Analysis of Successful Marketing Components of Category Dominant Brands: Strategic Marketing as Easy as A - B - C

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Analysis of Successful Marketing Components of Category Dominant Brands

Strategic Marketing as Easy as A - B - C

By

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Submitted in partial fulfillment of the requirements for the Masters of Arts in Corporate and Public Communication
Seton Hall University

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CHAPTER 1
INTRODUCTION AND OVERVIEW

INTRODUCTION

In the book *Smart Things to Know about Brands and Branding*, acclaimed marketing author John Mariotti defines a *brand* as a “trusted promise of quality, service and value, established over time and proven by the test of repeat use and satisfaction (Mariotti, p. 14).” In essence, it is a product or service whose attributes can be trusted by consumers on a repeat basis. But there are more attributes to a brand than just the product or service manufactured or produced. It is the perception and image, specifically created by marketing strategists, designed to evoke and establish a connection and emotion between the product and its targeted end user. It is not simply displaying a cutting-edge corporate identifier or logo. This perception is created through effective and efficient marketing components including advertising, public relations, product placement, cause-related marketing and celebrity and event sponsorships. (Mariotti, pgs. 14 - 18)

The author’s decision to analyze and compare the effective marketing strategies of the three selected category dominant brands stems from a strong interest in brand marketing practices and the impact those products have on the purchase power of consumers both nationally and internationally. It can be assumed that consumers have an emotional bond with specific products and/or services for a variety of reasons. Those reasons are the motivating factor that encourages repeat purchasing. But how is the bond created? Is it fueled by repetitive advertising, public relations, product placement, celebrity/athlete
sponsorships and cause marketing strategies? Or is it strictly because the products and/or services exemplify the highest quality of value and performance for its price - within its specified category – in the mind of the consumer?

Throughout the course of this study, the author will highlight the successful marketing components that have led to the category dominance of the ARM & HAMMER, BRILLO and COCA-COLA brands. As a result of thorough research, the author will additionally emphasize the commonalities and differentiations between the three, emphasizing which methods have assisted in the establishment of their status as a world renowned brand - securing them as category leaders for years to come.

BRANDING

As the opening paragraph of this study indicated, the branding effort is not tangible. It is considered by many experts to be a feeling or instinct a consumer has when purchasing products and services they trust or are devoted to. In The Brand Gap, author and marketing expert Marty Nuemeier notes that “marketers realize that branding is not about stamping a trademark on anything that moves, rather it is about managing relationships between the company and its constituents (Nuemeier, p. 87).” In a sense, branding is formulating a strategic plan to ensure specific products stand out from the next by utilizing its point of differentiation and key attributes. The key to its success is
finding out which marketing vehicle is the most effective in embedding that perception in the minds of the target audience. The goal of executing effective marketing components is the creation of a charismatic brand, or a brand that consumers feel there is no substitute for. (Nuemeier, pgs. 85 – 87)

As noted in Marconi’s *The Brand Marketing Book*, consumers base their decision of brand loyalty on value, image, convenience and availability, satisfaction, service and guarantee and warranty. It is imperative that brands deliver these messages to potential purchasers to increase brand awareness and increasing sales. (Marconi, pgs. 62 - 64)

The key element in establishing brand loyal consumers is trust. This “trust” is established as a result of consistent positive quality and reliability of the products or services.

Throughout the course of this study, the author will clearly examine the successful marketing components executed by ARM & HAMMER, BRILLO and COCA-COLA brands that have contributed to gaining brand loyal customers in addition to their overall success as category dominant brands. (Neumeier, p. 149)

**RESEARCH QUESTION**

Utilizing a centric focus on three category dominant brands from the corporate business sector, the author will clearly demonstrate the strategic efficacy of the marketing operations of category dominant brands. The three brands being analyzed for this study
are ARM & HAMMER, BRILLO and COCA-COLA – some of the most internationally recognized products in the world.

SUBSIDIARY QUESTIONS

In order to thoroughly understand how marketing practices such as advertising, public relations, product sampling, celebrity endorsements and event sponsorships affect consumers, yielding positive results for the brand, this proactive study will place much emphasis on answering the following questions:

1. What marketing methods are essential in creating category dominant brands?

2. What methods are most effective in producing the best return on investment (ROI)?

3. Which components are the easiest to execute? Which are more difficult?

4. Do marketing practices, such as in store point-of-purchase and online promotions drive/motivate consumers to make brand specific purchases?

5. Does radio, television and print advertising increase overall sales and increase loyalty for the brand?

6. Are public relations practices such as product sampling events and strategically generated media “buzz” beneficial in influencing purchases?

7. Do celebrity endorsements affect customer loyalty to a brand?

8. Are cause-related marketing partnerships effective in influencing which brands consumers purchase?

9. Do sports, concerts, charities and special events sponsorships drive consumers to support brands?

10. Are consumers aware of how these components affect their purchasing?
PURPOSE OF STUDY

Through extensive research and analysis of data acquired from industry journals, marketing texts, consumer feedback, expert interviews, online and industry trade publications, the purpose of this study is to identify the successful marketing components of category dominant brands and explain why and how these methods have contributed to the success of each brand in connecting with brand loyal consumers and prospective purchasers.

As the successful marketing components of the three brands are most commonly tied into the company's corporate branding strategy, it is important for the audience to understand what branding is and why it is important. Through his findings, the author will explain the importance of branding, its overall importance and how advertising, public relations, product sampling, celebrity endorsements and event sponsorship practices contribute to the success of iconic brands.

OBJECTIVES

The author's primary objective of this study is to find commonalities between the marketing components of the selected dominant brands. Once identified, the author will explain the components utilized by ARM & HAMMER, BRILLO and COCA-COLA and why they are deemed effective. Secondly, the author will briefly highlight how these
methods effect the perceptions in the minds of consumers in addition to influencing purchasing decisions.

TERMS

**Brand** – “trusted promise of quality, service and value, established over time and proven by the test of repeat use and satisfaction (Mariotti, p. 14).”

**Brand Loyalty** – the trust/bond established between the brand and the consumer which motivates repeat purchasing on a regular basis.

**Brand Personality** – the idea encompassing who the brand is, what it does, how it is done and where it wants to head in the future. (Schmitt/Simonson p. 72)

**Brand Management** – Is the management of product, service and brand differences as they exist in the minds of the consumer. (Neumeier, p. 2)

**Advertising** - The activity of attracting public attention to a product or business, as by paid announcements in the print, broadcast, or electronic media.

**Public Relations** – The art or science of establishing and promoting a favorable relationship with the public to create goodwill for a person or institution.

**Product Sampling** – used to increases sales, this is the opportunity for consumers to test a product/service to see if it is beneficial to them.

**Celebrity Endorsement** – the paid or unpaid use of a testimonial and/or likeness of a celebrity/athlete supporting a specific product or service.

**Cause Marketing** – when a corporation or brand partners with a non-profit organization benefiting a specific cause (i.e. breast cancer, AIDS etc.).

**FSI** – Free Standing Insert - executed in newspaper and in-store promotions.

**Logotype** – a design-speak for a trademark made from a custom-lettered word. Also referred to as LOGO for short. LOGOS is Greek for “Word.” (Neumeier, p. 1)
Charismatic Brand – any product, service or company for which people believe there is no substitute. These brands are often the dominant position in their categories with market shares of 50% or higher. (Neumeier, p. 19)

Earcon – the auditory counterpart to an icon – i.e. the Intel Inside brand’s memorable “bong” sound bite. (Neumeier, p. 88)

Halo Effect – the transfer of emotion of an event, or person being sponsored, as attributes of the brand (D’Alessandro, p. 71) – i.e. professional athletes like Tiger Woods or concert and other events exemplify this trend.

LIMITATIONS

As a plethora of category dominant brands currently exist in the consumer marketplace, the direct focus of the author’s research and conclusions would have been far too broad and multifaceted to effectively demonstrate. As a result, the author’s decision to analyze the selected brands was based on the strength of their overall identity, name recognition and current demand in conjunction with access and availability to key players and rare data from within the parent companies.

Additionally, limitations exist within the survey results as respondents possess differences in education level, annual household income, gender, geography and professional experience. As the majority of the sample consisted of a high income bracket, results of brand purchasing behaviors may be skewed as finances do not weigh as heavily in the minds of those consumers.
SUMMARY

Thus far, the author has provided essential insight on what brand marketing, or "branding," is - in addition to outlining the purpose of the study, the subsidiary and research questions, overall objectives, familiar terms and study limitations.

In Chapter II, the author will present in detail the overall history of branding in addition to the extensive company/brand histories of ARM & HAMMER, BRILLO and COCA-COLA - three of the most recognized brands in the world. The author will then analyze and explain the commonalities of marketing practices between the brands highlighting the many marketing milestones and successes that have contributed to their category dominance.
CHAPTER II
HISTORY OF ANALYZED BRANDS

INTRODUCTION

ARM & HAMMER, BRILLO and COCA-COLA all have extensive histories dating as far back as the mid to late 1800s. As they share many commonalities, each brand began in a similar fashion - with a vision, mission and the dedication to make a dream become reality. Since inception, each brand has demonstrated marketing mastery in knowing and understanding the needs and wants of its consumers, the continuous production of quality and dependable products/services, the creation of an emotional bond between brand and end user and the maintenance of a dominant presence in the overall marketplace through strategic communication practices. Presently, these three brands, specifically corporate identifiers, are considered as some of the most recognized products in the world. This chapter will further explain the histories behind these giant entities and the communication methods that contributed to their category reign for over a century.

HISTORY OF BRANDING

Dating back centuries, the existence of branding began with artisans and craftsmen who created handmade quality items and emblazoned them with distinct identifiable markings. As hundreds of years passed, the same idea was applied to everything from cattle to individual's most valuable possessions. Before long, manufacturers were using branding as a method of marketing and selling their reputations. (Mariotti, pgs. 14 – 20)
After World War II, marketers developed a formula known as the famous AIDA model of which brands followed. “First, build Awareness for the brand, then create or find Interest in the brand. Next, build a Desire to purchase the brand to fulfill some real or imagined need, and finally incite the consumer to take Action – go out and buy the brand (Mariotti, p. 17).” This proved to be an effective model for a long period of time encouraging brand loyalty amongst consumers. But as all good things come to an end, the development of the 4 P’s: Product, Price, Promotion and Place – which is still highly utilized in today’s market, changed the way marketers communicated their strategies. (Mariotti, pgs. 15 – 17)

HISTORY OF ARM & HAMMER

Church & Dwight Co., Inc., founded in 1846, is one of the nation’s oldest manufacturing companies and the world’s leading producer of sodium bicarbonate, popularly known as baking soda - a natural product which cleans, deodorizes, leavens and buffers. The company’s ARM & HAMMER brand is one of the nation’s most trusted trademarks for a broad range of consumer and specialty products developed from the base of bicarbonate and related technologies. (www.churchedwight.com)

Over one hundred and fifty years ago, two natives of New England took the first step toward establishing an industry that has since become of international importance.
Baking soda, the trade name for bicarbonate of soda, is now found in practically every household throughout the country and is regarded a necessity by millions of Americans. It was first prepared for commercial distribution by Dr. Austin Church and his brother-in-law, John Dwight. (www.churchdwight.com)

Dr. Austin Church, an accomplished medical doctor, abandoned two decades of a lucrative practice in Rochester, New York to pursue the start of a risky business on a process he created through his beloved hobby of chemistry. He moved to New York City where he built the first American factory to produce sodium bicarbonate, or baking soda. Until then, baking soda was commonly known as saleratus, and solely imported from Europe. (www.churchdwight.com)

Dr. Austin’s partner, John Dwight joined his brother-in-law as the marketing and sales expert who, as a result of their partnership, formed the John Dwight & Company. The farmer turned salesman sold the product with such conviction, he won over the confidence of the grocery trade, helping the business thrive. (www.churchdwight.com)

Following the retirement of Dr. Church, his two sons started their own firm, Church & Co., and continued to produce baking soda in their Brooklyn, New York, factory. The doctor’s son, James A. Church, joined his father’s company after leaving his defunct Vulcan Spice Mills. A fan of mythology, he brought with him the historic ARM &
HAMMER logo which depicted Vulcan, the hammer-wielding god of fire, and applied it to the packaging of the baking soda. At the same time, John Dwight & Company continued the manufacturing the product and introduced the Cow Brand Baking Soda in 1876. The brand’s identity featured a visual of a cow, as the product was named after Lady Maud - a prize winning Jersey cow at the Philadelphia Centennial Exposition. Both brands were equally trusted and popular among consumers. After a period of time, consumers requested the package with the ARM & HAMMER symbol on it than all others. As a result, the ARM & HAMMER name became the company’s primary brand. (www.churchedwight.com)

In 1896, the two interests merged their companies to form the Church & Dwight Company and featured both logos in its consumer advertising. Eventually, the ARM& HAMMER logo edged ahead leading to the discontinuation of production of the Cow Brand in the United States in 1960. (www.churchedwight.com)

Today the use of bicarbonate of soda is no longer confined to the kitchen. It is used throughout the house and in every phase of housekeeping and personal hygiene. ARM & HAMMER Baking Soda, which was first prepared in a New England village, now is used the world over. (www.churchedwight.com)
TIMELINE – ARM & HAMMER MARKETING MILESTONES

The following excerpts were taken exactly from a timeline compiled by Church & Dwight Company in celebration of the brand’s marketing milestones. The information can be accessed through the company website at www.churchdwight.com.

“Throughout its 150+ year history, Church & Dwight Co., Inc. has been in the forefront of consumer marketing. From 19th century trading cards and “Books of Valuable Recipes” to 20th-century print advertisements and radio and television commercials, a wide range of communication tools educated the public to the many attributes of Baking Soda. This pictorial record, first published in 1996 to celebrate our 150th Anniversary, chronicles the progression of our consumer product marketing in the United States over the 150 years since our founding (www.churchdwight.com).”

1846 – When the Church & Dwight joint venture was launched in New York City, grocery stores sold flower, sugar and soda from open wooden kegs. To distinguish their soda from pricy imports, the founders pre-wrapped their one-pound packages often bearing the brand names of their customers. The “red labeled” soda package was the first marketing milestone, offering convenience and product purity to homemakers who chose it over the competition.

1860 – The first edition of one million copies of “Valuable Recipes” was published, marketing Church & Dwight’s first entry into direct mail promotions. The database was
compiled from postmaster mailing lists, and later from early telephone books. Over the decades, 137 editions appeared bearing both ARM & HAMMER and Cow Brand logos. The final edition was issued in 1957, ending a run of almost a century.

1867 – James A. Church applied his ARM & HAMMER logo to the new firm’s packages. Meantime, John Dwight & Company continued as a separate business.

1874 – Church & Co. introduces sodium carbonate based ARM & HAMMER washing soda, also known as Sal Soda, for heavier-duty cleaning chores.

1888 – Trading cards were used as an early form of product promotion, and collecting them was a nationwide fad. A century ago, the first ARM & HAMMER series, 2 X 3 inches in size and entitled “Beautiful Birds of America” appeared. In the following five decades, well over 500 different artworks in trading card sets if 15, 30 or 60, including flowers, animals, cow breeds, fish, champion dogs, Mother Goose characters, and birds were published by Church & Dwight, Co. Distribution of the cards ended in 1966.

1896 – After 31 years of operating separate businesses, Church & Co. and John Dwight and Company merged to form Church & Dwight Co., Inc.
1907 – Almost a century ahead of its time, the company instituted the use of recycled paperboard to package its household products.

1927 – The first full page 4 color ads ran in such magazines as Good Housekeeping and McCall’s.

1931 – ARM& HAMMER Baking soda was accepted as a dentifrice by the American Dental Association. The company used the ADA seal in advertising directed to the dental profession as well as consumers.

1940s – Four million leaflets per year were distributed on the subject of oral hygiene alone utilizing direct-mailings.

1955 – The multi-use baking soda wheel was created as an interactive tool to familiarize consumers with the product’s versatility.

1960s/1970s – Print advertising campaigns resumed in major magazines, Sunday supplements, the grocery trade press, dental and medical journals. In 1969, radio commercials were first used in national advertising. Additional use wheels were circulated geared to specific categories of baby care, camping, personal care and easier

1972 – Church & Dwight dramatically grew its baking soda business with a single-use TV commercial themed to refrigerator deodorization.

1979 – 1987 – The Harry and Louise TV series was ARM & HAMMER’s first consistent campaign look that could be identified with baking soda as well as other brands, including the national introduction of ARM & HAMMER carpet deodorizer.

1986 – In celebration of its 100th anniversary on July 4th, 1986, the Statue of Liberty’s inner copper walls were cleaned with sodium bicarbonate which removed 99 years of coal tar without damage to the copper. More than 100 tons of sodium bicarbonate were used in the restoration.

1988 – ARM & HAMMER Dental Car Toothpaste was introduced nationally

HISTORY OF BRILLO

As the BRILLO brand changed corporate ownership multiple times, much detailed information on the history of the brand is unavailable. The following history is based on data directly provided to the author by the Church & Dwight Company.

BRILLO was founded by Mr. Brady, an aluminum pot and pan salesman, along with his brother-in-law Mr. Ludwig, a New York City jeweler. Realizing that his customers needed a way to keep their pots and pans shiny, Mr. Brady took this problem to his brother-in-law, who suggested using soap, jeweler’s rouge, and fine steel wool together as a way to clean aluminum pots and pans. This idea was a success, and soon after, Mr. Brady was selling more of this new product than his pots and pans.

As a result, Mr. Brady and Mr. Ludwig decided to set up a company to sell their product, hiring New York attorney Milton Loeb. After accepting an interest in the business in exchange for legal services, Mr. Loeb became involved in the project and eventually became president of the company for many years.

Patented in 1913, the BRILLO formulation was registered as a trademark. The partnership between the three formed the Brillo Manufacturing Company, headquartered and produced in Brooklyn, New York.
By 1917 the Brillo Manufacturing Company was producing steel wool pads with a cake of soap included, selling six pads to a box. Initially the sale of BRILLO brand steel wool pads was conducted on a house-to-house basis by aluminum wares salesmen, but eventually could be purchased in hardware stores. In 1918, the F. W. Woolworth Company began selling BRILLO brand steel wool pads in nearly 1,000 stores throughout the eastern half of the country, followed by grocery stores in the 1920’s - accounting for most of total BRILLO pad sales.

In the early 1930’s, the company identified a way to put the soap directly into the pads, which increased the demand for BRILLO pads. They were also producing other steel wool products at that time, including floor maintenance products and steel wool balls which were sold under the “Supreme” trademark. Interestingly, during World War II, most of the rolls of steel wool originally to be used for steel wool were instead painted brown and green to create camouflage canopies for Allied guns and tanks, virtually removing BRILLO Steel Wool pads from the grocery shelves.

The demand for consumer products soared after the war. In 1955, the Brillo Manufacturing Company purchased the Williams Company of London, Ohio - a producer of steel wool since 1920. This assisted in an increase in production and additional sourcing of fine steel for its products. The Brillo Manufacturing Company soon became the worlds leading manufacturer of steel wool products.
In 1963, the Purex Corporation, a major producer of household products, purchased the Brillo Manufacturing Company moving its New York-based operation to London, Ohio. The Purex Corporation immediately expanded national television advertising and sponsored several programs including “I Love Lucy.” In 1965, Purex signed comedian Allan Sherman as the first celebrity spokesman for BRILLO Steel Wool Soap Pads, starring in several television commercials with the theme, “BRILLO Soap Pads, the soap pads with muscle.”

In 1964, BRILLO received free publicity from a Pop Art Show done by famous artist Andy Warhol when the artist chose to make oversized replicas of BRILLO Steel Wool Boxes. For a short time, these boxes became an artistic success.

In 1985, The Greyhound Corporation purchased several brands from Purex including in the sale of the BRILLO Brand. The Greyhound Corporation was later renamed Greyhound Dial Corporation in 1990, then The Dial Corporation in 1991. In 1997, Dial sold the brand to Church & Dwight Co., Inc., the makers of ARM & HAMMER products among others.

In 2001, Church & Dwight Co., Inc., introduced BRILLO GRIPPER to address consumers desire not to touch the steel wool pads. The BRILLO GRIPPER is a plastic device designed to be attached to each pad before using, which alleviates damage to
hands and nails when cleaning - the first major change to the BRILLO Steel Wool brand in many years.

In 2003, BRILLO launched a revolutionary new disposable product, BRILLO Scrub 'n Toss®. The scratchless, flexible, reusable cleaning pad designed for multiple surfaces was designed to address the decline in consumer use of steel wool due to both the increased use of non-stick cookware and the decline in home cooking.

Over the years, BRILLO has become a universally recognized brand of steel wool soap pads. According to a 1993 research study, BRILLO has a 95% consumer awareness level and status as a true American icon.

NOTE: The above information is drawn from published materials and from archives passed along by prior operators of the business.
HISTORY OF THE COCA-COLA COMPANY

In May, 1886, John Stith Pemberton, or "Doc" as he was known, first concocted the Coca-Cola formula with a wooden oar and a forty gallon brass kettle in his backyard. A pharmacist in Atlanta, Georgia, Doc was a well known Confederate war hero who enjoyed experimenting with patent medicines. Always possessing the entrepreneurial spirit, Pemberton dreamed of making a fortune as a result of his experiments. As sales of patent medicines were thriving, he was determined to start selling his own. Struggling to find a suitable name for the product, "Coca-Cola" was a suggestion given by John Pemberton's bookkeeper and business partner, Frank Robinson. (Allen, pgs. 18 - 25)

Having excellent penmanship as Pemberton's bookkeeper, it was Robinson who first named the product, after its coca leaf and kola nut ingredients, and scripted "Coca-Cola" into the flowing letters which have become the most recognized and valuable corporate identifiers in the world. (Allen, pgs. 18 - 20)

The soft drink was first sold to the public at Jacob's Pharmacy's soda fountain in Atlanta on May 8, 1886. About nine servings of the soft drink were sold each day. Sales for that first year added up to a total of about $50. The funny thing was that it cost John Pemberton over $70 to produce, yielding losses for the first year of sales. Until 1905, the soft drink, marketed as a tonic, contained extracts of cocaine as well as the caffeine-rich kola nut. (Allen, pgs. 28 - 35)
“By the late 1890s, Coca-Cola was one of America’s most popular fountain drinks. With another Atlanta pharmacist, Asa Griggs Candler, at the helm, the Coca-Cola Company increased syrup sales by over 4,000% between 1890 and 1900. Advertising was an important factor in Pemberton and Candler’s success and by the turn of the century, the drink was sold across the United States and Canada (Bellis, About.com).” According to www.coca-cola.com, Candler gave away coupons for complimentary first tastes of Coca-Cola, and outfitted distributing pharmacists with clocks, urns, calendars and apothecary scales bearing the Coca-Cola brand. People saw Coca-Cola everywhere, and the aggressive promotion worked. By 1895, Candler had built syrup plants in Chicago, Dallas and Los Angeles. “Around the same time, the company began selling syrup to independent bottling companies licensed to sell the drink. Even today, the United States soft drink industry is organized on this principle (Bellis, About.com).”

“Until the 1960s, both small town and big city dwellers enjoyed carbonated beverages at the local soda fountain or ice cream saloon. Often housed in the drug store, the soda fountain counter served as a meeting place for people of all ages. Often combined with lunch counters, the soda fountain declined in popularity as commercial ice cream, bottled soft drinks, and fast food restaurants came to the fore (Bellis, About.com).”
During the 1980s, The Coca-Cola Company experienced much change and innovation to follow pop culture. In 1981, Roberto C. Goizueta became chairman of The Board of Directors and CEO of The Coca-Cola Company. Goizueta, who fled Castro's Cuba in 1961, completely overhauled the company with a strategy he called "intelligent risk taking." Among his bold moves was organizing the numerous U.S. bottling operations into a new public company, Coca-Cola Enterprises, Inc. He also released diet Coke®, the very first extension of the Coca-Cola trademark - within two years, it had become the top low-calorie drink in the world, second in success only to Coca-Cola (www.coca-cola.com).

In 1985, the brand released New Coke, a new taste for Coca-Cola and the first product extension in its formulation in 99 years. According to The History of Coca-Cola found on www.coca-cola.com, consumers loved the new formula in taste test, but in the real world, they had a deep emotional attachment to the original drink. The general public begged and pleaded to get it back. Critics called it the biggest marketing blunder ever. The original formula was returned to the market as Coca-Cola Classic, and the product began to increase its lead over the competition - a lead that continues to this day.

Today, products of the Coca-Cola Company are consumed at the rate of more than one billion drinks per day (Bellis, About.com)."
COCA-COLA FUN FACTS

The following Coca-Cola fun facts were found online at http://www.geocities.com/Heartland/4269/history.html.

- Mexico and Iceland have the highest per capita consumption of Coca-Cola.
- Coca-Cola translated to Chinese means, "To make mouth happy".
- Every second over 7,000 Coca-Cola products are consumed.
- If all the Coca-Cola ever produced were in 6 1/2 oz. bottles and placed end to end they would wrap around the earth more than 11,863 times.
- The tallest Coca-Cola bottling plants are in Hong Kong. The plant in Quarry Bay is 17 floors, and the plant in Shatin is 25 floors.
- The bottling plant at the highest elevation in the world is located in Bolivia, at 12,000 feet.
- The world's longest Coca-Cola truck is in Sweden. It is 79 feet long with a four-axle trailer.
- The Varsity Restaurant in Atlanta, Georgia, has earned the distinction of serving the highest volume of Coca-Cola anywhere. It dispenses nearly 3 million servings of Coca-Cola annually.
- If all the Coca-Cola vending machines in the U.S. were stacked one on top of each other, the pile would be over 450 miles high.

TIMELINE - THE HISTORY OF COCA-COLA BOTTLING

The following is a timeline of the history of Coca-Cola Bottling compiled by the brand. It can be accessed online at www.coca-cola.com.
Coca-Cola originated as a soda fountain beverage in 1886 selling for five cents a glass. Early growth was impressive, but it was only when a strong bottling system developed that Coca-Cola became the world-famous brand it is today.

1894 ... A modest start for a bold idea

In a candy store in Vicksburg, Mississippi, brisk sales of the new fountain beverage called Coca-Cola impressed store owner, Joseph A. Biedenharn, he began bottling Coca-Cola to sell, using a common glass bottle called a Hutchinson. Biedenharn sent a case to Asa Griggs Candler, who owned the Company. Candler thanked him but took no action. One of his nephews already had urged that Coca-Cola be bottled, but Candler focused on fountain sales.

1899 ... The first bottling agreement

Two young attorneys from Chattanooga, Tennessee believed they could build a business around bottling Coca-Cola. In a meeting with Candler, Benjamin F. Thomas and Joseph B. Whitehead obtained exclusive rights to bottle Coca-Cola across most of the United States -- for the sum of one dollar.

1900-1909 ... Rapid growth

The bottling pioneers divided the country into territories and sold the rights to local entrepreneurs. Their efforts were boosted by major progress in bottling technology,
which improved efficiency and product quality. By 1909, nearly 400 Coca-Cola bottling plants were operating, most of them family-owned businesses. Some were open only during hot-weather months when demand was high.

1916 ... Birth of the Contour Bottle

Bottlers worried that Coca-Cola’s straight-sided bottle was easily confused with imitators. A group representing the Company and bottlers asked glass manufacturers to offer ideas for a distinctive bottle. A design from the Root Glass Company of Terre Haute, Indiana won enthusiastic approval. The Contour Bottle became one of the few packages ever granted trademark status by the U.S. Patent Office. Today, it’s one of the most recognized icons in the world - even in the dark!

1920s ... Bottling overtakes fountain sales

As the 1920s dawned; more than 1,000 Coca-Cola bottlers were operating in the U.S. Their ideas and zeal fueled steady growth. Six-bottle cartons were a huge hit starting in 1923. A few years later, open-top metal coolers became the forerunners of automated vending machines. By the end of the 1920s, bottle sales of Coca-Cola exceeded fountain sales.

1920s and ’30s ... International expansion

Led by Robert W. Woodruff, chief executive officer and chairman of the Board, the
Company began a major push to establish bottling operations outside the U.S. Plants were opened in France, Guatemala, Honduras, Mexico, Belgium, Italy and South Africa. By the time World War II began, Coca-Cola was being bottled in 44 countries.

1940s ... Post-war growth

During the war, 64 bottling plants were set up around the world to supply the troops. This followed an urgent request for bottling equipment and materials from General Eisenhower's base in North Africa. Many of these war-time plants were later converted to civilian use, permanently enlarging the bottling system and accelerating the growth of the Company's worldwide business.

1950s ... Packaging innovations

For the first time, consumers had choices of Coca-Cola package size and type—the traditional 6.5 ounce Contour Bottle, or larger servings including 10, 12 and 26-ounce versions. Cans were also introduced, becoming generally available in 1960.

1960s ... New brands introduced

Sprite®, Fanta®, Fresca® and TAB® joined brand Coca-Cola in the 1960s. Mr. Pibb® and Mello Yello® were added in the 1970s. The 1980s brought diet Coke® and Cherry Coke®, followed by POWERade® and Fruitopia® in the 1990s. Today scores of other brands are offered to meet consumer preferences in local markets around the world.
1970s and '80s ... Consolidation to serve customers

As technology led to a global economy, retail customers of The Coca-Cola Company merged and evolved into international mega-chains. Such customers required a new approach. In response, many small and medium-size bottlers consolidated to better serve giant international customers. The Company encouraged and invested in a number of bottler consolidations to assure that its largest bottling partners would have capacity to lead the system in working with global retailers.

1990s ... New and growing markets

Political and economic changes opened vast markets that were closed or underdeveloped for decades. After the fall of the Berlin Wall, the Company invested heavily to build plants in Eastern Europe. As the century closed, more than $1.5 billion was committed to new bottling facilities in Africa.

21st Century ... Think local, act local

The Coca-Cola bottling system grew up with roots deeply planted in local communities. This heritage serves the Company well today as consumers seek brands that honor local identity and the distinctiveness of local markets. As was true a century ago, strong locally based relationships between Coca-Cola bottlers, customers and communities are the foundation on which the entire business grows.
COMMONALITIES AS BRANDS

The brands selected by the author for this study have more in common than dominance in their respective product category sales, market share and overall corporate presence. They are internationally recognized brands that share a common mission, vision and corporate responsibility to their shareholders and consumers that serves as the foundation of their organization, thus allowing its business operations to perform in an ethically, profitable and productive manner.

According to the Church & Dwight Company website, parent company of the ARM & HAMMER and BRILLO brands, the key elements, skills and behaviors that contribute to its overall success can be executed through the five (5) E’s:

1. **Energising** – High energy and passion; able to energize group/team to achieve stretch objectives.

2. **Entrepreneurial** – Visionary and courageous; bold, intelligent risk-taking.

3. **Edge** – Makes tough calls but is right most of the time. Effective in direction setting.

4. **Execution** – Delivers commitments and results consistently on time and with quality.

5. **Enable** – Improves the performance of others through coaching/mentoring; removes barriers, provides the right resources.
In addition to the 5 E’s, the company additionally observes the matrix of analytical thinking, creativity and innovation, external focus, collaboration and teamwork, communication and functional mastery when executing all aspects of its business.

(www.churchdwight.com)

According to its website and resulting from the author’s conversation with brand managers, Coca-Cola operates within a similar set of guidelines. “The Coca-Cola Company exists to benefit and refresh everyone it touches. The basic proposition of our business is simple, solid and timeless. When we bring refreshment, value, joy and fun to our stakeholders, then we successfully nurture and protect our brands, particularly Coca-Cola. That is the key to fulfilling our ultimate obligation to provide consistently attractive returns to the owners of our business (www.coca-cola.com).”

The author believes these three organizations will continue to succeed as dominant brands for the next century as they operate in observance of the P.A.C.T. factors -- Pride, Accountability, Commitment and Trust. While operating utilizing these factors, the company continues to demonstrate its Pride in the product/service it supplies, Accountability for the actions of the entire company, Commitment to its customers while strengthening the Trust formed between the company and consumer. The relationship consumers have with the product/service company will consistently remain strong as it is understood that the corporation is not looking to increase sales for a short-term increase in profits, rather to form a mutually beneficial bond between the two.
EMOTIONAL MARKETING

The use of human emotions in marketing is the driving force behind branding as a whole. Marketers place enormous emphasis on conducting research to discover the types of emotions elicited as a result of using a product and/or service. Additionally, these professionals strategically communicate the types of feelings the end user will experience as a result of using the products and/or services through methods including advertising, public relations, cause marketing and celebrity and athlete endorsements.

Marc Gobé, author of Citizen Brand, believes that consumers are not only emotional with the products, but with the qualities the brand stands for overall. He writes, “most emotional brands seem to share the three following traits:

1. A great corporate culture focused above all on people, both in the office and in the public community
2. A communication style and philosophy that stands out from the crowd, where the look of the products and the feel of the advertising are consistent
3. An emotional hook that draws us to their promise, or, in other words, a value proposition that reinforces a brand commitment to their audience (Gobé, p. xvi-xvii)”

This emotional bond that is created between the brand and the consumer is the foundation to establishing a building and maintaining a strong brand identity.
The interviews conducted by the author uncovered the emotional marketing opinions of Senior Brand Managers at ARM & HAMMER, BRILLO and COCA-COLA. All three managers agreed that emotional marketing is imperative in their marketing strategies and the contributing factor to the overall success of the brand.

Mr. Patrick Cox, Senior Brand Manager for the ARM & HAMMER brand notes that “while Arm & Hammer possesses the dominant share of Baking Soda market, we ultimately compete with other categories for the product’s many uses – specifically laundry additive, cleaner, etc. Our consumer’s emotional connection to the brand has been historically one of the critical success factors for the brand.”

Mr. Dion Ross, Senior Brand Manager for the BRILLO brand remarks that emotional marketing “is crucial for both Brillo Steel Wool and Brillo Scrub’n’Toss. Emotional marketing is important because both products are competing in household cleaning categories. As consumers today dread household cleaning, in some cases it is perceived as a necessary evil. Therefore, any products that will make the chore easier or faster for them, conveys the perception it will give them more quality time to spend with family and friends.”

Betsy Armentrout, Senior brand Manager for COCA-COLA notes that emotional marketing “The market is consistently pressuring brands and products to a commodity
status. The responsibility of brand managers is to continually drive the brand value with consumers and stakeholders. Coca-Cola classic had driven value through a variety of means – emotional and experiential marketing being a key lever. Advertising such as the legendary "Mean Joe Green" and "Hilltop" TV spots maintain that status for the emotional pull on the consumer heartstrings. Loyalty is built when consumers participate with the brand. Think about your favorite brands. You probably are not loyal to them due to a two week sale price a couple of years ago. My guess is that you probably cannot remember the sale price from yesterday, but I bet you would remember participating in the Olympic Torch Relay as a torch bearer in St. Louis this coming summer. And I bet your friends will remember your participation and the brand that gave you that amazing experience. As a result, I bet you will forever love Coke.”

As a result, category dominant brands heavily rely on the use of emotional marketing when communicating to the public through advertising, public relations, cause-related marketing and celebrity and athlete sponsorships.

COMMONALITIES: ADVERTISING, PUBLIC RELATIONS, CAUSE-RELATED AND CELEBRITY/ATHLETE SPONSORSHIPS AND EVENTS

There is a famous Biblical reference noting it takes a village to raise a child. Much of the same can be applied to building a prosperous category dominant brand. Author Marty Neumeier notes that “branding requires not only the work of executives and marketing
people who manage the brand, but an ever-changing roster of strategy consultants, design firms, advertising agencies, research companies, PR firms, industrial designers, environmental designers and so on — creating an entire branding community (Neumeier, p. 51).” It is imperative to strategically cater the overall plan to utilize portions of those professional effectively as to craft a clear and concise perception to deliver to consumers.

The most powerful influencer of a product or service is a direct result of experience. This is when the individual encompasses the “brand experience.” The emotional bond between brand and consumer has consistently played a major part in the marketing efforts of Coca-Cola. According to www.coca-cola.com, “the history of Coca-Cola is a story of special moments - times with family and friends and special occasions when Coke was naturally there. Every person who drinks a Coca-Cola enjoys a moment of refreshment - and shares in an experience that millions of others have savored. And all of those individual experiences combined have created a worldwide phenomenon - a truly global brand that plays its own small part on the world stage.”

ADVERTISING

"Advertising did not invent the products or services which called forth jobs, nor inspire the pioneering courage that built factories and machinery to produce them. What advertising did was to stimulate ambition and desire - the craving to process, which is the strongest incentive to produce. To satisfy this
craving the factory was impelled to turn itself into a growing factory; and then, by the pressure of mass demand, into many factories. Mass production made possible mass economies, reflected in declining prices, until the product that began as the luxury of the rich became the possession of every family that was willing to work.*

Bruce Barton, chairman of BBDO advertising, 1964.

Advertising is the most common and effective form of communicating a specific message to the target consumer. According to the website http://www.brandaware.co.uk,

“Advertising can rent space in the mind. All advertising is designed to elicit a response - that response will only be positive if the individual believes the brand message.” In the book *The 22 Immutable Laws of Branding*, the author notes that “advertising is a powerful tool, not to build leadership a fledgling brand, but to maintain that leadership once it has been obtained. Companies that want to protect their well-established brands should not hesitate to use massive advertising programs to smother the competition (Ries, p. 21).”

As each brand utilizes the effective tool of advertising, it is executed in different fashions. The ARM & HAMMER and BRILLO brands execute print, trade, direct-mail, national free standing insert (FSI) and coupon advertising. These tools generate the best response for these brands and are the most commonly represented within their respective product categories.
Currently ranked #1 in its category, the COCA-COLA brand requires a more multidimensional advertising strategy than ARM & HAMMER and BRILLO due to the superior frequency of the consumer’s product usage. In addition to national FSI’s, COCA-COLA utilizes television, radio, cinema, print, outdoor and online advertising methods to deliver its message of refreshment – encompassing all possible advertising vehicles. As mentioned in The 22 Immutable Laws of Branding, COCA-COLA’s historic use of all advertising vehicles has contributed to the maintenance of the brands category leadership since it was first obtained in the late 1800’s.

The overall use of advertising is the most beneficial ways for brands to saturate the media with a controlled, strategically created message placing emphasis on product attributes and values of the brand. This consistent presence message

PUBLIC RELATIONS

The primary function of public relations practices are to make/keep the public aware of the existence of the firm and maintain the good name and image of the brand by issuing press releases, organizing news conferences and informing the public about the firm’s overall activities. Maintain goodwill amongst the public for the company as it is acceptable to assume the customer will support the product and eventually become a charismatic brand to the consumer. (www.business2000.ie/cases/cases/case6.htm)
According to the author’s expert interviews conducted with the Senior Brand Managers, ARM & HAMMER, BRILLO and COCA-COLA all utilize public relations techniques. To brand strategists, public relations is the driving force behind any successful branding effort as the buzz generated and print, radio and television inclusions keeps the overall image of the brand in the spotlight. In most cases, and in the cases of ARM & HAMMER, BRILLO and COCA-COLA, public relations methods are the primary communications utilized while being supported through various advertising efforts including print, radio, television, outdoor and online vehicles. As public relations is not a paid placement within the media, it is imperative that practitioners design and implement campaigns to deliver a specific message to the public leaving little to no wiggle room for the chance for writers/broadcasters to disrupt the key communication. Being an practitioner in the field, the author additionally understands the efficiency of reaching as many consumers as possible on a tight budget. The return on investment of a successful campaign will cost just under $5.00 per thousand consumers reached.

A final extension to public relations strategies is the use of product sampling. This method is and has been utilized by ARM& HAMMER, BRILLO and COCA-COLA since the beginning of the brand. COCA-COLA relied on free sampling vouchers to expand its consumer base since the late 1800’s. Still in effect today, ARM & HAMMER and BRILLO presently utilize the most recent form of sampling – FSI’s accompanied by
coupons in Sunday newspapers nationwide. These product sampling techniques are an effective way to increase brand loyalists and new product users as it gives the consumer a chance to see if the product and/or service meets and exceeds the needs or wants of the purchaser.

**CAUSE-RELATED MARKETING**

One of the most common techniques utilized by brands is cause-related marketing campaigns. This method is created when a for-profit company partners with a not-for-profit where each side benefits through its union. Normally created to increase publicity and drive sales, this technique heavily relies on emotional marketing to assist in its success.

According to [www.causerelatedmarketingforum.com](http://www.causerelatedmarketingforum.com), the following tactics are most commonly utilized by corporate sponsors and/or brands when looking to establish a cause-related marketing campaign. “Tactically, cause marketing programs fall into three general categories:

1. **Transactional**: Programs that elicit participation with an offer to make a contribution to a designated cause based on consumer activity such as buying a specific product, redeeming a coupon, registering at a website or shopping at a particular retail chain.
2. **Message Promotion**: Joint campaigns that raise awareness of a cause’s message (e.g. fight skin cancer) or participation in its programs (e.g. join us in a coastal cleanup) while building a positive association with the corporate sponsor or its brands.

3. **Licensing**: Independent Sector defines cause marketing licensing as “An agreement in which the nonprofit allows its information or knowledge to be used for a fee or an agreement in which a nonprofit's name is attached to a product. Typically, a nonprofit licenses a company to develop, produce, market and/or distribute a mission-related product that is promoted either with the organization’s brand name or co-branded with both the company’s and nonprofit’s names (www.causerelatedmarketingforum.com).”

Coca-Cola supports and partners with cause-related groups including the Special Olympics, Boys & Girls Clubs of America, Children’s Miracle Network and the Tiger Woods Foundation. Through these partnerships, both Coca-Cola and partners have benefited, but more importantly they have given individuals around the world a chance to obtain reach their potential and shoot for the stars.

Although the ARM& HAMMER and BRILLO brands have not partnered with a non-profit in recent years, they still offer much guidance and advice to benefit the health of consumers. BRILLO launched a campaign in 2003 alerting consumers to the dangers of bacteria that festers within kitchen scrubber sponges and how to reduce of prevent the
resulting health affects. ARM & HAMMER promotes similar tips to its consumers through its long line of household deodorizing products.

**CELEBRITY ENDORSEMENTS & EVENT SPONSORSHIPS**

The final marketing component commonly utilized by varieties of different category dominant brands is the use of celebrity and athlete endorsements and event sponsorships. Marketers refer to this tactic as utilizing the "halo effect to transfer the emotion of an event, or person being sponsored, as attributes of the brand (D’Alessandro, p. 71)." This practice is often utilized by brands leveraging beverages, supplements and sports or pop culture mainstream related items and apparel. For instance, one of the most recognized athletes of the 1990’s was Michael Jordan – synonymous with Gatorade. Today, some of the most recognizable celebrities, events, concerts and sports teams are all tied in with endorsements and event sponsorships.

For example, COCA-COLA is currently a proud sponsor of the Olympics (since 1928), FIFA World Cup Soccer and NASCAR racing. As COCA-COLA effectively utilizes these sponsorship opportunities, they will continue to grasp the stronghold on its market share as the audiences that participate are made up of tons of consumers being exposed to the heavy branding that is always present at sponsorship events.
SUMMARY

In Chapter II, the author explained in great detail the histories of the ARM & HAMMER, BRILLO and COCA-COLA brands. Highlighting each founder's mission, vision and innovation to create products that consumers will enjoy, the author discussed the components used by brand marketers from inception to today. The use of emotional marketing is a necessity in today's marketplace as it is essential to connecting with the consumer and the creation of a bond that will eventually lead to brand loyalty.

As there are many tools that can be executed to communicate with consumers, the author discusses the most commonly and effectively executed components to reaching its audience as noted through the author's research and multiple discussions with brand managers. Advertising, public relations, cause-related marketing and celebrity and event sponsorships strategies are the most effective and efficient ways to generate buzz, talk ability and overall brand image.

In the next chapter, the author will present information on the design of the consumer survey conducted to establish the effects marketing components have on the purchasing decisions of consumers. The survey will be broken down by questions and rational will follow as to why the author included each line of questioning.
Following the breakdown of the survey, the author has included detailed transcripts from conversations with Patrick Cox, Senior Brand Manager of Arm & Hammer; Dion Ross, Senior Brand Manager of Brillo; and Betsey Armentrout, Senior Brand Manager of Coca-Cola. The brand managers explain what marketing components are most effective and what branding and consumer loyalty means to them.
CHAPTER III
SURVEY DESIGN AND EXPERT INTERVIEWS

INTRODUCTION
In effort to further obtain accurate information relating to the attitudes that motivate consumer purchasing behaviors, the author created and executed a survey to a sample of 100 respondents from various age groups, annual household incomes, education levels and marital and child status. The questions were designed and formatted by the author and disseminated via an online polling website, www.zoomerang.com, in effort to obtain additional knowledge on the affect marketing practices have on the purchasing decisions of consumers.

PURPOSE OF SURVEY
The purpose of administering the survey is to discover what motivates consumers to purchase products and/or services from specific brands as well as to decipher if the brand marketing components utilized by dominant brands influence consumers resulting in the purchasing process. Additionally, it was executed to discover how consumers view their involvement in the purchasing process. As a result, this information will assist the author in supporting information pertaining to the identification of successful marketing techniques utilized by category dominant brands.
SURVEY DESCRIPTION

In effort to effectively obtain qualitative information for this study, the author composed ten statements to be analyzed using the Likert Scale rating system. Participants were to select the answers that most appropriately suited their perceptions by choosing from five possible answers in Likert scale format — structured as strongly agree, agree, neutral, disagree and strongly agree.

Following responses to the ten statements, respondents were then asked to complete optional information disclosing their demographic including: gender, age, education level, profession, annual household income and status of children. The depth of this information will further assist the author in obtaining a better understanding of how the marketing practices of category dominant brands influence consumer loyalty and purchase power.

SURVEY SAMPLE

The survey was administered online to a well rounded sample of individuals possessing diverse backgrounds, brand experiences and financial, ethnic and professional differences. The author reached his goal by receiving responses from 100 individuals. The information gathered assisted the author in supporting his claim that advertising, public relations, cause-related marketing, event and celebrity sponsorships and product placement serve as practical and effective means of positively influencing the perceptions of the general public.
ANALYSIS OF SURVEY QUESTIONS

The survey questions were designed specifically to uncover which marketing practices, if any, motivate consumers to purchase specific brands. The following section contains the questions administered in the survey in addition to a description on what information the author was looking to obtain as a result.

I generally consider myself a "brand loyal" consumer.

As one of the main objectives of the survey is to generate consumer feedback on how the design and execution of brand marketing components affects the general perceptions in the minds of consumers, the author included this question as a means to verify that the consumer is aware of their purchasing behaviors in addition to quantify and qualify the amount of respondents as "brand loyal" consumers. The results of this question will support or discredit the effects brand marketing has on consumers.

My purchase behavior is mostly motivated by the price of a product.

The author deemed it necessary to include this line of questioning to discover how great of a role price plays in consumer purchasing. As the results yielded, and as one can assume, price plays a very important role in purchasing for many consumers. To offset this factor, brand marketers work extra hard to create the "must have" and "high value" perception—in effort to evoke a sense of urgency, thus making the product a necessity for consumers of all income brackets.
Marketing practices, such as in store point of purchase and online promotions drive/motivate me to make brand specific purchases.

As many brands utilize these “impulse purchase” tactics, the author was looking to gain a better understanding of how consumers view this method, in addition to its positive and/or negative impact it has on perceptions and product sales. Most of the time, these techniques do not increase repeat purchases, but rather work as a short-term sales boost as consumers are drawn in by a one-time incentive or gimmick.

Radio, television and print advertising increase my loyalty to a specific brand.

By requesting feedback on the effects of radio, television and print advertising, the author was looking to discover the strength of this communication in the minds of consumers against those of public relations, endorsements and cause-related marketing efforts. As advertising is a paid form of communication, allowing the brand the opportunity to deliver its message without any interruptions, it is important for the author to understand how it reinforces and promotes consumer loyalty.

Public relations practices such as product sampling events and strategically generated media “buzz” influence my purchase.

As the public relations effort is responsible for much of the strategic buzz around a product or event, the author was looking to establish how it affects consumers versus
advertising. This chatter that is generated is, in the author’s opinion, the most effective way to drive sales, encourage product sampling and build/strengthen the branding effort as positive recommendations from friends, family and co-workers (people we trust) will most likely result in the trial of a product or service. It was also necessary to include this question to ensure that consumers are aware of the differences between public relations and advertising strategies.

**Celebrity endorsements affect my loyalty to a brand.**

It was important for the author to include this question as many consumers are motivated to purchasing products as a result of ties to role models including sports figures, television and movie stars. As these tactics are most successful with younger demographics, the author deemed this information necessary as it applies to the Coca-Cola brand being analyzed.

**Cause-related marketing partnerships influence which brands I purchase.**

The author felt it necessary to include this line of questioning as many products companies donate time and money to various causes in effort to give back to the community and as a way to generate media coverage - increasing sales by tugging at the heart strings of consumers. To support his claim, it is important for the author to understand the affects this technique has on consumers.
Sports, concerts, charities and special events sponsorships drive me to support brands I am loyal to.

As brands sponsorships are everywhere in pop culture, the author was looking to understand how, if any, sponsorships of events people enjoy attending drive increase in loyalty and sales. As the results were not enough to prove this assumption, the author believe that the branding assault encountered is comparable to that of television, print, radio and online advertising.

EXPERT INTERVIEWS

The following information is the direct result of expert interviews conducted with brand managers from ARM & HAMMER, BRILLO and COCA-COLA brands being examined. As mentioned in the book, The Brand Gap, “brand managers are building brand departments, which are populated by brand strategists, who are armed with brand research (Neumeier, p. 14).” Their roles are essential in the direction of the marketing efforts as they thoroughly evaluate consumer and market feedback and oversee and balance strategy, creativity and overall campaign execution. The open-ended nature of the questioning will provide qualitative perspectives, to augment the quantitative data from the author’s survey data.
Mr. Patrick Cox, Senior Brand Manager of Arm & Hammer

The following is a transcript of an expert interview briefly conducted by the author with Mr. Patrick Cox, Church & Dwight Company, Inc.’s Senior Brand Manager for the Arm & Hammer’s brand.

**BML:** Please Arm & Hammer’s target demographic.

**PC:** Arm & Hammer’s target demographic is primarily women age 25-54 with a pinpoint focus on female consumers 25-35 years old.

**BML:** Where does the brand currently rank within its category and market share? What percentage of brand consumers are brand loyal customers?

**PC:** The Arm & Hammer brand is ranked #1 in its category with and 80% market share. The majority of our consumers are loyal to Arm & Hammer.

**BML:** Of the many marketing tools at the disposal of the brand, such as advertising, public relations, product sampling and celebrity sponsorships/endorsements, which are most commonly executed by Arm & Hammer and which methods produce the most effective return on investment?
PC: To increase consumer visibility, we see the most effective execution as a result of advertising, public relations, FSI's, direct mail pieces and trade promotion. The most effective return on investment is achieved through specially designed public relations campaigns followed by print advertising.

BML: Do you feel the use of emotional marketing is important to the success of the brand and its products?

PC: Absolutely, while Arm & Hammer possesses the dominant share of Baking Soda market, we ultimately compete with other categories for the product’s many uses – specifically laundry additive, cleaner, etc. Our consumer’s emotional connection to the brand has been historically one of the critical success factors for the brand.

BML: In your opinion, what is the most effective way to transform consumers into brand loyal customers?

PC: The best way to transform consumers into brand loyalists is through a deep understanding of their needs & wants - with respect to product development, messaging, offers, etc. The brands that tailor its marketing plan based upon an accurate consumer research wins.
Mr. Dion Ross, Senior Brand Manager of Brillo

The following is a transcript of an expert interview briefly conducted by the author with Mr. Dion Ross, Church & Dwight Company, Inc.'s Senior Brand Manager of the Brillo brand.

**BML:** Please briefly describe Brillo Steel Wool and new Brillo Scrub'n'Toss' target demographic.

**DR:** Brillo Steel Wool's target demographic is primarily women age 25-54 with a pinpoint focus on female consumers 35-49 years old with 4 or more household members.

Brillo Scrub'n'Toss' primary target demographic is women 25-54 with a pinpoint focus on female consumers 35-49 and scrubber sponge users with 4 or more household members.

**BML:** Where does Brillo currently rank within its category? Market share? What percentage of Brillo consumers are brand loyal customers?

**DR:** Brillo Steel Wool has a 42% share of market. 51% of Brillo Buyers are loyal consumers.
Brillo Scrub’n’Toss is the first Brillo line extension in over 25 years. As a new product, it holds an approximate 3% market share with overall consumer loyalty yet to be determined.

**BML**: Please explain the marketing tools (i.e. advertising, PR, sampling, sponsorships etc.) most commonly executed by the brand and which ones produce the best return on investment?

**DR**: Brillo Steel Wool most commonly executes FSI's, trade promotion, in-store Point Of Purchase including Shelf Talkers and/or Floor Graphics, Bonus/Special Packs, Floor stand Displays. Additionally, public relations are utilized.

Brillo Steel Wool finds national FSI's as the most effective and efficient.

Brillo Scrub’n’Toss most commonly executes advertising, FSI’s, in-store demonstrations, product sampling events, Direct-Mail Sampling, trade promotion, in-store Point of Purchase tactics including Shelf Talkers and/or floor graphics, On-Pack Sampling with other complimentary Church & Dwight Products, floor stand displays and public relations.
Brillo Scrub’n’Toss finds On-Pack Sampling with other Church & Dwight products and public relations are most effective and efficient.

**BML:** Do you feel the use of emotional marketing is important to the success of the brand and its products?

**DR:** Yes, it is crucial for both Brillo Steel Wool and Brillo Scrub’n’Toss. Emotional marketing is important because both products are competing in household cleaning categories. As consumers today dread household cleaning, in some cases it is perceived as a necessary evil. Therefore, any products that will make the chore easier or faster for them, conveys the perception it will give them more quality time to spend with family and friends.

**BML:** In your opinion, what is the most effective way to transform consumers into brand loyal customers?

**DR:** The relationship with brand loyal customers is formed when a product delivers unique benefits that consumers can rely on - which ultimately leads in some way to improving their quality of life.
Betsy Armentrout, Senior Brand Manager of Coca-Cola

The following is a transcript of an expert interview briefly conducted by the author with Betsy Armentrout, The Coca-Cola Company's Senior Brand Manager of the Coca-Cola brand.

**BML:** Please briefly describe Coca-Cola Classic's target demographic.

**BA:** Coca-Cola Classic targets male and female consumers ages 12-64. We segment within this demographic to develop specific programs that drive loyalty and purchases. Each program cater to each demographic.

**BML:** Where does Coca-Cola currently rank within its category? Market share? What percentage of brand consumers are brand loyal customers?

**BA:** Coca-Cola Classic ranks as #1 in its category, approximately 15% of total carbonated soft drink category. Approximately 21% of all carbonated soft drink consumers consider Coca-Cola Classic their favorite brand.
BML: Please list and explain the marketing tools (i.e. advertising, PR, sampling, sponsorships etc.) most commonly executed by the brand and which ones produce the best return on investment?

BA: Coca-Cola Classic utilizes various promotions, advertising (TV, radio, cinema, print, outdoor, online), new product introductions, sponsorships and events both locally and nationally.

The return on investment is difficult to gauge on experiential/long-term tools such as sponsorships and advertising. Volume tactics such as coupons and FSI’s are the easiest and best reads for return on investment. But brand and equity building programs are far more difficult to accurately account for the payout.

BML: Do you feel the use of emotional marketing is important to the success of the brand and its products?

BA: The market is consistently pressuring brands and products to a commodity status. The responsibility of brand managers is to continually drive the brand value with consumers and stakeholders. Coca-Cola classic had driven value through a variety of means – emotional and experiential marketing being a key lever. Advertising such as the legendary "Mean Joe Green" and "Hilltop" TV spots maintain that status for the
emotional pull on the consumer heartstrings. Loyalty is built when consumers participate
with the brand. Think about your favorite brands, you probably are not loyal to
them due to a two week sale price a couple of years ago. My guess is that
you probably cannot remember the sale price from yesterday, but I bet you
would remember participating in the Olympic Torch Relay as a torch bearer
in St. Louis this coming summer. And I bet your friends will remember your
participation and the brand that gave you that amazing experience. As a result, I
bet you will forever love Coke.

**BML:** In your opinion, what is the most effective way to transform consumers
into brand loyal customer?

**BA:** I don't think there is one "most effective way to transform consumers
into brand loyal consumers." However, I think there is one approach - 1.
Understand your consumers intimately. Understand their wants, their
dreams, their backgrounds and their habits etc. 2. Once you have that understanding,
connect with them. Every consumer is different; however there are also inherent
similarities. Search for the similarities and celebrate their differences.
SUMMARY

In Chapter III, the author outlined in great detail the purpose and description of the survey, the sample of whom it was administered and in-depth analysis of each question followed by expert interviews from Mr. Patrick Cox of ARM & HAMMER, Mr. Dion Ross of BRILLO and Ms. Betsey Armentrout of COCA-COLA.

The purpose of this chapter is to give the audience a greater understanding behind the importance of the consumer survey including why it was required with focus on what the author was hoping to achieve as a result. Additionally, it was equally important to explain the demographics of the sample pool of respondents and the in-depth analysis of each question administered. This practice was executed to uncover the motivating factors and need to ask certain questions - and what was to be gained by asking them. The expert interviews conducted by the author include very important present day insight into the current marketing practices used by dominant brands on a daily basis. This knowledge will greatly assist the reader in understanding the author’s thought process and what he is looking to achieve as a result.

The next chapter will further explain the results of the consumer behavior survey administered by the author. This information will assist in supporting the author’s claim that the successful marketing components of category dominant brands the affects they have on the purchasing decisions of the general consumer.
CHAPTER IV

PRESENTATION OF CONSUMER SURVEY RESULTS

According to a 2003 survey conducted by Interbrand, the world’s leading brand strategy and design consultancy, 70% of consumers use brands to guide their purchase decisions. 40% of consumers will pay a premium for a brand that has won their loyalty. 38% of the market capitalization of the 100 Best Global Brands for 2003 is attributed to brand value. (www.interbrand.com)

The consumer survey conducted by the author was designed using the Likert scale with response criteria listed as: strongly agree, agree, neutral, disagree and strongly disagree to ensure credible response results, comprehensive answer selection and convenience for the participants. The questions were created as a result of the author’s personal interest, research conducted and conversations with peers, professional and experts in the brand marketing field. The goal of this survey is to establish and confirm that (1) the majority of consumers are brand loyal and that (2) strategic marketing practices such as advertising, public relations and interactive marketing fuels their loyalty.

GENDER

Of the ninety-three total survey respondents, thirty-one or 33% were male and sixty-two or 67% were female. Although there are more females represented in the sample, the author believes the results will consist of accurate information as two of the three brands being analyzed specifically target women ages 25 – 54.
AGE DISTRIBUTION

Of the ninety-three total survey respondents, sixty-six or 71% ranged in age from 21-30, twelve or 13% ranged in age from 21-40, ten or 11% ranged in age from 41-50, 4 or 4% ranged in age from 51-60 with no response in the 61 and over category.

EDUCATION LEVEL

Of the ninety-three total survey respondents, three or 3% have a high school education, nine or 10% have some college, fifty-one or 55% have an undergraduate degree, sixteen or 17% have some graduate education, twelve or 13% have a graduate degree and two or 2% surveyed have a post graduate degree.

ANNUAL HOUSEHOLD INCOME

Of the ninety-three total survey respondents, six or 6% fall under the $20,000 - $30,000 income range, thirty or 32% fall under the $31,000 - $50,000 income range, eighteen or 19% fall under the $51,000 - $75,000 income range, sixteen or 17% fall under the $76,000 - $100,000 income range and twenty or 22% fall under the $100,000 and over income range.

CHILD STATUS

Of the ninety-three total survey respondents, seventeen or 18% of people polled have a child or children with seventy-six or 82% who do not.
Statement 1: I generally consider myself a "brand loyal" consumer.

Of the ninety-three total survey participants, fifteen people or 16% of respondents strongly agreed; fifty-five people or 59% agreed; fifteen people or 16% were neutral; seven people or 8% disagreed; one person or 1% strongly disagreed.

As 75% of consumers polled agreed in some way, based on these results, it is acceptable to conclude that the majority of consumers are loyal to brands they purchase. As this question is the basis of this study, the author believes these results are accurate in supporting the subject of the thesis.

As 25% of individuals polled responded with neutrality, disagreement and strong disagreement, one can assume factors such as price and product availability play a strong role in their purchase decisions.
Statement 2: My purchase behavior is mostly motivated by the price of a product.

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>18%</td>
<td>41%</td>
<td>26%</td>
<td>15%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Of the ninety-three total survey participants, seventeen people or 18% of respondents strongly agreed; thirty-eight people or 41% agreed; twenty-four people or 26% were neutral; fourteen people or 15% disagreed with 0 responses to strongly disagree.

As 59% of respondents agreed in some way, the data indicates that price plays a major role for the majority of consumers during the purchasing process.

As 15% of respondents reported disagreement relating to price motivating purchase power, it is acceptable to assume that these individuals are not affected by price and purchase products or service as it is safe to assume they are in a higher annual household income bracket than the remainder of the sample. One could also conclude that these individuals have an objective of fulfilling their needs with a brand they can trust – therefore willing to spend the money on certain items.
Statement 3: I am normally open to purchasing new or improved products from brands I am familiar with.

Of the ninety-three total surveyed, twenty-one people or 23% of respondents strongly agreed; sixty-four people or 69% agreed; five people or 5% were neutral; two people or 2% disagreed with one person or 1% strongly disagreed.

As 92% of respondents agreed in some way, the data concludes the individuals sampled are open to trying new products and/or services from brands they are familiar with. One can assume they do so to gauge if the improvement fulfills an unmet need or want.

Additionally, it is safe to imply that many consumers are driven to testing new and/or improved products as a result of mass marketing practices such as sampling, FSI’s, advertising and/or buzz generated from public relations executed to hype up new or improved product attributes.
Statement 4: I often purchase products that are category dominant brands (i.e. Coca-Cola, Brillo, Nike, etc.)

Of the ninety-three total surveyed, twenty-three people or 25% of respondents strongly agreed; forty-nine people or 53% agreed; thirteen people or 14% were neutral; seven people or 8% disagreed with one person or 1% in strong disagreement.

As 78% of respondents agreed in some way, the data supports the author’s claim that consumers often purchase category dominant brands due to the established trust they have gained experientially in addition to the quality and reliability of the product and/or service. This data also supports that author’s claim that the aforementioned marketing components outlined in the previous chapter have left a positive impact on the perceptions of consumers.
Statement 5: Marketing practices, such as in-store point of purchase and online promotions drive/motivate me to make brand specific purchases.

Of the ninety-three total surveyed, ten or 11% of respondents strongly agreed; forty-five people or 48% agreed; twenty-four people or 25% were neutral; thirteen people or 14% disagreed with one person or 1% in strong disagreement.

As 59% of respondents agreed in some way, the data supports the author’s research that promotions in-store and online result in brand specific purchases. This leads the author to conclude that promotions assist the product in standing out by separating it from its competition while highlighting the product and/or service attributes – focusing on how it can benefit the consumer.
Statement 6: Radio, television and print advertising increase my loyalty to a specific brand.

- Strongly Agree: 5%
- Agree: 42%
- Neutral: 40%
- Disagree: 12%
- Strongly Disagree: 2%

Of the ninety-three total surveyed, five people or 5% of respondents strongly agreed; thirty-nine people or 42% agreed; thirty-seven people or 40% were neutral; eleven people or 12% disagreed with two people or 2% strongly disagreed.

As 47% of respondents agreed in some way, the data indicates radio, television and print advertising increases respondents loyalty to specific brands. The data supports the author's claim that marketing efforts strongly influence the purchasing and loyalty of consumers.

As 40% of the sample responded neutral, it is evident that the author should have phrased the question to generate a more detailed a better response from the response pool.
Statement 7: Public relations practices such as product sampling events and strategically generated media “buzz” influence my purchase.

Of the ninety-three total surveyed, seven people or 8% of respondents strongly agreed; forty-one people or 44% agreed; thirty-two people or 34% were neutral; fourteen people or 15% disagreed with no respondent in strong disagreement.

As 52% of respondents agreed in some way, the data indicates that product sampling events and strategic buzz generated from public relations practices does influence the purchasing of survey participants.

As 34% of respondents answered with neutrality, it acceptable to assume that a large portion of consumers are uneducated in regards to the differences between strategic public relations “buzz” and other marketing components.
Statement 8: Celebrity endorsements affect my loyalty to a brand.

<table>
<thead>
<tr>
<th></th>
<th>Respondents</th>
<th>Response Ratio</th>
</tr>
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<tr>
<td>Strongly Agree</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Agree</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Neutral</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Disagree</td>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>17%</td>
<td></td>
</tr>
</tbody>
</table>

Of the ninety-three total surveyed, no respondents or 0% strongly agreed; eight people or 9% agreed; twenty-five people or 27% were neutral; forty-four people or 47% disagreed with sixteen people or 17% in strong disagreement.

As 64% of respondents disagreed in some way, the data indicates that celebrity endorsements do not have a significant influence in the purchasing decisions of survey participants.

The data supports the author’s opinion that although celebrity endorsements can be more successful for specific categories, such as athletics, it is the weaker marketing effort when it comes to influencing the purchasing of consumers.
Statement 9: Cause-related marketing partnerships influence which brands I purchase.

Of the ninety-three total surveyed, four people or 4% of respondents strongly agreed; thirty-eight people or 41% agreed; twenty-eight people or 30% were neutral; twenty people or 22% disagreed with 3 people or 3% in strong disagreement.

As 45% of respondents agreed in some way, the data indicates that cause-related marketing partnerships positively influence them majority of sampled consumer when making purchases.

As 30% of the sample answered with neutrality, the author believe it is acceptable to conclude that consumers will purchase brands they are loyal to regardless of a cause-related marketing partnership as long as the product and/or service continues to deliver its quality and reliability.
Statement 10: Sports, concerts, charities and special events sponsorships drive me to support brands I am loyal to.

Of the ninety-three total surveyed, two people or 2% of respondents strongly agreed; twenty-one or 23% agreed; forty people or 43% were neutral; twenty-nine people or 31% disagreed and one person or 1% in strong disagreement.

As 43% of the sample pool was neutral, the dad indicates that sport, music, charity and special events are not a contributing factor when it comes to consumer purchasing.

As 32% of respondents disagreed in some way, the author can conclude, as similar to cause related marketing practices, consumers will continue to purchase the products and/or services as long as the brand continues to produce quality and reliable goods.

The author believes that although these sponsorship events may not "drive" participants to purchase brand products, they will certainly encounter brand presence at events that further strengthens the image of the brand.
CONCLUSION

Based on the information resulting from the consumer survey, the author confirms his original assumption that the majority of marketing components designed and executed by category dominant brands have a tremendous impact on the perceptions of consumers – evidently contributing to the creation of brand loyalty when executed properly.

The results to Statement 1 reveal that 75% of respondents consider themselves to be “brand loyal” consumers. This supports the fact that consumers acknowledge that they are the target of brand marketing efforts and that the techniques have had a positive affect on them – which has yielded loyal end users.

Additional survey responses disclosed that, as assumed, consumers agree that price plays a major role in the purchasing process. The author assumes that affects of the marketing components of category dominant brands is evident as 78% of consumers purchase dominant products and/or services. Supported by 47% of respondents who are affected by advertising and 52% affected by public relations activities.
CHAPTER V
SUMMARY AND CONCLUSIONS

Throughout the course of this study, the author analyzed in-depth research and case studies focusing on effective marketing components that can be utilized to increase overall visibility, sales and brand loyalty of a brand or corporation. As there are hundreds of techniques that can be implemented, the author chose to focus on the specific methods utilized by brands who dominate their category. The author’s decision to specifically analyze the ARM & HAMMER, BRILLO and COCA-COLA brands was a direct result of his professional marketing experience, personal loyalty to the brands and in effort to find out which components are most commonly utilized, cost effective and preferred by brand managers to implement by the category dominant brands.

To complete this study, the author was heavily reliant on data obtained through various industry texts and journals, brand marketing books, and multiple conversations with brand managers, marketing professionals and consumers. Additional data was also provided as a result of the consumer survey designed and conducted by the author.

As a result of this study, the author discovered the marketing components most commonly utilized by category dominant brands include advertising (print, radio, television, online and outdoor), public relations, cause-related marketing partnerships,
celebrity endorsements and event sponsorships. These communication vehicles assist brands in communicating their image, values and goals to consumers in effort to establish a bond that, in hopes, will make its product and/or service invaluable to his/her everyday life.

**BENEFITS**

The author strongly believes that the results of this study can benefit companies and brands of all categories and sizes as the main point of these marketing components are promote clear and effective communications with the general public while eliciting an emotional bond with targeted end users. The aforementioned components are not solely executable by mega corporations, but by any and all companies looking to communicate their core messages.

The author hopes this study will assist the reader in understanding which components to execute when looking to communicate with the general public.

**FEEDBACK**

Throughout the course of this study, the author received high quantities of qualitative feedback from colleagues, peers, friends, family, survey respondents, marketing specialists and brand managers. Approximately 90% of feedback received supports the author’s claim that advertising (print, radio, television, online and outdoor), public relations, cause-related marketing partnerships, celebrity endorsements and event
sponsorships are most effective and are most commonly recognized by consumers, evoking a call to action during purchasing.

As time passes and technologies change, it can be assumed that marketing practices will continue to evolve as a result. As techniques such as viral marketing strategies continue grow in popularity, they still take a back seat to the more traditional roles such as the basic advertising and public relations strategies. One can assume the reason is an efficient return on investment, but the author believes it is based on the consumer’s acceptance of these practices.
BIBLIOGRAPHY


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Timeline of Coca-Cola Bottling. [On-line]. Available at http://www2.cocacola.com/ourcompany/history/bottling.html


The History of Coca-Cola: John Pemberton was the Inventor of Coca-Cola. [On-line]. Available at http://inventors.about.com/library/inventors/blcocacola.htm


APPENDIX A

Survey
Consumer Behavior Survey

The following survey is being conducted as part of my thesis project to receive a Masters of Arts in Corporate and Public Communication from Seton Hall University, South Orange, New Jersey. The purpose of this research is to determine the "brand loyalty" behaviors of the average consumer when purchasing everyday products in support of the following statement:

"Utilizing a centric focus on 3 renowned brands from the corporate business sector, the author will clearly demonstrate the strategic efficacy of the marketing operations of category dominant brands."

This survey is completely anonymous and all information provided will remain strictly confidential. If you are interested in the outcome and conclusions of this research, please contact me at bml25@optonline.net to request a copy.

Please return all completed survey information via regular mail, e-mail or fax to:

Brian M. Lowe
4G Beech Spring Dr.
Summit, NJ 07901
(Fax) 973.857.6246
(E-mail) bml25@optonline.net

Thank you in advance for your participation.

Merriam-Webster's dictionary defines Brand Loyalty as being faithful to a cause, ideal, custom, institution, or class of goods identified by name as the product of a single firm or manufacturer.
### Part I: Based on the Likert scale below, please circle the answer that most appropriately reflects your opinion.

<table>
<thead>
<tr>
<th></th>
<th>SA</th>
<th>Strongly Agree</th>
<th>A</th>
<th>Agree</th>
<th>N</th>
<th>Neutral</th>
<th>D</th>
<th>Disagree</th>
<th>SD</th>
<th>Strongly Disagree</th>
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</thead>
<tbody>
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<td>1.</td>
<td>I generally consider myself a &quot;brand loyal&quot; consumer.</td>
<td>SA</td>
<td>A</td>
<td>N</td>
<td>D</td>
<td>SD</td>
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<tr>
<td>2.</td>
<td>My purchase behavior is mostly motivated by the price of a product.</td>
<td>SA</td>
<td>A</td>
<td>N</td>
<td>D</td>
<td>SD</td>
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<td>3.</td>
<td>I am normally open to purchasing new or improved products from brands I am familiar with.</td>
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<td>A</td>
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<td>D</td>
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<td>4.</td>
<td>I am normally open to purchasing new or improved products from brands I am unfamiliar with.</td>
<td>SA</td>
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<td>N</td>
<td>D</td>
<td>SD</td>
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<td></td>
</tr>
<tr>
<td>5.</td>
<td>Marketing practices, such as in store point of purchase and online promotions drive/motivate me to make brand specific purchases.</td>
<td>SA</td>
<td>A</td>
<td>N</td>
<td>D</td>
<td>SD</td>
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<td>6.</td>
<td>Radio, television and print advertising increase my loyalty to a specific brand.</td>
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<td>D</td>
<td>SD</td>
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<td>7.</td>
<td>Public relations practices such as product sampling events and strategically generated media “buzz” influence my purchase.</td>
<td>SA</td>
<td>A</td>
<td>N</td>
<td>D</td>
<td>SD</td>
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<td>8.</td>
<td>Celebrity endorsements affect my loyalty to a brand.</td>
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<td>N</td>
<td>D</td>
<td>SD</td>
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<td>9.</td>
<td>Cause-related marketing partnerships influence which brands I purchase.</td>
<td>SA</td>
<td>A</td>
<td>N</td>
<td>D</td>
<td>SD</td>
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<td>10.</td>
<td>Sports, concerts, charities and special events sponsorships drive me to support brands I am loyal to.</td>
<td>SA</td>
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Part II: Optional Information.

To gain a better understanding of marketing demographics, please complete the information below.

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<tr>
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<td>Some graduate</td>
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| Profession:      | Title and/or industry ____________________________ |

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<th>Annual Household Income:</th>
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<th>$31,000 - $50,000</th>
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<td>$51,000 - $75,000</td>
<td>$76,000 - $100,000</td>
<td>$100,000 and over</td>
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| Children: | Yes | No |
APPENDIX B

Survey Results - Breakdown Sheet
## Breakdown of Survey Results

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<th>Question</th>
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