

2007 Marketing Conference— Las Vegas

Out of Box Ways to Present Data:

PERCEPTUAL MAPS

**January 31, 2007
8:00 a.m. – 9:15 a.m.**

Perceptual Maps: How It Works

- Bi-annual Consumer Market Study
- Conducted by MORI
- Mail Survey
- Image Rating Measurement
- Correspondence Analysis
 - Map the stores relationship with each image
 - Places stores on a level playing field, regardless of their market share

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Image Ratings of Department Stores

Q19: Image Ratings of Department Stores

Using the department stores listed below, please write in the number of the ONE store you feel is BEST described by each of the statements which follow.

STORE LIST:

- | | | |
|--------------|-------------|----------|
| 1. Dillard's | 4. Sears | 7. Other |
| 2. JC Penney | 5. Von Maur | 8. None |
| 3. Kohl's | 6. Younkers | |

- ___ a. Knowledgeable salespeople
- ___ b. Merchandise has good value for the dollar
- ___ c. Has a good supply of advertised merchandise
- ___ d. Good quality merchandise
- ___ e. Best atmosphere
- ___ f. First to introduce new fashion trends
- ___ g. Prices are competitive with other stores
- ___ h. A prestige store
- ___ i. Store with most meaningful sales & markdowns
- ___ j. Good exchange/return policy
- ___ k. Expensive
- ___ l. Store makes it easy to find what I want
- ___ m. Good selection of brand-name merchandise
- ___ n. The store you shop most for women's clothing & intimate apparel
- ___ o. The store you shop most for men's clothing
- ___ p. The store you shop most for children's clothing
- ___ q. The store you shop most for cosmetics & fragrances
- ___ r. The store you shop most for small housewares such as dishes & silverware

Department Store Ratings

•Six stores listed

•18 images listed

•Respondents are asked to write in the number of the ONE store they feel is BEST described by each of the statements

•Can rate multiple stores

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Image Perceptual Map: Department Stores

16 County Area
Total Adults = 443,400

Shop most for cosmetics/fragrances ♦



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Source: 2005 Consumer Market Study, MORI

Image Perceptual Map: Department Stores

Linn County Area
Total Adults = 152,000

Shop most for cosmetics/fragrances ◆

YOUNKERS ◆

Shop most for housewares ◆

Shop most for women's clothes ◆

Knowledgeable salespeople ◆

First for fashion trends ◆

Good selection of brand-names ◆

Most meaningful sales

Good exchange/return policy

Good supply of advertised merch.

Prestige store ◆

VON MAUR ◆

Best atmosphere

Good quality ◆

Easy to find what I want

SEARS

JC PENNEY

KOHL'S

Competitive prices

Expensive ◆

DILLARD'S ◆

Shop most for men's clothes

Good value

Shop most for kids clothes ◆



Source: 2005 Consumer Market Study, MORI

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Image Ratings of General Merchandise Stores

Q18: Image Ratings of General Merchandise Stores

Using the discount stores listed below, please write in the number of the ONE store you feel is BEST described by each of the statements which follow.

STORE LIST:

- | | |
|------------------------|-----------------------------------|
| 1. Bed, Bath & Beyond | 13. Only Deals |
| 2. Ben Franklin | 14. Paul's Discount |
| 3. Big Lots | 15. Sam's Club |
| 4. Dollar General | 16. ShopKo |
| 5. Dollar Tree Store | 17. Smulekoff's |
| 6. Family Dollar Store | 18. Target/Super Target |
| 7. Farm & Fleet | 19. Theisen's |
| 8. Gordman's | 20. Tuesday Morning |
| 9. Hobby Lobby | 21. Wal-Mart/Wal-Mart Supercenter |
| 10. K's Merchandise | 22. Other |
| 11. Kmart/Big Kmart | 23. None |
| 12. Michael's | |

- ___ a. Knowledgeable salespeople
- ___ b. Merchandise has good value for the dollar
- ___ c. Has a good supply of advertised merchandise
- ___ d. Good quality merchandise
- ___ e. Best atmosphere
- ___ f. First to introduce new fashion trends
- ___ g. Prices are competitive with other stores
- ___ h. A prestige store
- ___ i. Store with most meaningful sales & markdowns
- ___ j. Good exchange/return policy
- ___ k. Expensive
- ___ l. Store makes it easy to find what I want
- ___ m. Good selection of brand-name merchandise
- ___ n. The store you shop most for women's clothing & intimate apparel
- ___ o. The store you shop most for men's clothing
- ___ p. The store you shop most for children's clothing
- ___ q. The store you shop most for cosmetics & fragrances
- ___ r. The store you shop most for small housewares such as dishes & silverware

General Merchandise Store Ratings

•21 stores listed

•18 images listed

•Respondents are asked to write in the number of the ONE store they feel is BEST described by each of the statements

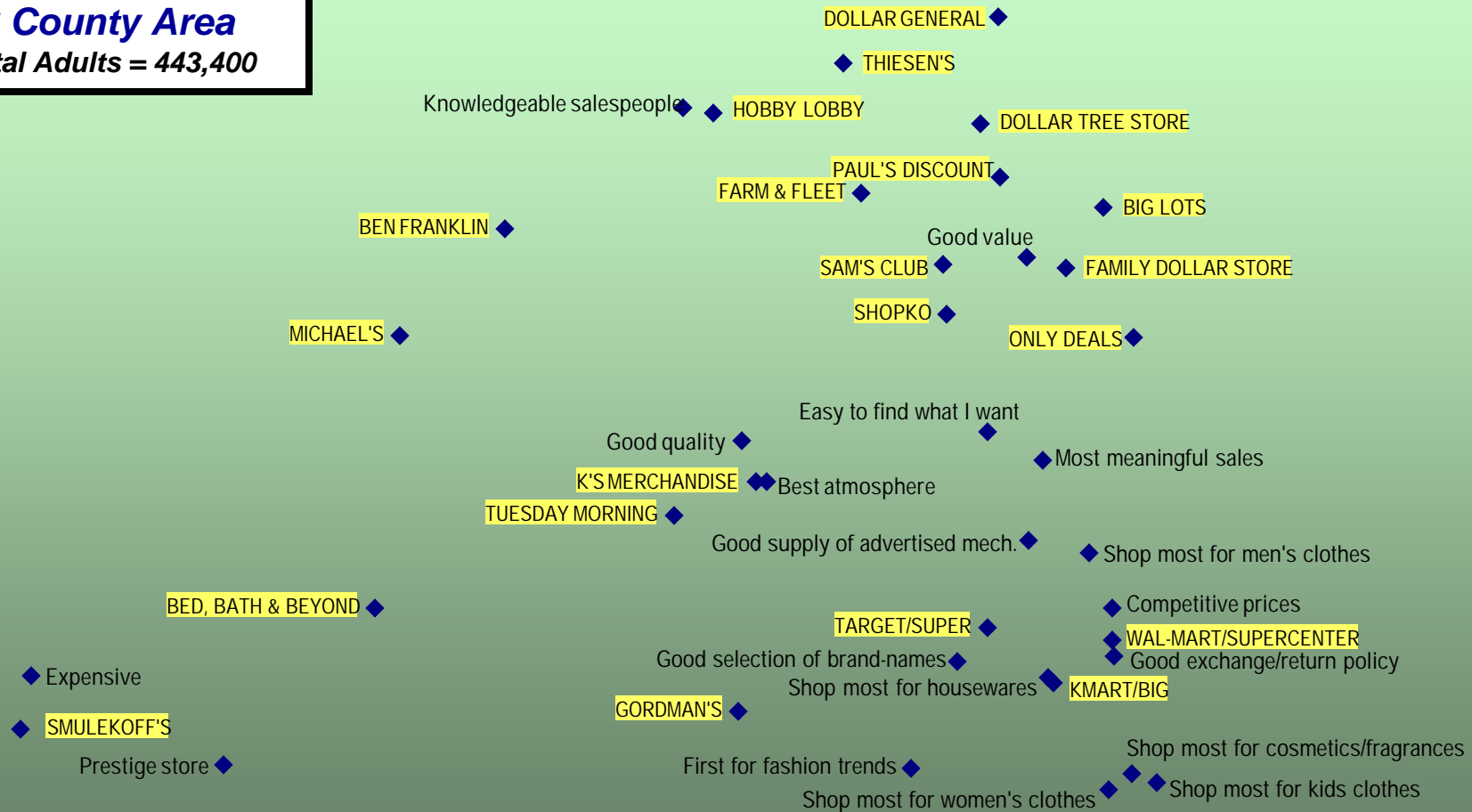
•Can rate multiple stores

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Image Perceptual Map: General Merchandise Stores

16 County Area
Total Adults = 443,400



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Source: 2005 Consumer Market Study, MORI

Image Perceptual Map: General Merchandise Stores

Linn County Area

Total Adults = 152,000



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Source: 2005 Consumer Market Study, MORI

Image Ratings of Grocery Stores

Q43: Grocery Store Image

Using the list of stores that follows, please write in the number of the ONE store you feel is best described by each of the statements below.

STORE LIST:	
1. Aldi Foods	11. Hy-Vee
2. Big Kmart	12. Jack and Jill
3. Cub Foods	13. Martin Bros Distribution
4. Dicks	14. New Pioneer Co-op
5. Eagle Country Market	15. Sam's Wholesale
6. Econofoods	16. Sav-A-Lot
7. Express Super Value	17. Target Superstore
8. Fareway	18. Wal-Mart Superstore
9. Food Pride	19. Other grocery store
10. Hometown Foods	20. None of these

Best variety and selection of goods?

Best or lowest prices?

Best advertised specials?

Best selections of national brands, such as those advertised on TV or in the newspaper?

Most helpful & friendly employees?

Best locations?

Most convenient or longer hours?

Fastest, most convenient checkouts?

Cleanest, most attractive stores?

Best selection of ready-made take out food?

Widest variety of in-store services?

Freshest meat?

Freshest produce?

Grocery Store Ratings

•18 stores listed

•13 images listed

•Respondents are asked to write in the number of the ONE store they feel is BEST described by each of the statements

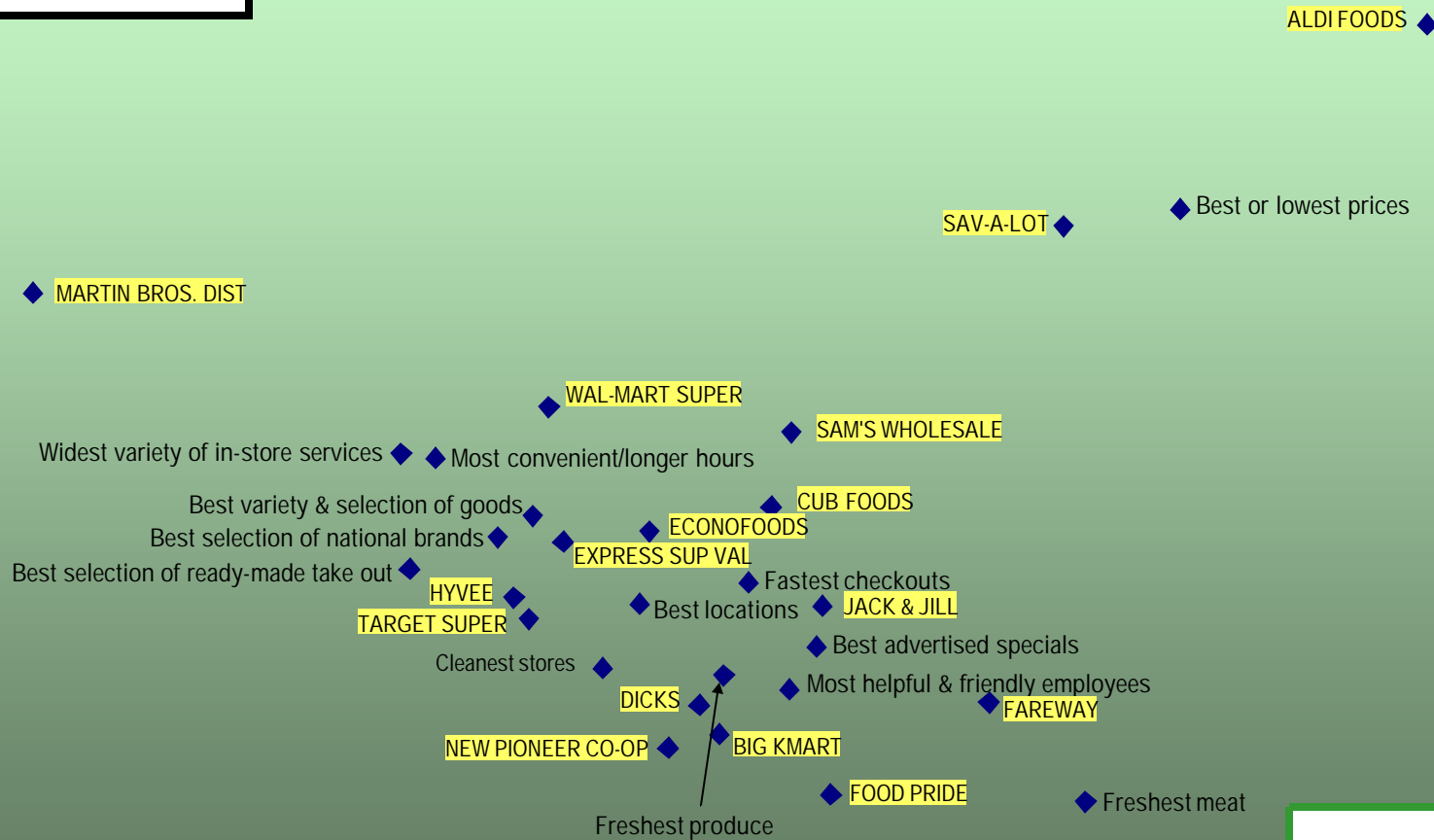
•Can rate multiple stores

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Image Perceptual Map: Grocery Stores

16 County Area
 Total Adults = 443,400



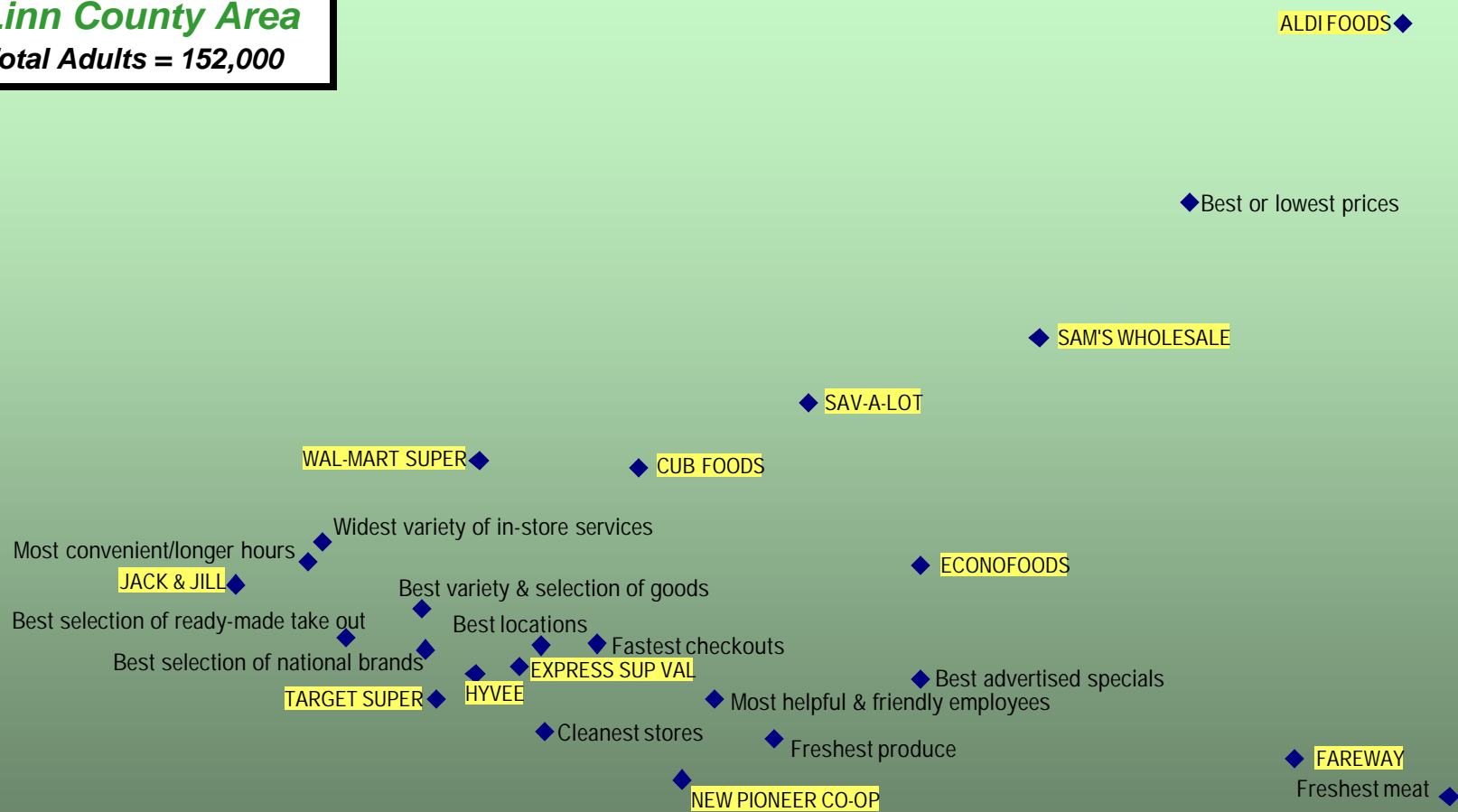
Source: 2005 Consumer Market Study, MORI



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Image Perceptual Map: Grocery Stores

Linn County Area
Total Adults = 152,000



Source: 2005 Consumer Market Study, MORI



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Perceptual Maps: **Advertiser Reaction**

- It tells the whole story on one page
- It's better than going through pages and pages of charts and graphs
- It tells me where I stand in the consumer's mind, compared to my competitors
- It helps me in planning my branding message for the coming year
- More of these kind of pages will help me get to the bottom line faster

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