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Testing market positioning themes: a perceptual mapping approach

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The purpose of this article was to examine a research method designed for testing marketing communication themes. The theme testing approach, which was based on perceptual mapping procedures, focused on communication potency issues such as the degree to which the communication achieves marketing communication objectives, is compatible with the image of the source, is compatible with the target consumers' preferences and is differentiated from competitors' market positions. The results of convergent and discriminant validity tests suggested strong support for the theme testing method.

KEYWORDS: Advertising testing; marketing positioning

INTRODUCTION

'Watch what you can do' is the positioning theme that supports Microsoft Corporation's \$50 million advertising blitz for Ultimate TV, a digital recorder that can record two television shows at once and pause live television for snack breaks (Elkin, 2001). Microsoft Corporation hopes that its positioning theme does not go the way of Domino's Pizza's Bad Andy. Domino's Pizza recently dropped the Bad Andy character like a hot pizza and is embracing a new \$20 million positioning strategy touting the tag line 'Get the door. It's Domino's' (MacArthur, 2001).

Positioning themes, sometimes called headlines, taglines or slogans, are an important foundation of advertising communications and they primarily fall into two general categories: those emphasizing an organization and those emphasizing a product. An example of the first is 'Have you driven a Ford . . . lately?' (Ford Motor Company). An example of the latter is 'Melts in your mouth, not in your hand' (M&M Milk Chocolates). Most positioning themes fall into the latter category.

Underscoring their importance, competitors do battle over them. Papa John's International opposed Pizza Hut's trademark application for the positioning theme 'The best pizzas under one roof', contending that the phrase was 'deceptively misdescriptive' (*sic*). Their action comes on the heels of a federal judge prohibiting Papa John's from using 'Better ingredients, better pizza' due to a lawsuit brought by the Tricon Global Restaurants unit (Garfield, 1997).

Although often comprised of few words, positioning themes serve many purposes. First and perhaps foremost, a positioning theme is the focal point for the creative work and the framework for communicating a message to the consumer. For example, one of the most common methods of communicating a positioning theme in print advertising is to express the theme in a headline (Kotler, 2003). Advertising headlines are designed to attract attention and interest by connecting with the 'self-interest' of the consumer via the communication of news, feature and benefit information, brand names and other factors of interest to consumers (Gardner, 1983). Second, the level of recall of an advertising message is positively affected by the target's level of attention when exposed to the message. Since attention is usually a limited resource, individuals tend to focus selectively on certain aspects of advertising stimuli (Gardner, 1983). This selective focus can be directed to a particular message in an advertisement by increasing the prominence of the message. Advertising themes, which are usually expressed via the headlines of advertisements (Kotler, 2003), tend to be prominent. In general, a primary function of an advertisement headline is to attract attention to the information relayed via the headline (Vanden Bergh and Katz, 1999). To the extent that the theme expressed in the headline receives enhanced attention during advertisement exposure, message recall can be increased (Taylor and Fiske, 1978; Gardner, 1983).

In general, if a theme is effective in generating increased interest in and recall of a marketing communication message, this prominent aspect of the advertisement can acquire increased weight in subsequent evaluations of the advertised object (Gardner, 1983). Gardner (1983) examined the effects of product attribute information prominence in advertisements on attribute recall and the impact on brand evaluations. Attribute prominence was manipulated experimentally by including (not including) the target product attribute in the advertisement headline. The findings indicated respondents' recall for the target product attribute was higher when it was included in the headline. In addition, the effect of the target attribute information on respondents' brand evaluation was higher when the target attribute information was included in the headline.

Two important research methods used for testing marketing communication messages are concept testing and copy testing. In concept testing, respondents from the target market are shown the general communication concept and their reactions are recorded. In these tests, the primary objective is to '... determine which concepts from among alternatives being considered, are best received by consumers' (Vanden Bergh and Katz, 1999). The second method is copy testing, which involves '... the systematic examination of the effect of the verbal and visual elements of an advertisement on members of the target audience' (Vanden Bergh and Katz, 1999). Examples of the issues examined in copy testing include recall, persuasion likeability and purchase interest (Vanden Bergh and Katz, 1999). A key question that is examined in most advertising research is whether or not the advertisement is capable of achieving the advertising objectives (Kotler, 2003). For example, when designing and testing marketing communication messages, decision makers often desire information involving questions such as the following.

1. How do various alternative messages compare with respect to achieving various communication objectives?
2. Are the communication objectives compatible with the image or market position of the message source?
3. Is the intended positioning strategy compatible with the target consumers' preferences, values and needs?
4. Is the intended positioning strategy differentiated from competitor market positions?

The purpose of this study was to test a method of examining these types of questions. In the following section the marketing communication testing method is described. The focus of the discussion involves the evaluation of alternative marketing positioning themes. The next two sections describe the procedures used for testing the validity of the marketing communication testing method and report the findings. The final section contains a discussion and conclusion.

MARKETING THEME POSITIONING ANALYSIS

The objective of this study was to provide and test empirically a research method for testing marketing communication themes. The method, which emphasizes congruence and differentiation analysis, consists of examining various competitive issues concerning alternative promotional themes and alternative sources of promotional themes (e.g. retail stores, service organizations, etc.) in the context of the development of competitive positioning strategies. For the purpose of illustration, the example described in Table 1 focuses on the religious Christmas concept example used in this study (concept), a retail store (source), the promotional theme being tested (theme), the market segment’s personalized Christmas concept (ideal) and a competitor of the originator of the test theme (competitive source). In this illustration, a total of 15 comparisons were possible. The strategic objective for the originator of the test theme involves various congruence–differentiation situations. For a detailed discussion of this congruence–differentiation analysis framework see Teas and Grapentine (2003).

Congruence–Differentiation analysis

The framework in Table 1 involves examining the comparative positions (as perceived by consumers) of the concept, the theme that is designed to reflect the concept, the source of the theme and the target market ideal. The following are the positioning issues that can be examined.

Source–Concept congruence

Is the source of the theme (i.e. a retail store) compatible with the concept being projected? A lack of congruence indicates that the concept may not represent a feasible positioning strategy for the source.

TABLE 1. Congruence: differentiation analysis

	Concept	Source	Theme	Ideal	Competitive source
Source	C	–	–	–	–
Theme	C	C	–	–	–
Ideal	C	C	C	–	–
Competitive source	D	C/D	D	D	–
Competitive theme	D	C/D	D	D	D

C, the objective is congruence; D, the objective is differentiation.

Concept–Theme congruence

Does the theme project the concept that is intended? In this analysis the concept represents the advertising objective while the theme represents the advertising implementation.

Concept–Ideal congruence

What is the ideal positioning strategy as measured by consumers' attitudes that describes their preferred Christmas experience? Concept–Ideal congruence concerns whether the concept that is being tested accurately reflects the ideal (personalized Christmas) that has been determined by prior research. A lack of congruence suggests that the test concept is not congruent with a particular market segment's ideal.

Source–Theme congruence

Is the source compatible with the theme that is being tested? For example, themes for which the retail store is not perceived by customers to be a credible source could be developed. In this case, the theme would be expected to fail because it is not believable.

Source–Ideal congruence

Is the source considered to be compatible with the ideal concept of a particular target market? (In the example used in this study, is the source compatible with the consumers' perception of the ideal Christmas scenario?)

Theme–Ideal congruence

Does the theme accurately reflect the ideal concept as perceived by the customer? This analysis corresponds to traditional advertising copy testing, which is designed for examining whether the theme is communicating the desired message.

Differentiation of the concept from competitive sources and themes

The purpose of this analysis was to examine the extent to which the target concept shows promise for developing a competitive market position that is unique.

Differentiation of the source from competitive sources and themes

This examination focused on positioning uniqueness. Establishing a unique position in the market is often but not always the strategic objective. For example, a source may wish to challenge a competitor in its own arena. In this situation, the degree to which the source is congruent with a competitor and its theme may represent a strategic advantage in that it will enable the source to attack the competitor's strategic position directly.

Differentiation of the theme from competitive sources and themes

Establishing themes that are differentiated from competitive themes and competitive sources is generally desirable. A marketing positioning strategy that differentiates the source from the competition via the development of a differentiated theme, particularly if the theme is found to be congruent with a market segment's ideal concept is usually considered to be a source of marketing positioning strength.

Differentiation of the ideal from competitive sources and themes

This issue involves an examination of the extent to which the ideal concept identified with respect to a market segment is currently not being effectively targeted or, perhaps, is being neglected by the competition.

Differentiation of competitive sources and themes

This differentiation issue involves an examination of the degree to which the competitor's efforts to establish a particular position via a competitive theme has been successful. Differentiation indicates that the competition is not effectively implementing a theme strategy.

A perceptual mapping approach

Examining these congruence–differentiation issues involves an analysis of perceptions or attitudes of potential consumers. A widely used method for examining consumers' perceptions of items (such as products, competitors, etc.) is perceptual mapping. Two types of perceptual mapping that have experienced widespread usage in marketing are multidimensional scaling and multiple discriminant analysis. For theoretical discussions and applications of multidimensional scaling and multiple discriminant analysis see Hair *et al.* (1998) and Churchill and Iacobucci (2002).

Multidimensional scaling

Multidimensional scaling is a method of analysis that is used by marketers for analysing the relative images of a set of entities (e.g. products, stores, brands, etc.) in multidimensional perceptual space. The data used for the analysis are respondents' judgements of the similarities of the entities. The scaling procedures transform the similarities ratings into distances, which result in the entities being positioned in multidimensional perceptual space.

Multiple discriminant analysis

Market researchers often use multiple discriminant analysis in situations in which entities are being compared or contrasted on the basis of multi-attribute image ratings. Specifically the procedure uses ratings of entities on a common set of characteristics to produce a set of weighted linear composites called discriminant functions. These functions are estimated in a way that maximally separates the entities being mapped in multidimensional perceptual space. The estimation of the linear composites and the subsequent estimate of discriminant structure (loading) coefficients facilitate interpretation of the perceptual maps.

The primary mapping procedure used in this study was multiple discriminant analysis. Since multiple discriminant analysis is based upon multi-attribute ratings, the resulting maps are more interpretable than those produced by multidimensional scaling methods and, therefore, they produce more diagnostic information when used in advertising theme testing.

PRELIMINARY STUDY

The preliminary study was used for developing an initial set of retail store Christmas season themes, identifying two differentiated retail stores and developing a set of items that could be used for measuring customers' attitudes concerning Christmas, Christmas themes and retail stores. This exploratory investigation used a convenience sample of 29 adult consumers

approximately equally split by gender. First, using multidimensional scaling procedures based on similarity ratings of all the possible pairs of the promotional positioning themes, the preliminary study identified themes that were highly differentiated from each other. Based upon these results, the following five themes were selected for the primary study.

1. Where Christmas is convenient.
2. We help you express your faith at Christmas.
3. Where you will find Christmas treasures.
4. We are Christmas ideas.
5. We help you share the true meaning of Christmas.

Second, the preliminary study was used for identifying two stores that were differentiated in the marketplace and that could be used as context stores for the Christmas theme test. The stores selected for this portion of the study were Wal-Mart, Target, Hallmark, K-Mart, Sears and Younkers (a local department store). Multidimensional scaling procedures using similarity ratings of all the possible pairs of these stores were used for identifying stores that were highly differentiated as places to shop for Christmas. Based upon the results of these tests, Wal-Mart and Hallmark were selected as the stores to be used in the primary study. The results of the multiple discriminant analysis indicated the Hallmark store was more differentiated from the Wal-Mart store (in terms of Euclidean distance) than any of the other stores. Since multidimensional scaling is an 'attribute-free' mapping procedure, detailed analysis of the factors differentiating the two stores was not possible. However, the findings suggested that Hallmark differentiated from Wal-Mart by being a specialty store in a mall versus the free-standing department store, low-price image of Wal-Mart.

Third, the preliminary study was used for generating attributes that could be incorporated into measures of peoples' perceptions of Christmas, promotional positioning themes and stores. Initially, a list of 52 possible descriptors (to be used in a semantic differential scale) was developed based on preliminary exploratory interviews and were contained in a questionnaire that obtained respondents' opinions concerning Christmas as a special occasion. In addition, the respondents rated the following theme on these 52 items: 'Christmas is a religious event that focuses on the birth of Christ and the meaning of his life for Christians'. The responses to these questionnaires were factor analysed in order to identify the primary dimensions represented by the 52 items. Based upon the results of the factor analysis, the items presented in the Appendix were used in the primary study for obtaining multi-attribute ratings of the Christmas concept, alternative themes, stores and the respondents' personalized Christmas concept.

Fourth, the religious-focused Christmas concept was tested in the preliminary study. Based upon the findings, the following Christmas concept was adopted: 'Christmas is a religious celebration that commemorates the coming of the Son of God through the birth of Jesus Christ'.

PRIMARY STUDY

The primary study demonstrated the congruence-differentiation method of promotional positioning theme testing using perceptual mapping and reported on its validity and potential usefulness. Multiple discriminate analysis was the primary method of analysis for examining many of the congruence-differentiation issues in Table 1. In general, multiple discriminant analysis was used for creating attribute-based positioning maps of nine items in perceptual space: the religious Christmas concept, the personalized Christmas concept, two stores and five promotional positioning themes. In addition, multiple discriminant analysis, constant sum scaling

and conjoint measurement were used for examining the convergent and discriminant validity of the maps.

Measurement

A detailed description of the instrumentation is provided in the Appendix. The perceptual items rated on the 15 attributes were the respondents' personalized Christmas concept, the respondents' religious Christmas concept ('Christmas is a religious celebration that commemorates the coming of the Son of God through the birth of Jesus Christ'), five themes (convenience, ideas, faith, treasures and meaning) and two stores (Hallmark and Wal-Mart). These multi-attribute ratings of nine perceptual items were used for creating multiple discriminant maps.

A constant sum scale measured the degree to which the five test themes were congruent with the respondents' personalized Christmas concept. The respondents allocated 100 points across the five themes to indicate the extent to which each of the themes expressed an idea that was congruent with their personalized Christmas concept. The same constant sum scale was used for measuring the following.

1. The degree to which the respondents perceived the two stores to be congruent with their personalized Christmas concept.
2. The relative congruence of the five themes with the religious Christmas concept.
3. The relative congruence of the two stores with the religious Christmas concept.

Conjoint analysis was used for providing additional measures of congruence of (1) the five test themes and two stores with (2) the personalized Christmas and the religious Christmas concepts. In these conjoint analyses the two stores were paired up with each of the five themes thereby creating a 2×5 (ten-stimulus profile) factorial design. These conjoint stimuli were used for obtaining two sets of ratings. First, the respondents were asked to rate the ten store-theme combinations in terms of congruence with their personalized Christmas concept. A point scale of 0–100 was used for these ratings. Second, the same set of stimuli was rated in terms of congruence with the religious Christmas concept.

Sample

The sample design incorporated a convenience sample of 80 university undergraduate students and 20 adult consumers. The total sample was approximately equally split by gender. The use of a sampling frame that consists of a somewhat homogeneous respondent group (such as university students) is appropriate in theory testing where the external validity of the descriptive empirical findings is not important (Calder *et al.*, 1982). In addition, students are familiar with the retail stores examined in this study.

PRIMARY STUDY FINDINGS

The theme–store positioning findings

The primary method of analysis for examining theme congruence–differentiation issues was based upon multiple discriminant analysis. In general, multiple discriminant analysis was used for creating attribute-based positioning maps of nine items in perceptual space: the religious Christmas concept, the personalized Christmas concept, two stores and five promotional themes. Several tests of the validity of the perceptual map are reported.

Discriminant analysis

The results of the discriminant analysis of the respondents' ratings of the religious Christmas concept, personalized Christmas concept, two stores and five themes are presented in Table 2. As indicated in Table 2, three functions were statistically significant. Interpretation of the functions was based upon the rotated discriminant loadings. For a detailed discussion of the interpretation of discriminant loadings and standardized discriminant coefficients see Hair *et al.* (1998) and Churchill and Iacobucci (2002). For the most part, the patterns of the rotated standardized discriminant function coefficients paralleled those of the rotated discriminant loadings. As indicated in Table 2, the characteristics with the strongest positive loadings on the first discriminant function were for expressing religious faith, holy, serious and emotional. In addition, the items casual and informal were strongly negatively correlated with function 1. Based upon these results, the first discriminant axis was labelled formal/serious. The items loading most strongly on the second discriminant function were for expressing religious faith, holy and established. Based upon these items, axis 2 was labelled religious. The items loading strongly on the third discriminant function were fun, exciting and flashy. Based upon these results, the third axis was labelled fun/exciting.

Perceptual map

The multiple discriminant perceptual map is presented in Fig. 1. The positions of the nine items on the map are based upon the item centroid values, which are reported in Table 3. Interpretation of the positions of the nine items indicated that the religious Christmas concept was the most positively positioned item on the first two axes, i.e. the formal/serious dimension and

TABLE 2. Discriminant analysis results: personalized Christmas concept, religious Christmas concept, two stores and five themes – three axes solution

Variables: semantic differential ratings	Rotated discriminant loadings			Rotated standardized coefficients		
	Function 1	Function 2	Function 3	Function 1	Function 2	Function 3
(X ₁) Fun	-0.07	0.03	0.62	-0.17	-0.06	0.51
(X ₂) Complicated	-0.05	-0.27	0.06	0.09	-0.23	0.13
(X ₃) Youthful	-0.08	-0.23	0.39	0.15	-0.28	0.06
(X ₄) Exciting	-0.01	0.07	0.60	-0.02	0.25	0.29
(X ₅) Informal	-0.55	0.12	0.03	0.20	0.06	0.19
(X ₆) For expressing religious faith	0.53	0.63	-0.03	0.11	0.50	-0.08
(X ₇) Casual	-0.57	-0.09	-0.08	-0.34	0.16	-0.03
(X ₈) Holy	0.58	0.59	0.01	0.30	0.13	-0.08
(X ₉) Practical	-0.11	-0.04	-0.28	-0.16	0.03	-0.24
(X ₁₀) Serious	0.57	0.21	-0.18	0.26	-0.26	-0.09
(X ₁₁) Organized	0.36	-0.14	-0.09	0.50	-0.48	0.00
(X ₁₂) Established	-0.04	0.52	-0.06	-0.56	0.71	0.04
(X ₁₃) Convenient	-0.13	-0.32	-0.22	0.07	-0.28	-0.39
(X ₁₄) Emotional	0.43	0.32	0.24	0.26	-0.03	0.08
(X ₁₅) Flashy	-0.07	-0.15	0.61	-0.02	-0.08	0.47

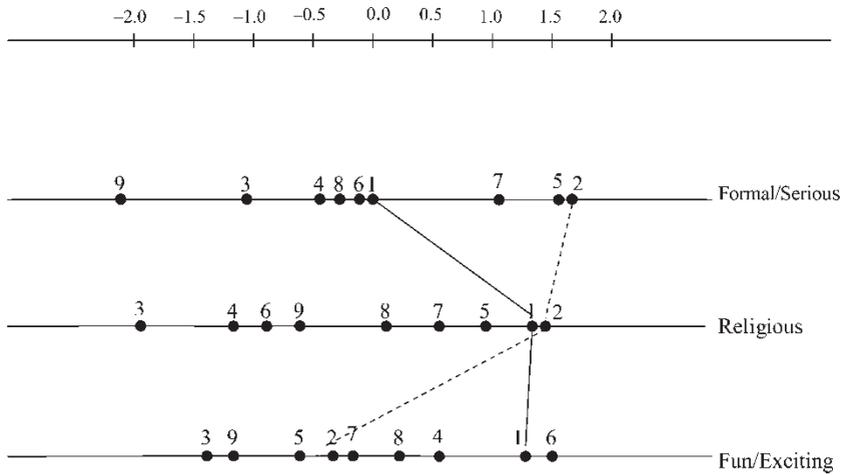


FIGURE 1. Three-dimensional perceptual map based upon multiple discriminant analysis: personalized Christmas concept, religious Christmas concept, two stores and five themes. 1, personalized Christmas concept (solid line); 2, religious Christmas concept (dotted line); 3, ideas theme; 4, convenience theme; 5, ‘we help you express your faith at Christmas’ theme (this theme is closest to the religious Christmas concept and somewhat close to the personalized Christmas concept); 6, treasures theme; 7, ‘we help you share the true meaning of Christmas’ theme (this theme is second closest to the religious Christmas concept and is also close to the personalized Christmas concept); 8, Hallmark (Hallmark is more favourably positioned than Wal-Mart); 9, Wal-Mart. It should be noted that the religious Christmas concept and themes 5 and 7 are more serious and formal than the personalized Christmas concept.

TABLE 3. Item centroids: rotated solutions

Items	Function 1	Function 2	Function 3
(1) Personalized Christmas concept	-0.06	1.29	1.21
(2) Religious Christmas concept	1.65	1.48	-0.36
(3) Theme: ideas	-1.09	-1.87	-1.22
(4) Theme: convenience	-0.40	-1.19	0.48
(5) Theme: faith	1.54	0.93	-0.51
(6) Theme: treasures	-0.27	-0.75	1.33
(7) Theme: meaning	1.00	0.57	-0.01
(8) Store: Hallmark	-0.31	0.14	0.10
(9) Store: Wal-Mart	-2.06	-0.59	-1.03

religious dimension. The religious Christmas concept received considerably lower ratings on the fun/exciting dimension. In contrast, the personalized Christmas concept was positioned considerably lower than the religious Christmas concept on the formal/serious dimension. However, the personalized Christmas concept position was very similar to the religious Christmas concept position on the religious dimension and was positioned much more positively than the religious

Christmas concept on the fun/exciting dimension. These findings suggest that the personalized Christmas concept was somewhat incongruent with the religious Christmas concept, particularly on axes 1 and 3.

Congruence and differentiation implications

In order to examine some of the congruence and differentiation implications of the findings, assume the focus of the study was on the Hallmark store and item 5 (the faith theme) and that the communication objective was to pursue a religious Christmas concept positioning strategy. As noted earlier, the theme testing procedures examined in this study provided congruence and differentiation information that is useful in examining questions concerning marketing communication effectiveness.

Source–Concept congruence

The map illustrated in Fig. 1 indicates the Hallmark store (item 8) was more congruent with the religious Christmas concept (item 2) than the Wal-Mart store (item 9), particularly with respect to the formal/serious and religious dimensions of the perceptual map. That is, the Hallmark store (item 8) was positioned more closely to the religious Christmas concept (item 2) than the Wal-Mart (item 9) store on each of the three perceptual map dimensions.

Concept–Theme congruence

The religious Christmas concept (item 2) was very congruent with the faith theme (item 5) on each of the three perceptual map dimensions. This finding suggests the theme was effective in expressing the religious Christmas concept.

Source–Theme congruence

When compared to Wal-Mart (item 9) Hallmark (item 8) was more strongly linked to the faith theme (item 5) on the formal/serious and religious dimensions of the perceptual map. In addition, Hallmark (item 8) was positioned more closely to the true meaning of Christmas theme (item 7) than Wal-Mart on each of the three perceptual map dimensions. These findings provide support for Hallmark's adoption of a religious focus in its marketing strategy.

Concept–Ideal congruence

The personalized Christmas concept (item 1), which represents the ideal Christmas in this study, was very congruent with the religious Christmas concept on the religious dimension of the discriminant map. It was less congruent with the religious Christmas concept on the other two dimensions. This finding suggests somewhat marginal congruence between the personalized Christmas and religious Christmas concepts.

Source–Ideal congruence

The findings suggest that Hallmark (item 8) was more closely aligned with the personalized Christmas concept (item 1) than Wal-Mart (item 9) on all three of the perceptual map dimensions. These findings therefore provide marginal support for Hallmark's adoption of the faith theme (item 5) as a marketing communication strategy.

Theme–Ideal congruence

The treasures theme (item 6) was closely aligned with the personalized Christmas concept (item 2) on the formal/serious dimension of the perceptual map. The faith theme (item 5) was most closely aligned with the personalized Christmas concept (item 1) on the religious dimension and the treasures theme (item 6) was the most closely aligned theme with the personalized Christmas concept (item 1) on the fun/exciting dimension. In general, no theme was strongly associated with the personalized Christmas concept on all three dimensions. These findings provide only partial support for the adoption of the faith theme (item 5).

Differentiation of the concept from competitive sources and themes

The religious Christmas concept (item 2) was well differentiated from items 3, 4 and 6 on the formal/serious perceptual map dimension. On the religious dimension, the religious Christmas concept (item 2) was well differentiated from items 3, 4 and 6. On the fun/exciting dimension the religious Christmas concept (item 2) was well differentiated from item 6. In addition, the religious Christmas concept (item 2) was more differentiated from the Wal-Mart store (item 9) than it was from the Hallmark store (item 8) on the first two discriminant map dimensions. These findings provide considerable support for Hallmark's adoption of a religious Christmas concept marketing communication strategy.

Differentiation of the source from competitive sources and themes

The findings indicate Hallmark (item 8) was differentiated from Wal-Mart (item 9) on the formal/serious dimension of the perceptual map. It was also well differentiated from Wal-Mart (item 9) on the fun/exciting dimension. The results indicate that there was considerable differentiation between Hallmark (item 8) and items 5 and 7 on the formal/serious dimension, items 3 and 4 on the religious dimension and items 6 and 3 on the fun/exciting dimension. These findings indicate Hallmark had significant market positioning differentiation advantages.

Differentiation of the theme from competitive sources and themes

The findings indicate the faith theme (item 5) was well differentiated from Wal-Mart (item 9) on the formal/serious and religious dimensions of the perceptual map and was somewhat less differentiated from the Wal-Mart (item 9) position on the fun/exciting dimension. In addition, the findings indicate that the faith theme (item 5) was well differentiated from items 3, 4 and 6 on the first two perceptual map dimensions and item 6 on the third perceptual map dimension. These findings indicate the faith theme (item 5) had potential in terms of distinctiveness.

Differentiation of the ideal from competitive sources and themes

The findings indicate that items 3 and 5 were not particularly congruent with the personalized Christmas concept (item 1) on the formal/serious perceptual map dimension, items 3, 4 and 6 were not congruent with the personalized Christmas concept (item 1) on the religious dimension and items 3 and 5 were not congruent with the personalized Christmas concept (item 1) on the fun/exciting perceptual dimension. The findings suggest that, when compared with Hallmark (item 8), Wal-Mart (item 9) was less congruent with the personalized Christmas concept on all three perceptual dimensions. These findings suggest significant potential advantages associated with Hallmark (item 8) over Wal-Mart (item 9).

Differentiation of competitive sources and themes

Wal-Mart (item 9) was not particularly congruent with items 5 and 7 on the formal/serious perceptual map dimension, items 3, 5 and 7 on the religious dimension and items 6 and 4 on the fun/exciting dimension. This suggests that, if any of these themes represented the Wal-Mart (item 9) positioning strategy, the strategy was not particularly successful.

In summary, item 5 (we help you express your faith at Christmas) was more congruent with the religious Christmas concept than the other items. Given the content of this item this result has strong face validity. Item 7 (we help you share the true meaning of Christmas) was positioned second closest to the religious Christmas concept and was also positioned close to the personalized Christmas concept. These findings suggest this item may have represented a way to tie the religious Christmas concept to the personalized Christmas concept. Hallmark was more closely linked to both the personalized Christmas and religious Christmas concepts than Wal-Mart. This finding suggests that Hallmark was more favourably positioned than Wal-Mart as a place for members of this target customer group to shop during the Christmas season. The religious Christmas concept was somewhat more serious and formal than the personalized Christmas concept. This suggests a lack of fit between the two concepts. However, there was strong congruence between the two Christmas concepts on the religious dimension of the perceptual map suggesting the personalized Christmas concept for this market segment had a strong religious content. In addition, the religious Christmas concept was not positioned close to the personalized Christmas concept on the fun/exciting dimension of the perceptual map. In general, these results suggest that the religious Christmas concept may not have represented an optimal positioning strategy for this target market.

Clearly, no theme was a perfect match with the personalized Christmas concept on all three dimensions of the perceptual map. The treasures theme was congruent with the personalized Christmas concept on the formal/serious and fun/exciting map dimensions. The convenience theme was somewhat congruent with the personalized Christmas concept on these dimensions. The faith theme was somewhat congruent with the personalized Christmas concept on the religious and fun/exciting map dimensions. Based on the findings reported in Fig. 1, these themes would be candidates for adoption. However, the meaning theme may have been the strongest theme in that it was positioned somewhat close to both the personalized Christmas and religious Christmas concepts.

Evidence of convergent validity

A comparison of the multiple discriminant analysis findings with the results of two additional measurement procedures, conjoint measurement and constant sum congruence scaling, was used for testing the convergent validity of the multiple discriminant perceptual mapping procedure.

Conjoint analysis

The measures of congruence between (1) the stores and test themes and (2) the two Christmas concepts was provided by conjoint analysis (see Green *et al.* (1988) for a detailed discussion). These congruence measures could be compared with the original multiple discriminant analysis mapping results involving nine items: five themes, two stores and two Christmas concepts. The results of the conjoint analysis are presented in Tables 4 and 5 and in Figs 2 and 3.

As indicated in Tables 4 and 5, the part-worth estimates suggest the Hallmark store was most congruent with both the personalized Christmas concept (Table 4) and the religious Christmas

TABLE 4. Conjoint measurement results: congruence with the personalized Christmas concept

	Part worth	Congruence ranking
Store		
Hallmark	0.73	1
Wal-Mart	-0.73	2
Theme		
Meaning	0.29	2
Convenience	-0.65	4
Treasures	1.16	1
Faith	-1.06	5
Ideas	0.27	3

Constant = 5.5 and Pearson R = 0.84.

TABLE 5. Conjoint measurement results: congruence with the religious Christmas concept

	Part worth	Congruence ranking
Store		
Hallmark	0.80	1
Wal-Mart	-0.80	2
Theme		
Meaning	2.33	2
Convenience	-3.35	5
Treasures	-0.05	3
Faith	2.47	1
Ideas	-1.41	4

Constant = 5.5 and Pearson R = 0.99.

concept (Table 5). These findings are similar to the multiple discriminant analysis results presented in Fig. 1. In addition, as indicated in Table 4, the treasures theme was most congruent with the personalized Christmas concept. The least congruent theme was the faith theme. The ideas and meaning themes had similar part worths and were ranked second and third in terms of congruence with the personalized Christmas concept. The convenience theme was ranked fourth in congruence. These findings indicate considerable convergence with the multiple discriminant analysis findings.

The part-worth functions for the themes' congruence with the religious Christmas concept are presented in Table 5. The two themes that were most congruent with the religious Christmas concept were the faith and meaning themes. These findings are congruent with the multiple discriminant analysis results. The rank order of congruence of the remaining themes was treasures, ideas and convenience. This congruence ranking of the part worths indicates considerable convergent validity with respect to the multiple discriminant analysis findings.

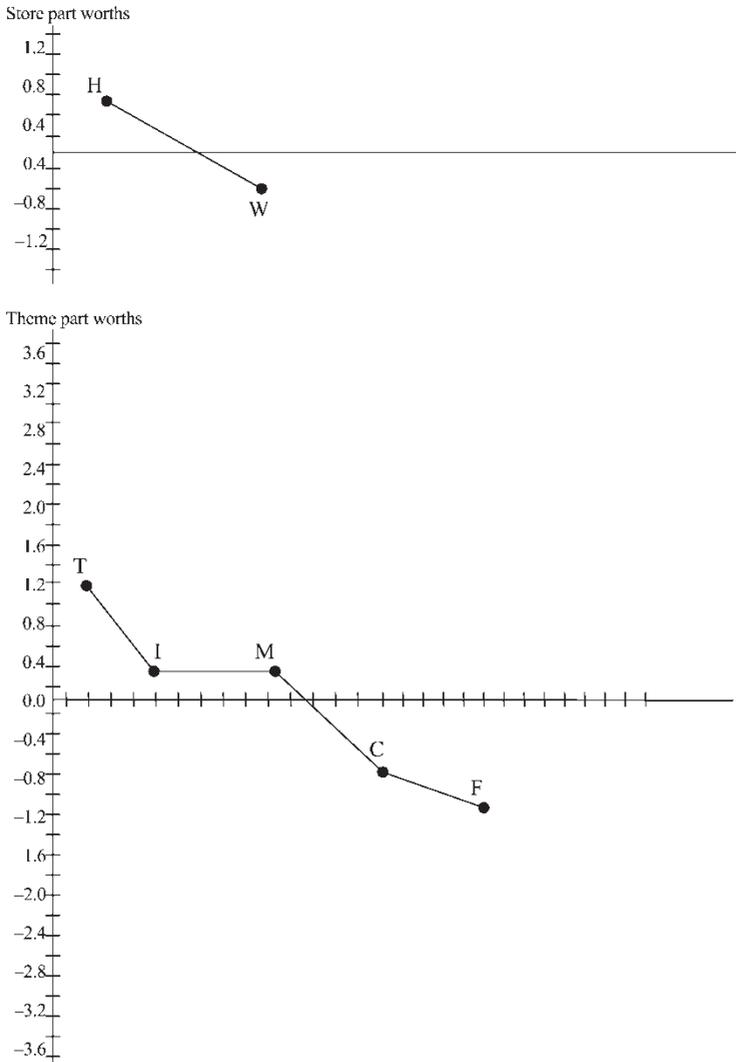


FIGURE 2. Conjoint measurement results. Congruence with the personalized Christmas concept: part-worth graphs. Store part worths: H, Hallmark; W, Wal-Mart. Theme part worths: C, convenience; F, Faith; I, ideas; M, meaning; T, treasures.

Constant sum scaling results

The constant sum scaling of results are presented in Tables 6 and 7. As indicated in Table 6, the analysis of congruence with the personalized Christmas concept indicated a rank order of treasures, meaning, ideas, faith and convenience. On the other hand, the rank order of congruence with the religious Christmas concept was faith, meaning, treasures, ideas and convenience. In addition, as indicated in Table 7, the results indicate that Hallmark, when compared with Wal-Mart, was more congruent with both the personalized Christmas and religious Christmas concepts. These findings indicate considerable convergent validity with respect to the multiple discriminant analysis results illustrated in Fig. 1.

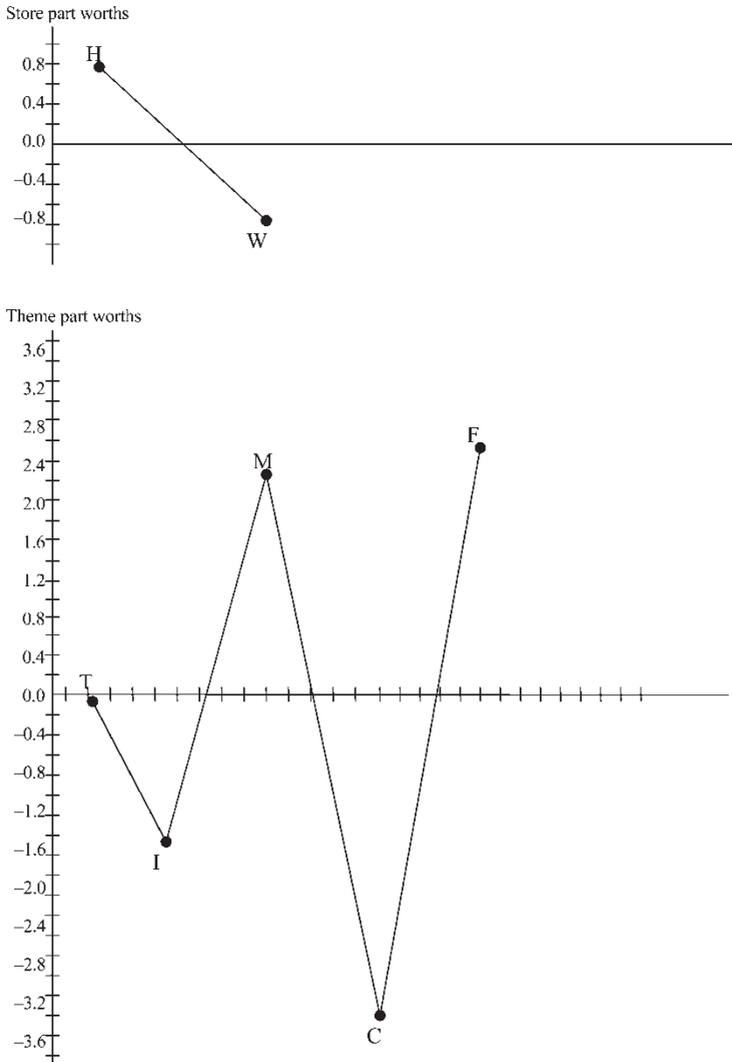


FIGURE 3. Conjoint measurement results. Congruence with the religious Christmas concept: part-worth graphs. Store part worths: H, Hallmark; W, Wal-Mart. Theme part worths: C, convenience; F, Faith; I, ideas; M, meaning; T, treasures.

Euclidean distance analysis

The perceptual map reported in Fig.1 can be used for calculating perceptual distances (see Tables 8 and 9) in three-dimensional space using Euclidean distances. The Euclidean distance between points is a common method of calculating global similarity indexes between items in multidimensional space. Using these procedures, the Euclidean distances between (1) the themes and (2) the personalized Christmas and religious Christmas concepts were calculated. Based upon this analysis a rank order of congruence could be calculated between the five themes and the two Christmas concepts. These congruence rankings could be compared to the congruence rankings based upon the conjoint analysis and constant sum scaling results.

TABLE 6. Constant sum scale measures of theme congruence results

Theme	Mean	Congruence ranking
Congruence with the personalized Christmas concept		
Where Christmas is convenient	14.22	5
We help you express your faith at Christmas	16.98	4
Where you will find Christmas treasures	27.05	1
We are Christmas ideas	18.33	3
We help you share the true meaning of Christmas	23.42	2
Congruence with the religious Christmas concept		
Where Christmas is convenient	2.98	5
We help you express your faith at Christmas	43.32	1
Where you will find Christmas treasures	11.39	3
We are Christmas ideas	6.82	4
We help you share the true meaning of Christmas	35.58	2

TABLE 7. Constant sum scale measures of store congruence results

Store	Mean
Congruence with the personalized Christmas concept	
Wal-Mart	47.31
Hallmark	52.69
Congruence with the religious Christmas concept	
Wal-Mart	24.25
Hallmark	75.75

A summary of the congruence analysis is provided in Tables 8 and 9. As indicated in Table 8, which provides the results in terms of congruence with the personalized Christmas concept, the congruence rankings with respect to the themes across three different methods provide reasonably consistent results. For example, the treasures and meaning themes were the top ranked themes in terms of congruence with the personalized Christmas concept. On the other hand, the faith theme was ranked fourth or fifth across the three alternative methods. There was some variance in terms of the ideas and convenience themes across the three methods.

As indicated in Table 9, which reports the results in terms of congruence with the religious Christmas concept, the rankings were consistent across the three methods. For example, the faith theme was ranked first, the meaning theme was ranked second and the treasures theme was ranked third across all three methods. The ideas and convenience themes were ranked fourth or fifth across all three methods. These findings provide evidence of considerable convergent validity across the three congruence analysis methods.

Evidence of discriminant validity

The findings were quite different concerning the alternative themes' congruence with the personalized Christmas and religious Christmas concepts, which is evidence of discriminant

TABLE 8. Convergent validity tests: congruence with the personalized Christmas concept

Theme	Congruence ranking results				
	Discriminant analysis		Conjoint analysis ^a	Constant sum scale	
	Rating	ED		Ranking	Mean
Ideas	5	4.14	3	3	18.33
Convenience	3	2.61	4	5	14.22
Faith	4	2.38	5	4	16.98
Treasures	2	2.05	1	1	27.05
Meaning	1	1.77	2	2	23.42

ED, Euclidean distance.

^aSee Tables 4 and 5 for the conjoint analyses results.

TABLE 9. Convergent validity tests: congruence with the religious Christmas concept

Theme	Congruence ranking results				
	Discriminant analysis		Conjoint analysis ^a	Constant sum scale	
	Rating	ED		Rating	Mean
Ideas	5	4.41	4	4	6.82
Convenience	4	3.46	5	5	2.89
Faith	1	0.57	1	1	43.32
Treasures	3	3.40	3	3	11.39
Meaning	2	1.17	2	2	35.58

ED, Euclidean distance.

^aSee Tables 4 and 5 for the conjoint analyses results.

validity. For example, when the respondents were rating congruence with the personalized Christmas concept using conjoint measurement or the constant sum scale they provided different ratings than they provided when they were using these methods for rating congruence with the religious Christmas concept. This finding is similar to prior research conducted by Teas and Perr (1989), which indicated that respondents are capable of using these methods (particularly conjoint analysis) for measuring perceptions in addition to preferences.

DISCUSSION AND CONCLUSIONS

One of the more elusive challenges confronting marketers is whether a company’s advertising is able to position a product in consumers’ minds effectively. This paper presents and tests a method for performing this: the congruence–differentiation matrix and its associated perceptual mapping procedures. The method provides several benefits to marketing decision makers by helping them think more effectively about how to create a communications message.

The 15 congruence–differentiation cells in the matrix focus on important issues that form the foundation of effective advertising. The matrix therefore serves to help managers ask important questions about communications development. Is our message, for example, congruent with the kind of company people think we are?

Examples of questions that can be addressed in theme testing include the following.

1. The degree to which the communication achieves the marketer's communication objectives.
2. The degree to which the communication objectives are compatible with the image of the message source.
3. The degree to which the positioning strategy is compatible with the target consumers' preferences.
4. The degree to which the positioning strategy is differentiated from competitor market positions.

The analysis summarized in Fig. 1 addresses each of these questions. First, assuming that the communication objective of the religious Christmas concept (item 2) was to promote a formal, religious message, the results show that the religious Christmas concept (item 5) was the strongest item on these dimensions. Second, the results indicate that, when compared to Wal-Mart (item 9), Hallmark (item 8) was positioned more closely to the religious Christmas concept (item 2). Third, the results indicate the religious Christmas concept (item 2) was congruent with the target market's preferences, i.e. personalized Christmas (item 1), on the religious dimension of the perceptual map described in Fig. 1, but was somewhat incongruent with the consumers' preferences on the formal/serious and fun/exciting dimensions. In general, the religious Christmas concept (item 2) was perceived to be more formal and serious and less fun and exciting than the consumers' personalized Christmas concept (item 1). Fourth, assuming the convenience theme (item 4) was one used by a competitor, the results described in Fig. 1 indicate that it was substantially differentiated from the religious Christmas concept (item 5) on the first two dimensions with somewhat weaker differentiation on the fun/exciting dimension. This might be an attractive strategy if there is a segment of the market that has a personalized Christmas that is more convenience versus formal, serious and religious oriented.

Building on this framework, a marketer can investigate segmentation issues by clustering respondents on their ratings of the ideas theme, in this study, for example, by the respondents' evaluations of the personalized Christmas concept. Few markets are homogenous in consumer wants and desires. More often, consumers segment themselves by the features they seek (and are willing to pay for) in products. For some, the ideal Christmas has a serious religious meaning. For others, it is less religious and more of a fun and exciting time. By using the ideas theme ratings and appropriate cluster analysis techniques, researchers can use the congruence–differentiation matrix for examining a variety of communication objectives *vis-à-vis* target market segments.

Clearly this study had limitations.

1. The heavy reliance on student data.
2. The limited set of stores.
3. The limited theme scenario, i.e. Christmas.

Consequently, there is a need for additional tests of the 'theme' testing framework using samples from non-student populations and other marketing situations. However, the results of this study indicate considerable support for the proposed theme testing procedures. First,

convergent validity tests involving different measurement approaches, i.e. conjoint measurement and constant sum scaling, indicated strong convergent validity. Second, using the procedures for evaluating themes in the context of differentiated perceptual focal points, i.e. a personalized Christmas concept and a religious Christmas concept, resulted in evidence of considerable discriminant validity.

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APPENDIX: MEASUREMENT RATINGS

The following is the full set of measures: (1) fun/not fun, (2) complicated/not complicated, (3) youthful/old, (4) exciting/boring, (5) informal/formal, (6) for expressing religious faith/not for expressing religious faith, (7) casual/not casual, (8) holy/not holy, (9) practical/not practical, (10) serious/not serious, (11) organized/disorganized, (12) established/not established, (13) convenient/inconvenient, (14) flashy/not flashy and (15) emotional/unemotional.

Item 1: personalized Christmas concept

Directions

We would like you to indicate your reactions to Christmas as a special occasion. Please use the scales below to rate how well they describe your feelings towards Christmas. For example, if you feel that Christmas is a very fun occasion for you, you would check the blank furthest to the left next to the phrase fun. The rest of the blanks reflect varying degrees to which you feel the two words at each end of the scale describe your feelings about Christmas.

Christmas is . . .

Fun	_____	_____	_____	_____	_____	_____	_____	Not fun
Complicated	_____	_____	_____	_____	_____	_____	_____	Uncomplicated
			•					
			•					
			•					
Emotional	_____	_____	_____	_____	_____	_____	_____	Unemotional

Item 2: religious Christmas concept

Directions

In the box below is a description of Christmas. We would like you to indicate your reactions to the description by using the scales to rate your reaction to the Christmas description.

<p>Christmas is a religious celebration that commemorates the coming of the Son of God through the birth of Jesus Christ.</p>

The description describes a Christmas that is . . .

Fun	_____	_____	_____	_____	_____	_____	_____	Not fun
Complicated	_____	_____	_____	_____	_____	_____	_____	Uncomplicated
			•					
			•					

Item 3: convenience theme

Directions

The next theme is ‘where Christmas is convenient’. Please use the scales below to indicate your reaction to this theme.

The theme ‘where Christmas is convenient’ reflects a Christmas experience that is . . .

Fun	_____	_____	_____	_____	_____	_____	_____	Not fun
Complicated	_____	_____	_____	_____	_____	_____	_____	Uncomplicated
			•					
			•					

Item 4: ideas theme

Directions

Now we would like you to indicate your reactions to some special theme phrases a store might use for the Christmas season. The first theme phrase is 'we are Christmas ideas'. The following is a list of words that may or may not describe your feelings toward the theme 'we are Christmas ideas'. Please use the scales below to indicate your reaction to this theme.

The theme 'we are Christmas ideas' reflects a Christmas experience that is . . .

Fun	_____	_____	_____	_____	_____	_____	_____	Not fun
Complicated	_____	_____	_____	_____	_____	_____	_____	Uncomplicated

-
-

Item 5: faith theme

Directions

The next theme is 'we help you express your faith at Christmas'. Please use the scales below to indicate your reaction to this theme.

The theme 'we help you express your faith at Christmas' reflects a Christmas experience that is . . .

Fun	_____	_____	_____	_____	_____	_____	_____	Not fun
Complicated	_____	_____	_____	_____	_____	_____	_____	Uncomplicated

-
-

Item 6: treasures theme

Directions

The next theme is 'where you will find Christmas treasures'. Please use the scales below to indicate your reaction to this theme.

The theme 'where you will find Christmas treasures' reflects a Christmas experience that is . . .

Fun	_____	_____	_____	_____	_____	_____	_____	Not fun
Complicated	_____	_____	_____	_____	_____	_____	_____	Uncomplicated

-
-

Item 7: meaning theme

Directions

The next theme is 'we help you share the true meaning of Christmas'. Please use the scales below to indicate your reaction to this theme.

The theme 'we help you share the true meaning of Christmas' reflects a Christmas experience that is . . .

Fun								Not fun
Complicated								Uncomplicated
•								
•								

Item 8: store ratings (Hallmark/Wal-Mart)

Directions

The following questions concern your perceptions of (store name) stores such as the store in the (mall name) mall. More specifically, please think about (store name) stores as places for Christmas shopping. Use the scales below to rate (store name) stores as places for your Christmas shopping.

Christmas shopping at (store name) stores is . . .

Fun								Not fun
Complicated								Uncomplicated
•								
•								