Research, Aim, Fire: How Research Guides Branding

Presented to AAF Hampton Roads
May 18, 2010
“Advertising without research is like shooting an arrow into the air and then looking for a target to catch it with.”

-Someonejustifying a research budget
Today’s Agenda

• Why advertising matters to brands
• Why brands matter to buyers
• Measurement approaches
• Case studies
• Implications for brand stewardship
Why Does Advertising Matter?

“Advertising is the ‘wonder’ in Wonder® Bread.”

-Jef Richards
Why Do Brands Matter?

• A brand is…

  – The intangible sum of a product’s attributes: its name, packaging, and price, its history, its reputation, and the way it's advertised.  
    --David Ogilvy

  – A singular idea or concept that you own inside the mind of the prospect.  
    --Al Ries

  – A living entity [...] enriched or undermined cumulatively over time, the product of a thousand small gestures.  
    --Michael Eisner

  – The express checkout for people living their lives at ever increasing speed.  
    --Brandweek
What Are Brand Relationships?

- Relationships with brands consist of two dimensions:

  - **How** you know the brand...
    - Brand name(s)
    - Tagline(s)
    - Logos and graphics
    - Advertising
    - Experience (your own and others’)

  - **What** you know about the brand...
    - Image/Identity
    - Expected performance
    - Actual performance
    - Overall relationship with brand
Measurement
Why is Measurement Important?

• Measurement matters because of:

  – **What** you learn…
    • Brand awareness and market presence
    • Brand and product performance
    • Brand image/identity
    • Customer/prospect profiles

  – **Who** you learn it from…
    • Overall market
    • Your customers
    • Specific prospect targets
    • Specific market segments/niches
Measurement Approaches

• Qualitative (open-ended)
  – Focus groups
  – In-person interviews

• Quantitative (closed-ended)
  – Surveys/questionnaires
  – Administered via phone, web, paper, etc.
Measuring Brand Identity

- Example of qualitative deliverables:

Homework assignment for children’s focus group on aquarium products: “Show us your ideal aquarium”
Measuring Brand Identity

• Evaluating performance on market positions over time helps quantify the impact of market events:

![Graph showing consumer ratings over time for different market positions: Industry leader, Family-friendly, and Value.]
Case Study: Snack Food
Case Study: Snack Food

- Large national study conducted among snack food consumers nationwide
- “Pre/post” study
- Quotas by market for:
  - Our client’s brand penetration
  - Specific TV ad exposure strategies
Case Study: Snack Food

- Original goal: determine the best way to boost ad effectiveness in different markets
- Discovery: “effectiveness” determined by...
  - Schedule (recency, frequency, exposure)
  - Ad content
    - Promotions/calls to action
    - Awareness drivers
    - Equity ads
Case Study: Snack Food

• Study results:
  – Insight: Awareness and action depend on recency
  – Outcome: Promotional campaign using high-exposure bursts around in-store activity

![Graph showing ad exposure over time]
Case Study: Snack Food

- Study results:
  - Insight: Equity depends on **cumulative** exposure
  - Outcome: Emotional branding campaign using “slow and steady” approach

![Ad Exposure Chart]

<table>
<thead>
<tr>
<th>Ad Exposure</th>
<th>High</th>
<th>Medium</th>
<th>Low</th>
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</table>
| Time        | ![Graph](image)

**Message Factors**
*Insightful Marketing Research*
Case Study: Snack Food

• Key Learnings:
  – You can’t measure ad effectiveness without clearly defined objectives... what are your ads *supposed* to do?
  – Align expectations of campaign performance with definitions of campaign objectives
  – Research note: To measure and compare awareness results, use a closed-ended quantitative survey with trending capabilities
Case Study: Prius
Case Study: The Prius
“For a majority of the owners surveyed, the purchase of a hybrid is not motivated by fuel-saving concerns. The real incentive is one's own image as a responsible green citizen of the world. The symbolic effects of hybrid ownership are at least as powerful, if not more so than the functional reality.”

-Andrew Leonard, Salon.com (http://www.salon.com/tech/htww/2006/01/06/hybrids/)
Case Study: The Prius

• Key Learnings:
  – The reason you create a product/service isn’t always the reason your customer buys it.
  – Understanding purchase drivers helps you position your brand and products more attractively to customers and prospects.
Case Study: The Prius

• Key Learnings:
  
  – Research note: To find out what you don’t know, create a forum for open discussion (focus groups, etc.)
  
  – Research note: Use “aspirational” research, habits and practices, psychographics, and other techniques to help understand how your brand fits into your target’s lifestyle
Case Study: Baseball Team
Case Study: Baseball Team

- Minor-league baseball team with MLB affiliation
- Positioned as family-friendly activity
- Chief complaint: post-game parking lot congestion
- Research goal #1: Verify current market position
- Research goal #2: Prioritize expenditures
### Case Study: Baseball Team Performance Ratings

<table>
<thead>
<tr>
<th>Least</th>
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<tbody>
<tr>
<td><strong>Least</strong></td>
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<td>Discounts available++</td>
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<td>Length of game</td>
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<td>Variety of items</td>
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<td>Beer prices</td>
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<td>Level of play</td>
<td>Prices of vendor items</td>
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### Value Issues

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<td><strong>Least</strong></td>
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<tr>
<td>Safety in stadium</td>
<td>Can move around freely in stadium</td>
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<tr>
<td>View of field</td>
<td>Convenience of stadium location</td>
</tr>
<tr>
<td>Fan involvement in btw. inning activities</td>
<td>Number of restrooms</td>
</tr>
<tr>
<td>Restroom cleanliness</td>
<td>Waiting time for restrooms</td>
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<tr>
<td>Variety of btw-inning activities</td>
<td>Number of vendors</td>
</tr>
<tr>
<td>Variety of items</td>
<td>Opportunity to see future major leaguers</td>
</tr>
<tr>
<td>Taste of food</td>
<td>Easy to find seats</td>
</tr>
<tr>
<td>Excitement of game</td>
<td>Restroom cleanliness</td>
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<td>Length of btw-inning activities</td>
<td>Variety of food</td>
</tr>
<tr>
<td>Height of stadium</td>
<td>Opportunity to get to know players</td>
</tr>
<tr>
<td>Quality of seating area</td>
<td>Level of play</td>
</tr>
<tr>
<td>Cleanliness of seating area</td>
<td>Availability of tickets</td>
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<td>View of field</td>
<td>Speed of service</td>
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### Irritations

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<tr>
<td>Music selection on P.A.</td>
<td>Availability of tickets</td>
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<td>Location of satellite stands</td>
<td>Speed of service</td>
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<tr>
<td>Size of souvenir shop</td>
<td>Opportunity to get to know players</td>
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<tr>
<td>Variety of souvenirs</td>
<td>Ease of exiting parking lot after game</td>
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<td>Merchandise selection in satellite stands</td>
<td>Opportunity to see future major leaguers</td>
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<tr>
<td>Souvenir shop hours during off-season</td>
<td>Level of play</td>
</tr>
<tr>
<td>Souvenir shop hours on non-game days</td>
<td>Availability of tickets</td>
</tr>
<tr>
<td>Clarity of sound system</td>
<td>Speed of service</td>
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### Message Factors

*Insightful Marketing Research*
Case Study: Baseball Team

Research Goal #1: Verify Current Position

Least  Contributions to Value Perception  Most
Research Goal #2: Prioritize Expenditures
Case Study: Baseball Team

• Key Learnings:
  – Volume ≠ importance (parking lot issue an Irritation)
  – Weaknesses can be addressed creatively to enhance current positioning
  – Research note: Basic satisfaction research may yield incomplete understanding or conclusions. Align research methodologies with strategic needs.
Case Study: Furniture Store
Case Study: Furniture Store

• Local chain of retail furniture stores
• Broad appeal, traditionally little targeted marketing
• Agency partner introduced three-step approach:
  – **Data mining**: Analyze customer databases to identify lucrative segments (psychographics)
  – **Research**: Targeted research among desirable segments
  – **Communication**: Overall branding with customized targeted micro-campaigns
Case Study: Furniture Store

VALUE ISSUES

- Most
  - Furniture displayed in a way I can imagine it in my home
  - Store layout makes it easy to find what I am looking for
  - On-site financing
  - Large selection in each category
  - Easy purchase process
  - Easy financing process
  - Contributes to Value Perception
  - FIRRI
  - BASICS
  - Store was neat and clean
  - Friendly and honest salespeople
  - Salesperson didn’t rush me
  - Salesperson explained payment/financing options
  - Furniture available for pickup when I want it
  - Furniture is available when I need it
  - Furniture is available in many colors/finishes
  - Furniture displayed in a way I can imagine it in my home
  - Furniture fits my style
  - Furniture is a worthwhile investment
  - Furniture displayed in a way I can imagine it in my home
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Message Factors
Insightful Marketing Research

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Case Study: Furniture Store

Segment 1: “Well-Off Young Professionals”

- Large selection of styles to choose from
- Carries brands I know and like
- Large selection of coordinating accessories
- Furniture displayed in a way I can imagine it in my home

Value Issues

Basics

Irritations

Customer Satisfaction

Least

Contributes To Value Perception

Most

Message Factors
Insightful Marketing Research
Case Study: Furniture Store

Segment 2: “Comfortable Older Couples”

- Quick home delivery
- Offers good sales and promotions
- Reasonably-priced furniture
- Easy purchase process

Least  Contributes To Value Perception  Most

Customer Satisfaction

Value Issues

Message Factors
Insightful Marketing Research
Case Study: Furniture Store

• Key Learnings:
  – Start with the data you have on hand.
  – Seek opportunities to integrate sources of information and knowledge.
  – Research note: Advance planning can lead to more robust segmentation and deeper insights.
  – Research note: The more you know, the less you have to ask – third party information can be valuable.
Case Study: Hospital
Case Study: Hospital

• Background: high ratings among patients, low consideration among non-patients

• Conducted research among patients and non-patients

• Two issues impacting brand image:
  – Perceived performance
  – Relevance of position
Case Study: Hospital

**Patient Analysis**

**BASICS**

- Excellent quality care overall (++)
- Nurses showed good attitude toward your requests
- Physician explained tests/treatments
- Trust them to get you needed treatment
- Attentive nurses
- Reasonable test/treatment wait times
- Sufficient staff for patient needs (++)
- Patient needs met promptly (++)
- Sufficient staff for patient needs
- Nurses spend enough time with patients

**IRRITATIONS**

- Least
- Most
- Least
- Most
- Least
- Most
- Least
- Most

**VALUE ISSUES**

- Patient satisfaction
- Highest
- Lowest

**Message Factors**

Insightful Marketing Research
Case Study: Hospital

BASICS

Excellent quality care overall

Clean hospital

Advanced equipment & technology

Well-qualified physicians

Physician answers questions to your satisfaction

Well-qualified staff

Patient needs met promptly

Being kept informed about your condition/treatment

Modern facilities

Non-Patient Analysis

IRRELEVANTS

Contributes To Value Perception

Message Factors

Insightful Marketing Research

Least

Most

Highest

Lowest

Stated Importance

VALUE ISSUES

Excellent quality care overall

Clean hospital

Advanced equipment & technology

Well-qualified physicians

Physician answers questions to your satisfaction

Well-qualified staff

Patient needs met promptly

Being kept informed about your condition/treatment

Modern facilities
Case Study: Hospital

• Key Learnings:

  – Experiences shape perceptions, needs, expectations, and priorities.

  – The same market position means different things to different people.

  – Communicating a message with the wrong subtext or supporting attributes can erode credibility.
Case Study: Hospital

• Key Learnings:
  – Research note: Use open-ended qualitative interviewing to explore how customers and prospects build expectations in the absence of experience
  – Research note: In a quantitative study, segment data collection and analysis by experience levels (customer/non; high/medium/low volume; etc.)
Case Study: Wal-Mart
Case Study: Wal-Mart

• What we know about Wal-Mart
  
  – No one *likes* shopping there
    
    • No surprise: Wal-Mart consistently scores below other major retailers in shopper satisfaction (MFI studies)
  
  – Store and product experiences are intertwined
    
    • Unpleasant surprise: the same products, when purchased at Wal-Mart, sometimes receive lower scores (MFI studies)
Case Study: Wal-Mart

• Brand contradictions may be an acceptable compromise for strong brands
Case Study: Wal-Mart

• Some brands/products have overlapping images or target audiences

Taylor Swift, LEI Jeans spokesperson

AC/DC, Bruce Springsteen, Garth Brooks, Miley Cyrus, Exclusive Wal-Mart releases

Case Study: Wal-Mart

• Key Learnings

  – Distribution channel and purchase experience will impact overall view of your brand and products

  – Any cross-brand associations (distribution, co-marketing, etc.) should have overlap in brand image or equity

  – Research note: Customer experience surveys can combine and correlate multiple dimensions of attitudes/perceptions (such as assessing a retail experience and a product experience)
Case Study: OxiClean
Case Study: OxiClean

- Creative repositioning
  - Cleaning product with "miracle cleaning" claims
  - How to make transition from "As Seen On TV" to mainstream product?
- "Didn’t your mother ever teach you about OxiClean?"
Case Study: OxiClean

• Key Learning:
  – Some weaknesses can be addressed head-on by…
    • Creative repositioning (OxiClean)
    • Acknowledging the weakness directly (Listerine & BK)
  – Research note: To understand brand weaknesses, start with qualitative research to identify areas of general concern to customers, then use a quantitative study to measure your performance
Case Study: Iron Pipe
Case Study: Iron Pipe

- Goal: Complete company-wide rebranding
- Question: How to position company/products?
- Concerns:
  - Commodity products (pipes and valves)
  - Industrial B2B market (commercial and government)
  - Cheaper imports (especially from China)
  - Alternative products (PVC, clay, steel, etc.)
Case Study: Iron Pipe

- Comprehensive research project, including qualitative and quantitative phases:

  - Employees
  - Distributors
  - Prospects
  - Past Customers
  - Current Customers
Case Study: Iron Pipe

• Key Learnings:
  
  – Company provided both products (pipe, valves) and services (delivery, quality guarantee, consulting)
  
  – Product quality expected to meet minimum threshold, leaving little room for differentiation on quality
  
  – Services provided peace of mind and made customers’ lives easier overall
Case Study: Iron Pipe

• Key Learnings:
  – Solution: focus on company’s philosophy of delivering quality in all aspects, and on customer’s confidence in a job well done
  – Research note: Exploratory techniques helped reveal issues driving purchase decisions, while quantitative studies allowed direct apples-to-apples comparison of results across important segments
Implications for Responsible Stewardship
Implications

• Are you doing the right things to build awareness and stay top of mind among customers and prospects?

• Are you doing enough to maintain and reinforce your brand image?

• What expectations are you building for your brand among customers and prospects? Are you delivering on your brand’s promises?

• Do you know the true purchase drivers for your customers and prospects?
Implications

• Is every aspect of the customer experience – researching options, purchasing your product/service, and receiving the deliverable – consistent with your brand’s identity?

• Are you doing a good job of recognizing and addressing brand weaknesses?

• Are you placing the appropriate emphasis on your brand as a relationship management tool?
To find out more…

If you are interested in discussing any of these topics – or any other research or marketing issue – in greater detail, please contact:

Tom Lannan, Vice President
Tom Logue, Vice President
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Memphis, TN 38137
901-683-5350
www.messagefactors.com
Thank You!
About Message Factors
About Message Factors, Inc.
Who We Are

- Founded in 1967
- Headquartered in Memphis, TN
- Over 3,500 research studies conducted
- Full-service research firm with in-house project management, data processing, analysis, and consulting capabilities
To help our clients grow their business through value-added market research and consulting services.
Who We Serve

• Over 300 clients served in past three years, including:
  – Procter & Gamble, FedEx, Chrysler, McKee Foods, Baptist Health Care, and ServiceMaster
  – Over a dozen Fortune 500 companies
  – U.S., Canadian, and German clients
  – Studies in U.S., China, Germany, France, and Brazil
Who We Serve

- Clients represent many industries

Technology
- E-learning software
- ASP software
- Website development
- Information services

Consumables
- Snack foods
- Batteries
- Pet supplies
- Cosmetics

Manufacturing/Distribution
- Paper products
- Automotive
- Shipping/trucking
- Pipes and valves

Other Industries
- Travel and tourism
- Sports and recreation
- Not-for-profit

Health Care
- Hospitals
- Health insurance
- Medical equipment

Financial Services
- Banks
- Investment services
- Insurance
- Claims processing
• Wide range of qualitative services, including:
  – Traditional focus groups
  – Alternative focus group methodologies
  – One-on-one interviewing
  – Ethnographic research
  – Syndicated qualitative (Opinion Library™)
Services Offered

• Traditional quantitative approaches:
  – Awareness measurements
  – Attitudinal measurements
  – One-time, pre-post, and ongoing tracking studies
  – Telephone, online, in-person, mail, and comment card methodologies
• Strategic quantitative approaches:
  – Value Analysis™: loyalty-oriented proprietary approach
  – Barriers to Growth Analysis™: concept and new product development
  – Data integration, data mining, and database analysis
  – 360-degree stakeholder assessments
Services Offered

• Research audiences/targets:
  – Current customers (consumer and B2B)
  – Lost customers (consumer and B2B)
  – Prospects (consumer and B2B)
  – General marketplace (consumer and B2B)
  – Employees
  – Distributors and franchisees
Contact Us

For more information, please contact:

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Biographies

Charles J. Beech, Chairman and CEO

Charles J. Beech is Chairman and CEO of Message Factors, Inc., a national market research consulting firm, as well as PWI, a national research field service company. Mr. Beech is also Chairman and CEO of Peregrine Enterprises, Inc., an investment holding company that focuses on acquisitions and strategic alliances relating to marketing services and consumer products businesses. Mr. Beech currently, and for the last 15 years has founded and continues to develop businesses in the People’s Republic of China.

Previously, as the Managing Partner of MARCO, a merchant banking firm, Mr. Beech became President and CEO of CheckRobot, Inc. CheckRobot developed breakthrough technology for checkout lanes in food stores as well as video-driven electronic marketing products. The electronic marketing products were sold through a joint venture, Advanced Promotion Technologies with Procter & Gamble, GTE, Dun & Bradstreet and Schlumberger. Mr. Beech was the Director of this joint venture.

As president of the Maybelline Sales Corporation – a national cosmetics company - Mr. Beech was a member of the Officers Committee and contributed to strategic planning and daily overall operations.

For seventeen years, Mr. Beech worked for Procter & Gamble in a variety of management positions covering trade marketing, training and sales. His responsibilities included developing sales and promotional plans for new and established brands, developing and analyzing test markets, managing sales offices throughout the United States and developing and implementing training and management programs and seminars.

Mr. Beech has been a board member of the Salvation Army, a member of the vestry of St. Thomas Episcopal Church, and the President of the Terrace Parks Swim and Tennis Club. Until recently Mr. Beech was on the Board of Trustees of St. Mary’s School for Girls for ten years. He currently serves on the board of the International Children's Heart Foundation. Mr. Beech is the current President of the local Navy League in Memphis.
Thomas Lannan, Vice President

Thomas Lannan brings more than 25 years experience in marketing and advertising. Tom most recently was the director of account services at the second largest ad agency in Memphis where he managed the 14-member account service staff working with FedEx, International Paper, Thomas & Betts, ServiceMaster Clean, TruGreen, Chemlawn and Hilton Hotels.

Prior to his last agency management position, Tom served as vice president of Health Communications, a Memphis-based marketing and strategic planning firm specializing in medical services providers, medical device manufacturers and pharmaceutical companies where primary research played a critical role with due diligence and the strategic planning process. He worked on the marketing plans and execution for new developments in laser technologies, ophthalmic diagnostics and orthopedics.

Tom’s professional career includes executive management positions at the Schering Plough Corporation and Nationwide Communications as well as positions in strategic planning, advertising agency management, account management, non-traditional media channels, public relations and broadcast production.

Tom is a native of Indianapolis and a graduate of Indiana University.
Thomas Logue is responsible for coordinating and overseeing the day-to-day research management and analysis activities at Message Factors. This includes work in study design, project management, analysis, and data processing. In addition, Tom is Message Factors' senior technical expert on proprietary research methodologies.

Tom handles several major corporate accounts for Message Factors, managing both consumer and business-to-business research in industries such as consumer goods, utilities, health care, banking, and entertainment. His specific areas of expertise include attitudinal and behavioral loyalty, awareness, image/perception, and concept testing.

Tom oversees qualitative research conducted by Message Factors, and has served as moderator or head interviewer for a variety of traditional and alternative focus groups, executive one-on-one interviews, and ethnographic research.

Tom has spoken on marketing research, branding, and marketing principles at venues including the Florida Natural Gas Association, the World Health Care Congress, and the Memphis Brand Council.

Tom received bachelor's degrees in Business Administration/International Studies and German Language/Literature from Rhodes College in Memphis, TN. Tom received his MBA from Walden University.
Additional Case Studies
Case Study: Brand Extensions
Case Study: Extensions

• Brand extensions leverage existing brand equity to pursue new opportunities

• Extensions require:
  – Strong brands (prominent and well-known)
  – Brands with a clear identity
  – A closely related application
Case Study: Extensions

Mr. Clean

↓

Tide

↓

Mr. Clean Car Wash

Tide Dry Cleaners
Case Study: Extensions

• Key Learnings
  - Extensions can be risky: if extension fails, original brand can be damaged
  - Research note: Concept testing can be used to determine consumer interest and acceptance
Case Study: Opinion Library™
Case Study: Opinion Library™

• Consumer opinions collected by Message Factors and arranged by topic

• 1,000+ open-ended verbatim responses on different topics

• Question: When are brand names most important to you, and why?
Case Study: Opinion Library™

- Question: When are brand names most important to you, and why?
  - When spending a lot of money on something, quality is a huge issue. That is when brand names matter most.
  - Food items. It is the food safety and quality I have come to expect.
  - Brand names are important to me because over the years I have learned which products are high quality and which are not.
Case Study: Opinion Library™

• Question: When are brand names most important to you, and why?
  
   – *Brand names are most important for me for those products where safety, health, or reliability is an issue.*
   
   – *When they stand behind their products.*
   
   – *Important mostly because of reputation: either from personal experience or the experiences of friends I trust and respect.*
Case Study: Opinion Library™

• Key Learnings:
  – Most people think of brands in positive terms, e.g. name brands mean high quality while “generics” mean low quality
  – People expect brand name items to cost more, but additional expense is worthwhile to achieve greater value
  – Underlying relationship with brand is based on trust that brand performance will be consistently good