

Leveraging Inside Sources of Consumer Insights

Observation/Commentary

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Bullet Points:

- Inside source interviews can quickly, impressively, and inexpensively uncover unique insights that would otherwise be overlooked in conventional research.
- Inside sources are people who interact with a target market on a frequent or intense basis. For golfers, inside sources could include clubhouse owners or caddies; for weekend cooks, inside sources could be butchers or gas grill salespeople; for affluent women, inside sources could be personal shoppers or personal chefs.
- This article shows how to locate, interview, and leverage inside sources to generate new insights about target consumers and new marketing tactics that more effectively reach and resonate with them.

Key Words:

Inside source, key informant, target segment, target segment, brand champion, heavy user, qualitative research, focus groups, depth interviews

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ABSTRACT

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Inside source interviews can quickly, impressively, and inexpensively uncover unique insights that would otherwise be overlooked in conventional research. Inside sources – people who interact with a target market on a frequent or intense basis – can have powerful insights about why consumers in this target market behave as they do. Unfortunately, these inside sources are generally overlooked by researchers and not often used as valuable key informants. For golfers, inside sources could include clubhouse owners or caddies; for weekend cooks, inside sources could be butchers or gas grill salespeople; for affluent women, inside sources could be personal shoppers or personal chefs. This article shows how to locate, interview, and leverage inside sources to generate new insights about target consumers and new marketing tactics that more effectively reach and resonate with them.

Locating and Leveraging Inside Sources of Consumer Insights

Using inside source interviews to generate insights can impressively uncover unique insights that would otherwise be overlooked through much more involved, complicated, and expensive forms of marketing research. This is particularly the case when it comes to generating new consumer insights about a target market or an even more narrowly defined target segment, such as potential purchasers of high-end stereo equipment, soft drink switchers, power tool buyers, energy drink lovers, or new car shoppers. Inside sources are those people who either frequently or intensively interact with the target segment – generally in a service-related context, including salespeople, servers, repair experts, customer service representatives, or blog authors. While not credentialed or trained as marketing researchers, these individuals may have developed unique lay theories about the target segment that are unlikely to otherwise be revealed through focus groups (Fortini-Campbell, 1991), brand equity laddering interviews (Wansink 2003), or by quantitative means. Locating and leveraging these inside sources can be an insightful way to quickly learn more about a target segment.

Suppose a researcher is target market or on an even more specifically-defined target segment of individuals who behave in a way we can determine how to encourage similar behavior in other potentially similarly predisposed individuals. In a marketing context, this target market or target segment might be people who highly loyal to Brand A, people who are heavy users of Brand A, people who have switched from Brand B to Brand A (Wansink 1994), or more generally, people who are frequent users of a category, people who are high level

spenders in a category, and so on. In a public health context, these target segments could include people who exhibit any behavior we would like to expand or encourage on a wider basis. This could include people who serve and eat vegetables during every dinner, people who recycle, people who use the USDA MyPlate (Wansink and Kranz 2013), parents with healthy weight children (Bevelander et al 2014), people who drink more milk than soft drinks, and so on. In all of the above instances, the first step would be to find inside sources who can help generate insights on whatever target segment we are trying to better understand.

Using inside source interviews can involve using questioning and projecting. With questioning, the researcher locates and interviews an inside source about how the target segment behaves, what they talk about, what related preferences they might have, and so on (Wind, 1978; Wells and Tigert 1971; Weinstein and Nesbit, 1986; Plummer, 1984). With projecting, the research asks the inside source to project or to predict about why he or she *believes* the targeted individuals behave in the way they do or have the preferences they have (Wansink, Shimizu, and Brumberg 2013; Haley, 1985). While it is generally unusual to use third-party projection rather than obtaining such information directly from consumers, the value in doing so with inside sources is that they that may have subtle insights that would not otherwise be detected by the even those consumers in the target market themselves.

After defining inside sources, this article illustrates how these field-tested techniques can be used to elicit the most useful insights. We then demonstrate how the generated insights can be used for message development, positioning, and the targeting of communication efforts as well as the key implications they have for product design, pricing, and placement.

Defining and Locating Inside Sources

Inside sources are individuals who deal with the target segment on a frequent or intense basis. Importantly, inside sources are not the target segment themselves, but they closely know and understand the target segment. For example, if the target segment were Fortune 500 CEOs, possible inside sources might be personal assistants, charter flight pilots, the Chief Operating Officer, tailors, tax accountants, attorneys, luxury car dealers, or chauffeurs. As Table 1 illustrates, different target segments and different marketing objectives require different types of inside sources (Fortini-Campbell, 1991).

[Insert Table 1]

There is wide latitude in the types of individuals who can serve as inside sources. This speaks to the flexibility of the method, but it also has key implications for how to most effectively approach inside sources for interviews. Continuing with the example above, if the objective is to better understand the business-to-business buying habits of high tech CEOs, both a Silicon Valley software engineer and an airline club bartender at SFO might prove to be useful inside sources, but they would be approached very differently. Regardless of the inside source, however, the objective of the interview is to gain notable or unexpected key insights into the behavior of the target segment. Whereas some inside sources require financial incentives – usually ranging from \$30 to \$400 for a 45-minute interview – many others are willing to freely share their insights over coffee or lunch.

Interviewing Inside Sources

There are a wide range of insights one can get from interviewing inside sources. Table 2 shows how varied some of these insights can be and how the insights can vary widely (yet not inconsistently) between one source and another.

[Insert Table 2]

To best capture such useful insights, it is important to approach the interview more as an engaging conversation rather than as a checklist of questions. After thanking the individual and acknowledging them as a reliable inside source, it is best if the interview flow naturally and that the interviewee have time to fully explain his responses rather than be repeatedly asked a cadence of consecutive questions. This also allows you to obtain more information beyond the usual one-word answers or overgeneralizations. At the same time, however, it is important to guide the interview so that it does not stray too far from the intended objective.

The examples in Table 2 demonstrate the breadth and depth of questions that can be answered through an inside source interview. However, inside sources can sometimes have trouble generating the kind of insights that are needed, or they can claim to lack such knowledge. While a wide range of useful questions can be asked to help them unlock or uncover some of their insights, eight useful types of questions (and specific illustrations of them) include the following:

- 1) How is the Target segment Different?** What are some of the different ways that men who buy Hartmann luggage different from ones who are not? This can include how they act, what they talk about, what they wear, what they might be carrying with them, how they order or ask questions, what they prefer, how they treat the person they might be with, and so on (Wansink 1994).
- 2) What Clues Would You Use to Predict Who's a Member of the Target segment?** If there were two people in front of you and you knew one of the two of them drank milk every night at dinner and one drank soft drinks, how would you guess which was which (Wansink and Park 2000)?
- 3) What Questions Do They Ask and When Do They Decide?** Tell me about the last time a person came in and bought a Cadillac instead of a foreign import car they were also considering. What were some of the questions they asked? What was the turning point where they seemed to change their mind in favor of the Cadillac (Wansink 2005)?
- 4) What are Some Unusual or Funny Things You See Customers Do?** Some of your Dunkin' Donuts customers come in every day and others come in less regularly. What are some unusual or funny things you've seen people do if they are new customers or very infrequent customers?
- 5) What Have You Overheard?** What are some of the things you've overheard people say that suggests why they might eating at your Burger King (or Olive Garden) rather than eating at the McDonalds (or TGI Fridays) across the street (Wansink and Hanks 2014)?

6) How Have You Helped Change Somebody's Behavior? Tell me about the last time

you were able to convince someone at your bar to buy an expensive wine they ended up liking rather than instead ordering cocktails or beer (Wansink, et al 2006)?

7) What Do You Find Surprising? What do you sometimes find surprising about the

customers you talk with who eventually end up deciding to buy one of the top-end gas grills?

8) What Would You Do? Let's suppose that your manager said that he made a lot more

money on the Shrimp Salad than on the Onion Ring Basket. Given all of the orders you've taken from customers, what are some of the tricks that you or one of the other sharp waitresses think you could use to encourage a lot more people to order the more profitable Shrimp Salad (Wansink 2014)?

The basic process of the interview will differ for each researcher depending on their topic familiarity, their chemistry with the inside source, and the location where the interview takes place. While it is important to focus on the questions you are most interested in directly addressing, it is also important to be flexible. For instance, early in the interview, you may need to resolve suspicions the inside source might have or to alleviate their hesitancy to speculate or to – on the other hand – over-generalize. Common questions often have to do with the interview process (“What’s the point of all of these questions?” or “What are you doing this for?”). In other cases, it is more important to move the inside source away from making gross generalizations (“Rich people like expensive things” or “It all depends on price”) on one hand, or making

dismissive comments (“Everyone is different” or “I never thought out it”) on the other hand. Table 3 illustrates common potential stumbling blocks that can happen during inside source interviews, and it suggests some responses as to how to effectively deal with these barriers.

[Insert Table 3]

Most inside sources need guidance and encouragement to dig deep and to generate insights that might not yet even have. During a 45-minute interview, the most productive point is usually at the 15-30 minute mark. Before that, they may be nervous and defensive, and after that they can sometimes start running out of ideas and become repetitive. Yet even if an inside source can only give you a few minutes during a break or during a slow part of their day, the insights can be valuable. The key to great interviews, however, is doing them face-to-face. Attempting to conduct a inside source interview over the phone, with a web-cam, or on-line nearly always results in the inside source being distracted, irritated, and superficial in their comments.

Yet even with a highly experienced and skilled interviewer, not every inside source interview will yield critical insights. Base on my experience, if you are interviewing five inside sources, you can expect the following: one or two of them will be able to provide a wide range of useful insights; one or two will offer a couple thoughtful observations; and about two of them will not be willing or able to offer any useful insights. Given this yield rate, you might want to plan on conducting a few more interviews than planned. As a rule of thumb, my researchers usually conduct 10-12 inside source interviews on a particular issue (which is when they become

repetitive). Still, even just two or three interviews can provide surprising more insight into the target segment than one would think.

Generating and Leveraging Inside Sources

In order to leverage insights from inside sources, it is useful to organize them in a way that shows how they can be fully integrated into all four components (4-Ps) of the Marketing Mix: Promotion, Product, Price, and Place. Interview-generated insights can yield concrete suggestions in any or all four of these areas, with the ultimate goal of providing actionable insights to change behavior.

Extending some of the illustrations from prior tables, Table 4 provides examples of implications that would apply to some or all 4P's of the marketing mix. While not all insights have implications for all four aspects of the marketing mix, some insights may generate multiple suggestions for a single aspect.

[Insert Table 4]

Discussion

Again, using inside sources can quickly, impressively, and inexpensively uncover unique insights that would otherwise be overlooked. Following the previously mentioned steps will facilitate the process, from choosing an objective, to selecting appropriate inside sources, determining the specific questions that will elicit meaningful responses, and finally, to generating

tangible implications for the marketing mix. This method for obtaining these insider tips can be used with a wide range of sources and can be applied to a wide range of issues, from the concerns of ordinary consumers to those of well-established companies and organizations. It permits flexibility in one's depth of focus, whether this be a broad overview of an industry or a narrow application to specific brand or behavior.

Yet using inside sources has limitations. There are limitations to interviewing individuals, particularly those associated with a lack of objectivity, which can result in interviewer bias, Hawthorne effect, respondent biases, and the like. Furthermore, an interview may yield some insights that are not generalizable to other individuals or situations. While inside source interviews are useful, they should not be exclusively relied upon. Other methods for generating insights, such as laddering and prototyping (Wansink 2000) or demographic and psychographic data, may be used in conjunction with inside source interviews to produce a richer profile of the issue in question, or to then quantify the magnitude of these insights or to test their validity by using a wide-scale survey

The inside source approach need not be limited to marketing. It can also be put into practice to find insights and solutions to encourage healthy eating, active lifestyles, or financial well-being. The process of identifying and translating insights into actionable items can generate more effective ways of motivating positive behavior change. Future research in this area may include comparing the inside source approach to other techniques such as using in-depth interviews of the target segment or using motivational interviewing. Showing how inside source interviews compliment these other methods will encourage its wider use.

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Table 1: Identifying Possible Inside Sources

| Client | Objective | Target segment | Possible inside sources |
|---|---|-----------------------------------|---|
| High-end Electronics Chain | Attract radio equipment buyers when new items are first introduced | Early adopters of radio equipment | Sales people at electronics retail stores (such as Best Buy, Radio Shack), tech bloggers, electronics repairmen, |
| New golf equipment company | Build word-of-mouth excitement for new line of golf clubs | Golfers | Caddies, pro shop staff, golf instructors, groundskeepers, country club waiters, |
| Private client investment service within an investment bank | Attract more high-worth clients | Fortune 500 CEOs | Chauffeurs, personal assistants, charter flight pilots, Chief Operating Officers, tailors, accountants, attorneys, luxury car dealers |
| BBQ Sauce Manufacturer | Increase BBQ sauce usage among light users | People who like to barbeque | Butchers, shelf stockers, gas grill salespeople, park managers, waitresses at a BBQ restaurant |
| Arizona Spa | Reposition itself for elite Southern California market | Affluent women | Jewelers, personal shoppers, hairdressers, nannies, personal trainers |
| Restaurant in a Famous Memphis Hotel | Increase visits to the restaurant by out-of-town travelers on business accounts | Frequent travelers to Memphis | Airport bartenders, flight attendants, airport security staff, taxi drivers, hotel staff |

Table 2: Insights from Inside Sources

| Client's Goal | First Inside Source | Insights | Second Inside Source | Insights |
|--|--|---|---|---|
| <p>On-line cosmetics company:</p> <p>Increase sales of imported soaps</p> | <p>Beauty consultant at cosmetics store</p> | <p>Customers like to test products before purchasing</p> | <p>Employee at store for spiritual and holistic health books and supplies</p> | <p>Customers are interested in alternative medicines and natural ingredients</p> |
| | | <p>Customers bring in magazine articles featuring products that interest them</p> | | <p>They like personal relationships with store employees</p> |
| | | <p>Pre-teen and teen girls enjoy shopping in groups</p> | | <p>They like communal atmosphere of shopping and appreciate recommendations from fellow buyers</p> |
| | | <p>Many people buy online but return in store after they see and test product</p> | | |
| <p>Container and Storage Supply Company:</p> <p>Increase sales of recyclable aluminum containers to restaurants and food service companies</p> | <p>Director of Sales of metal distribution company</p> | <p>Businesses often need product specifications and dimensions. They want reliable and consistent quality.</p> | <p>Waitress at restaurant that uses recyclable aluminum containers</p> | <p>Customers who “doggie bag” food in aluminum containers often order larger, more caloric dishes</p> |
| | | <p>Businesses are already informed; they don't need to be educated about the product. They buy only what they need, not what they want, whereas retail consumers buy what they want and not what they need.</p> | | <p>Food supply and storage needs vary month to month depending on price changes and diners' preferences</p> |
| | | <p>Most business-to-business companies have a few key accounts, a small but loyal customer base. Face-to-face contact is valued highly.</p> | | <p>Most family-owned restaurants are looking for a long term relationship with their suppliers for better prices and customer service</p> |
| | | <p>Distributors should develop partnerships with customers (e.g. purchase their stock and offer on-site support if needed). This helps maintain business relationship in the long-term</p> | | <p>The recyclability of these containers is a major selling point and buyers like to see companies that care about the environment and sustainability</p> |

| | | | | |
|---|--|---|--|---|
| <p>Non-Cola Soft Drink Company:</p> <p>Expand to South Korean market</p> | <p>South Korean student at a US university</p> | <p>International drinkers in the U.S. find that soda ‘neutralizes’ the greasiness of foods like hamburgers and pizza</p> <p>The “stronger” or “sweeter” a soda tastes, the better it masks the grease in the meal</p> | <p>Employee at a US fast food chain which serves the drink</p> | <p>Constant soda drinking keeps him “refreshed” throughout the day</p> <p>When drinking a lot of soda, he doesn’t always stick to a ‘favorite’ brand, just to add variety</p> <p>Variety in soda choice can add excitement to an otherwise routine schedule</p> |
| <p>Manufacturer of chewable calcium supplements:</p> <p>Market supplements to women as means of preventing osteoporosis</p> | <p>Pharmacist</p> | <p>Pharmacists approve of calcium supplements, but they don’t make direct recommendations to customers</p> <p>More people take calcium for treatment than as a preventive measure</p> <p>Purchasers of supplements tend to be well-read, physically fit, pro-active and seek self-improvement</p> <p>People respond to fear tactics.</p> <p>People like “combo items” that include calcium and other vitamins</p> | <p>Registered dietician at assisted care facility</p> | <p>People who start taking supplements usually take them continually, becoming customers for life.</p> <p>Many older users started taking them even before entering a medical facility or assisted care situation.</p> |

Table 3: Strategies for Interviewing Inside Sources

| When your Inside Source says.... | It often means | Try responding like this.... |
|--|---|---|
| <p>“What’s the point of all these questions?”</p> <p>“Who/What are you doing this for?”</p> <p>“Why are you asking <i>me</i>?”</p> | They are skeptical about the purpose of the interview | <p>“These questions help us understand (insert organization or company here) and how they can improve their operations”</p> <p>“We’re looking for ways to increase sales/participation in (insert organization or company here)”</p> <p>“You’re a knowledgeable source for (insert target segment here) since you interact with these people often”</p> |
| <p>“I don’t know”</p> <p>“I never thought about it...”</p> <p>“I can’t think of anyone right now”</p> <p>“It’s hard to say... everyone is different”</p> | They are thinking too generally and are not thinking about specific individuals or encounters | <p>“Think of the last customer you had.”</p> <p>“Who was your most memorable customer? What made them memorable?”</p> <p>“What are some of the most popular or common items that were selected?”</p> <p>“If you were convincing a customer to come, what would you say?”</p> |
| <p>“It depends on the price” (or another response related to price)</p> | They are relying on a easy answer without wanting to dig any deeper | <p>“Let’s think beyond the price, what would be the second biggest influence on whether someone would purchase this?”</p> |
| <p>“Rich people who like expensive things”</p> <p>“People like high-quality products”</p> | They are again thinking too general and not about exceptions to these basic rules | <p>“Instead of thinking about these folks as a group, let’s focus on individuals you’ve met. Try to picture a specific person who exhibited this behavior.”</p> |
| <p>“There’s not one certain “group” or “category” that all our customers can be placed in”</p> <p>“All our customers are different and behave in different ways”</p> | They have difficulties thinking in terms of patterns or sub-segments | <p>“What kinds of people do you see (insert a specific action or behavior here)?”</p> <p>“Can you recall any specific behaviors or unusual habits that your patrons have?”</p> <p>“What other types of people might be interested in (insert topic here)?”</p> <p>“Describe a prototypical customer. What is the typical profile of a loyal customer?”</p> <p>“What are some professions of your average customer?”</p> |

Table 4: Inside Source Insights and Implications for the Marketing Mix

| Goal | Insights | Promotion | Product | Place | Price |
|---|---|--|--|--|---|
| Increase business-to-business sales of aluminum recyclable containers | <p>Purchasers are informed about products they want</p> <p>Appreciate reliability, consistency, and precise product specifications</p> <p>Develop a few key accounts with close relationships and face-to-face contact</p> <p>Recognizable brand</p> <p>Focus on sustainability</p> <p>Buyers need flexibility as purchase needs vary according to customers preference</p> | <p>Interactive website with that tracks loyalty points to use towards future purchases and allow customers to construct personalized purchase and delivery packages</p> <p>Newsletter</p> <p>A loyalty program to track customers' good behavior (e.g. on-time payments, eco-friendly business practices) rewarded with coupons or discounts on future purchases</p> <p>A detailed product specification booklet</p> | <p>Welcome letter to first-time customers</p> <p>A clean, sleek company logo should be apparent on all packaging to promote brand</p> <p>Include detailed product specifications with each order</p> <p>Sales-people meet buyers regularly to maintain relationship; ask buyers if company's products suit their needs; develop new products as needed</p> | <p>On-site recycling and machinery that saves energy and made of earth-friendly materials promotes image of sustainability and saves money</p> <p>Make meeting place for buyers a nice place so they feel respected and comfortable; display quotes or statements that promote trusting, caring, long-term relationships</p> <p>Set aside space in production facility to hold stock for customers</p> | <p>Offer payment extensions for companies that struggle to pay on time</p> <p>Offer variety of package options to suit product and delivery needs of a variety of customers</p> |
| Expand Non-cola soft drink into South Korean market | <p>Customers loyal to other sodas drink this for variety</p> <p>International drinkers use soda to cut grease in Western food</p> | <p>Emphasize "unique taste" and "strong flavor"</p> <p>Free sample booths in popular urban areas; comes with bag of chips to show how it cuts grease</p> | <p>Make unique packaging to (e.g. create new bottle different from other soft drinks in South Korean market)</p> | <p>Where soda options may be monotonous (e.g. office and school cafeterias, vending machines)</p> <p>Fast food restaurants to encourage drinking with greasy Western food</p> | <p>Be competitive with other soft drinks</p> <p>Offer coupon or discounts at fast food restaurants</p> |
| Encourage more people to take chewable calcium supplements | <p>Pharmacies don't often recommend these products to customers</p> <p>People respond well to</p> | <p>Direct advertising campaign at pharmacies</p> <p>Attempt to reach customers early in life so</p> | <p>In developing other supplements in the future, companies should include combinations to vitamins and minerals to</p> | <p>Free samples by mail, in pharmacies or doctors' offices</p> <p>Ask doctors to put in</p> | <p>Emphasize savings in time or convenience</p> <p>Chewable supplements can be taken at any</p> |

| | | | | | |
|--|--|--|---|---|--|
| | <p>fear tactics and combination items</p> <p>People who start taking supplements early are often customers for life</p> <p>Purchasers tend to be well-read, physically fit, pro-active and seek self-improvement</p> | <p>they begin taking supplements as a preventative measure</p> <p>Use doctors and other health professionals as authority figures in promotions</p> | <p>encourage purchase</p> | <p>bowls at reception desk and in office waiting room (like candy)</p> | <p>time without water and are individually wrapped so may be taken anywhere</p> |
| <p>Increase online sales of imported soaps</p> | <p>Customers like to test products before buying</p> <p>Younger customers tend to shop in groups</p> <p>Most buyers appreciate recommendations from fellow buyers</p> <p>Buyers like natural ingredients</p> <p>Buyers refer to products seen in magazines</p> | <p>Ask yoga and natural beauty bloggers to promote and link to company website</p> <p>Make website highly interactive: create newsletter, blog or chat forum</p> <p>Include feature on website for customers to recommend products to friends or write product reviews</p> | <p>Emphasize product ingredients on website and how they aid in skin care</p> | <p>Send product samples or scent samples by mail</p> <p>Give samples to yoga studios for bathroom use</p> | <p>Price may be raised because customers focus on ingredients rather than cost</p> |