispanic political participation. The majority believe that the Hispanic community is united in pursuing political goals. More than 75% of respondents said that the Hispanic vote is "very important" in determining the outcome of local, state and national elections.

A total of 39% believe that reshuffling of legislative districts, triggered by the 1990 Census, will bolster the role of Hispanic voters, while 52% expect Hispanic impact to stay about the same after redistricting. Forty-three percent voiced the opinion that the 1990 Census undercounted Hispanics, versus 30% who stated the opposing view or offered no opinion on the subject.



More than half of the Hispanics polled support a U.S.-Mexico free trade pact with the majority (72%) believing that the measure would create thousands of new jobs in Mexico and help stem the flow of undocumented workers to this country. The greater portion of respondents, however, said that they would disapprove of a free trade agreement if it resulted in the loss of jobs or a drop in wages for U.S. workers.

A total of 37% of those questioned feel that Puerto Rico should remain a commonwealth, yet 41% stated that both island residents and Puerto Ricans on the mainland should have a say in the change in status. The majority (69%) think that Spanish should be the official language of Puerto Rico.

Most Americans view boycotts as effective

Boycotts, both real and threatened, have made the news with increased frequency in recent years. But do they make a difference? Most Americans seem to think they can. A recent survey conducted by the Barna Research Group, Ltd., Glendale, CA, showed that about two-thirds of all American adults feel boycotts can accomplish something. In addition, 14% of the 1,060 respondents to the nationally-representative telephone survey claimed that in the last month, they had "avoided buying a specific product or brand because it is being boycotted by a group or cause" they support.

Boycotts appear somewhat more likely to occur among younger adults and people with a higher level of formal education. Nineteen percent of the respondents aged 18 to 26 claimed to have participated in a boycott recently, compared to 14% of the 27 to 64 year-olds, and only 9% of the respondents over the age of 64. Among people without any college education, 10% had participated in a boycott, compared to 18% of the respondents who had attended or graduated from college. Blacks were slightly less likely to have participated in a boycott (9%) than were whites or Hispanics.

Survey respondents were also asked to react to the statement, "Participating in a boycott of products or companies doesn't really accomplish anything." Sixty-seven percent of the respondents disagreed with that statement, with 32% disagreeing strongly, and 35% disagreeing somewhat. Eighteen percent agreed somewhat with the statement, while 12% agreed strongly that boycotts really accomplish nothing (for a total of 30% agreement). Three percent were uncertain.

There were some differences in opinion about boycotts among different types of people. Respondents with no formal education beyond high school were more likely to feel that boycotts are ineffective than were people who had gone to college (36% to 27%). Blacks were somewhat more likely to see boycotts as ineffective (41%) than were Hispanics (24%) or whites (29%). Men were also more likely to feel this way than were women (35% to 26%). In addition, people who lived in the western U.S. were the least likely to feel boycotts accomplish little (23%, compared to 30% in the Northeast, 33% in the Central, and 33% in the South).

Although Protestant groups have made the news recently with boycott efforts related to morality issues (such as abortion or the content of television programs), Protestants were somewhat less likely than Catholics and people of other religious backgrounds or no religious background to be involved in a boycott, or to believe that boycotts can be effective.

George Barna, president of the Barna Research Group, notes that 25 million Americans were projected as having boycotted something in the month preceding the survey. "With the markets for most consumer goods becoming increasingly fragmented, and market share levels dropping in many product categories, boycotts may have a significant effect on the boycotted product or company. With 25 million people involved, losing sales from even a small proportion of this group could have a devastating impact on a company. This is a clear example of how a company's bottom line may be based on more than just business and financial decisions, but also on speaking to the collective conscience of the American people."

Fragrance

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home where they are easily seen. Heavy/extra-heavy users (64%) do so more than infrequent/light users (50%). The most popular locations for fragrance storage are in a bathroom medicine chest or cabinet (56%), on a bathroom shelf (48%) or vanity (43%), and on the top of a dresser (43%).

Few men keep aftershave or cologne in their car (15%) or workplace (9%). Those who do are much more likely to be heavy or extra-heavy users. In short, there is a correlation between visibility and usability.

Application

In general, men apply aftershave or cologne a maximum of only once per day. Only a fourth (27%) apply fragrance more often. The low number of applications per day may be due, to a great extent, to the perceived lasting power of cologne. Many believe that cologne fragrance lasts a long time—averaging six hours.

Not unexpectedly, the face and neck are the two most common places for applying aftershave and cologne. What is surprising is the wide variety of other places where men apply fragrance—not only on the body, but even on clothing.

Body	
Face	88%
Neck	84%
Chest	50%
Behind ears	26%
Arms	25%
Wrists	21%
Shoulders	18%
Underarms	11%
Legs/knees	5%
Clothing	
Shirt	31%
Suit coat	19%

Wearing aftershave or cologne at work is critical to "heavy usage." Men who do not wear fragrance at work are unlikely to use men's fragrances more than four times per week. Few non-users believe it is desirable for men to wear aftershave or cologne at work, while most heavy users are clearly in favor of at-work usage.

The key issue

Numerous issues were chosen for exploration in this research, but one was central to the study's sponsors, justifying their efforts. The assumption of many marketers in selling men's fragrance has been that the primary purchasers of aftershave and cologne are women buying for men. The key objective of this research, from the sponsors' perspective, was to determine if this premise was correct. Syndicated research sources were able to say how much men's fragrance was purchased, but were unable to answer this central question—who is buying?

The sponsors were interested in this topic because the industry's premise had important consequences for their business. If women are the primary purchasers, then the media targeted for advertising should appeal primarily to women. However, if both men and women are buying men's fragrance, then it would behoove manufacturers to place advertising in dual-audience media such as news magazines.

Who buys men's fragrances?

The answer to the key issue is that three-fourths (73%) of all men are fragrance buyers, having personally purchased one or more bottles of aftershave or cologne in the past year. Two-thirds (66%) bought it for their own use and over a third (36%) bought it as a gift. The average number of bottles men bought in the last twelve months was 4.5

Conceptually, three fragrance purchase levels emerged from this research. "Heavy purchasers" are those who bought five or more bottles of aftershave or cologne for themselves or as a gift in the last year. They represent over a third (37%) of all respondents. "Light" purchasers, representing over a third of the respondents (36%), bought one to four bottles of men's fragrance for themselves or as a gift within the past year. "Non-purchasers" are those who had not made either an aftershave or cologne purchase within the past year for any reason. They represent a quarter (27%) of the respondents.

Buyers spent almost twice as much on cologne as they spent on aftershave. Men spent an average of $21 on the last bottle of cologne they bought, and nearly $12 on the last bottle of aftershave.

Because the study design did not include a parallel sample of women, we are unable to draw definitive conclusions on the role of women in the purchase of men's fragrance. However, a basic industry premise—that women do play a role in the purchase of men's fragrance—was confirmed by the research. Half (48%) of the men said their wife or girlfriend had purchased aftershave or cologne for them during the past year. Close to half of this group (22%) said the women purchased the fragrance based on the man's preference. The other half of this group (26%) said the woman selected a brand of her own choice.

The flip side of these data is that half (52%) of the men have no women involved in the purchase of their fragrances, indicating that the preponderance of men's fragrance purchase is by men.

Nearly all men (94%) report they have at least one bottle of aftershave or cologne in their household, and three-fourths report three or more bottles. The median number of bottles available per household is four.

Recognizing that some women do buy fragrance for men, that many women influence purchases men make, and that women are a critical factor driving the men's purchase and usage, these new data indicate that the strategy for successfully appealing to fragrance buyers now requires a dual-audience approach.

Purchase motivations

A variety of factors explain why men use fragrance. The three most important are: the pleasure derived from the scent itself (78% said this is "very important"); the wife/girlfriend says she likes the smell (63%); and fragrance makes the men feel better groomed (57%). Seven other factors motivating fragrance usage were mentioned by at least a third of the users as very important: it makes you feel good, it makes you feel cleaner, you get compliments when you wear it, it refreshes you, it is a habit with you, it makes you feel fully dressed, and it makes you more attractive to women.

While pleasing women is an extremely important motive in the purchase and usage of men's fragrance, it is important to recognize the variety of other factors that contribute to the success of this market.

Introducing a new concept: The Killer Cologne

During the qualitative phase of this project, the participants discussed "levels" of men's fragrance. Some aftershaves and colognes were categorized as being extra special—chosen for wear when a man wanted to be particularly attractive to women. One man called his special fragrance "a killer cologne:"

"I have a regular cologne and then a high-catch cologne...a killer cologne!"

Other men agreed with this sentiment, saying they too have special fragrances for use on special occasions:

"I have two types—the real quality stuff I'll hang on to for a first date or a special occasion as opposed to the regular stuff that my girlfriend already knows about—why waste it?"

"I have the regular stuff for going to work and then you got the stuff you want for a hot date."

"I use one particular scent in the morning. When I'm going out to a special social setting, like a dinner with a couple or other couples, I'll wear something else. But if I'm going out to a bar, maybe trying to get into a little trouble, then I'll wear the (brand)!"

One-fifth (21%) of the respondents indicated they have a cologne they consider a "killer"—a brand that is extra special for wearing when they want to be particularly attractive to women.

Marketing implications

The survey results are rich in suggestions for marketing opportunities through which the men's fragrance industry can increase sales.

First, promotional efforts should be directed to both men and women. Prior emphasis on women seems to have minimized the men's role in this market. One limitation of these data is that women's perspectives on the issues examined in this research were not explored. Nonetheless, the results are so clear that fragrance marketers now have convincing information for directing more efforts toward men. In effect, a dual-audience orientation in which both men and women are encouraged to buy men's fragrance would appear to be most appropriate.

Second, recognizing there are different levels of usage, ranging from extra-heavy (seven days per week) to infrequent (in the last six months), it may be desirable to position different fragrances to different user levels.

Third, "killer cologne" users are a particularly interesting market segment. Their identification argues for promoting specific fragrances to individual market segments, a key group being men who desire a cologne as an aid in appearing particularly attractive to women. Romance, sexiness and seductiveness are certainly themes that may be persuasive in positioning a cologne as a "killer."

Fourth, expanding on situational significance, some fragrances may be targeted as particularly appropriate for different settings and locations. For example, a fragrance pitched to the workplace can be explicitly different from one oriented to evening home use or outside social events.

Fifth, seasonal fragrance usage now appears to be an accepted option within the women's market, while being a virtual non-option among men. Some brands may be positioned as most appropriate for different seasons, with emphasis particularly on warm or cool themes.

Sixth, storage location may be equated with usage. If men are encouraged to store their fragrance in more locations, greater sales may result. Two locations which are prime examples of additional storage sites are cars (e.g., glove compartments) and offices (e.g., desk drawers).

Seventh, traditionalists might argue that fragrance belongs only on the face and neck. Yet this survey documents that many men already apply fragrance in a variety of other locations. To the extent these less traditional locations are promoted as socially appropriate sites for placing fragrance, that could encourage additional fragrance usage.

Eighth, given that cologne costs significantly more than aftershave, even though many men are unable to distinguish between the two, it might behoove the industry to promote the distinctiveness of cologne in order to increase its usage and, correlatively, profits. ❑

Winning isn't everything for teens who play sports

A study by the Athletic Footwear Association (AFA), a trade group of manufacturers of athletic footwear and part of the Sporting Goods Manufacturers Association, found that for teens who participate in organized sporting activities, having fun is more important than winning.

The study of more than 10,000 junior high and high school students found that winning was far down on the list of reasons why teens enjoy a sport. "To have fun" finished first as the single most important reason for playing a school sport, followed by "to improve skills," "to stay in shape," "to do something I'm good at," "the excitement of competition," "to get exercise" and others. "To win" finished tenth.

These findings were similar for boys and for girls, although the boys placed more emphasis on competitive aspects than did girls, who rated physical fitness aspects more highly.

Reasons for participating in a sport outside of school were similar.

"Having fun is a nebulous concept, but it's a critically important one for anyone dealing with young people and sports," says Gregg Hartley, executive director of the North Palm Beach, Florida-based AFA. "When the students are asked the main reason they dropped a sport, they say it wasn't fun. When asked what would make them go back to a sport they dropped, they say it should be more fun. The impression is that sports should be less serious and more playful. Some students feel competition and winning are what make sports fun. But there's another, larger, group that feels differently. Unless their needs are met, they are likely to leave sports forever."

Analysis of the study's findings identified three groups of teenagers possessing similar reasons for participating in sports: reluctant participants, image-conscious socializers, and competence-oriented participants.

The socializers, 40% of the total, are probably good athletes but they tend to get the most satisfaction from external approval and rewards. When these factors decrease or are no longer meaningful, members of this group are likely to drop out of sports.

The competence-oriented group, roughly 35%, show the most promise of participating in sports throughout their lives. This dedicated group is less concerned with winning and is more interested in learning about and competing with themselves.

The reluctant participants, about 25%, are involved in sports because of peer or parental pressure. Because their involvement isn't typically voluntary, they have a high dropout potential.

Another major finding was that participation in sports decreases markedly between the ages of 13 and 18. As the students grew older, their interest in all voluntary sports (except general physical conditioning) decreased. As teens grow older, their interest turns to other activities, such as dating, being with friends, and watching TV.

Students were asked which of 27 non-school activities—from watching TV to taking musical instrument lessons—they planned to participate in. The chart shows their answers for sports and exercise activities.

Percent of students ages 10, 13 and 18 who say they participate or intend to participate in sports are listed below:

	Age 10	Age 13	Age 18
Non-school team	45%	32%	26%
Sports lessons	41	30	18
Pickup games	37	29	26
Intramural sports	24	26	19
Sports camps	23	25	17
General conditioning	21	41	47

"The impression is that sports should be less serious and more playful. Some students feel competition and winning are what make sports fun. But there's another, larger, group that feels differently. Unless their needs are met, they are likely to leave sports forever."

"These figures are inflated by two factors," Hartley says. "The good intentions of young people who say they will get involved but in fact never do, and the involvement of many athletes in multiple sports categories. The figures on general conditioning are surely influenced by the equivalent of New Year's resolutions. Studies have shown that most kids are not attracted to exercise for its own sake because they find it boring."

When students were asked about the reasons why they dropped out of a sport, most said that they lost interest or that the sport wasn't fun. Time constraints either not enough time or schedule conflicts were also cited, as were problems with coaches.

"The answers, taken as a whole, suggest that more young people might stay in sports if sports were directed more toward their interests and needs. In many cases this means sports should be less demanding, less time-consuming, less geared towards winning, and less focused on the elite athlete," Hartley says. ❑

Product & Service-In Depth

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anything else on their desk (including mail which usually goes to the bottom of the pile, if it hasn't been screened by a secretary).

3. Respondent impact--Respondents are continuously reminded their responses will directly influence project results. Once the benefits are understood, respondents are more likely to take the time to fill the survey out.

K&A recently completed a project for a major ground transportation carrier. Our client hired us to identify the primary decision making criteria their customers use when evaluating various modes of transportation. Specifically, our client wanted to gain a better understanding of:

• the performance attributes most important to their top customers;

• customers' performance expectations verses the current level of service provided;

• the satisfaction level of our client's performance relative to these expectations, and:

• the effectiveness of competitors at meeting these same expectations.

In short, our job was to help our client leverage their strengths, "fix" their shortcomings and develop customer segments and customer service criteria based upon performance characteristics.

Successful implementation requires four steps:

Step 1: Conduct Interviews To Shape An Effective Phone-Phax Survey

To start, we conducted forty in-depth interviews with customers across industries to uncover key attributes and issues as they related to the project. The objective of this step was to gather enough customer-driven information to help design an effective Phone-Phax survey.

Step 2: Design The Survey

In this step, we used all the typical surveying design techniques including having the instructions be self-explanatory, keeping it short and simple, having a strong introduction, and so forth. Since we were using the fax, we also added some new design steps. This included making sure the font size was large enough to prevent smudging (we use 14 point, Helvetica), placing our fax number on every page, and numbering pages since fax transmissions are not always perfect. In addition, each survey included a hand written, fax cover sheet.

Once written, we tested the survey with our clients to identify sensitivity areas or content "holes" and then with customers to check logic, wording and question ordering. Ultimately, we ended up with a comprehensive, "user-friendly" survey that was ready to administer.

Once written, we tested the survey with our clients to identify sensitivity areas or content "holes" and then with customers to check logic, wording and question ordering. Ultimately, we ended up with a comprehensive, "user-friendly" survey that was ready to administer.

Step 3: Administer The Survey

Early on, we determined our sample size should include our client's top 250 customers (they accounted for over 80% of revenues), as well as a few potential and previous customers.

To administer the fax, we called potential respondents to either introduce ourselves and the nature of the project for the first time or re-introduced ourselves to those we spoke with in step 1. We then explained the purpose of the survey and asked if they would take ten minutes to complete it. A typical "sell" conversation may go like this:

"Hi Dale, my name is Scott Davis and I work for a management consulting firm in Chicago called Kuczmarski and Associates. We have been hired by Company X to work with their customers on ways to improve their quality of service. The ultimate goal of this research is to provide you with a higher level of service than you are receiving today. What I would like to do is fax you a survey, have you complete it and fax it back to me at your earliest convenience. Would it be all right if I send it out now?"

Immediately faxing the survey after your phone conversation is key to Phone-Phax success. Immediacy helps stress the survey's urgency and maintain the momentum started with your phone conversation.

The fax cover sheet allows you to personalize and hand write the same message you just delivered on the phone. A typical Phone-Phax cover sheet message may look like this:

"Hi Dale—Thank you in advance for filling out this survey. Once again, the purpose of the survey is to identify those attributes most important to you when selecting a carrier. Please call me with any questions—Scott."

Communicating this same message again, in the survey instructions, helps reinforce the importance of the survey. While this much "presell" may seem tedious, we believe it helps respondents truly understand the purpose and end benefits of the faxed survey.

In addition, communicating the importance and benefits of the survey three times, possibly within one hour, helps respondents better understand their role in the study and what is in it for them. Further, this "relentlessness" helps us achieve 50-75% response rates and minimizes the chance the survey will be thrown into the garbage pile instead of the immediate attention pile.

On average, we achieve a 30% response rate in the first week of testing, 50% in week two and up to 60-75% by week three. To help increase these percentages, we follow up on "delinquent" surveys one week after being sent out to encourage respondents to reply.

Step 4: Follow-Up Interviews

After receiving respondents' completed surveys, we follow up, by telephone, in order to: (1) fill in any data "holes" or answers that are unclear, and; (2) gather additional information for a project. In our ground transportation carrier example, we used follow up information to get an understanding of how a new customer service program should be designed and ultimately implemented.

Beyond excellent response rates, additional benefits can be realized by using a Phone-Phax.

1. Fast results— Unfortunately, the Post Office does not always cooperate with our time constraints and it often takes six to eight weeks to mail and receive completed surveys. In contrast, the expediency of the fax machine has allowed us to complete project surveying with four weeks.

2. Quality results— High response rates enable us to minimize the effects of non-response and maximize the quality of information secured.

3. Cost savings— High response rates means fewer surveys are sent out. Consequently, out-of-pocket savings can be as high as 20-30% relative to mail surveying (this includes the up-front phone call, fax transmission and thermal fax paper costs versus the cost of sending the survey via mail, with a postage paid return envelope).

4. Intangible benefits— In the above ground transportation carrier example, customers appreciated a carrier taking the time to ask their opinion. Consequently, our client received many phone calls from their top customers praising their efforts. This, in turn, built goodwill and P.R. which our client is still benefiting from today.

Conclusion

In summary, we believe the Phone-Phax, as a high-tech surveying technique, should challenge the way researchers traditionally approach their data collection process. The four step process provides a cost effective way to secure high quality data in a relatively short amount of time and helps alleviate the frustrations realized from receiving low survey response rates.

Finding the Hot Buttons

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Correspondence analysis

The object of correspondence analysis is to merge row and column percents so they correspond visually with a perceptual map. The positions of the row and column categories on the map represents their relationships so that the closer the categories the more they are related.

For example, in the MapWise program for correspondence analysis the actual distances between and among all categories best summarizes their relationships. Since correspondence analysis can relate categories of more than one variable, it can relate brands, features, benefits, and values on the same perceptual map. Rather than linking these variables in a means-end chain, they are linked by their proximity in space. For example, a brand's features are near the brand, a feature's benefits are near the feature, and the values derived from a benefit are near the benefit. Likewise, the relative proximity of brands and motivations reveals the motivations driving the purchase of each brand.

The solution to correspondence analysis shown in Figure 1 summarizes the relationships among features and benefits. The first axis explains two-thirds of the variance or relationships among the categories and the second axis explains the rest. Since the solution is significant, the correspondence map best distinguishes relationships among categories of the features and benefits. The test for point stability indicates that the positions of these categories on the map are stable.

The categories of the other variables, brands and values, are overlaid on the solution by their relationships with either features or benefits through crosstabulation. The relative proximity of the categories on the correspondence map represents the strength of their relationships.

The research indicates that the features of the brands are as follows: Brand A has quality, Brand B is guaranteed, and Brands C and D are stylish. Evidently, the benefit of quality is status, the benefit of a guarantee is a lower risk, and the benefit of style is conformity. Overlaying values on the map discloses that the value of status is leadership, the value of low risk is safety, and the value of conformity is love. The motivations for buying each brand are as follows: buyers of Brand A seek leadership, buyers of Brand B seek safety, and buyers of Brands C and D seek love.

Summary

This hypothetical example demonstrates a scientific approach to identifying motivations for buying a specific brand. In-depth interviews can elicit the salient features through triadic comparisons of competitive brands and probes of the benefits and values derived from these features. Responses to these interviews can be classified, coded, aggregated, crosstabulated, and visually summarized on a correspondence map. Interpretation of the map reveals the underlying motivations, the "hot buttons" for buying the client's brand. Promotions that appeal to these "hot buttons" are effective in influencing people to purchase the brand. ❑

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Start-Ups

continued from p. 19

opened in lower Manhattan. The facility, owned by the Journal of Commerce, is available Monday through **Thnrsday** evenings after 6 p.m. It is located at Two World Trade Center, 27th Flr., New York, NY, 10048. Contact Marcia Holland at 212-837-7160.

◆

Jackson Ascts. has opened mall/focus facilities in Charlotte, NC at Carolina Place and in Nashville, TN at CoolSprings Galleria. Contact Marisa Pope at 404-454-7060.

◆

FocusVision Network has moved its offices to 1623 Third Ave., Ste. 201, New York, NY, 10128. Phone 212-831-8100.

◆

The MRB Group announces that its Custom Studies unit, formerly a division of Simmons MRB, is to function more independently as MRB Custom Studies and also act as the New York office of MRB International. MRB Custom Studies provides full service consumer and non-consumer research in the U.S. overseas. Contact David Pring at 212-916-8937 for more information.

◆

Larry Constantineau has founded **Marketing Viewpoints, Inc.**, a marketing and research consultancy that focuses on helping clients better utilize internal resources. MVI is located at 12 Lakewood Dr., Racine, WI, 53402-2833. Phone 414-639-1280.

◆

Bretton-Clark, consultants and producers of software for marketing research, has moved to expanded facilities at 89 Headquarters Plaza, North Tower/14th Flr., Morristown, NJ, 07960. Phone 201-993-3135. Fax 201-993-1757.

◆

A group of research and consulting firms around the world have formed a strategic alliance called the **CSM Worldwide Network**, an international network of companies sharing a common method of customer satisfaction measurement and quality improvement consulting. The network, headquartered in Tempe, AZ, is an affiliated company of Indianapolis-based Walker Research, Inc.

◆

Dr. Griffin Dix, formerly research director at MacWeek, has opened **Griffin Dix Ascts.**, conducting qualitative and quantitative research for the computer and publishing industries. The firm is located at 1985 San Juan Ave., Berkeley, CA, 94707. Phone 415-527-1451. Fax 415-527-4497.

◆

J. Ross Ascts., marketing research and consulting, has relocated corporate offices to 2500 Midport Rd., Stes. 500/510, Port St. Lucie, FL, 34952. Contact Jack Ross at 407-335-7655 for more information.

◆

Guideline Research Corp. has opened a new division serving the Midwest—Guideline Chicago, Inc. This full service division, featuring a large capacity telephone center, is headed by Bruce Westcott. The address is 1771 West Dietl Rd., Ste. 300, Naperville, IL, 60563. Telephone 708-527-6000.

◆

Marketing Concepts Group has opened an office at 115 W. Colfax, South Bend, IN, 46601. Telephone 219-233-3453. The firm has linked marketing resources with Market Strategies, Inc., a full service research company located in Southfield, MI.

◆

Phyllis F. Schwebel, manager of corporate magazine market research at Time Warner, has formed a consultancy, **The Garth Co.**, at 118 Madison Ave., New York, NY, 10016.

◆

Los Angeles-based Interviewing Service of America has formed **ISA International**, designed to collect data over the telephone worldwide. For more information contact Michael Halberstam at 818-989-1044.

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1, 3, 6, 7B

Please make the following correction in your Rolodex Focus Group Facility File:

Research Unlimited
Fax 916-448-2355

Please make the Following additions to the 1991 Telephone Interviewing Facility Directory:

Northstar Interviewing Service, Inc.				
4660 W. 77th Street, Suite 140	17	17	17	0
Edina, MN 55435				
Ph. 612-897-3700				
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PWI Research				
1755 Lynnfield, Suite 249	40	6	40	40
Memphis, TN 38119				
Ph. 901-682-2444				
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Please make the following addition to the 1991 Permanent Mall Facility Directory:

LaValle Research Services
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Syracuse, NY 13290
Ph. 315-466-6000
Fax 315-466-5405
Elise LaValle, Owner/President
H-25%   M-50%   L-25%
Stat.-3   2, 3, 4,

Trade Talk

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gotten any information. Anybody who feels half decent about the brand would put it at the top of the scale or next to the top of the scale. So we were trying to develop a much more sensitive scaling procedure."

Total Research has identified seven primary factors of brand image that consumers use to evaluate a brand's quality. Each person weights these factors differently. Some of the factors include:

• Sophistication—The more intellectual or sophisticated a brand appears to be, the higher the quality is.

• Wholesomeness—The brand has an image of being nurturing and caring, thus it is a quality brand.

• Wide acceptance—"There are a lot of people who believe that the brands that are the most widely accepted are the best brands, brands like Kodak, Campbell Soups, Hershey," Morton says.

• Trendiness or stylishness—The people who weight this factor the heaviest are the opposite of those who put a great deal of emphasis on a brand's level of acceptance, Morton says. "If something's been around a long time, they're not interested in it. They see quality as something that's constantly evolving."

The brands that scored the best in the Equitrend study seem to blend sophistication and wholesomeness. "If you look at the brands that finished at the very top in perceived quality, they are the ones like Kodak film, which provides a technically sophisticated product but has a lot of wholesome imagery associated with it. CNN is another example. It has a kind of patriotic image because of the Gulf War coverage but also it's a technically sophisticated product. IBM and AT&T are two other brands that combine these two traits."

On the other hand, two brands that scored in the top twenty—Hallmark Cards and Mercedes-Benz—do very well with images that are dominated by only one factor, wholesomeness for Hallmark and sophistication for Mercedes-Benz. And the results show that brands can successfully combine factors other than wholesomeness or sophistication and still do well.

Cross-category

Another goal of EQUITREND was to provide a way to compare several different brands, especially those in different industries and service categories. "The companies that make these brands have millions of dollars of research that looks at the brands versus their competitors. Our job wasn't to duplicate that work, it was to look at the brands in a cross-category context. For example, when we look at American Express card we can certainly look at it versus Master Card and Visa, but we're also very interested in American Express and its similarities and dissimilarities to all the other brands we tested."

Using perceptual maps, the brands are plotted according to their image in the eyes of the consumers, providing a look at how the brands perform compared to many other brands, not just those in their product or service category.

"You might expect that when you put brands from all these different categories into a perceptual map that you'd end up with all the candy bars together and all the sodas together and that there would be 34 little pockets of brands but it's not like that at all. Brands can be spread all over the place. For example, Pepsi has a much different market position than Coke does. Typically a brand is likely to be more similar to non-members of its category than members of its category in terms of its imagery and positioning."

From Total Research's point of view, this cross-category analysis allows marketers to see the big picture, to learn how their brand relates to competitors and brands outside of their specific product or service category—something that marketing research doesn't always allow, Morton says.

"The trouble with 99.9% of market research is, it only looks at one category and it tries to figure out why people do what they do just based on exhaustive information about that one category. It takes consumers into levels of detail that are five quantum leaps beyond the level that they actually think at when they make their product selections.

"I might be the researcher on Maxwell House coffee, for example, and I'm spending 50 hours a week thinking about nothing but Maxwell House coffee. I develop this study where I ask consumers an hour's worth of questions about all the different coffee brands and get them rated by 10 occasions on 50 attributes by 4 different kinds of users. But the consumer's decision may be instantaneous, made without hardly any thought at all and is probably more a reflection of their general model as consumers than any kind of in-depth models that they have of the coffee market.

"The feeling that we have developed over a lot of these studies is that people don't have a separate decision model for each market that they have to make selections in. If they did it would be a nightmare to be a consumer. Most consumer choices are very casual. The overall model may be very well thought out in terms of a consumer saying, 'I'm primarily sophisticated but I also have a certain level of practicality to my choice and I certainly lean toward the trendy brand.' What we think is really exhaustive and stable is the person's overall model."

Quality=sales

For those firms that still need convincing that the pursuit of quality makes more than just good public relations sense, EQUITREND results show the effect quality can have on a company's bottom line. "We've found in general that for any given brand, each step up the scale is associated with about a 30% increase in sales. So if a brand's overall score was 6.00 and it can move to 7.00, that's about a 30% increase in unit sales," Morton says. ❑

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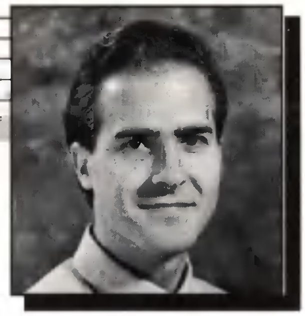
TRADE TALK



by Joseph Rydholm
managing editor

Study seeks to define quality

Most consumers would agree that quality is an impor tant factor in determining the products and services they use. Yet each consumer has a different definition of quality. For some, it's an automobile that gives years of trouble-free service. For others, it's a restaurant where the service is always fast and the food is always delicious. Quality is a complex issue with many different components.

Now in its second year, Total Research Corporation's EQUITREND study is a step towards defining those components more clearly. Through telephone interviews with 2,000 men and women age 15 and older, EQUITREND measures the brand equity of 190 brands in 55 product and service categories (roughly 1/3 packaged goods, 1/3 durable goods, and 1/3 services) from long distance service to candy bars.

Consumers were asked to respond to a list of brands in terms of their perception of each brand's quality. They were also asked about usage behavior and their level of satisfaction with the products and services. The EQUITREND study not only resulted in a ranking of brands based on consumer perceptions of quality, it also allowed for the creation of a segmentation system based on those perceptions.

Test theories

John Morton, senior vice president, director of advanced statistical research, Total Research Corp., says that the idea for creating the EQUITREND study came from the desire to test some theories that Total Research had about what can and can't be measured in consumer research.

"Our experience has been that even if you're trying to understand consumers in a very deep and esoteric way, the simpler the questioning procedure and the more you use real concrete things as opposed to abstractions the more useful your results will be. We wanted to develop a study that would be very germane to the whole issue of brand. We also wanted to develop a study that people would have no trouble responding to, that would elicit honest answers that had real meaning."

To react to each of the brands names read to them, respondents used a ten-point scale that had 10 as a measure of extraordinary quality, 5 quite acceptable, and 0 unacceptable. "One of the things about this scale is that 5 is quite acceptable and yet we give people five levels above quite acceptable to grade brands. The reason that we did that was that our past research had found that if you use 'excellent-good-fair-poor' or even 'excellent-very good-fair-poor' you get so many responses in the top two scale points that you haven't really

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