

## **ABSTRACT**

RAULSTON, CHARLES IAN. Analysis of the Market Potential and Effectiveness of Upstream Textile Advertising. (Under the direction of Dr. Nancy Cassill and Dr. William Oxenham).

The United States' (U.S.) textile industry has traditionally competed on cost measures in order to gain market share in the global market. However, because of increased globalization and influences from foreign competition, using a low cost strategy has become more difficult and firms are now looking for less price sensitive methods of differentiation. Advertising has been identified as an effective method of differentiating products and building value for the firm. Upstream firms, such as those involved in fibers, yarns, and fabrics, which do not directly sell to the final consumer, often have trouble communicating product benefits to the end users, as well as their immediate customers in their supply chain.

The purpose of this study was to determine how U.S. textile firms can use advertising to differentiate their products and how to communicate product benefits to their customers and the end consumer effectively through media choices and advertisement content. This study was completed using quantitative surveys among end use consumers and interviews with firms with successful upstream advertising strategies. The results of this research were used to develop a procedural model that U.S. textile firms can use to develop effective advertising strategies to differentiate their products in the market and increase competitiveness. The results provided companies with a framework they can use to develop their advertising strategy by guiding them through the advertisement development methodology in order to take advantage of market opportunities and to minimize potential risks.

The results of the study identified online advertising as a potentially effective way to communicate messages to consumers and entities in the textile supply chain. The benefits, challenges, opportunities and potential of upstream textile advertising were identified. In addition, the study identified effective strategies for communicating with end consumers, supply chain representatives, and the industry. Consumer and supply chain level perspectives were also collected related to the effectiveness of current advertising campaigns. The framework developed during the study highlights methodology and considerations specific to the upstream segment of textile industry and provides a sequential model for advertisement development.

Analysis of the Market Potential and Effectiveness of Upstream Textile Advertising

by  
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A thesis submitted to the Graduate Faculty of  
North Carolina State University  
in partial fulfillment of the  
requirements for the Degree of  
Master of Science

Textiles

Raleigh, North Carolina

2009

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## **BIOGRAPHY**

Ian Raulston was born in High Point, North Carolina to Keith and Resa Raulston in 1985. After graduating from Thomasville High School in 2003, he enrolled at the North Carolina State University's College of Textiles. Having been awarded two full scholarships, the Park and Centennial Scholarship, his undergraduate career was focused on academics and community service. During his summers, Raulston has had the privilege of working for the Institute of Textile Technology in 2005, and Glen Raven in 2006 and 2007. Raulston graduated as a valedictorian with a Bachelor of Science in Textile Management with a concentration in branding and marketing, in 2008. After graduation, Raulston became an Institute of Textile Technology Fellow, choosing to pursue his Masters of Science in Textile Technology Management. He interned with Highland Industries during the summer of 2008. Upon graduation, Raulston will be seeking employment in the field of marketing or advertising. In his spare time, Raulston is an active barefoot runner, whitewater kayaker, and exercise enthusiast.

## ACKNOWLEDGEMENTS

I would first like to express my appreciation to my co-chairs Dr. Nancy Cassill and Dr. William Oxenham. Their guidance, encouragement, dedication, and patience provided me with the tools and the strength to complete this study. I would also like to thank Dr. Erin Parrish for her commitment to helping me to make sense of it all and to succeed in my endeavor. I want to thank Patrice Hill and Merisa Velebir for their support and laughs over the last two years. I would also like to express my appreciation to the Staff of the Institute of Textile Technology and the membership for putting together a challenging and fulfilling academic program. I would also like to thank my fellow ITT classmates for their support, their encouragement, and the love that we have shared during our ITT experience. They have been like a second family to me, and I hope we never lose touch with one another.

Last, but most importantly, I would like to express my deepest gratitude to my Mom, Dad, family, and friends for their support and unconditional love. I really appreciate you all pushing me to be the best person I can be and for accompanying me along my life's journey.

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## **CHAPTER I**

### **INTRODUCTION**

The United States' (U.S.) textile industry has traditionally competed on cost measures in order to gain market share in the global market. However, because of increased globalization and influences from foreign competition, using a low cost strategy has become more difficult (Dickerson, 1999). Firms are now looking for new ways to differentiate their products that are not price sensitive. For apparel, branding and private labels are an obvious choice to distinguish their products. However, upstream firms, such as those involved in fibers, yarns, and fabrics, which do not directly sell to the final consumer, often have trouble communicating product benefits to the end users, as well as their immediate customers in their supply chain.

In order to effectively differentiate their products and to reverse this poor communication trend, firms must create both customer and consumer level demand for upstream products. By creating a value-added proposition, apparel and textile retailers may be able to justify a higher price. This can be accomplished through promotional activities such as pull/pull marketing, public relations (PR), sales promotion, and advertising. The best way to communicate product benefits to customers and consumers is through effective advertising (Keller, 2003). However, each company and target customer is unique and not all strategies are universally successful. Therefore, in order to create a viable business strategy that U.S. textile firms can use to determine the market potential for an advertising campaign, current advertising methods must be assessed.

Advertising effectiveness is a measurement of the tangible contributions advertising makes to the brand or the company (Wright-Isak, Faber, & Horner, 1997). There is no universally agreed upon procedure for assessing the standard of performance for advertising. Most businesses use sales volume as a measurement of success, but this procedure fails to capture the nonmonetary benefits of advertising such as awareness and perceptions. It has been suggested that both qualitative and quantitative measures should be employed to assess advertising effectiveness. However, with the diverse benefits and roles of advertising, there are no standards for advertising success (Wright-Isak, Faber, & Horner, 1997). Typically, it is up to the individual company to measure and evaluate their own set standards. Much like the procedure for measuring effective advertising, there is no set standard for what constitutes a successful advertising campaign. From the literature, it has been stated that it is up to the individual company to determine whether an advertising campaign was successful or not (Wright-Isak, Faber, & Horner, 1997).

### **Purpose of Research**

The purpose of this research was to examine upstream textile firms that effectively used advertising to differentiate their products in the market. The broad research question was how could U.S. upstream textile firms use advertising to increase their competitiveness and differentiate their products from low cost competitors in the global market? From the broad research question, the narrowed focus was to determine the most effective advertising strategies for reaching customers, consumers, and the industry. Specific research questions, which were developed from the narrowed question include:

1. What are the benefits, challenges, opportunities and potential of upstream advertising?
2. What are some different strategies used in the performance market? Focusing on the sports and leisure market and outdoor apparel and equipment subsegment?
3. What are the most effective strategies for U.S. textile firms to use in order to communicate with the customer and the end-use consumer? What perspectives do the following groups have about advertising:
  - a. End consumers;
  - b. Customers;
  - c. Industry?
4. How can this knowledge be presented to help upstream textile firms create value and differentiate their products?
5. What is the cost/benefit relationship between money spent on advertising and realized gains for the firm?

## **Research Objectives**

### *Phase I: Exploratory*

RO1: Define advertising success and identify companies with successful advertising strategies.

RO2: Complete a competitive analysis, using secondary data, on the advertising strategies of upstream textile manufacturers in addition to the strategies of upstream firms from other industries in order to:

RO2A: Develop an understanding of the current advertising campaigns.

RO2B: Assess the strategies used by the selected companies.

*Phase II: Inductive Logic*

Phase II and III will be conducted concurrently.

RO3: Examine differences in the marketing strategies used by the performance textile market, focusing specifically on the outdoor apparel and equipment subsegment of the sports and leisure market segment.

RO3A: Assess benefits

RO3B: Assess challenges

RO3C: Assess opportunities

RO3D: Assess potential

RO3E: Advertising methodology

RO4: Examine the effectiveness from a supply chain perspective to determine:

RO4A: Which media types the population views most frequently

RO4B: What advertising media has the best response rate

RO4C: What part of the advertisement causes the population to seek additional information

RO4D: What features of the advertisement are most effective

RO4E: What factors the population considers before purchasing

RO4F: Where the population seeks product information

*Phase III: Deductive Logic*

RO5: Examine the effectiveness of upstream advertising from an end consumer perspective to determine:

RO5A: If the population is aware of the advertised ingredient product

RO5B: If the population knows the functionality of the ingredient product

RO5C: What features of the advertisement the population feels are most effective

RO5D: If the population looks for the ingredient when purchasing products

RO5E. If the population is willing to pay more

RO5E: Where the population seeks product information

RO6: Develop an understanding of the potential of upstream textile advertising focusing on different advertising opportunities including:

RO6A: Print

RO6B: Television

RO6C: Internet

*Phase IV: Model Development*

RO7: Develop a framework that U.S. textile companies can use to develop a successful upstream advertising campaign.

RO7A: Provide ITT member companies with the knowledge and guidelines differentiate themselves through advertising in a highly competitive market.

## **Significance of Study**

The significance of this study is fourfold. First, the results of this research will provide knowledge of the benefits, challenges, opportunities, and potential of upstream advertising. This knowledge will aid companies in determining the cost/benefit relationship of advertising for their company and could aid in managerial decision-making.

Second, it will determine the most effective strategies for U.S. textile firms to use in order to communicate with the customer and the end-use consumer for the performance market. This will allow firms to determine what advertising communication media type best fits their target market.

Third, it will provide a framework for U.S. textile firms to use when implementing an upstream advertising strategy.

Finally, it will provide a means for U.S. textile firms to create perceived value and differentiation. By understanding the nature of the upstream advertising, U.S. producers will be ideally positioned to gain a competitive advantage through differentiation.

## **Limitations**

1. This study was specifically limited to the upstream textile firms participating in the sports and leisure segment of the performance textile market. Companies interviewed are representative of the upstream segment of the industry, but not the entire industry. Therefore, the results presented in this report cannot be generalized for all segments or all product categories.

2. Participants in the consumer survey are limited, but are representative of the population. Because a non-probability convenience sample was used during the study, the results presented in this report cannot be generalized for the entire population. Biases in awareness may have occurred due to fact that upstream companies have sponsored events and programs on the College of Textiles campus.
3. Respondent bias may be present in surveys and interviews, due to their willingness or unwillingness to disclose certain data.
4. Advertising is only one component of promotional activities. While companies can achieve success through other promotional avenues, this study only focuses on the advertising portion of the mix.
5. Due to the markets and consumer preferences of Raleigh/Cary, North Carolina area, the availability and selection of products and publications identified in this study are limited. Therefore, the results of this study are geographically limited and cannot be applied to all geographic areas.

### **Definitions of Relevant Terms**

1. Advertising Failure: Campaigns or individual advertisements that do not meet pre-established company objectives that may take the form of increased sales, new customers, increased market share, or increased brand/product/service/company awareness (adapted from Vass, 2005).
2. Advertising Success: Campaigns or individual advertisements that meet pre-established company objectives that may take the form of increased sales, new

- customers, increased market share, or increased brand/product/service/company awareness (adapted from Vass, 2005).
3. Brand: A representation of promises, images, or experiences associated with a product in the mind of the consumer (Kegan, 2005).
  4. Brand image: Complex array of images associated with a product and the maker of that product (Kegan, 2005).
  5. Channel of Distribution: The collection of agencies that perform the activities required to link producers with users (Kegan, 2005).
  6. Collateral: Printed company or product brochures or pamphlets, distributed to potential customers.
  7. Competitive Advantage: The meeting of the firm's core competencies and the factors required to yield significant customer value (Kegan, 2005).
  8. Differentiation: The ability of a firm to serve a large market and be perceived as having unique products, often allowing for premium pricing (Kegan, 2005).
  9. Downstream: Relates to the relative position of a company in relation to other companies. These companies are further along in the supply chain, close to the consumer. Companies may include finished goods companies, marketer, wholesalers, and retailers (adapted from Dickerson, 1999).
  10. Host Brand: Product or brand that allows another company's brand to be promoted on or with their product, in an effort to build brand equity and creditability for the hosting product (Desai, 2002).

11. Ingredient textile: Includes any fiber, yarn, fabric, or finish used to create a product (Desai, 2002).
12. Outdoor Market Segment: Segment of the sports and leisure includes: Apparel (sport and weather resistant jackets, vests, and pants); Accessories (hats, socks and gloves); Footwear (hiking shoes and hiking/hunting boots); and Equipment (tents, sleeping bags, and backpacks/daypacks) (adapted from NC Textile Connect, 2008).
13. Performance Textiles: Classification of textile products that combine technical performance with esthetic dimensions to fulfill specific end uses and niches. These products include those used in the agriculture, construction, apparel, geotextile, home furnishings, military, industrial, medical, transportation, environmental, packaging, and sports and leisure sub sectors. Non-performance products may include commodity goods (Nelson, 2008).
14. Positioning: Creating certain associations in the mind of users compared to competitors (Kegan, 2005).
15. Public Relations (PR): Component of the marketing mix that monitor and evaluate public opinion about a company or its products (Keegan & Green, 2005).
16. Sports and Leisure Segment: Product category includes any recreational and consumer goods including tents, backpacks, fabric covered sport balls, awnings, umbrellas, etc. (NC Textile Connect, 2008).
17. Supply Chain: Group of agencies that facilitate the conversion of raw materials into finished good for consumption (Kegan, 2005).

18. Targeting: Act of evaluating market segments and concentrating marketing efforts on a specific country, area, or consumer group (Kegan, 2005).
19. Upstream: Companies that produce or support the production of textile fibers, yarns, and fabrics (both finished and greige) (adapted from Dickerson, 1999).
20. Upstream Advertising: The act of communicating a sponsored or paid message through a non-personal channel including trade shows, showrooms, hang tags, print advertisements, Internet advertisements, and sponsored events. Messages can be product, company, or service oriented (adapted from Kegan, 2005).
21. Value: A consumer's perception of benefits from a firm's product or service relative to the cost of the good or service (Kegan, 2005).

## CHAPTER II

### LITERATURE REVIEW

#### Conceptual Framework

The conceptual framework used for this research study was a modified version of the Shultz and Barn's Advertising Campaign Planning Process Model (1999). This adapted model, Figure 1, illustrates the advertising planning process from the inception, through the implementation and feedback stages, including secondary considerations such as public relations and sales activities. This adapted model was developed using several inputs from other advertising strategy models, including the Sandage, Fryburger, & Rotzoll Advertising Component Model (Sandage, Fryburger, & Rotzoll, 1983), the Cooper Strategic Analysis Framework (Cooper, 1997), and Keller's Factors in Designing Effective Advertising Campaigns (Keller, 2003). The segments added from these models were denoted by bolded boxes in Figure 1. Justification for these additions can be found in the following section.

#### *Frameworks Used to Adapt Study's Conceptual Framework*

The synthesis of this model was developed by combining elements from four different strategy perspectives, each with unique elements that were incorporated into the final model. The Schultz and Barn's Advertising Campaign Planning Process (Schultz & Barns, 1999) acted as the basis for the adapted model. Table 1 outlines the framework evaluation process and identifies the strengths and weakness of each model, as well as the components deemed important or useful in creating the adapted model.

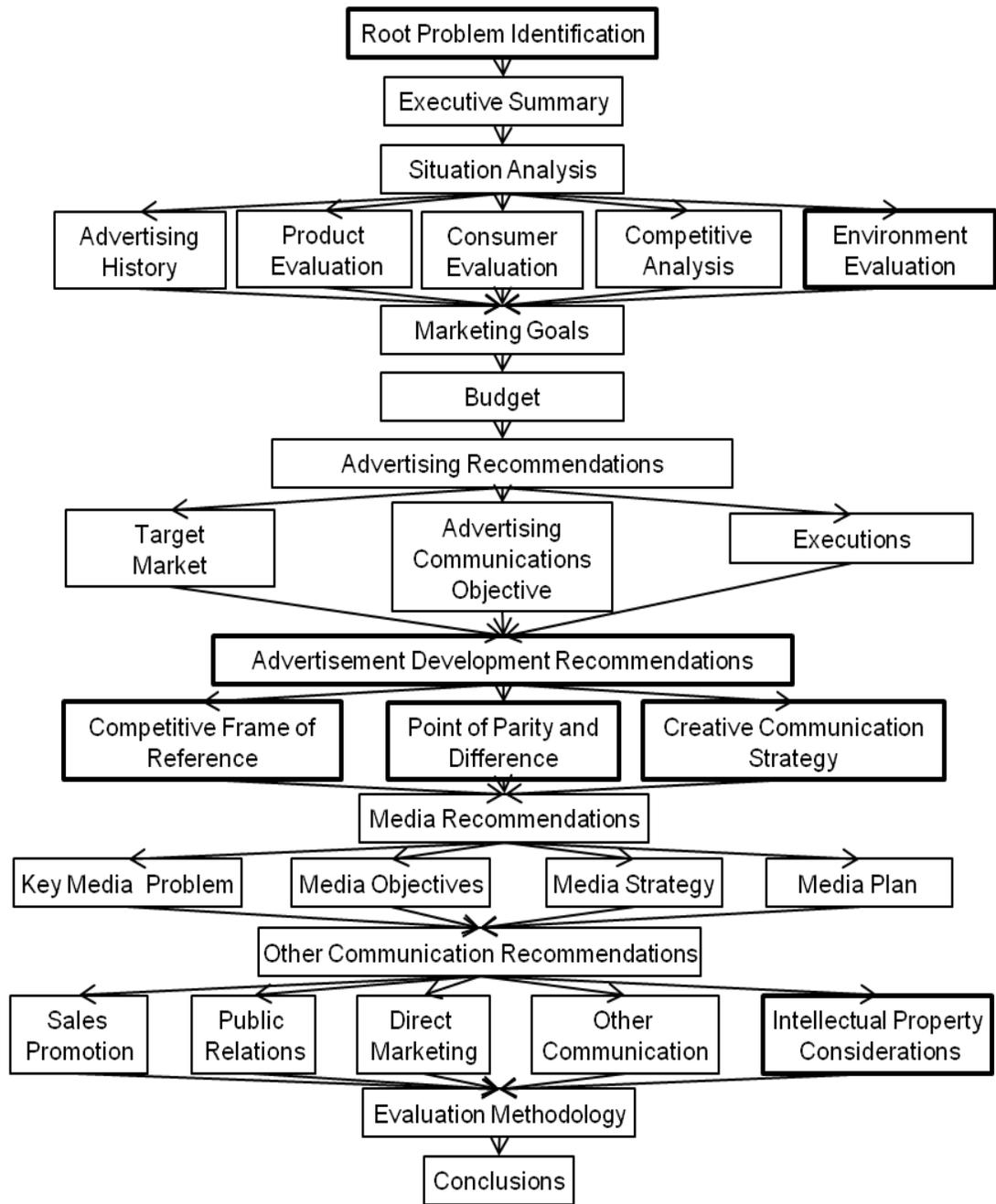


Figure 1: Adapted Advertising Methodology Model

Source: Adapted by I. Raulston (2009) Schultz, D. E., & Barns, B. E. (1999). *Strategic Brand Communication Campaigns*. Chicago, IL: NTC Business Books. 68.

Table 1

## Framework Evaluation

Framework Evaluation			
Model	Components	Strengths	Weaknesses
Schultz & Barns	Environmental scan	Detailed methodology	Does not describe management's role
	Defining goals	Specifically mentions activities within steps	Does not mention what makes an effective advertisement
	Budgeting	Includes budgets early in the process	Does not identify root business problem
	Targeting	Considers prior advertising and competitors early	Does not call for trail testing
	Media planning	Calls for evaluation of strategy post implementation	
	Secondary considerations	Mentions auxiliary considerations	
	Evaluation Conclusions		
Sandage, Fryburger & Rotzoll	Research	Simple model	Lacks detail
	Strategic planning	Considers the major components of planning	No evaluation or testing step
	Tactics	Includes intellectual property issues	Does not mention what makes an effective advertisement
	Advertisement construction	Includes looking at marketing mix	
Cooper	Problem definition	Consideration of reasons to advertise and its potential role	Does not consider budgets, media planning
	Marketing mix	Considers branding and the customer's relationship with the brand	Only takes the process through conceptualization
	Environmental scan	Takes into consideration the environment	Does not call for post evaluation or trial testing
	Define role of advertising	Defines the underlying business problem to determine if advertising is the right course of action	Does not mention what makes an effective advertisement
	Advertising objectives	Incorporates marketing mix	Does not call for post evaluation or trial testing
Keller	Components of effective advertisements	Details what should be included in the actual advertisement	Does not account for the rest of the strategic process.

Figure 2, was used as the basis for the modified conceptual framework. This model depicts the entire advertising development process from the planning stages through playback and evaluation. The major strength of this model is its organization. Primary activities and subsequent sub-activities within that heading are listed in a way that allows for a succinct implementation methodology. This model also highlights the importance of proper customer and market research prior to any actual advertising or media strategy development. The final strength of the Shultz and Barn's Advertising Campaign Planning Process Model (1999) is that it considers in the planning process secondary activities such as public relations, sales promotion, and post implementation evaluation.

The Sandage, Fryburger, & Rotzoll Advertising Components Model (1983), Figure 3, represents a very simplistic view of the advertising development process. The strength of this model is that it considers intellectual property rights and protection as part of the development process. As advertising attempts to reach new audiences, especially through digital communications, the risks of not protecting company media increases dramatically. Many companies that participate in the online community are not aware of the potential risks of fraud, slander, and piracy (Bartkiewicz, 2008). Therefore, it is critical to include intellectual property issues when developing and implementing an advertising strategy, especially when using online media communication strategies. From this model, an additional component for intellectual property was added to the Shultz and Barn's Advertising Campaign Planning Process Model (1999).

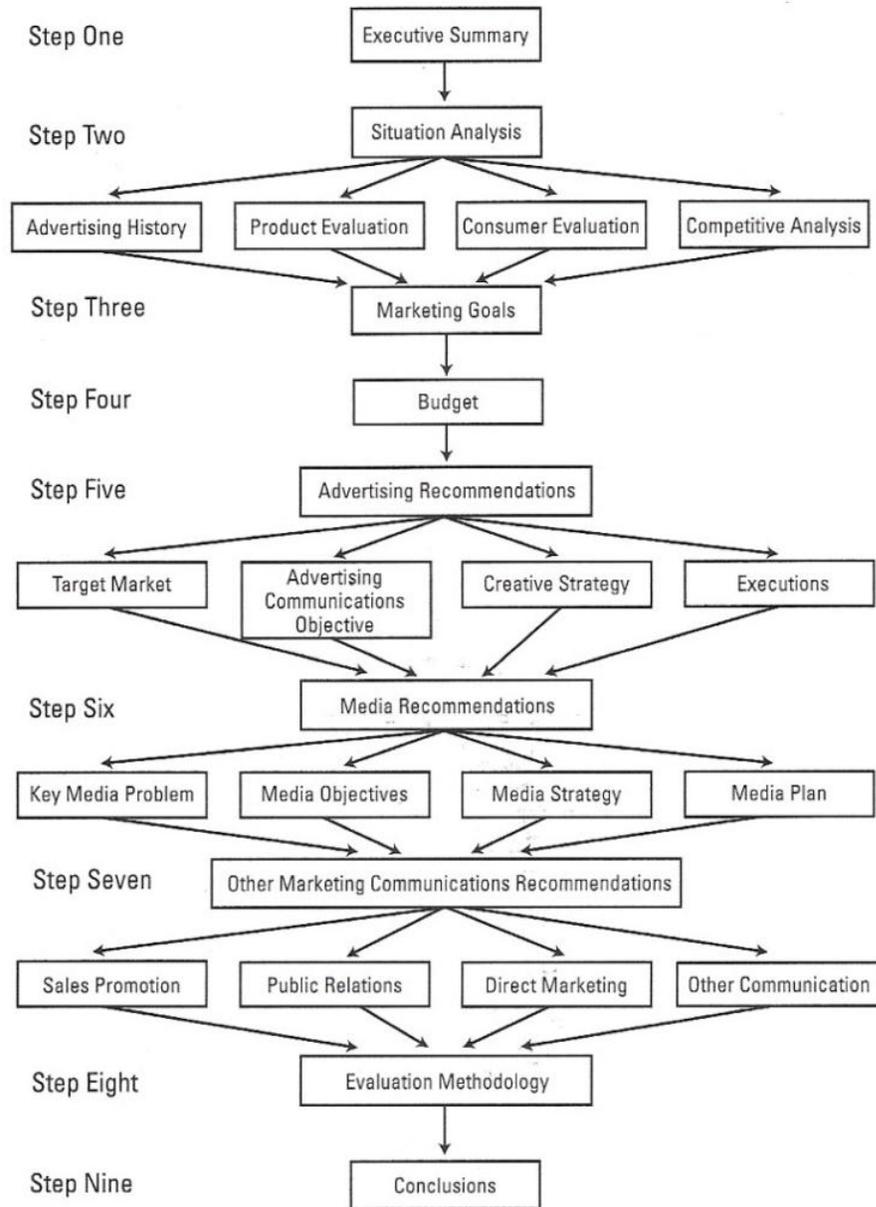


Figure 2: Schultz and Barn's Advertising Campaign Planning Process

Source: Schultz, D. E., & Barns, B. E. (1999). *Strategic Brand Communication Campaigns*. Chicago, IL: NTC Business Books.

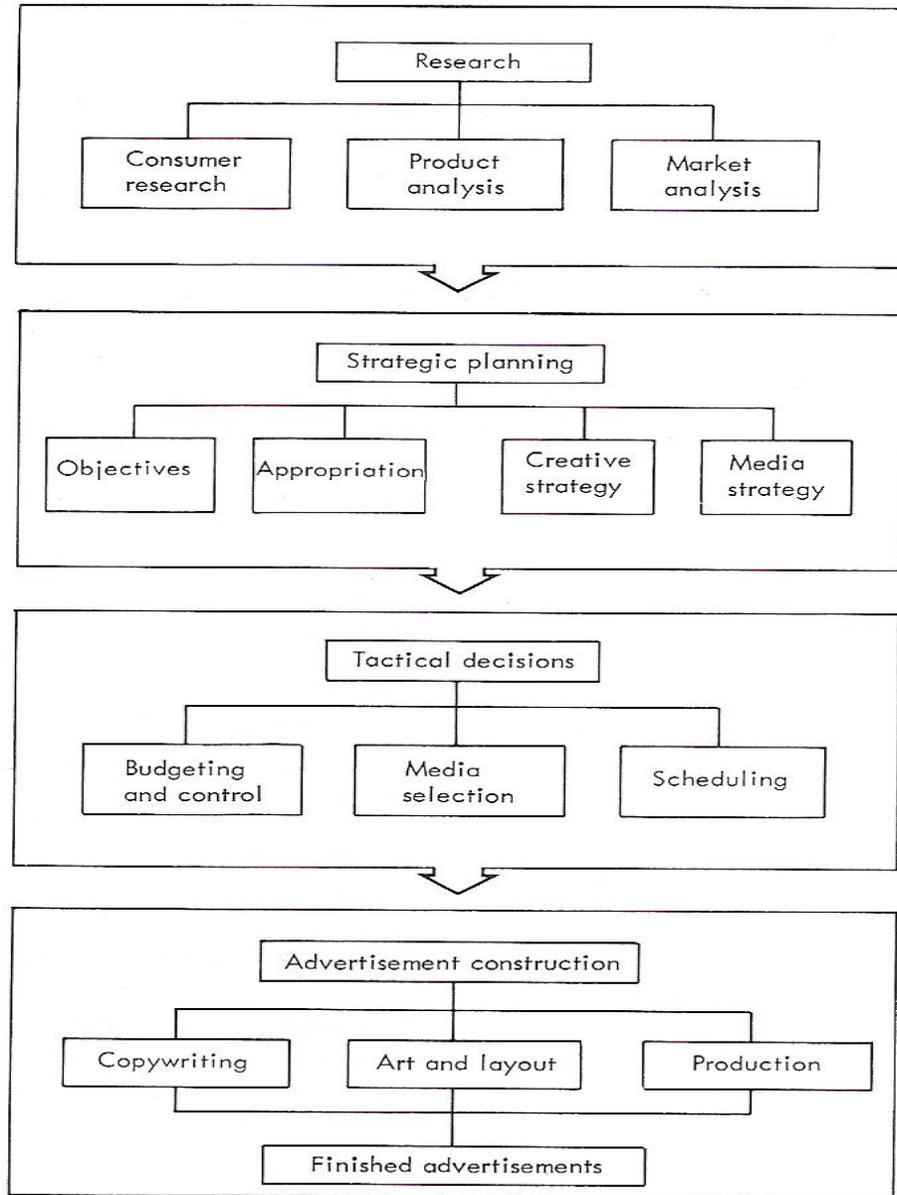


Figure 3: Sandage, Fryburger, & Rotzoll Advertising Components Model

Source: Sandage, C. H., Fryburger, V., & Rotzoll, K. (1983). *Advertising Theory and Practice*. Homewood, IL: Richard D. Irwin, Inc. p. 6.

The next model considered for inclusion in the research project was the Cooper Strategic Analysis Framework (Cooper, 1997), Figure 4. This model attempts to understand the underlying reasons to advertise and its potential role to solve the core business problem. Understanding the root business cause or problem allows the advertising development team to better develop strategies that are tailored to promote certain outcomes. This step should be carried out early in the strategic planning process to ensure that appropriate goals and strategies reflect the overall business goal (Cooper, 1993).

The weaknesses of the Shultz and Barns, Sandage, Fryburger, and Rotzoll, and Cooper models were that none of them mentioned what goes into creating an effective advertising campaign. According to Kevin Keller (2003), though the effectiveness of an advertisement is largely dependent on the product, the target market, and the nature of competition, there are elements that help to ensure the success of an advertisement. In Keller's *Factors in Designing Effective Advertising Campaigns* (2003), Figure 5, he lists components that can be used to define the positioning of the product, as well as the communication strategy (Keller, 2003). This source was selected to be incorporated in the adapted model because it was the only one that listed specific elements included in an advertisement.

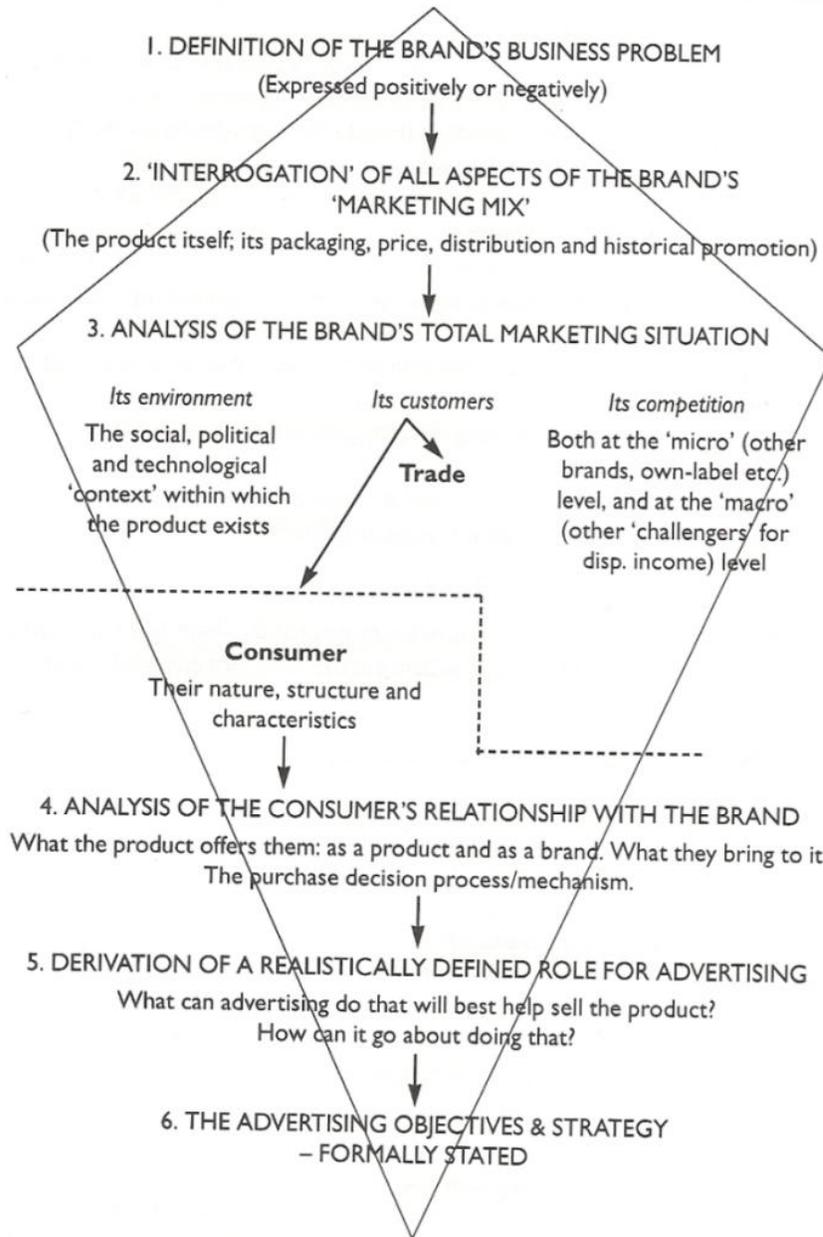
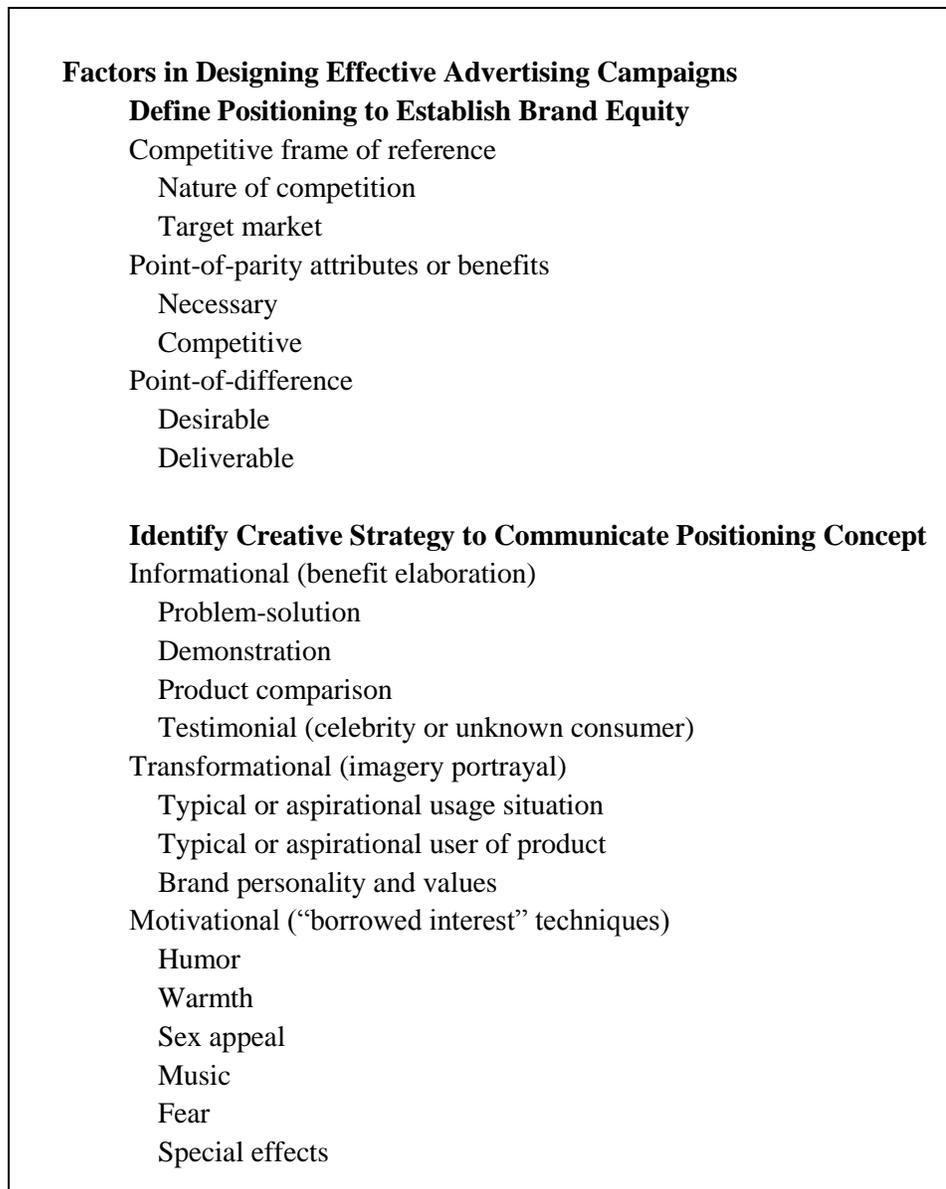


Figure 4: Cooper's Strategic Analysis Framework

Source: Cooper, A. (1997). *How to Plan Advertising 2nd Edition*. London: Cassill. P.32

Keller's *Factors in Designing Effective Advertising Campaigns* (2003) identifies both product and market level considerations, as well as creative and perceptual attributes, which are both critical for advertising success. Traditional business to businesses advertising strategies have been product with supportive copy points. Several authors, including Steve McKee from Business Week Online (McKee, 2008) and Daniela Andrews from Marketing Magazine (Andrews, 2005), are advocating adapting consumer based advertising techniques for use in business to business communications. This new tactic stems from their argument that companies do not buy products, people buy products for companies and because they are still acting like traditional consumers, except in a business setting, the advertising strategy to reach them must reflect those preferences. Although business customers have unique buying procedures, it is the buyer that has the initial contact with the advertisement and if they, on a consumer level, are not interested in the advertisement, then there is no connection. Therefore, Keller's *Factors in Designing Effective Advertising Campaigns* (2003) works well in demonstrating the need for both informational and psychological elements in B2B and B2C advertising.

From the adapted Shultz and Barn's Advertising Campaign Planning Process Model (1999), it should be possible to determine the effectiveness and potential of advertising by examining successful campaigns for the factors listed in Keller's Model and then referencing those companies in respect to their development and implementation strategy, and their assessment of the relative success of the campaign.



*Figure 5: Keller’s Factors for Effective Advertisements*

Source: Keller, Kevin, L. (2003). *Strategic Brand Management, 2nd ed.* New Delhi, India: Prentice-Hall of India

## **Performance Textiles**

Performance textiles include those used in the agriculture, construction, apparel, geotextile, home furnishings, military, industrial, medical, transportation, environmental, packaging, and sports and leisure markets. These textile products combine technical performance with aesthetic dimensions to fulfill specific end uses and niches. Participating in the performance textiles market segment is said to be an effective strategy for stimulating new business growth, creating value added products, and increasing competitiveness when traditional textile segments, such as apparel and household textiles, have become stagnant (Nelson, 2008). Current projections estimate that 40% of total textile production and total textile consumption are composed of performance textiles and that there will be continued growth in this segment as markets expand and new products are developed (Nelson, 2008).

Of the various segments of the performance textile market, there are several that use advertising and branding as a way to differentiate their products to increase competitiveness. Of the twelve segments, the apparel and sports and leisure segments can be classified as more consumer oriented product segments and as a result, may participate more heavily in branding and advertising than the other, more industry and non-consumer based, segments. The sports and leisure segment was selected for the study because fiber, yarn, and fabric (upstream) manufactures are more likely to directly participate in this market through product innovations.

### *Sports and Leisure Segment and the Outdoor Market*

The sports and leisure segment is a potentially lucrative and value-added subsegment of performance textiles which includes recreational and consumer goods such as specialty

apparel, tents, backpacks, fabric covered sport balls, awnings, and umbrellas (adapted from NC Textile Connect, 2008; Nelson, 2008). Over the past several years, there has been an increasing consumer demand for performance apparel as specialty finishes and performance enhanced attributes of products become more desirable (Nelson, 2008). Though the growth rate for this segment is projected to be lower in comparison to other performance segments, there is potential for lucrative business opportunities as the end products with these textile components tend to command higher price points (Nelson, 2008).

A growing market for sports and leisure products is the outdoor market. The outdoor market subsegment includes consumer apparel, accessories, footwear, and equipment used for sport and recreation in an outdoor setting. This market is made up of hardcore enthusiasts and aspirational consumers of predominantly Baby Boomers and Millennials (Outdoor Industry Association, 2006). In 2007, there were 10.6 million brands in the outdoors and recreation segment, an increase of 5.6% since 2006, and 15.2% since 2005 (Perry, 2008).

According to a report conducted by the Outdoor Industry Association (2007), the largest non-profit trade association for the active outdoor recreation businesses, the outdoor market is strong and growing (Outdoor Industry Association, 2007). According to their annual report for 2006, 66% of Americans participated in outdoor activities, which include camping, hiking, cycling, fishing, hunting, surfing, and skiing/snowboarding. The outdoor market was valued at \$33 billion in 2005, with sales stemming from specialty, chain, department, mass merchant/discount stores, and Internet/catalog sales (Outdoor Industry Association, 2006).

Not only is this a growing and profitable segment, but according to David Matz, President of the Retailers of the Outdoor Industry, outdoor product sales typically improve during economic downturns as consumers choose camping and other outdoor activities as vacation substitutes. Other trends include Eco friendly products, which are gaining ground in this segment, as well as incorporation of technical features, which are important to hikers, climbers, and snow sport enthusiasts. Eco trends include natural/synthetic fiber blends and recycled fibers (Lloyd, 2008).

### **Defining Upstream, Downstream and Upstream Advertising**

The textile complex, Figure 6, represents the textile supply chain, from fiber to finished good. The complex was adapted from Dickerson's Textile and Apparel Production-Distribution Chain (Dickerson, 1999). The adapted complex is divided into two sectors, the upstream and the downstream. Upstream activities are characterized as activities in the early stages of the supply chain. These activities include the fiber industry (manufactured fibers and natural fibers) and the textile industry (spinning, weaving, knitting, finishing, and nonwovens operations). Downstream activities involve end uses (interior furnishings, apparel industry, industrial goods) and distribution (wholesale and retail activities) (Dickerson, 1999). However, the relative position of the firm in the supply chain determines whether another firm is upstream or downstream from that company. The focus of this study is the upstream portion of the supply chain.

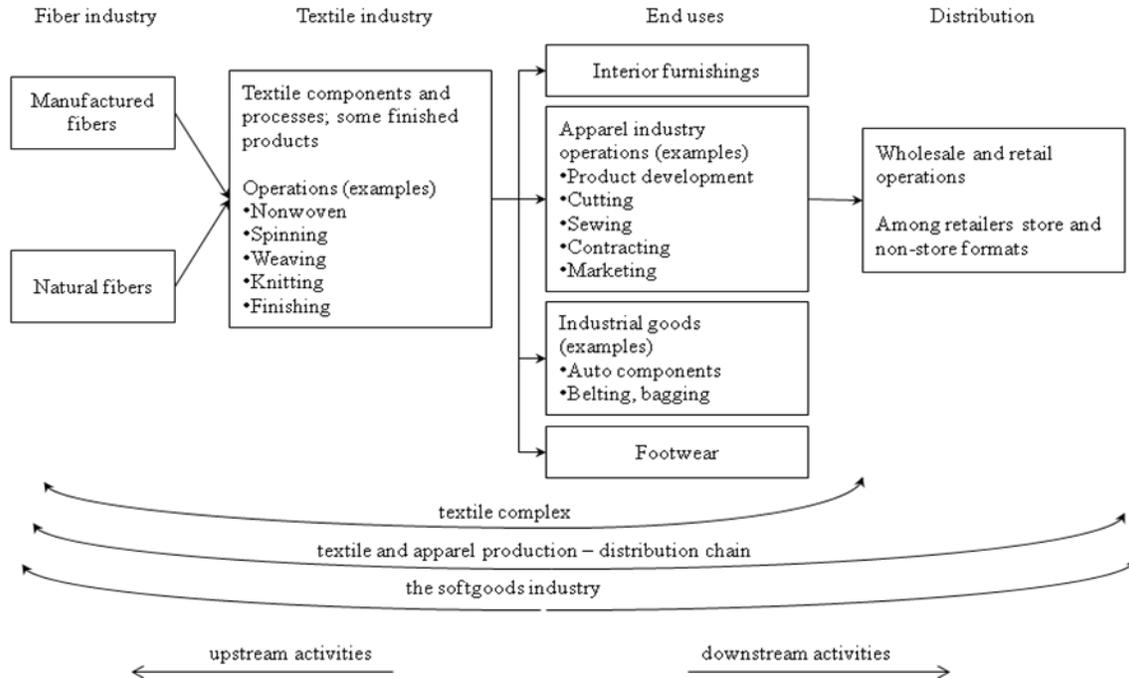


Figure 6: Dickerson's Textile and Apparel Production-Distribution Chain

Adapted from: Dickerson, K. G. (1999). *Textiles and Apparel in the Global Economy*. 2<sup>nd</sup> Ed. Upper Saddle River, NJ: Prentice Hall. 19.

Upstream textile advertising describes the efforts of an ingredient component manufacturer attempting to promote their textile component to another firm in their supply chain. An upstream firm may advertise to their customers (push strategy), or retailers and end use consumers (pull strategy) in order to create demand for their products. These products may include promotions for fibers, yarns, or fabrics, depending on their position in supply chain (Dickerson, 1999). These promotions may take the form of print advertisements in trade publications or consumer magazines, hang tags on final products, television commercials or sponsored events, or various forms of online media including websites, blogs, and online advertisements (Keller, 2003).

## **Advertising Effectiveness Theory**

According to an article by Christine Wright-Isak, Ronald Faber, and Lewis Horner (1997), there is no universally agreed upon method for evaluating the effectiveness of an advertisement. Advertising effectiveness is a measurement of the tangible contributions advertising makes to the brand or the company. This means that advertising effectiveness is not based upon a single advertisement or campaign, but the aggregate contribution of these efforts over a period of time. These activities include all advertising activities or promotional activities created by the firm or other outside entities over the life span of the company or brand. Therefore, the cost of these efforts in aggregate must be less than the overall benefit to the brand or company. With this definition, advertising is meant to increase the long-term goodwill of the company or brand. It is then the task of the company to determine what specific effects contribute to the overall effectiveness of the campaign and determine what effects are universally beneficial. A successful advertising campaign is founded upon careful market research, sufficient managerial and financial support, careful media selection and planning, and communicating messages that are perceived to be unique and creative to the target audience (Wright-Isak, Faber, & Horner, 1997).

There is no universally agreed upon procedure to assessing the standard for performance of effective advertising. Firms typically use sales based evaluations since return on investment (ROI) is such a prominent focus in business. However, it has been said that sales volume indicators may not be the best way to evaluate the effectiveness of advertising, since so many other factors can contribute to sales volume (Wright-Isak, Faber, & Horner,

1997). According to the Wright-Isak, Faber and Horner (1997), in order to understand real-world impacts, several variables need to be accounted for:

1. The probability that the intended target received the message
2. The circumstances that prevented the advertisement from impacting the target
3. Whether or not the viewing of the advertisement impacted the purchase behavior
4. The market share versus the share of voice i.e. what is the ratio between the company's share of the advertising market over the company's share of the sales market
5. The message in context with the media in which the message was delivered

An effective way to measure advertising success is to set specific goals for the advertising campaign before implementation. This establishes expectations for advertising specifically, instead of attempting to evaluate the effectiveness of the entire marketing mix through advertising. Advertising campaigns should also be assessed for indirect impacts that may positively affect the overall business goal. Finally, recognizing both the short term and long-term value of advertising is critical for assessing the overall effectiveness of the advertisements (Wright-Isak, Faber, & Horner, 1997).

Advertising effectiveness can be broken down into two segments: short term and long term. Short-term evaluations allow researchers to see what changes have occurred in the business due to the presence or absence of advertising by measuring the effect advertising has had on sales volume, brand or company perception, and awareness (Wright-Isak, Faber, & Horner, 1997). These timing distinctions are important as the benefits of advertising may

take long periods of time before the effects are realized (Shultz & Barns, 1999). These evaluations are typically completed by surveying both targeted and non-targeted customers or consumers (Wright-Isak, Faber, & Horner, 1997).

Long-term assessment requires understanding how advertising efforts have affected the overall perceptions and attitudes held by customers and consumers over time. However, it is more difficult to assess advertising's specific role since so many other factors contribute to these perceptions. Long-term evaluation allows researchers to assess what specific factors or elements in the advertising are most effective. This can be completed by comparing a company to their competitors and determining which has the strongest linkage between the company's advertised message and the common market attribute (Wright-Isak, Faber, & Horner, 1997).

### **Effectiveness Evaluation Methods**

Advertising evaluation can be broken down into two segments: efficiency and effectiveness. Efficiency involves reaching the greatest number of persons for at the lowest cost. This strategy is good for blanket or mass media advertising for universal appeal. However, this method does not take into account individual preferences of the population. Effectiveness evaluation pertains to the receptiveness of the target audience and the results of the campaign, with less emphasis on the cost (Shultz & Barns, 1999).

According Wright-Isak, Faber, and Horner there is no universally agreed upon method for evaluating the effectiveness of an advertisement. With the diverse benefits and roles of advertising, there are no standards for advertising success. Typically, it is up to the individual company to measure and evaluate by their own standards. Often, the question for

most decision makers and budgeting personnel is what the expected return is for each dollar spent on advertising. It is often difficult to assess what advertising direct impact is to the firm, since advertising efforts are intertwined with other marketing mix activities such as public relations (Wright-Isak, Faber,& Horner, 1997).

Advertising effectiveness can be measured using many different methods. In general, the process for measuring advertising effectiveness must be repeatable, substantiated through prior baseline data, evaluated over specific time frame, and measured against what benefits would have been received had the investment not been made (Shultz & Barns, 1999). Evaluation methods can be broken down into two segments: qualitative and quantitative. Qualitative research uses the observations of subjects to identify general theories based on the views of the participants of the study (Creswell, 2003). In advertising, qualitative research typically takes the form of interviews and focus groups, which researchers use to gather consumer opinions about a product, brand or company.

For most firms, return on investment and sales are the two most important quantitative indicators of advertising success. However, awareness must be built first in order to drive sales. According to Rett Haigler, Senior Account Executive for CORDURA brand, companies often concentrate on creating sales through their advertising efforts, but creating awareness and interest should be the center point for new media campaigns. After awareness has been established, then sales oriented advertisements should be created (Haigler, 2008).

### **Advertising Success**

Much like the procedure for measuring effective advertising, there is no set standard for what constitutes a successful advertising campaign. From the literature, it has been said

that it is up to the individual company to determine whether an advertising campaign fulfilled the pre-established goals and objectives (Wright-Isak, Faber, & Horner, 1997). If the goals and objectives were met, then the campaign would be deemed successful (Shultz & Barns, 1999). Others view advertising as delivering the right message to the target consumer and influencing them to purchase the advertised product or service.

### **Advertising Effects**

#### *Positive Benefits*

There are several benefits associated with advertising. From an economic standpoint, advertising encourages growth and competition among market players. For the advertising company, advertising builds awareness and visibility of products, reduces the risk of new products, and has the potential for a large return on investment. From a consumer's perspective, advertising provides free information about products and companies that they may not have heard of otherwise. Advertising also functions to increase product demand and ushers in higher standards of living through its messages (Sandage, Fryburger, & Rotzoll, 1983).

#### *Negative Impacts*

Advertising can also have negative effects. Advertising expenditures could be considered wasteful and resource depleting, while creating non-price competition. Advertising also works to create barriers of entry and increases prices. Consumers may also be misled by advertising, which can diminish overall perceptions and value (Sandage, Fryburger, & Rotzoll, 1983).

## **Advertising Challenges**

According to Haigler (2008), companies tend to exhibit similar challenges while planning their advertising strategy. Haigler states that most brands do not understand the value that they are bringing their customer or consumer. In order to be successful, the company or brand must work to determine what the core benefits of their products are and what the consumer/customer values most. Making advertisements relevant to the target audience is one of the most challenging aspects of advertising (Haigler, 2008).

Additional challenges include:

1. Savvy Customers and Consumers- Populations are aware of advertising tactics (Keller, 2003)
2. Breaking Through Advertising Noise- The average consumer is exposed to over 3,000 advertisements a day, and most consumers must see a message twenty seven times before considering to do business with a company (Vass, 2005)
3. Increasing Costs- Limited budgets (Keller, 2003)
4. Uniqueness- Creativity, relevancy, and message (Haigler, 2008)
5. Trusting the Data- Acting on research results and not emotion (Haigler, 2008)
6. Having Patience- Developing advertisements fully and not pushing advertisements through to have something in the market (Haigler 2008)

## **Differences Between B2B and B2C Advertising**

According to one source from *Marketing Magazine* (Andrews, 2005), there are several widely held misconceptions about business-to-business (trade) advertising. The author states that business-to-business advertising and business-to-consumer advertising are

fundamentally the same. Both advertising segments require gathering knowledge about their target customers, target markets, and products. Andrews (2005) points out that business customers are fundamentally different from typical consumers. Business customers are typically more informed, more willing to listen, and more formal. These customers typically have prior knowledge about a variety of products and have specific needs that the product must deliver. Though the business customer is well informed, they still have emotional connections and unique experiences that determine their attitudes and purchasing habits. Understanding how these characteristics work together is a critical factor for advertising effectively (Andrews, 2005).

In addition to these characteristics, the author points out business customers have unique purchasing procedures that are typically formal and require multiple levels of approval before the final purchase. Because of this added complexity, firms that understand these differences and similarities are better positioned for advertising success. To facilitate this potentially lengthy process, advertisers should provide sufficient information and guidance in the advertisement to acknowledge potential bottlenecks in the purchasing process immediately. Finally, products sold to business customers are typically more complex in nature. This creates a challenge for advertisers to describe the product in a statement that is brief yet gives sufficient information to persuade the customer to purchase the product (Andrews, 2005).

### **Current Strategies for Differentiation**

#### *General Methodology for Textile Advertisement Development*

According to Kathy Vass of Textile World, advertisements should be created in order to increase sales. She states that many companies approach advertising campaigns as just a way

to keep the company's name out in the market or as a response to competitors. Successful advertising strategies are founded upon specific and measurable objectives, which will allow a company to access what tactics work with what target groups (Vass, 2005).

When developing the objective strategy, it is important to list specific outcomes that will aid in determining the effectiveness of the advertisement. This will help guide the creative process to ensure that the specified goals are being met. Some secondary objectives of advertising may be to attract new customers, increase market share, promote new products and services, or to increase company interest (Vass, 2005).

There are six steps involved in developing a new advertisement:

- i. Develop objectives
- ii. Design advertisements around those objectives
- iii. Test the advertisements to determine if they will meet the objectives
- iv. Redesign or modify the advertisement based upon testing results
- v. Run the advertisement for as long as the objectives are being met
- vi. Terminate the advertisement when it begins to fail at meeting the objectives or the objectives become obsolete (Vass, 2005)

#### *Upstream Tactics- Ingredient Advertising*

Ingredient advertising is a technique commonly used in upstream advertising. Since many upstream firms do not sell directly to the end consumer, it is often difficult to relate the attributes and benefits of the ingredient. Ingredient advertising places ads developed by the upstream component supplier on the final product sold to consumers, in an effort to educate the consumer. The theory behind ingredient advertising is that if the consumer understands

and recognizes the brand and associated performance benefits the upstream ingredient provides, then that consumer begins to prefer and look for that ingredient when purchase new products. This allows the host product or brand to borrow equity from the ingredient brand, as well as gives the ingredient brand more visibility in the end consumer market. For the hosting product, the ingredient helps to build confidence for a particular attribute of their product, by relying on the ingredient product's equity in the market (Desai & Keller, 2002).

In order for this type of partnership to develop and be effective, the message or ingredient product must be relevant to the host brand, in addition to the final consumer. This means that the hosting brand must be supported or enhanced by collaborating with the upstream company in order for this type of advertising to be a viable choice. Ingredient advertising helps to differentiate products in the market, but increases the advertising expenditures for the ingredient or upstream company. There are also certain risks associated with ingredient advertising including uncertainty of advertising duration, risks of association, and potential lack of control of advertising strategy (Desai & Keller, 2002).

### *Direct Marketing*

Direct marketing offers a way for marketing managers to directly measure the effectiveness of their advertisements and predict future outcomes. There is a fundamental difference between traditional image marketing, which is used to build knowledge and familiarity with either a product or brand, and direct marketing (Rosenberg, 2005). In an "image" based advertising program, the goal is to present many advertisements repeatedly in a variety of places in hopes of influencing the consumer at the time of purchase. The first fundamental difference between image marketing and direct marketing is that direct

marketing presents advertisements at a specific time, to a target customer, when they can be influenced most easily. Because there is a one to one interaction between the advertisement and the customer, it is possible to track the effectiveness of the advertisement, which is the second fundamental difference. Having the ability to measure the advertisements effectiveness allows marketers to make decisions based on precedent and facts. The third difference is that direct marketing is repeatable. Because there is trackable data for managers to use, there is now a concrete basis for generating assessments of the ads. Once effective strategies are identified for a set of parameters, that strategy can be implemented in the future with some degree of predictability. The challenge of this strategy is the initial planning stage and putting the advertisement in the right place and the right time (Rosenberg, 2005).

#### *Affiliate Advertising*

Affiliate marketing is a viable online advertising strategy. The concept of affiliate marketing was introduced in the mid 1990's by Amazon, an online retailer of new and used goods, when they began paying other websites to refer customers to amazon.com. When a customer purchased a product from amazon.com, 15% of the sale went back to the original site that sent the customer. Websites participating in affiliate marketing could easily post links or ads for Amazon and continually receive revenue with little effort. However, the real winner in this strategy is Amazon. Amazon now had many websites advertising for them and Amazon only had to pay 15% of the sale for the referrals that actually yielded customers. Once the customers visited amazon.com, it is unlikely that they would go through the affiliate once again and just go directly to amazon.com (Dysart, 2005).

## **Summary**

From the literature, several perceived benefits, challenges, and opportunities associated with advertising were identified. Methodologies, tactics, and advertising theory were also explored. However, no specific reports could be found regarding to the role of advertising as it relates to upstream textile advertising.

## **CHAPTER III**

### **METHODOLOGY**

#### **Purpose of Research**

The purpose of this research was to examine upstream textile firms that effectively used advertising to differentiate their products in the market. The broad research question was how could U.S. upstream textile firms use advertising to increase their competitiveness and differentiate their products from low cost competitors in the global market? From the broad research question, the narrowed focus was to determine the most effective advertising strategies for reaching customers, consumers, and the industry. Specific research questions, which were developed from the narrowed question include:

1. What are the benefits, challenges, opportunities and potential of upstream advertising?
2. What are some different strategies used in the performance market? Focusing on the sports and leisure market and outdoor apparel and equipment subsegment?
3. What are the most effective strategies for U.S. textile firms to use in order to communicate with the customer and the end-use consumer? What perspectives do the following groups have about advertising:
  - a. End consumers;
  - b. Customers;
  - c. Industry?

4. How can this knowledge be presented to help upstream textile firms create value and differentiate their products?
5. What is the cost/benefit relationship between money spent on advertising and realized gains for the firm?

Figure 7 is a visual depiction of the research question.

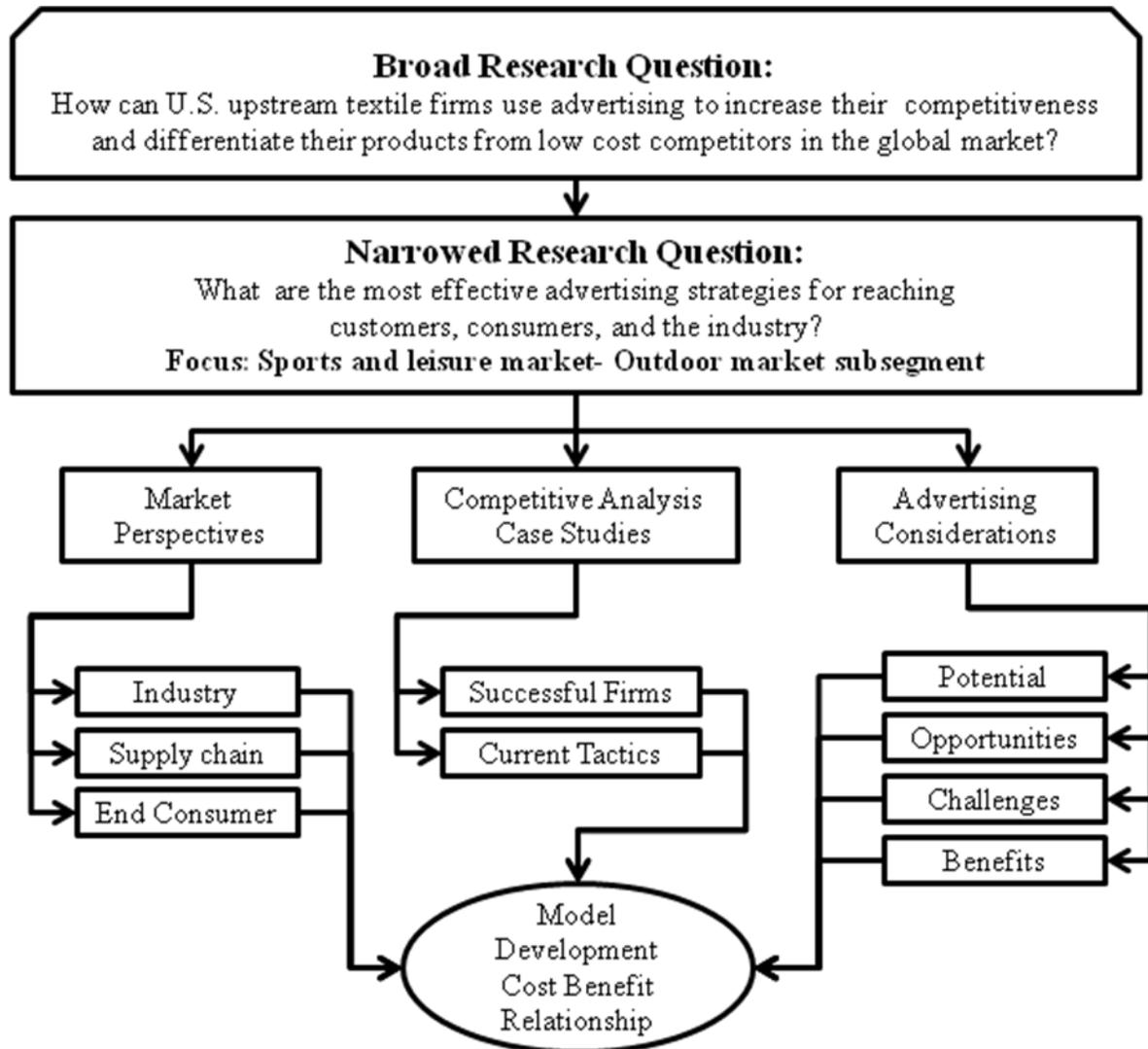


Figure 7: Visual Depiction of the Research Question

## **Research Objectives**

### *Phase I: Exploratory*

RO1: Define advertising success and identify companies with successful advertising strategies.

RO2: Complete a competitive analysis, using secondary data, on the advertising strategies of upstream textile manufacturers in addition to the strategies of upstream firms from other industries in order to:

RO2A: Develop an understanding of the current advertising campaigns.

RO2B: Assess the strategies used by the selected companies.

### *Phase II: Inductive Logic*

Phase II and III will be conducted concurrently.

RO3: Examine differences in the marketing strategies used by the performance textile market, focusing specifically on the outdoor apparel and equipment subsegment of the sports and leisure market segment.

RO3A: Assess benefits

RO3B: Assess challenges

RO3C: Assess opportunities

RO3D: Assess potential

RO3E: Advertising methodology

RO4: Examine the effectiveness from a supply chain perspective to determine:

RO4A: Which media types the population views most frequently

RO4B: What advertising media has the best response rate

RO4C: What part of the advertisement causes the population to seek additional information

RO4D: What features of the advertisement are most effective

RO4E: What factors the population considers before purchasing

RO4F: Where the population seeks product information

*Phase III: Deductive Logic*

RO5: Examine the effectiveness of upstream advertising from an end consumer perspective to determine:

RO5A: If the population is aware of the advertised ingredient product

RO5B: If the population knows the functionality of the ingredient product

RO5C: What features of the advertisement the population feels are most effective

RO5D: If the population looks for the ingredient when purchasing products

RO5E: If the population is willing to pay more

RO5E: Where the population seeks product information

RO6: Develop an understanding of the potential of upstream textile advertising focusing on different advertising opportunities including:

RO6A: Print

RO6B: Television

RO6C: Internet

#### *Phase IV: Model Development*

RO7: Develop a framework that U.S. textile companies can use to develop a successful upstream advertising campaign.

RO7A: Provide ITT member companies with the knowledge and guidelines differentiate themselves through advertising in a highly competitive market.

### **Research Design**

#### *Strategies and Theories*

Phase I was exploratory in nature. The main objective of this phase was to understand current upstream advertising strategies used by both upstream textile firms and non-textile firms in order to fulfill RO1 and RO2.

Phase II of the study used an inductive research approach, Figure 8. By definition, this methodology is a qualitative research method, which uses the observations of subjects to identify general theories based on the views of the participants of the study (Creswell, 2003). Consumer and industry level advertising campaigns were observed in order to assess what strategies upstream textile firms competing in the sports and leisure segment were currently using. Phase III used a deductive approach based on the findings of Phase I. A deductive research approach used research and data analysis to confirm or further a theory. The deductive approach is highlighted in Figure 9. The results of the consumer survey were used to verify findings from industry interviews and case studies in order to gain insights into effective advertising strategies.

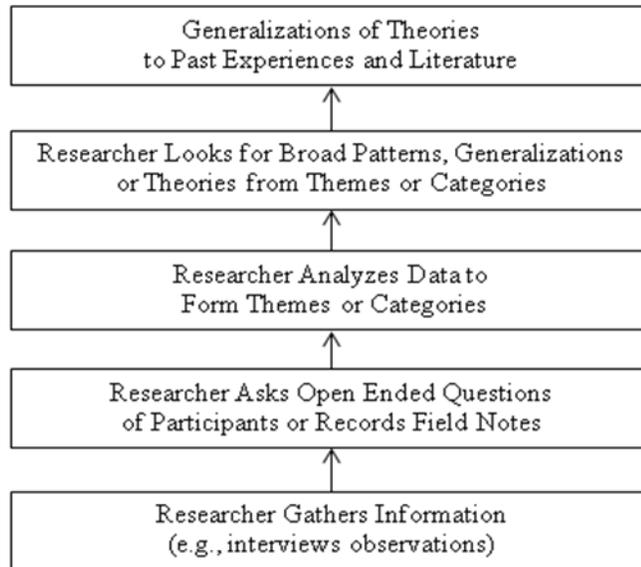


Figure 8: Inductive Research Approach

Source: Creswell, J. (2003). *Research Design: Quantitative, Qualitative, and Mixed Methods Approaches*. Thousand Oaks, CA: Sage Publications. 125

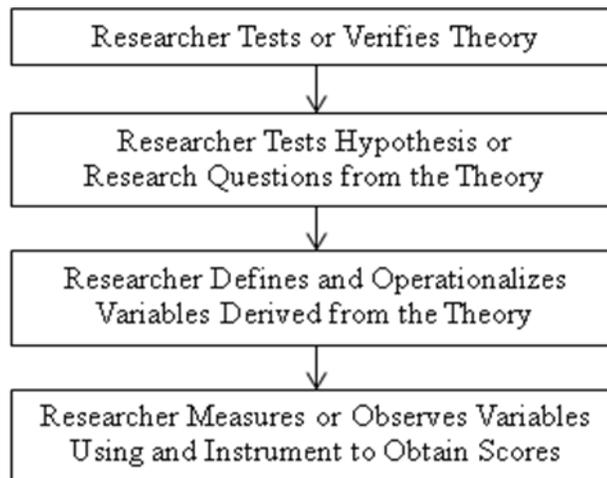


Figure : Deductive Research Approach

Source: Creswell, J. (2003). *Research Design: Quantitative, Qualitative, and Mixed Methods Approaches*. Thousand Oaks, CA: Sage Publications. 125

#### *Four Phase Approach: Explanation of Significance*

Research was conducted using a four-phase approach. The first phase (Phase I) was exploratory in nature. The main objective of this phase was to understand current upstream advertising strategies used by both upstream textile firms and non-textile firms in order to fulfill RO1 and RO2.

The second and third phases (Phase II and III) of the study were conducted simultaneously. Phase II used an inductive research method using informational interviews with upstream textile firms. During this phase, the data was used to develop an understanding of the benefits, challenges, and potential of upstream textile advertising focusing on different advertising opportunities including print, television, and Internet in order to fulfill RO3, RO4, and RO6.

Phase III was completed using a deductive research approach by which consumer data was collected to identify behaviors that could be used to identify effective communication strategy elements. The instrument for this phase consisted of a survey administered to end-use consumers in order to examine the effectiveness of upstream advertising from an end-user perspective. The data was used to develop an understanding of the potential of upstream textile advertising focusing on different advertising opportunities including print, television, and Internet in addition to the added impact (or lack thereof) of celebrity spokespersons in order to fulfill RO5 and RO6

Phase IV combined the results from Phase I, Phase II, and Phase III in order to develop a framework (RO7). The framework was constructed in order to provide the U.S.

textile and apparel companies with the knowledge and guidelines for how to differentiate themselves through advertising in a highly competitive market.

### *Phase I: Exploratory*

In Phase I, both qualitative and quantitative data were collected on the advertising campaigns of upstream textile and non-textile firms. This phase was completed to determine what elements constitute effective advertising strategies through secondary data, a competitive analysis, and case studies. By understanding the strategies of successful textile and non-textile companies, common strategies and successful methods can be uncovered through these secondary sources. Phase I was divided into eight steps. Table 2 summarizes the activities of Phase I and their contributions to the study.

Table 2

#### *Data Collection: Phase I (Step 1)*

The first step in Phase I was to define clearly, in terms of the project, what constitutes an upstream firm and what was considered an upstream advertisement. Trade publications, Dickerson (1999), and dialogue with advertising agencies were used to develop these definitions.

#### *Data Collection: Phase I (Step 2)*

Secondary data sources were used to identify a conceptual framework to guide the research. This resource established what major elements and activities were required to create a successful advertising campaign. This step helped to guide the overall research, as well as establish the criteria for company selection and evaluation.

Phase I Instrument- Secondary Data Collection

Step	Process	Sources Used	Contribution to Research Objective
1	Define upstream and advertising	<ul style="list-style-type: none"> <li>• Dickerson, 1999</li> <li>• Consulted advertising agency</li> </ul>	Identify companies with successful advertising strategies (RO1)
2	Identify a representative framework to determine factors necessary for a successful advertising campaign	<ul style="list-style-type: none"> <li>• Keller, 2003</li> <li>• Advertising Age</li> <li>• Literature</li> <li>• Internet research</li> </ul>	Identify companies with successful advertising strategies (RO1)
3	Perform a product scan of companies and products participating in upstream advertising in the outdoor products segment	<ul style="list-style-type: none"> <li>• Internet research</li> <li>• REI</li> <li>• Dick's Sporting Goods</li> <li>• Target</li> <li>• Wal-Mart</li> <li>• The Great Outdoor Provision Company</li> </ul>	Complete a competitive analysis of successful advertising strategies (RO2)
4	Perform a media scan to understand where upstream companies are currently advertising.	<ul style="list-style-type: none"> <li>• Trade publications</li> <li>• Consumer publications</li> <li>• Online</li> </ul>	Identify companies with successful advertising strategies (RO1)
5	Identify companies with successful advertising strategies through a competitive analysis	<ul style="list-style-type: none"> <li>• Trade journals</li> <li>• Interbrand</li> <li>• EFFIE</li> <li>• Brandweek</li> </ul>	Identify companies with successful advertising strategies (RO1)
6	Assess selected strategies using qualitative and quantitative measures	<ul style="list-style-type: none"> <li>• Trade journals</li> <li>• Industry interviews</li> <li>• EFFIE</li> </ul>	Assess the strategies used by the selected companies (RO2B)
7	Develop an understanding of the current advertising campaigns of selected companies through case studies	<ul style="list-style-type: none"> <li>• Trade publications</li> <li>• Trade journals</li> </ul>	Assess the strategies used by the selected companies (RO2B)

Journal articles, textbooks, and consultation with advertising agencies were the primary sources for the initial data. From this data, the Shultz and Barn's Advertising Campaign Planning Process Model (1999) was selected and then adapted to fit the study. This adapted model was developed using several inputs from other advertising strategy

models, including the Sandage, Fryburger, & Rotzoll Advertising Component Model (Sandage, Fryburger, & Rotzoll, 1983), the Cooper Strategic Analysis Framework (Cooper, 1997), and Keller's Factors in Designing Effective Advertising Campaigns (Keller, 2003) (see pages 12-19). This phase was completed between Spring 2008- Fall 2008 and was used to help complete RO1.

*Data Collection: Phase I (Step 3)*

A product scan was conducted across different retail stores to assess what products and companies were participating in the outdoor market and help in answering RO1 and RO2. The goals of the scan were to:

1. Observe what product types and brands utilize upstream advertising in their products.
2. Determine what methods upstream firms are using to promote their products to the consumer and how it compares to the host brand's advertising efforts.
3. Assess the content of the upstream advertisement.
4. Reveal any differences in the advertising methods or tactics across retail store types.
5. Assess whether or not price point plays a role in the presence or type of upstream advertisements used.
6. Find out which upstream companies are utilizing advertising at the product level.

The sample for this scan was outdoor products consisting of: 1) Apparel (includes jackets, vests, and pants); 2) Accessories (includes hats, socks and gloves); 3) Footwear



possible in each of the four categories. Once a product was identified, information about the product and advertisements were collected. Information included:

1. Host brand name
2. Product type
3. Advertisement type
4. Advertisement location
5. Ingredient brand
6. Upstream textile company that produces the brand
7. Size of the advertisement compared to the host brand's advertisement
8. Price point of the product
9. Information included in the advertisement and additional comments

Once data collection was complete, the data was organized into tables, assessed for trends, and conclusions were drawn (see Appendix H for full results).

*Data Collection: Phase I (Step 4)*

In order to determine what upstream textile firms were participating in print advertising, a consumer and textile trade magazine media scan was conducted. Borders Bookstore, a large national book retailer, was selected for the scan as it offered a wide variety of magazines, spanning a variety of topics. This store was located in Cary, NC, an urban area, which has access to the most current issues. Categories included casual sports, outdoor recreation, sporting goods, game hunting, boating, home furnishings, and patio and deck fashions. The textile trade magazine scan was conducted in the Burlington Textile Library at North Carolina State University. This library subscribes to many national and international

publications on a variety of industry related topics. Categories of interest included performance textiles, industrial textiles, textile trade, textile management, fashion and design, national and international scientific journals. From the consumer advertisements identified during the scan, some were selected for use in the consumer survey portion of the study (see Instrument Development: Phase III).

*Data Collection: Phase I (Step 5)*

To gain a broad perspective of effective advertising, a competitive analysis was completed. The analysis served to provide real life examples of effective advertising as well as qualifying advertising benefits with quantitative data. In addition, the results of the competitive analysis, helped to establish the criteria for case study company selection. The sample for the competitive analysis consisted of a selection of the 2008 Gold Effie advertising award winners, which include brands from various markets and product categories. The Effie awards recognized creative advertising campaigns that achieved and surpassed managerial goals. The companies highlighted in the analysis were global in nature and represent a variety of industries and product categories. The sample was selected based upon available published cases, type of evaluation methodology used, and availability of quantitative output. Of the 16 published gold level winners, 14 were selected for use in the case studies. The two cases not selected did not provide sufficient quantitative data to be relevant for use in the study. The analysis consisted of determining the objectives, strategies, tactics, and evaluation methods used by the selected companies. The analysis also included quantitative evaluations of the effective advertising campaign, both pre and post

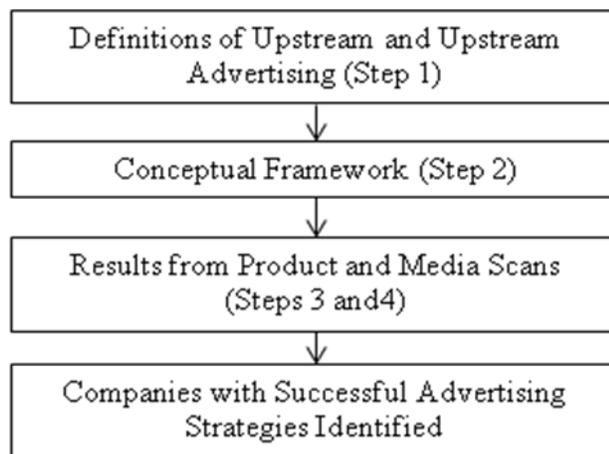
implementation. This phase was completed between Spring 2008- Spring 2009 and was used to complete RO1 and RO2.

Quantitative metrics were varied but included:

1. Sales volume comparisons
2. Revenue comparisons
3. Website traffic tracking
4. Return on investment

*Data Collection: Phase I (Steps 6-8)*

Based on definitions, the conceptual framework, and the results of the product and media scans, upstream firms with successful advertising campaigns were identified for case studies, see Figure 10. Secondary data sources such as trade publications, journals, databases, and company websites data were used to gather information of the advertising campaigns of selected firms. This phase was completed between Spring 2008- Spring 2009 and was used to complete RO1 and RO2.



*Figure 10: Visual Depiction of Steps to Select Successful Companies*

Case studies consisted of evaluating some of the advertising strategies used by upstream firms. Both textile and non-textile examples were considered. Secondary data sources such as trade publications, journals, databases, and company websites were used to gather information of the advertising campaigns. This step was used to complete RO2. Company analysis consisted of the following metrics:

1. A brief company profile including major products and statement on the nature of their competitive environment.
2. Identification of media types used and their target audiences.
3. Execution of media plan
4. Assessment of current advertisements through informational interviews using the following metrics:

Quantitative:

- a. Sales performance
- b. Market share

Qualitative:

- a. Awareness
- b. Recognition
- c. Image

*Phase I Sample Selection:*

A sample selection of companies and advertising campaigns was necessary in order to complete the case studies to satisfy RO2. Though the literature indicated that the definition of success was not universally defined (Wright-Isak, Faber, & Horner, 1997), for the purposes

of this study and as a way to select companies and develop cases analyses, a standard set of indicators was developed. The difficulty in establishing success criteria was due to the multidimensional benefits of advertising as well as availability of prior data with which to make comparisons over time. Another consideration was to ensure that both young, innovative companies as well as mature, stable companies were not excluded from consideration by setting standards too high or too low since many standards are market or segment specific. The standard was established be robust enough to include companies from all industries as well as specific enough to exclude those companies that are underperforming. Figure 11 outlines the selection process.



*Figure 11: Case Study Company Selection Criteria*

Based on the results of the competitive analysis, which listed quantitative evaluations of advertising effectiveness, campaigns were considered successful if the company gained either a 10% growth in sales, market share, recognition, or awareness within one year of the

campaign's launch and that could be traced back to the advertising efforts. By requiring a company to meet only one of the three criteria, it allows all sizes and markets to be considered. A threshold of 10% was chosen so that companies that already have higher levels of market share and awareness would still be eligible for consideration. Achieving a 10% gain in these categories indicates a significant business achievement over a relatively short period.

The second requirement was that the company must be considered an ingredient product manufacturer or support organization. Because this study was focused on upstream textile firms, which can be classified as an ingredient supplier depending on the application, methods used by other ingredient supplier was easily transferable to the upstream textile industry. A third requirement for consideration was that the company must participate in ingredient branding and advertising. Branding and advertising were said to be effective ways to communicate product benefits, increase awareness, and manipulate public image (Keller, 2003). By including companies that actively participate in these, the company demonstrates its eagerness to differentiate their products and increase competitiveness.

The fourth requirement was that the company must be universally perceived as a major player in their respective product category, or has at least 10% market share in the advertised category. This stipulation limited eligible companies to those that were viable and competitive in their respective product category. Finally, the company must have targeted both end consumers and industry audiences with their advertising. This stipulation was included because one of the focuses of the study is to determine the best methods to communicate effectively to both industrial customers and end consumers.

Companies both inside and outside of the textile complex were considered for case studies. Possible companies were found using several different sources such as Interbrand's Top 100 Brands list, advertising award winners, Advertising Age's Top 100, and other sources. Companies were selected upon the five criteria established previously. From these lists, the following companies and advertising campaigns were selected:

1. Intel Corporation- "Intel Inside"
2. Cotton Incorporated- "Fabric of Our Lives®"

The case study for the Fabric of Our Lives® campaign was verified by a representative of Cotton Incorporated.

### *Phase II: Inductive Logic*

#### *Data Collection: Phase II*

Phase II consisted of conducting industry interviews in order to gain primary qualitative information about the benefits, challenges, and opportunities of upstream advertising. In addition, companies were asked to provide perspectives as a customer related to the effectiveness of current advertising efforts. Information was collected through either in-person interviews or phone calls depending on scheduling limitations.

#### *Sample Selection: Phase II*

The initial population considered for the study included all North Carolina textile firms listed in the North Carolina Textile Connect website. This sample of companies included approximately 2,300 companies. North Carolina was selected due to convenience and the large sample of textile companies in the area. Based on the study's definition of an upstream firm, the initial population was reduced to 413 companies that were listed as either

fiber, yarn, or fabric manufactures or supporting agencies across market segmentations. All twelve sectors of performance textiles were included in this initial population. For a complete list of the 413 upstream companies, see Appendix A. Figure 12, is a visual representation of the sample selection requirements and the populations of those samples.



*Figure 12:* Industry Interview Sample Selection Process

From these 413 upstream firms competing across segments, companies identified as serving the sports and leisure markets were selected. This was completed by viewing company websites and information provided by North Carolina Textile Connect. Based on the definition of sports and leisure and product offerings, 36 companies were identified as

participating in the sports and leisure market. The 36 companies selected are provided in Table 3.

From the 36 companies servicing the sports and leisure segment, companies that used branding and advertising as a differentiation method were identified. Companies were considered for participation if they either supplied their market segment with their own privately held brands such as Sunbrella® from Glen Raven, or by using other ingredient brands such as US Supima Outlast® by Buhler Quality Yarns (Supima® and Outlast® are third party ingredient brands). Of the 36 companies, 30 firms were found to use branding to compete in the sports and leisure segment. The six companies not considered for the studies were removed because they did not offer branded products, only commodity, unnamed or unregistered products under their generic descriptive name (example: 20's singles 60/40 polyester/cotton yarn). A complete listing of the 30 companies is provided in Table 4.

Mini case studies were performed on the 30 identified firms in Table 4. For each company, products and markets of interest were identified as well as specific brands used to compete in the sports and leisure segment. Companies were also evaluated on their participation in consumer and/or industry level advertising. Companies that were identified as advertising in either of these two markets were considered for interviews. A consumer and trade magazine scan was used to identify companies advertising to these segments. Print advertisements were examined in publications held in the Burlington Textile Library at North Carolina State University and Borders bookstore located in Cary, NC.

Table 3

## Companies Participating in the Sports and Leisure

Selection	Number	Company Name	Product Category
1	7	Adele Knits	Fabric
2	18	American Fibers & Yarns Co	Yarn
3	26	Apex Aridyne Corp	Fabric
4	55	Burlington Industries Inc	Fabric
5	69	Carolina Glove Co	Fabric
6	70	Carolina Mills, Inc	Yarn
7	82	Clariant Corp	Fiber
8	87	Coats America	Yarn, Fabric
9	88	Cocona Inc	Fiber, Yarn, Fabric
10	89	Contempora Fabrics Inc	Fabric
11	90	Copland Fabrics Inc	Fabric
12	96	Cotton Inc	Fiber
13	97	Coville Inc	Fabric
14	109	DAK Americas	Fiber
15	116	Domestic Industries	Fabric
16	131	Elastic Fabrics Of America	Fabric
17	149	Frontier Spinning Mills	Yarn
18	157	Glen Raven, Inc.	Yarn, Fabric
19	163	Guilford Mills Inc	Yarn, Fabric
20	173	Hexcel Reinforcements Corp	Fiber
21	179	Hickory Yarns, Inc	Yarn
22	182	Hornwood, Inc.	Fabric
23	232	Milliken & Company	Fabric
24	243	National Spinning	Yarn
25	265	Parkdale Mills Inc	Yarn, Fabric
26	274	Pharr Yarns LLC	Fiber, Yarn, Fabric
27	287	Precision Fabrics Group	Fabric
28	296	Radici Spandex	Fiber, Yarn
29	294	Ramtex Inc	Yarn, Fabric
30	326	Schneider Mills, Inc.	Yarn
31	328	Shuford Mills LLC	Yarn, Fabric
32	349	Swift Galey	Yarn, Fabric
33	372	Tuscarora Yarns Inc	Yarn, Fabric
34	374	Uco Fabrics Inc	Fabric
35	381	Unifi Inc	Yarn, Fabric
36	393	Wellman Inc	Fiber

Table 4

## Companies Participating in the Sports and Leisure Using Branded Products

Selection	Number	Company Name	Product Category
1	7	Adele Knits	Fabric
2	18	American Fibers & Yarns Co	Yarn
3	55	Burlington Industries Inc/ITG	Fabric
4	70	Carolina Mills, Inc	Yarn
5	82	Clariant Corp	Fiber
6	87	Coats America	Yarn, Fabric
7	88	Cocona Inc	Fiber, Yarn, Fabric
8	89	Contempora Fabrics Inc	Fabric
9	90	Copland Fabrics Inc	Fabric
10	96	Cotton Inc	Fiber
11	97	Coville Inc	Fabric
12	109	DAK Americas	Fiber
13	116	Domestic Industries	Fabric
14	131	Elastic Fabrics Of America	Fabric
15	157	Glen Raven, Inc.	Yarn, Fabric
16	173	Hexcel Reinforcements Corp	Fiber
17	179	Hickory Yarns, Inc	Yarn
18	182	Hornwood, Inc.	Fabric
19	232	Milliken & Company	Fabric
20	243	National Spinning	Yarn
21	265	Parkdale Mills Inc	Yarn, Fabric
22	287	Precision Fabrics Group	Fabric
23	296	Radici Spandex	Fiber, Yarn
24	294	Ramtex Inc	Yarn, Fabric
25	328	Shuford Mills LLC	Yarn, Fabric
26	349	Swift Galey	Yarn, Fabric
27	372	Tuscarora Yarns Inc	Yarn, Fabric
28	374	Uco Fabrics Inc	Fabric
29	381	Unifi Inc	Yarn, Fabric
30	393	Wellman Inc	Fiber

Trade magazines spanned all segments of the supply chain including chemical, fiber, yarn, fabric, apparel and fashion publications. Consumer publications included sports and leisure magazines in the areas of home décor, hunting and fishing, marine boating, and sports and fitness. Of the 30 identified companies, 23 companies were selected for interviews. The

23 companies selected showed strong signs of advertising prescience in either the consumer or industrial markets. The eliminated companies failed to show clear signs of advertising activity or were found to be no longer in business at the time of the study. A complete listing of these companies is provided in Table 5.

Table 5

Validated Companies Participating in the Sports and Leisure Using Branded Products and Advertising in the Consumer and/or Industrial Segments

Selection	Number	Company Name	Product Category
1	7	Adele Knits	Fabric
2	18	American Fibers & Yarns Co	Yarn
3	55	Burlington Industries Inc/ITG	Fabric
4	70	Carolina Mills, Inc	Yarn
5	82	Clariant Corp	Fiber
6	87	Coats America	Yarn, Fabric
7	88	Cocona Inc	Fiber, Yarn, Fabric
8	89	Contempora Fabrics Inc	Fabric
9	90	Copland Fabrics Inc	Fabric
10	96	Cotton Inc	Fiber
11	109	DAK Americas	Fiber
12	116	Domestic Industries	Fabric
13	131	Elastic Fabrics Of America	Fabric
14	157	Glen Raven, Inc.	Yarn, Fabric
15	232	Milliken & Company	Fabric
16	243	National Spinning	Yarn
17	265	Parkdale Mills Inc	Yarn, Fabric
18	287	Precision Fabrics Group	Fabric
19	296	Radici Spandex	Fiber, Yarn
20	294	Ramtex Inc	Yarn, Fabric
21	328	Shuford Mills LLC	Yarn, Fabric
22	372	Tuscarora Yarns Inc	Yarn, Fabric
23	381	Unifi Inc	Yarn, Fabric

In addition to the North Carolina companies identified in the scan, seven additional companies were included in the interview sample, bringing the total sample size to 30 companies. From researching trade magazines, Buhler Quality Yarns Corp was identified as

a major upstream advertiser with print advertisements in many prominent industry magazines. Buhler also promotes their yarns with product level hangtags and participates in various trade shows around the world. In addition, Lycra® and CORDURA®, both Invista brands, were selected due to their prominence in industry and consumer advertising. Lycra is a strong, global brand that promotes its products across target audiences through print, product level, and international sponsored events. CORDURA®, another prominent brand, was identified through consumer magazines, on-product advertisements, and sponsored events across the country. W.L. Gore with its Gore-Tex® brand was identified as a key advertising player as it was the most heavily advertised product in the product scan. W.L. Gore places hangtags on nearly all consumer level products that use their fabrics, as well as sponsoring many outdoor sporting events and awards. Finally, to gain perspectives from a purely advertising point of view, Bosch and Co. and French West Vaughn were selected. These companies have researched and created advertising campaigns for companies such as Burlington Worldwide and Coco Cola®. Highland Industries and CloverTex were also considered, due to their success in their respective product categories. A complete listing of these additional companies is provided in Table 6.

Table 6

Companies Selected based Upon Leadership and Visibility in Advertising or Expertise in Advertising with Textile Companies

<b>Selection</b>	<b>Company Name</b>	<b>Product Category</b>
1	Broach and Co.	Advertising
2	Buhler Quality Yarns Corp	Yarn
3	CORDURA	Fabric
4	CloverTex	Yarn
5	French West Vaughn	Advertising
6	Highland Industries	Fabric
7	LYCRA	Fiber
8	W.L. Gore	Fabric

*Instrument Development: Phase II*

The researcher, based upon the adapted Shultz and Barn’s Advertising Campaign Planning Process Model (1999), literature review findings, and research objectives, developed the industry interview instrument. The adapted model was used to generate questions relating to advertisement development and methodology, while questions relating to benefits, challenges, opportunities, potential, and the sports and leisure market were developed based upon the literature review findings. Table 7 indicates how each question was developed and how the question related to the research objectives.

Table 7

## Interview Instrument- Question Source and Research Objective Correlation

Question Brief		Development Source	Corresponding Research Objective
1	Biggest advertising success and failure	Researcher developed	RO3A, RO3B, RO3C
2	Benefits of advertising- which are most valued	Researcher developed	RO3A
4	Identify effective ingredient advertisers	Researcher developed	RO1
5	Necessary to advertise in sports and leisure market	Researcher developed	RO3
6	Differences in tactics across products segments	Researcher developed	RO3
7	Opinion of which segments are over and under advertised	Researcher developed	RO3C
8	Advertisement development methodology- most challenging step	Adapted Shultz and Barns Model (1997)	RO3E
10	Activities considered in initial situation analysis	Adapted Shultz and Barns Model (1997)	RO3E
11	Primary goals across campaigns	Wright-Isak, Faber,& Horner, (1997)	RO3E
12	Frequency of goal reevaluation	Wright-Isak, Faber,& Horner (1997)	RO3E
13	Defining and evaluating advertising success	Wright-Isak, Faber,& Horner (1997)	RO3A, RO3D
14	New media opportunities- how will the company take advantage	Researcher developed	RO3C
15	Opportunities in advertising directly to end consumer as well as industrial consumers	Andrews (2005)	RO3C
16	Most effective media to communicate product/company information	Researcher developed	RO3C
17	How effective are your current campaigns	Researcher developed	RO3C
18	Elements of effective b2b and b2c advertisements	Keller (2003)	RO3C
19	Tactics applied across trade and consumer advertisements	Researcher developed	RO3C
20	Areas advertising has the potential to influence	Researcher developed	RO3D
21	Which media type have the best return on investment	Researcher developed	RO3D

Table 7: Continued

22	Are advertising and marketing the best ways to influence customers and differentiate products	Researcher developed	RO3D
23	Typical expected return on investment and payback period	Researcher developed	RO3D
24	Biggest challenges in reaching consumers and industrial customers	Researcher developed	RO3B
25	Underdeveloped areas of advertising- company and industry	Haigler (2008)	RO3B, RO3E
26	Reasons for seeking new information about products or companies	Researcher developed	RO4E
27	Where do you seek information	Researcher developed	RO4F
28	Does advertising influence which companies you seek first	Researcher developed	RO4A, RO4F
29	Looking for certain elements or information in advertisements	Researcher developed	RO4D, RO4C
30	Advertising media preferences	Researcher developed	RO4B
31	What factors influence supplier selection- other than cost	Researcher developed	RO4E
32	Willingness to pay more for branded or heavily advertised products	Researcher developed	RO3D

*Data Analysis*

Interview responses were collected via paper and pen or recorded on an audio device. Data was then transcribed into Microsoft Excel and organized by company respondent. The data was then organized and analyzed in order to identify trends. Findings were then summarized and conclusions were drawn.

*Phase III- Deductive Logic*

*Data Collection: Phase III*

In Phase III, primary research was conducted in order to gain insight into the potential of upstream advertising from a consumer perspective. This research took the form of a quantitative survey administered to selected end-use consumers. The sample population for

the survey was comprised of a convenience sample of 165 North Carolina State University, College of Textiles students (see Sample Selection: Phase III). Survey data was also used to develop an understanding of the potential of upstream textile advertising focusing on different advertising opportunities including print, television, and the Internet. Participants in the study were given an image-based survey where participants were asked to relate their opinions about selected features of an on screen advertisement.

Students were given a hard copy of the survey and images were projected onto a screen for viewing. Students were told that they were not obligated to participate and that their privacy would be kept secure. Students then signed a copy of the participant acknowledgement form.

The survey was divided into three sections. In the first section, three advertisements were displayed (one at a time) and students were asked to fill out a questionnaire based upon their opinions of the advertisement. Once all participants were finished evaluating the first advertisement, the second advertisement was projected and the process repeated until all three were displayed. The three upstream advertisements each represented a different style of print advertisement: one text heavy, one image heavy, one with a balance of both text and images. The names of the companies and products were removed from the advertisements in order to prevent biasing the participants. Respondents used a Likert scale to answer the survey questions, with answer choices of strongly disagree, disagree, neither agree or disagree equaling, agree, and strongly agree.

In the second segment of the survey, students were asked to compare the same three advertisements presented as a group. Students were then asked to compare the

advertisements against one another to determine which features are most effective. The third section of the survey asked the students to relate the general advertising preferences. Topics included were questions related to where they seek product information and what influences their purchase decision. Participants used the same Likert scale to fill out this portion of the survey. No advertisements were displayed during this portion of the survey.

#### Sample Selection: Phase III

To gain consumer level insights into the effectiveness of advertising, a convenience sample of North Carolina State University students was surveyed. As identified by the Outdoor Industry Association's report (2006), consumers of outdoor apparel and equipment are predominantly Baby Boomer (born between 1925-1945, population≈ 76 Million) and Millennial (born between 1982-2002, population≈ 70 million) aged consumers (Keller, 2003). The student population of North Carolina State University provides a large population of Millennial aged consumers. Four groups of students were surveyed totaling 165 Millennial aged participants. The population contained freshman, sophomores, juniors, and seniors that were enrolled in either consumer behavior or introduction to product evaluation classes at the College of Textiles at North Carolina State University. Students participating in the survey were at least 18 years of age and were not allowed to take the survey more than once.

#### *Instrument Development: Phase III*

The consumer survey instrument was developed by adapting questions either used in other scholarly consumer advertising studies or developed by the researcher. Studies used for question adaption included Hsu and Mo's (2009) "Consumer responses to incomplete information in print apparel advertising" and Adomaitis and Johnson's (2008)

“Advertisements: interpreting images used to sell to young adults”. These studies provided a sample of the survey instrument questions used to complete their research. Questions were modified and adapted to fulfill the requirements of this research study. Table 8 presents how each question was derived and how it related to the research objectives. A copy of the survey can be found in Appendix B.

The advertisements used as visual aids were selected based upon those found during the print media scan. Three upstream advertisements were selected from those identified in sports and leisure related consumer magazines found in Borders Bookstore. All company advertisements were selected based upon the company’s participation in the sports and leisure market. Product and company names were blocked out of the advertisements to minimize biases. Advertisement text was transcribed on the side of the presented image.

Table 8

Consumer Survey Instrument- Question to Research Objective Correlation

<b>Individual Advertisement Questions</b>		
<b>Question Brief</b>	<b>Adapted From Source</b>	<b>Corresponding Research Objective</b>
1 Advertisement awareness	Hsu & Mo (2009)	RO5A
2 Understand what product is promoted	Hsu & Mo (2009)	RO5B
3 Advertisement information is useful	Hsu & Mo (2009)	RO5B
4 Consumer identifies with presented content	Hsu & Mo (2009)	RO5C
5 Communicates information effectively	Hsu & Mo (2009)	RO5B
6 Communicates benefits effectively	Hsu & Mo (2009)	RO5B
7 Creativeness of advertisement	Hsu & Mo (2009)	RO5C
8 Advertisement evokes product curiosity	Hsu & Mo (2009)	RO5C
9 Advertisement evokes company curiosity	Hsu & Mo (2009)	RO5C
10 Advertisement appeals to consumer on personal level	Hsu & Mo (2009)	RO5C
11 Advertisement evokes perceptions of quality	Hsu & Mo (2009)	RO5C

Table 8: Continued

12	Advertisement evokes perceptions of company creditability	Hsu & Mo (2009)	RO5C
13	Images and text relate well	Hsu & Mo (2009)	RO5C
14	Consumer wants to experience ad content	Hsu & Mo (2009)	RO5C
15	Consumer would look for product/brand	Hsu & Mo (2009)	RO5D
16	Consumer would consider seeking additional information	Adomaitis & Johnson (2008)	RO5E
17	Consumer would consider purchasing the item	Adomaitis & Johnson (2008)	RO5E
18	Willing to pay more for branded product versus a generic	Adomaitis & Johnson (2008)	RO5E
<b>Multi-advertisement Comparison Questions</b>			
<b>Question Brief</b>		<b>Adapted From Source</b>	
		<b>Corresponding Research Objective</b>	
1	Most visually interesting	Hsu & Mo (2009)	RO5C
2	Most complete information	Hsu & Mo (2009)	RO5C
3	Most memorable or unique?	Hsu & Mo (2009)	RO5C
4	Best layout	Hsu & Mo (2009)	RO5C
5	Based on the advertisement would you seek additional information	Hsu & Mo (2009)	RO5C
6	Based on the advertisement would you consider purchasing	Hsu & Mo (2009)	RO5C
<b>General Advertising Preferences Questions</b>			
<b>Question Brief</b>		<b>Adapted From Source</b>	
		<b>Corresponding Research Objective</b>	
1	Consumer looks for branded textile products	Researcher developed	RO5D
2	Consumer prefers branded textile products	Researcher developed	RO5D
3	Likelihood of seeking information based on advertisements	Hsu & Mo (2009)	RO5A
4	Looks for information in print advertisements	Hsu & Mo (2009)	RO5F
5	Looks for information in television advertisements	Hsu & Mo (2009)	RO5F
6	Looks for information on company maintained websites	Hsu & Mo (2009)	RO5F
7	Looks for information on third party websites	Hsu & Mo (2009)	RO5F
8	Looks for information in newspaper and magazine articles and reviews	Hsu & Mo (2009)	RO5F

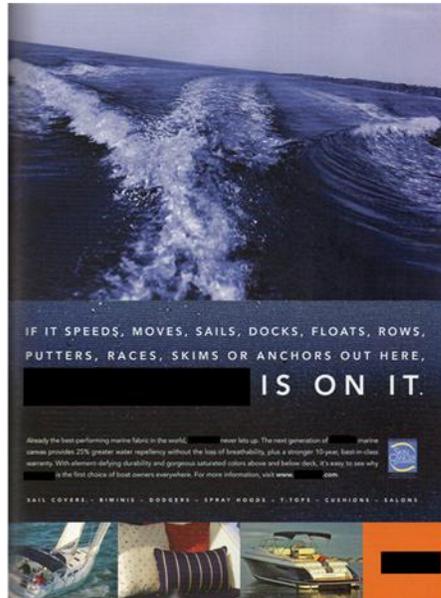
Table 8: Continued

9	Looks for information on in-store advertisements	Hsu & Mo (2009)	RO5F
10	Looks for information from store sales personnel	Hsu & Mo (2009)	RO5F
11	Looks for information on on-product hangtags and labels	Hsu & Mo (2009)	RO5F
12	Looks for information on the product's packaging	Hsu & Mo (2009)	RO5F
13	Looking for additional product information	Adomaitis & Johnson (2008)	RO5C
14	Looking for additional company information	Adomaitis & Johnson (2008)	RO5C
15	Product comparisons provide credibility	Researcher developed	RO5C
16	Showing real-life problem/solutions provide credibility	Researcher developed	RO5C
17	Celebrity spokes persons provide credibility	Researcher developed	RO5C
18	Technical information provide credibility	Researcher developed	RO5C

Advertisement A was an advertisement for Glen Raven's Sunbrella® marine fabric line. This advertisement was selected because it was a text heavy advertisement. The text represented an effective value statement, as well as points of parity and points of difference. The advertisements also presented several lifestyle photos that helped to promote the marine lifestyle with its products. Figure 13 was the image that participants used during the completion of their survey.

Advertisement B was an advertisement for wrinkle resistant cotton developed by Cotton Incorporated. This advertisement was selected because it was very image heavy and had very little text compared to the other advertisements selected for the survey. This advertisement was very visually appealing and unique in its layout. Figure 14 was the image survey participants used during the completion of their survey.

Advertisement C was an advertisement for Gore-Tex® developed by W.L. Gore. The advertisement featured some technical and performance graphics along with text and a life style image. The advertisement represented a good mix of technical performance information, text, and aspirational images. Figure 15 was the image survey participants used during the competition of their survey. A copy of the survey can be found in Appendix K.



## Advertisement A

Body Text Reads:

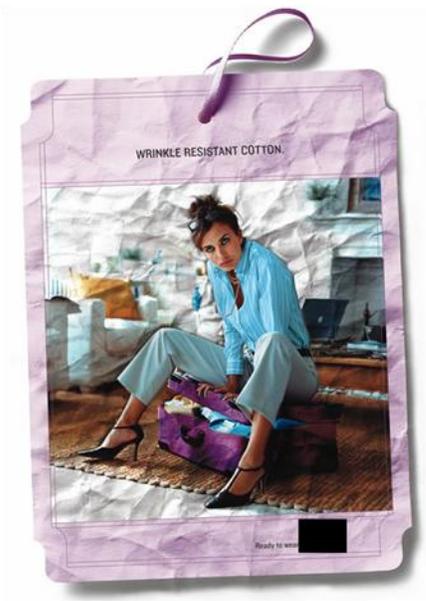
Already the best known marine fabric in the world, (product name) never lets up. The next generation of (product name) marine canvas provides 25% greater water repellency without the loss of breathability, plus a stronger 10 year, best-in-class warranty. With element defying durability and gorgeous saturated colors above and below deck, it's easy to see why (product name) is the first choice of boat owners everywhere. For more information, visit (website).

Bottom Text Reads:

Sail covers, Biminis, Dodgers, Spray hoods, T. Tops, Cushions, Salons

Figure 13: Advertisement A

Source: Sunbrella®, Glen Raven, Inc (2009).Advertisement. *Motor Boating*. p. 33.



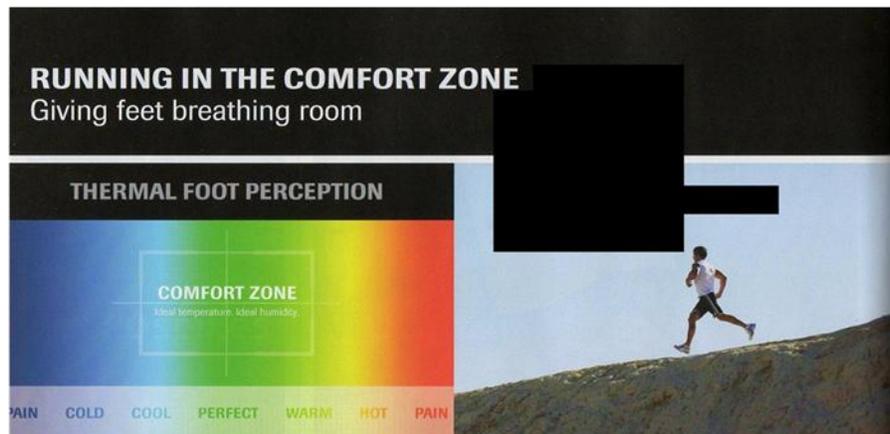
## Advertisement B

Bottom Text Reads:  
Ready to wear (Company Logo)

Figure 14: Advertisement B

Source: Wrinkle, Cotton Incorporated. (2009) Advertisement. *Cotton Incorporated Website*.  
retrieved from <http://www.cottoninc.com/Consumer-Ads/images/WRINKLE.jpg>

## Advertisement C



Inset Text Reads: Comfort Zone- Ideal temperature. Ideal humidity.

Figure 15: Advertisement C

Source: Gore-Tex®, W. L. Gore (2009). Advertisement. *Trail Runner*. P. 32

### *Data Analysis*

Survey responses were transcribed into Microsoft Excel. Excel files were imported into SPSS Statistics 17.0. In SPSS, frequency tables were created along with mean, median, and mode analyses. The data was then organized and analyzed in order to identify trends. Findings were then summarized and conclusions were drawn.

### *Instrument Approval*

Since the study required the participation of human subjects, both the interview instrument and consumer survey required the approval of the Institutional Review Board of the Use of Human Subjects in Research (IRB). Copies of the IRB submission form (Appendix D), IRB consent forms (Appendix E), initial contact letters (Appendix F), and the IRB exemption letter (Appendix G) are provided in the appendix.

### *Phase IV- Model Development*

A procedural model was developed utilizing data collected during Phases I-III. These phases identified effective methodologies, consumer and industry perspectives on effectiveness, media strategies, as well as benefits, challenges, opportunities, and potential of advertising. The Adapted Advertising Methodology Model was revised to reflect the study's findings. Selected participants from Phase II interviews provided additional feedback for the development of the model as well as external validation post development. Representatives from DAK Americas, Cotton Incorporated, and CORDURA® were selected to give feedback and external validation because their companies showed an established advertising development methodology.

**CHAPTER IV**  
**RESULTS AND DISCUSSION**

**Phase I: Exploratory**

*Phase I: Initial Product Scan Results*

*Objectives*

1. Observe what product types and brands utilize upstream advertising in their products.
2. Determine what methods upstream firms are using to promote their products to the consumer and how it compares to the host brand's advertising efforts.
3. Access the content of the upstream advertisement.
4. Reveal any differences in the advertising methods or tactics across retail store types.
5. Access whether or not price point plays a role in the presence or type of upstream advertisements used.
6. Find out which upstream companies are utilizing advertising at the product level.

*Key Findings:*

1. Footwear items contained the most occurrences of upstream advertising at the product level (20), followed by accessories (16), apparel (15), and equipment categories (4). There is potentially an opportunity for companies to include product information on equipment items since they are generally higher cost and durable items.

2. There is an opportunity for companies to include product information on equipment items since they are generally higher cost and durable items.
3. On-product hangtags were the most popular way to communicate product benefits to the end consumer (36 of 57 advertisements). Most hangtags provided ingredient performance attributes and directed the consumer to a product or company website for more information. Some used graphics while others used words to communicate messages, neither seemed more effective than the other.
4. The national specialty stores and specialty boutiques had the largest selection of outdoor products as well as carried the most products with upstream advertisements attached or fixed to the products.
5. Most national brands promoted their own proprietary fabrics and finishes.
6. Price point was not a factor in what type or if advertising was used.
7. Thinsulate by 3M, Gore-Tex by W. L. Gore, and Polartec by Polartec, LLC, were the most prevalent upstream advertisers.

### *Introduction*

Table 9 presents the summary findings by product type from the initial product scan. The scan was conducted in Cary, North Carolina and Raleigh, North Carolina on December 20, 2008. The data is arranged by attribute, with the frequency of the occurrence of that attribute, when applicable, listed to the right of the attribute description. Full, non-summarized product scan results are located in Appendix H.

Table 9

Product Scan Summary Findings by Product Type

Product Scan Summary Results- Apparel

Retail Channel	Frequency of Product Type	Host Brand Type	Frequency of Brand Type	Type of Ad	Frequency of Ad Type	Ad Location	Location Frequency	Size of Ad Compared to Host Product Ad	Size Frequency	Information Included in Ad (In Addition to Brand Name)	Top Two Advertising Companies in Product Type	Frequency of Ads	Company Supply Chain Segment	Average Price Point	Median Price Point
National Specialty Chain- REI	9	National	7	Hangtag	9	On-product	9	Smaller	0	Ingredient Attributes Technical Graphics Limited Company Information	Polartec	3	Fabric	\$119.63	\$114.00
		Private	2	Sticker	1	On-product	1	Same size Smaller Same size Larger	6 3 1 0 0		ExOffico	2	Finish		
National Specialty Chain- Dick's Sporting	2	National	2	Hangtag	2	On-product	2	Smaller Same size Larger	1 1 0	Ingredient Attributes	W. L. Gore Polartec	1 1	Fabric Fabric	\$112.50	\$112.50
Mass/Big Box Retailer- Target	None	None	None	None	None	None	None	None	None	None	None	None	None	None	None
Mass/Big Box Retailer- Wal-Mart	None	None	None	None	None	None	None	None	None	None	None	None	None	None	None
Local Specialty Boutique- Great Outdoor Provision Co.	3	National	3	Hangtag	3	On-product	3	Smaller	2	Ingredient Attributes Technical Graphics Limited Company Information	W. L. Gore	2	Fabric	\$111.33	\$70.00
								Same size Larger	1 0		ReviveX	1	Finish		

Table 9: Continued

Product Scan Summary Results- Footwear

Retail Channel	Frequency of Product Type	Host Brand Type	Frequency of Brand Type	Type of Ad	Frequency of Ad Type	Ad Location	Location Frequency	Size of Ad Compared to Host Product Ad	Size Frequency	Information Included in Ad (In Addition to Brand Name)	Top Two Advertising Companies in Product Type	Frequency of Ads	Company Supply Chain Segment	Average Price Point	Median Price Point
National Specialty Chain- REI	1	National	1	Hangtag	1	On-product	1	Same size	1	Ingredient Attributes	W. L. Gore	1	Fabric	\$79.99	\$79.99
National Specialty Chain- Dick's Sporting Goods	6	National	6	Hangtag	1	On-product	1	Smaller	0	Ingredient attributes	W. L. Gore	5	Fabric	\$116.33	\$90.00
				sewn in	2	On-package	2	Same size	0						
				Printed on packaging	6	Permanent	6	Larger	0	Logo	3M	4	Fiber		
Mass/Big Box Retailer- Target	None	None	None	None	None	None	None	None	None	None	None	None	None	None	None
Mass/Big Box Retailer- Wal-Mart	3	Private	3	Hangtag	3	On-product	3	Smaller	3	Ingredient attributes	3M	6	Fiber	\$53.00	\$57.00
				sewn in	3	Permanent	3	Larger	0						
				Printed on packaging	3	On-package	3	Same size	2	Logo	SympaTex	3	Fabric		
Local Specialty Boutique- Great Outdoor Provision Co.	2	National	2	sewn in	2	On-product	2	Same size	2	Logo	W.L. Gore	2	Fabric	\$127.50	\$127.50

Product Scan Summary Results- Equipment

Retail Channel	Frequency of Product Type	Host Brand Type	Frequency of Brand Type	Type of Ad	Frequency of Ad Type	Ad Location	Location Frequency	Size of Ad Compared to Host Product Ad	Size Frequency	Information Included in Ad (In Addition to Brand Name)	Top Two Advertising Companies in Product Type	Frequency of Ads	Company Supply Chain Segment	Average Price Point	Median Price Point
National Specialty Chain- REI	1	Private	1	Hangtag	2	On-product	2	Larger	2	Ingredient Attributes	ADVANSA Invista	1 1	Fiber Fiber	\$59.00	\$59.00
National Specialty Chain- Dick's Sporting Goods	1	National	1	Printed on packaging	1	On-package	1	Smaller Same size Larger	0 0 0	Ingredient attributes Logo	ADVANSA	1	Fiber	\$39.99	\$39.99
Mass/Big Box Retailer- Target	None	None	None	None	None	None	None	None	None	None	None	None	None	None	None
Mass/Big Box Retailer- Wal-Mart	None	None	None	None	None	None	None	None	None	None	None	None	None	None	None
Local Specialty Boutique- Great Outdoor Provision Co.	1	National	1	Hangtag	1	On-product	1	Smaller	1	CORDURA	CORDURA	1	Fabric	\$90.00	\$90.00

Table 9: Continued

Product Scan Summary Results- Accessories

Retail Channel	Frequency of Product Type	Host Brand Type	Frequency of Brand Type	Type of Ad	Frequency of Ad Type	Ad Location	Location Frequency	Size of Ad Compared to Host Product Ad	Size Frequency	Information Included in Ad (In Addition to Brand Name)	Top Two Advertising Companies in Product Type	Frequency of Ads	Company Supply Chain Segment	Average Price Point	Median Price Point	
National Specialty Chain- REI	7	National	6	Hangtag	11	On-product	11	Smaller	0	Ingredient Attributes	W. L. Gore	4	Fabric	\$54.50	\$54.00	
								Same size	9							Logo
National Specialty Chain- Dick's Sporting Goods	4	National	4	Hangtag sewn in Printed on packaging	2	On-product	2	Smaller	0	Ingredient Attributes	Polartec	2	Fabric	\$18.50	\$16.00	
					1	On-package	2	Same size	1							
					2	Permanent	1	Larger	1	Logo						
Mass/Big Box Retailer- Target	None	None	None	None	None	None	None	None	None	None	None	None	None	None	None	None
Mass/Big Box Retailer- Wal-Mart	None	None	None	None	None	None	None	None	None	None	None	None	None	None	None	None
Local Specialty Boutique- Great Outdoor Provision Co.	1	National	1	Hangtag	1	On-product	1	Smaller	0	Ingredient Attributes	W. L. Gore	1	Fabric	\$49.99	\$49.99	
								Same size	1							Larger

## *Discussion*

There were forty products identified across the five retail locations in Raleigh/Cary, North Carolina. A total of 14 apparel, 12 footwear, 12 accessory, and 3 equipment products were identified. Some retail locations sold no products containing upstream advertisements while others carried many. The most common advertising strategy was on-product ingredient advertising, taking the form of hangtags and sewn-in labels on products. From the number of advertisements found in the scan, it suggests that consumer shopping for these items are interested in the functional attributes of their products and thus require more product information before making their purchase decision. Other than on-product ingredient advertisements, no other forms of advertising were found during the scan.

From the observations of the product scan, it was determined that footwear items contained the most occurrences of upstream advertising at the product level (20). Accessories had the second largest number of upstream advertisements (16), followed closely by apparel (15), while there were very few examples in equipment category (4). A total of 57 advertisements were identified during the scan. The most common type of advertisement used across product types were hangtags fixed to the product along with the host brand's tag (36). There were 12 instances of advertisements on packaging, 8 sewn in labels, and 1 sticker. The majority of hangtags found in the scan either were the same size or smaller than the host brand's tag. Hangtags typically gave the performance properties of textile component, the logo of the product, the name of the upstream company, and a website for more information. In addition to the general information, only one of the hangtags found

provided full manufacturer information, which included a contact address and a phone number.

In the footwear category, most advertisements took the form of sewn in labels and metal plates permanently fixed to the product. The accessory categories had a mix of both hangtags and sewn in labels. Hangtags were the most common form of advertising found on apparel items. In the equipment category, the majority of the advertisements were presented on the box or on a hangtag. There was no clear reason why there were very few advertisements on the outdoor equipment products, as their fabric technologies and constructions are similar to those used in the apparel items.

The national specialty and specialty boutiques had the largest selection of outdoor products as well as carried the most products with upstream advertisements attached or fixed to the products (37). These store types specifically cater to outdoor enthusiasts and carry well-known national brands such as The North Face®, Columbia®, Patagonia®, Mountain Hardware®, and Marmot®. These stores offered activity specific items as well as multipurpose outdoor goods. The mass or big box stores had a much narrower selection, as these stores do not specifically target the outdoor market (3). These stores stocked general commodity type products with very few products in each product type. Many of the brands in these retail stores were private label goods with a few national brands such as Coleman®.

In the specialty channels, most established apparel brands, such as The North Face®, Patagonia®, Columbia® and others did not use upstream product advertisements. These outdoor brands advertised their own proprietary fabric and finish technologies instead of the upstream ingredient. Other, lesser-known brands and store brands typically had more

upstream advertisements on their products, most likely to increase their appeal over the national brands. These stores also carried the only instances of advertising in the equipment and accessories categories. However, across retail channels, footwear contained a high numbers of products containing upstream advertisements. Sewn in labels and metal plates were present on footwear across retail locations and price points.

There were three main upstream companies that participated in on-product ingredient advertig. In terms of visibility across retail locations and retail channels of all orientations, Thinsulate®, by 3M, product hang tags and sewn in labels could be found on eight of the forty products in the scan, including those found in the national specialty, boutique, and mass channels. This brand was the only brand to be found in all three channel types. In terms of frequency of advertisements, Gore-Tex®, by W. L. Gore, advertisements were found on sixteen of the forty products. Gore-Tex® advertisements were frequent in the apparel and footwear categories across the specialty retail locations. Apparel products used hangtags while shoes and boots typically used metal plates and sewn in labels to distinguish the host's product. Polartec®, by Polartec, LLC, was the final major player, with advertisements found on six of the forty products. Their hangtags could be found on various fleece goods, while hangtags and sewn in labels were used in the accessory category.

### *Phase I: Print Advertising Media Scan Results*

#### *Objectives*

1. Identify additional potential industry interview participants.
2. Identify advertisements for use in the consumer survey.

*Key Findings:*

1. Buhler Quality Yarns, CORDURA®, and Lycra® were added to the list of companies to contact for interviews.
2. Glen Raven, Cotton Inc., and W. L. Gore advertisements were selected for use with the consumer surveys.

The print media scan was conducted in order to aid in completing RO1 as well as identify potential advertisements to be used as examples in the consumer survey. From this scan, Buhler Quality Yarns, CORDURA®, and Lycra® were added to the list of companies to contact for interviews. Three consumer magazine advertisements were selected to be used in the consumer survey, see Figures 13-15.

*Phase I: Competitive Analysis*

*Objectives*

RO1: Define advertising success and identify companies with successful advertising strategies.

RO2: Complete a competitive analysis, using secondary data, on the advertising strategies of upstream textile manufacturers in addition to the strategies of firms from other industries in order to:

RO2A: Develop an understanding of the current advertising campaigns.

RO2B: Assess the strategies used by the selected companies.

*Key Finding*

1. Advertisement content supported or enhanced by interactive online content was an effective strategy.

2. Television commercials were an effective, yet expensive, advertising method.
3. Successful campaigns identified what their customer/consumer felt was the core value of their product and then developed their campaign around those findings.
4. Creating involvement between the company and the target audience can lead to increased success.

### *Introduction*

A competitive analysis was completed to develop an understanding of current advertising strategies used by both textile and non-textile firms. The results of the competitive analysis are presented in the Table 10. The results table highlights the strategies and tactics used by companies to address market problems and achieve goals. The results also present quantitative data quantifying the effects of advertising post implementation.

### *Discussion*

The majority of the companies began their advertising development by talking with and observing their customers/consumers and how they used and identified with their products. This step identified the core benefits and relationships the customer had with the product or brand. From these observations, the companies created a central theme or set of attributes that took into account these preferences in order to help frame the development of their campaign. This strategy helped to ensure that the campaign was be meaningful to the target audience, by specifically focusing on attributes that resonate with the target group.

Table 10

Competitive Analysis Results

Company	Product	Campaign Duration	Problem(s)	Strategy	Tactics	Goal(s)	Evaluation Metric	Pre-Campaign Score	Post-Campaign Score	Expenditure
Adobe Systems	Adobe	2006-2007	Top current successful products, appeal to multiple audience with diverse needs	Demonstrate the versatility of the product from an amateur all the way up to the professional level.	Print, Interactive online content, sponsorship	1 Create ads that speak to multiple audiences	Qualitative survey	All audiences, no matter what professional level responded well to		\$999 Thousand – \$2 Million
						2 Match revenue contribution of previous products	Sales volume comparison	Old product version- 56% of total revenues	New product version- 64% of total revenues	
						3 Restore confidence in acquisitions	Earnings per share	Not given	Up 113% from previous year	
The Alliance Theatre	Cuttin' Up at the Alliance Theatre	2006-2007	Lack of patronage	Build awareness among media personalities to promote the show.	Street teams, props, PR, print flyers, outdoor	1 Increase ticket sales	Daily ticket sales comparison	\$400	\$2,400	\$5,000
E&J Gallo Winery	Carlo Rossi Vineyards	2006-2007	Brand irrelevancy, poor product perception, product value-price vs. shelf space, limited promotional budget	Brought in designers to create art from packaging. Show cased art work on line and tour around country. Provided ideas on	Online, interactive online content, print, on product ads, PR Events	1 Reposition product among 21-29 year olds	Perception surveys	35% positive	57% positive	Under \$500,000
						2 Change product perceptions	Sales volume comparison	Not given	10% Increase	
Fisher-Price Friends	Fisher-Price	2006-2007	Limited technology growth, increased competition from substitutes	Build anticipation for product by keeping the product as secret as possible, to the point the consumer did not get to see the product until after the purchase	Television, product design, packaging, cinema, retail experience, PR	1 Create product buzz	Initial product launch sales	Hoped for 60,000 units sold in the first week	Sold 300,000 the first day	\$2–5 Million
Frito-Lay	Doritos	2006-2007	Purchase frequency declining, flat sales volume, brand popularly and loyalty down	Connect back to consumers, by allowing them to create advertising media, create new products, and connect to the brand on line	Television, interactive online content, packaging, PR, consumer involvement	1 Improve growth, popularity, loyalty, and equity for the brand	Consumer Survey	Popularity- 10% growth, loyalty- 13% growth, equity- 11% growth		\$20-40 Million
						2 Increase sales by 5%	Sales volume comparison	Not given	13% growth	
Hewlett Packard	Hewlett Packard	2005-2007	Price and promotion based competition, no differentiation among consumers, limited impact of media advertising	Make the PC personal again, by promoting the personal relationship people have with their computers. Used celebrity spokes people to promote message.	Television, interactive online content, sponsorship, print	1 Regain market position	Sales volume comparison	Not given	36% growth YOY	\$40 Million and over
						2 Increase market share	Market share analysis	12% gap between main competitor	Reduce to 4% gap	
						3 Change brand perceptions	Brand perception survey	Not given	10% increase across brand image metrics	
Kimberly-Clark	Kleenex	1/2007-6/2007	Product considered commodity, decreasing market share	Connect the brand with consumers on an emotional level, to reposition the brand as a comfort item	Radio, interactive print, in theater, live event, banner ads, PR, web sites	1 Create internet chatter	Nielsen BuzzMetrics	Not Measured	150% more in favor	\$10-20 Million
						2 Build brand awareness	Consumer Survey	51%	66.75%	
						3 Increase market share	Market share analysis	No given	0.5% increase - \$50M	

Source: Effie Awards. (2008). *Effie Awards Winners Showcase*. Retrieved Mar. 10, 2009, from

[http://www.effie.org/ideas\\_that\\_work](http://www.effie.org/ideas_that_work)

Table 10: Continued

Ocean Spray Cranberries, Inc.	Ocean Spray	2006-2007	Product considered unhealthy, industry in decline	Promote hidden product attributes to appeal to health conscious consumers. Used traditional advertising with online media and PR to develop the story and the product benefits.	Television, radio, interactive online content, outdoor	1 Increase base volume	Sales volume comparison	Not given	11.6% growth over previous year	\$20-40 Million
						2 Increase market share	Market share analysis	Not given	1.7 point share increase	
						3 Increase web traffic	Web traffic tracking	Not given	314% growth over pervious year	
						4 Build awareness	Consumer Survey	Not given	268,679,000 impressions	
						5 Increase brand metrics	Not Given	Not given	Not given	
SC Department of Environmental Health & Control	Rage Against the Haze (SC DHEC)	2006-2007	Limited staying power of similar advertisements, limited budget	Involve teens in the planning and development of the campaign. Use those teens to empower others and create community	Events, street teams, interactive online content, print	1 Increase awareness	Member tracking	None	4,000+ members	\$500-999 Thousand
						2 Decrease teen smoking rates by 5%	Survey	Not given	19.1% smoking drop	
						3 Create a sustainable message	N/A	Program still active		
Toyota Motor Sales	Toyota	1/2007-8/2007	Consumers extremely loyal to competitor's products, past failures, skeptical market perceptions	Prove product superiority compared to competitors through extreme product demonstration and sponsorship of consumer relevant events and activities	Television, print, PR, interactive online, sponsorship,	1 Increase sales	Sales volume comparison	Not given	300% increase	\$40 Million and over
						2 Close sales gap between leading competitors	Competitive sales comparison	Not given	Closes gap by 50% among top competitors and became #3 supplier	
						3 Improve brand image	Consumer brand metric survey	Average rating 46.65%	Average rating 55.56%	
University of Minnesota University Relations	University of Minnesota	2006-2007	Unfavorable public perception, lacks relevance	As the broader community to submit questions for the faculty and staff to answer in order to build credibility and an atmosphere of discovery	Print, direct, outdoor, radio, television, interactive online content	1 Increase awareness	Web traffic tracking	Not given	11% one day spike	\$500 - \$999 Thousand
						2 Increase outside financial support	Donations comparison	Not given	39% increase over previous year	
Unilever	Hellmann's	2006-2007	Grow mature brand, change unhealthy product perception	Found consumers valued real/wholesome food choices. Partners with Yahoo! Food to create online video highlighting real food from around the country. Repositioned product as a more wholesome ingredient.	Interactive online content, PR, television, print, consumer involvement	1 Increase sales by 3.2%	Sales volume comparison	Not given	7.6% increase	\$10-20 Million
						2 Create positive product perceptions,	Perception of contributing to healthy living	20% yes	59% yes	
						3 Create dialogue about "real" food	ROI	For every \$1.00 spent yielded \$2.50 in incremental revenue		
UPS	UPS	2006-2007	New entrants into market	Break down specific products and services to show ease of use and business integration	Television, interactive online content, print, direct, outdoor	1 Increase differentiation	Awareness survey	Not given	30% increase over previous year	Over \$40 Million
						2 Increase sales	Sales volume comparison	Not given	Up 9.1%	
						3 Increase interaction with brand	Web traffic tracking	Not given	1.3 million visits	

Source: Effie Awards. (2008). *Effie Awards Winners Showcase*. Retrieved Mar. 10, 2009, from

[http://www.effie.org/ideas\\_that\\_work](http://www.effie.org/ideas_that_work)

The tactics used to implement their strategies were varied, but most companies relied on television and online advertising to communicate with their customers. Companies would often create advertisements then supplement those advertisements with interactive online media, which included forums, games, and other content specially developed for that campaign. Many companies mentioned that creating involvement between the company and the customer in the campaign lead to increased success.

Evaluation methods were varied, but most companies used awareness surveys, market share and sales volume comparisons, and web traffic tracking as their primary metrics to evaluate the success of the campaign. Most companies averaged approximately a 10% increase in these areas depending on their initial goals and strategies, but there was no standard across companies or product categories.

### *Phase I: Case Studies*

#### *Objectives*

RO1: Define advertising success and identify companies with successful advertising strategies.

RO2: Complete a competitive analysis, using secondary data, on the advertising strategies of upstream textile manufacturers in addition to the strategies of upstream firms from other industries in order to:

RO2A: Develop an understanding of the current advertising campaigns

RO2B: Assess the strategies used by the selected companies.

### *Key Findings:*

1. Both companies primarily used television advertisements as their main form of communication.
2. Both companies used auditory signals or jingles tied to their advertisements.
3. Advertising is an effective way to differentiate products and build awareness.

### **Case Study: Intel's "Intel Inside" Campaign**

#### Introduction

Intel Corporation, founded in 1968 (Maddox, 2004) launched its "Intel Inside" advertising campaign in 1991, which was marked as the first time a PC component manufacturer successfully advertised to the end consumer (Intel Corp., 2009). Intel Corporation has appeared in the top seven Most Valuable Global Brands since 2001, as identified by Interbrand (Interbrand, 2009). The "Intel Inside" campaign has been listed as the number two best B2B advertising campaign by Advertising Age's Business Marketing magazine (50 Greatest B to B Ads. 1999). Now, Intel is one of the largest cooperative advertisers in the world. Intel has successfully used advertising to increase its brand awareness, product visibility, and revenues in both the consumer and industrial segments.

#### Opportunity

Prior to the launch of their now famous campaign, Intel relied solely on their computer vendors to promote their components. Because of Intel's relative distance from the end consumer, Intel had little brand identification or product awareness among users. During the late 1980's, Intel used a number series such as 386 or 486 to identify its microprocessors, which they assumed were protected under U.S. trademark law (Intel Corp., 2009). However,

by 1991, there were several new microprocessor companies competing and they were beginning to produce their own 386 and 486 processors (Arnott, 1994). When Intel attempted to take these companies to court for trademark infringement, the courts ruled that the 376 and 486 names were not trademarks, which left Intel's products vulnerable. In light of these proceedings, Intel realized that they needed to link the benefits and brand equity of its products directly to the company itself, in order to differentiate their products and increase their awareness (Intel Corp., 2009).

### Challenges and Media Tactics

To accomplish their goals, Intel examined the consumer advertising tactics of other component advertisers across product markets. Intel decided to model their advertising campaign after Monsanto Co.'s NutraSweet, an artificial sweetener. Intel's goal was to build product awareness to create brand preference among users. In 1989, the marketing team at Intel tested their first advertising campaign promoting their 386SX chip, a product that only Intel was providing, in Denver, Co. Known as "Red X" campaign, Intel employed a six-month, guerrilla style campaign using print, retail, and outdoor advertisements to attempt to jump start sales. The campaign included eye catching print and outdoor advertisements that resembled graffiti. Ads depicting the 286 were "spray painted" over with 386SX. This marked Intel's first attempted to advertise to computer buyers instead of computer manufacturers (Johnson, 1991).

Intel knew that in order to succeed in the consumer market, they would need to coordinate their efforts with PC manufactures (Intel Corp., 2009). After the success of the Denver trial, Intel launched "Intel Inside", its first full scale cooperative advertisement, with

IBM in April 1991 (Elkin, 2001). The goal of this campaign was to build consumer confidence in the Intel brand by associating itself with popular computer brands. By co-advertising with popular computer manufacturers such as IBM and Compaq, Intel was able to borrow their established brand equity in order to build its own (Arnott, 1994). The cooperative advertising campaign was an incentive based program by which Intel would take a percentage of the purchase price of the processor and put that money into an account for the host brand to be use to promote the Intel name along with their own products. This incentive was offered to all computer manufacturers that used advertisements that included the Intel Inside logo, including both print and product level advertisements (Intel Corp., 2009). The visibility of the Intel brand in printed publications reached 8,000 pages a month in 1994. These advertisements were either Intel's own efforts or those from computer manufacturers (Arnott, 1994).

In addition to the product and print advertisements, in 1992, Intel created a widely successful commercial with the help of George Lucas's Industrial Light and Magic. The commercial took the viewer through the internals of a computer and then focused on Intel's fast and powerful new microprocessor. According to Intel, television commercials proved to be the most effective communication method (Intel Corp., 2009). In 1994, Intel began working with composer Walter Werzowa to create an auditory jingle to identify their brand (Mucha, 2005). After many versions, the now classic four-note jingle debuted in 1992. This tone was played at the end of each of Intel's commercials, paired with the Intel Inside logo (Intel Corp., 2009). According to one source, in 2005, the Intel jingle was played around the world about once every 40 seconds (Mucha, 2005). In 1997, Intel began to promote its logo

on permanent displays inside retail locations such as Best Buy, Circuit City, and Comp USA. These displays included end caps, full wall displays, as well as product demonstrations showing how fast computers using Intel processors could perform (Stevens, Graves, 1997).

### Benefits

The success of the Intel Inside campaign was largely due to the successful recruitment of computer manufacturers. Without their participation, computer buyers would have had difficulty in identifying computers containing Intel processors. Computer manufactures not only benefited from the shared advertising expenses, but the Intel name on their products gave consumers a sense of comfort in knowing that their software was compatible, which in turn yielded additional profits and market share for participants. The success of the Intel Inside campaign was significant and in 1992, the first full year of the campaign, Intel's global sales had increased by 63% to \$4 billion. By 1993, Intel announced that their brand preference rating had increased from 60% in 1992 to nearly 80% (Arnott, 1994).

### **Case Study: Cotton Incorporated's "Fabric of Our Lives®" Campaign**

#### Introduction

Over the years, Cotton Incorporated has used many different media types to promote cotton fibers. One of their most successful endeavors was the "Fabric of Our Lives®" campaign. The campaign began in 1989, when Cotton Incorporated debuted their first series of television commercials on Thanksgiving Day. The advertisements featured the jingle "The touch, the feel of cotton, the fabric of our lives", which is now synonymous with the brand. The Fabric of Our Lives® campaign featured an iconic styled advertisement that attempted to

tie the benefits of cotton and cotton fabrics with the American experience (Cotton Inc, 2009). The advertisement campaign helped to support cotton market share growth, which had peaked in 1996 at 59% (EFFIE, 2000).

### Challenges and Goals

By 1998, cotton market share growth had stagnated and Cotton Incorporated attributed this to two occurrences. First, Cotton Incorporated's research indicated that the appeal of manmade fibers was on the rise. Synthetic fiber producers and garment manufactures had begun to develop specialized products that offered benefits that cotton had difficulty competing in, such as stretch recovery and drape. Second, "The Fabric of Our Lives"® campaign had successfully created brand awareness and loyalty in the Baby Boomer market, but the campaign was not nearly as successful in the teenage to 20's market segment. While this consumer group was buying cotton products, they had little awareness of what fiber composed their garment. In light of these challenges, Cotton Incorporated determined that it needed to assess the current awareness and recall of the cotton brand in the market, especially in the 16 to 24 years old demographic. Once this baseline was established, Cotton Incorporated could evaluate the changes in awareness post campaign implementation (EFFIE, 2000).

### Tactics and Media Strategy

The previous "Fabric of Our Lives®" campaigns still had many strengths and maintained high levels of recognition among Boomer groups. Cotton Incorporated's task then became to create a campaign that kept the elements that appealed to the Boomers, yet make the advertisements more relevant and appealing to the young demographics. Cotton

Incorporated also had to define the brand in the lives of the consumer, and they were planning to use product examples to make the message more relatable, which had not been attempted in the past. Cotton's strategy consisted of new television advertisements on cable, syndicated, and nontraditional avenues. This allowed them to reach a broad population, while at the same targeting a specific viewing demographic. Cotton Incorporated chose to place advertisements during highly viewed shows such as the Emmy Awards, as well as popular television channels such as MTV and The WB where the viewership was much younger (EFFIE, 2000).

#### Benefits and Successes

Over the course of the campaign and based upon preliminary evaluations, market share for cotton grew to 60%, the highest recorded value since the introduction of manmade fibers. Overall awareness in the market grew from 74% to 85% among women aged 25-49, 30% growth among 16-19 year olds, and 10% growth in the 20-24 age group. In 1999, Brandweek listed Cotton Inc #570 in their America's Top 2000 Brands ranking, this was a 108 place jump from their 1998 ranking of 678 (America's top 2000 brands, 1998; Brandweek, 1999). In 1998, Cotton Inc won a Silver EFFIE award for their 1997 campaign. The award was a national juried advertising award that recognized advertising campaigns that were not only creative, but exceed managerial goals for the campaign (Cotton Inc, 1999).

#### *Discussion: Case Studies*

Both of these companies used very similar tactics to build awareness, recognition, and preference for their products. From the results of these case studies, television advertising was an effective way to communicate with the end consumer. Both of these company's

advertisements also contained sound bites or jingles that became synonymous with the brand. It can be inferred that using these two media tactics in conjunction could be an effective way to build recognition in the marketplace.

One major difference between the two companies was their methods of measuring effectiveness. Intel used mostly quantitative measures such as market share and sales volume to measure the effectiveness. Cotton Incorporated on the other hand used slightly different tactics. Cotton began by establishing a baseline or initial measurement of awareness and recognition of the target market. Though they too used market share as an indicator, Cotton mainly used qualitative measures, focus groups and surveys, to track the changes in awareness and recognition. Both tactics are valid for establish effectiveness measures.

## **Phase II- Industry Interview Results: Inductive Logic**

### *Objectives*

RO3A: Examine differences in the marketing strategies of used by the performance textile market, focusing specifically on the outdoor apparel and equipment subsegment of the sports and leisure market segments.

RO3A: Benefits

RO3A2: Challenges

RO3C: Opportunities

RO3D: Potential

RO3E: Advertising Methodology

RO4: Examine the effectiveness from a supply chain perspective to determine:

RO4A: Which media types the population views most frequently

RO4B: What advertising media has the best response rate

RO4C: What part of the advertisement causes the population to seek additional information

RO4D: What features of the advertisement are most effective

RO4E: What factors the population considers before purchasing

RO4F: Where the population seeks product information

*Key Findings:*

1. The majority (7 of 11) respondents said it was *necessary to advertise* in the sports and leisure market segment in order to be competitive, due to the number of well-established brands in this segment. Companies tended to spend more advertising dollars in this segment than other product categories.
2. Respondents most frequently identified Lycra®, W.L. Gore, and Intel as successful ingredient advertisers.
3. Most of both B2B and B2C companies cited that the measure of advertising success was customer or consumer *awareness* of products or the company name prior to the firm contacting them formally. Increasing sales was the second most frequent answer. Benefits of advertising included building *awareness and company image* or *credibility*. Increasing sales was the third most frequent response.
4. For B2B communications, the top two elements to include in an advertisement for the sports and leisure segment were *performance attributes* and acknowledgment of *customer's interests*.

5. Both B2B and B2C companies agreed (10 of 11) stated that *online media held the largest opportunity* for advertising and but *PR and face-to-face interactions* were the most effective forms of advertising.
6. Most B2B respondents stated that the opportunities in consumer advertising were not clear and that the costs associated with reaching that group may out weight the benefits. At the supply chain level, the some of B2B respondents did not feel there were many opportunities at the fiber, yarn, and fabric level but there was opportunity downstream with brands, designers, and retailers.
7. For both B2B and B2C companies, the majority (8 of 11) respondents stated that the *Internet* was the main information source for new company information, if they had not done business with them in the past.
8. Across B2B and B2C respondents, factors they considered, other than cost, when determining new suppliers were the *status of the company* including factors such as *longevity, industry commitment, and credibility*.

*Sample Description*

Company	Primary Advertising Type			Major Advertising Methods					
	B-2-B	B-2-C	B-2-B & B-2-C	Print	Online	Event	On-product	PR	Television
A			X	X	X	X	X	X	
B	X			X	X	X		X	
C	X							X	
D			X		X		X	X	
E	X			X	X	X		X	
F			X	X	X	X	X	X	
G	X			X	X	X	X	X	
H			X	X	X	X	X	X	X
I	X			X		X		X	
J	X			X	X	X		X	
K	X			X	X			X	

Company ID	Position	Years in Position	Years with Company	Years in Industry	Company Position in Supply Chain
A	Director of Marketing	14	21	25	Fabric
B	Advertising Agency Owner	1	1	15	Advertising/Fiber
C	Director of New Business Development	2	10	34	Yarn
D	Marketing Manager	3	10	10	Yarn
E	Marketing Manger	4	9	20	Fiber
	VP of Client Relations	5	8	10	Public Relations/Fiber
F	Global Marketing Manager	2	2	20	Fabric
	Senior Account Executive	2	2	6	Advertising/Fabric
G	VP of Sales	8	8	26	Yarn
	Textile Engineer/Sales/ Customer Support	3	3	37	Yarn
H	Director of New Business Development	3	14	14	Fiber
I	Director of Sales and Marketing	7	15	15	Fabric
J	Vice President of Sales,	2	12	28	Fabric
	Vice President of Customer Development	2	2	13	Fabric
K	Global Marketing Manager	3	3	14	Yarn

### *Advertising in the Sports and Leisure Market*

Table 15 relates the results of the advertising in the sports and leisure market questions. These questions dealt with how the company viewed the relative necessity of advertising their products in the sports and leisure market in order to be competitive or successful in that market. This section of the interview was created and completed in order to satisfy research objective RO3.

#### *Discussion: Advertising in the Sports and Leisure Market*

When asked about the necessity of participating in advertising activities in order to be competitive in the sports and leisure market segment, seven companies said that it was important. Of the participants answering yes, many said when competing with national or established brands, advertising was a good way to build visibility for their products and company. The four companies that said advertising was not necessary in order to be

competitive stated that quality products and company name were the main differentiating factors.

Table 11

Advertising in the Sports and Leisure Market- Summary of Results

Topic	Comments Regarding Advertising in the Sports and Leisure Market
<b>Competitive necessity</b>	<p>A: Yes- Market penetration, product by product basis            B: No- Unless developing consumer brands            C: No- Not for our products            D: No- Can be done through other means            E: Yes- Important to stay visible            F: Yes- Consumers are brand conscious            G: Yes- Increase competitiveness            H: Yes- Increase competitiveness            I: No- Sales force and quality products            J: Yes- Increase competitiveness against established brands            K: Yes- Segment has tremendous growth potential</p>
<b>Differences in tactics</b>	<p>A: Performance segment receives more advertising dollars than other segments. Performance ads are product focused and use more diverse media types. Non-performance products use company focused ads and may be only promoted through print ads or face-to-face integrations.            B: New markets may require focused advertising to make an impact. The company must be established in the market first, then individual products.            C: We do not differentiate our advertising for different product segments.            D: Tactics are product specific. Some performance products receive more advertising focus, depending on competition, growth potential, and goals.            E: Tactics are customer and market specific. Ad development is based upon customer and market preferences. Ads are focused on the end use application.            F: The general approach is the same. Ads are adapted to fit market segment.            G: None.            H: Performance products use images of people who are active in the trade or consumer segment. Other product classifications are different and we use different ad media and tactics.            I: Performance products are more heavily promoted.            J: Performance products are the only advertised products, all others are promoted by direct mail or face-to-face interactions.            K: Tactics are similar, more emphasis on performance products. Ads are targeted, direct, and present product-in-use images. Emotional images were not effective.</p>

Table 11: Continued

<p><b>Development</b></p>	<p>A: Branded product’s ads are focused on the brands and product benefits. Unbranded ads are company focused, promotes longevity and credibility.</p> <p>B: Ads are focused on depicting our products performing better than branded alternatives. Point of parity and point of difference tactics.</p> <p>C: Our successful customers advertise our company. Little success with traditional advertising. Promote technical expertise and development capabilities.</p> <p>D: Main advertising vehicle is PR. Hangtags and web pages have been used successfully. Ads focus on education and connecting with the consumer.</p> <p>E: Have evolved from generic company ads to more iconic, emotion driven ads. We use consistency with layout and color to build synergies. Print, PR, and event hosting are our major advertising vehicles.</p> <p>F: Industry ads promote superior product attributes and company integrity. Consumer ads focus on emotional appeal by using aspirational images of real people using our product.</p> <p>G: Created generic industry level ads in the past, market knows who we are so no longer a top priority. Moved to ads focused on brands and retailers for a pull through strategy. Ads promote product quality, supply chain advantages, and benefits of doing business with our company.</p> <p>H: Ads are developed to reach a broad audience using economics of scale, utilizing print, online, television, and sponsored events to spread messages.</p> <p>I: Marketing activates are geared toward specific customers. Most ads highlight new products using direct mail. Rely heavily on customers to promote business.</p> <p>J: Ads promote product performance and our passion for our business. Ads portray aesthetically appealing images with performance attributes.</p> <p>K: Ads are developed to build a story around products. Ads are focused on product attributes and technical information, but in an appealing way. PR is a good starting point because of the cost and potential reach.</p>
<p><b>Successful companies</b></p>	<p>A: Gore-Tex, waterproof breathable fabrics, fiber companies</p> <p>B: Textile machinery companies</p> <p>C: Cocona due to presence and easily identifiable logo</p> <p>D: Polartec, Splenda</p> <p>E: Lycra, Linsing, BASF, Sunbrella</p> <p>F: Intel, Lycra, Gore-Tex, NutraSweet</p> <p>G: Cotton Inc, Linsing, Supima</p> <p>H: Lycra, Intel, Supima</p> <p>I: W.L. Gore, Trivantage, Apple</p> <p>J: Lycra, Scotchgard</p> <p>K: BASF, W.L. Gore</p>

However, nearly all companies agreed that advertising alone could not differentiate their products, personal relationships and face-to-face interactions were still very important.

In terms of differences in tactics, there was a trend that most companies invested more of their advertising budget on performance and sports and leisure products than other product categories. Many companies indicated that other, more commodity products were promoted through direct mail and face-to-face interactions. Most companies tried to highlight product benefits and performance aspects over other product attributes. Though the tactics seemed to follow a trend, the development of advertisements for this segment was quite different. Each company had a different development strategy, but most seemed to develop advertisements for specific target customers or product end uses. When asked what companies they believed were successful ingredient advertisers Lycra, W.L. Gore, and Intel were cited most frequently.

#### *RO3A-Advertising Benefits*

Table 12 relates the results of the advertising benefits questions. Questions dealt with what the companies viewed as the benefits of advertising and what they considered success.

#### *Discussion: Advertising Benefits*

When defining success, five companies cited either customer or consumer awareness of their products or company prior to them contacting or speaking with them to be the measure of advertising success. Building awareness was the top benefit of advertising; only three companies specifically cited increasing sales as a benefit of advertising.

Table 12

Advertising Benefits- Summary Results

Topic	Comments Regarding Advertising Benefits
<b>Defining success</b>	<p>A: Consumers know your products</p> <p>B: Short-term (less than 1 year) success is rare</p> <p>C: Letting customers know we can help their business</p> <p>D: Volume growth</p> <p>E: Customer has awareness before being approach by our business</p> <p>F: Creating long-term brand and company value</p> <p>G: Customer has awareness before being approached by our business</p> <p>H: Increased sales, create preference</p> <p>I: Customers change their perception that favors your products, increased sales</p> <p>J: Customer has awareness before being approached by our business, consumer demands our product from a retailer</p> <p>K: Increased sales</p>
<b>Benefits</b>	<p>A: Builds brand awareness, confidence in the company, creates buzz, defines what products mean to the customer, can build sales, can build credibility, builds company name for potential employees</p> <p>B: Keeps name in front of customers, reinforces commitment to industry, builds presence in market place, helps to develop the firm's knowledge of customers</p> <p>C: Do not see a lot of value in traditional advertising (print, PR, etc.), build relationships to gain new business</p> <p>D: Building credible brands, promote company viability, increase sales</p> <p>E: Increase visibility among mills, brands, and retailers, support customers, builds brand awareness and relationships between company and customer</p> <p>F: Supports brands and company integrity</p> <p>G: New business, creates perceptions and reputation, recognition along supply chain</p> <p>H: Increases favorability of our products, molds consumer perception, increases sales</p> <p>I: Depends on the goals of the message, establishes perceptions in the market, varies customer to customer</p> <p>J: Builds the name of our product, creates company credibility</p> <p>K: Builds awareness, shows commitment to industry</p>

Table12: Continued

<p><b>Evaluating methods</b></p>	<p>A: Difficult to measure effectiveness and recognition, can monitor calls and correlate to campaign's timeline, reader response cards offers direct tracking</p> <p>B: May take up to five years to see results, difficult to attribute success to a particular advertisement or promotion. Measure success in sales</p> <p>C: None</p> <p>D: No awareness or recognition evaluation methods, track web traffic and customer feedback</p> <p>E: No way to quantify effectiveness or awareness</p> <p>F: Use psychological response monitoring system to determine which ads give the best physiological and psychological response among focus group participants</p> <p>G: Assume that if sales are good, advertising is working</p> <p>H: Focus groups to determine recognition and awareness levels</p> <p>I: Compare sales over the course of the campaign, then evaluate how to modify the tactics</p> <p>J: No formal measurements</p> <p>K: Survey customers and potential customers for awareness</p>
<p><b>Elements of effective advertising</b></p>	<p>A: Ads should highlight a specific product attribute, logos provide easy and quick recognition, copy test should increase viability of product and logo, reassuring financial stability important for trade ads, communicate that your company knows what interests the customer/consumer</p> <p>B: Creating a brand can help easily identify products, for smaller markets using company focused advertising is important, promote longevity and commitment of company to industry, understand your customer and satisfy them</p> <p>C: None.</p> <p>D: Consistent and credible messages that can be built upon, ads must contain a callout or call to action</p> <p>E: Image must stop the reader, copy must be read quickly and easily, must contain a request for action (more pronounced in direct ads)</p> <p>F: Engaging images, create a story, consistency of messages</p> <p>G: Promote supply chain in ads (reminiscent of full package), company name, logos, buzz words customers identify with</p> <p>H: Depends on media type and message, mass media for general or broad messages, direct methods for product attribute promotions</p> <p>I: Promote you business and your products, but do not force the message</p> <p>J: Emphasize product attributes and esthetics, images with meaningful copy text, promote company credibility</p> <p>K: Universally appealing, products in actions, direct messages</p>

Companies made no distinction between long-term and short-term success; however, most were quick to add that as long as sales for their product were strong, they assumed that the advertising was effective.

As for the benefits of advertising, five respondents cited building awareness as a benefit of advertising. Four, the second most frequent response, said building credibility for the company was an important benefit. Finally, three respondents cited changing market perceptions as a benefit of advertising. A note worthy benefit, mentioned by company A was that advertising helps build the company name to potential employees.

There was a broad response to questions relating to the evaluation of advertising success. The most frequent response (4 of 11), was that no formal tracking was used. However, companies F, H, and K would be considered advanced as they use focus groups or other proactive approaches to measure effectiveness. Other companies fall in the middle, meaning they perform some tracking through automated means, but do not fully embrace effectiveness evaluation methods. Elements of effective advertising included performance attributes and acknowledgment of customer's interests.

#### *RO3B-Advertising Challenges*

Table 13 relates the results of the advertising challenges questions. Questions dealt with what the companies viewed as some of the challenges of developing advertisements and campaigns.

Table 13

Advertising Challenges- Summary Results

Topic	Comments Regarding Advertising Challenges
<b>Consumer level</b>	<ul style="list-style-type: none"> <li>A: Determining effectiveness</li> <li>B: Justifying expense</li> <li>C: Consumers do not find value in the products we produce, industry does</li> <li>D: Making your product and message relevant to the consumer</li> <li>E: Determining if consumer recognition is desirable</li> <li>F: Making your product and message relevant and meaningful to the consumer</li> <li>G: Justifying expense</li> <li>H: Developing ads that break through advertising noise, ads that will resonate</li> <li>I: Justifying expense</li> <li>J: Have to have developed brands, justify expense, not effective in the past</li> <li>K: Justifying expense</li> </ul>
<b>Industry level</b>	<ul style="list-style-type: none"> <li>A: Determining market positioning, advertisement frequencies</li> <li>B: Determining most effective media choices, understanding the customer and what messages need to be presented</li> <li>C: None</li> <li>D: Demonstrating credibility to potential customers</li> <li>E: Maintaining visibility among potential new customers</li> <li>F: Global product reach makes developing universal ads difficult</li> <li>G: Segment is saturated, changing the mind of the retailer and brands to source in U.S. Industry as a whole does a poor job communicating to brands and retailers</li> <li>H: Understanding the call to action and then developing a strategy around it</li> <li>I: Having meaningful ad content</li> <li>J: Differentiating products and company through ads</li> <li>K: Keeping advertising materials up-to-date</li> </ul>
<b>Managerial</b>	<ul style="list-style-type: none"> <li>A: Meeting deadlines, market research and customer analysis, budgeting and allocating, response tracking and evaluation methodology</li> <li>B: Collecting substantial quality information in the initial steps, understanding there are no instant results in advertising, evaluation methodology</li> <li>C: Having the mindset to take chances on something new</li> <li>D: Lead-times between product launch and products on the shelf- aligning business operations with advertising, being creative, positioning the product for growth</li> <li>E: None</li> <li>F: Developing a universally appealing message</li> <li>G: Being creative, finding pockets of opportunity</li> <li>H: Setting objects by segment, creative vs. functional ad decisions, constantly reevaluating consumer/customer preferences</li> <li>I: Having complete and accurate data</li> <li>J: Determining effectiveness, budget constraints, creativity, ad agencies</li> <li>K: Determining what benefits are going to be the most meaningful to customers and then developing ads around that benefit</li> </ul>

### *Discussion: Advertising Challenges*

The most frequently cited consumer level challenge was justifying the advertising expense. Many companies cited that for the money they would spend on a consumer advertisement, they could produce several industry advertisements that could potentially lead to direct sales. The other major challenge related was making advertisements relevant to the end consumer. As for the industry level, there was a variety of responses, with no clear trend. Most companies cited making advertisements relevant was the biggest challenge. Managerially, the two most cited challenges were collecting accurate information during the initial situation analysis and evaluating effectiveness of the campaign.

### *RO3C-Advertising Opportunities*

Table 14 relates the results of advertising opportunities questions. Questions dealt with what the companies viewed as some of the opportunities they felt advertising presented.

### *Discussion: Advertising Opportunities*

In general, based on the respondent's past advertising campaigns, the most successful media choices have been concentrated around online content, including websites, blogs, and email communications. Respondents used online content for direct advertisements as well as more mass media approaches. The majority (10 of 11) respondents said that online media held the largest opportunity for advertising and that their companies planned to take advantage of this media type in the future. Many stated that online media was easy to control, update, and distribute to any potential customer or end consumer.

Table 14

Advertising Opportunities- Summary Results

Topic	Comments Regarding Advertising Opportunities
<p><b>Media choices</b></p>	<p>A: Online direct mail- meaningful and infrequent, celebrity spokes persons or partnering, placing ads in publications that have longevity, product specific websites that link back to web pages- customers to see other products as well</p> <p>B: Websites, trade journals- catch all approach as well as targeted, and online media, promote transparency</p> <p>C: Partnering with other organizations- shared costs, supporting customers at events</p> <p>D: Web based content</p> <p>E: Digital communications, ads not always sales driven- presence is often enough</p> <p>F: Web 2.0 and mobile media, emotional media with real connections to targets</p> <p>G: Trade advertisements- targeting supply chain, retailers, brands, and designers. Websites, blogs, and direct email have been effective, trade brochures are quickly outdated-ineffective</p> <p>H: Nothing specific</p> <p>I: Event level advertising focused on specific customers, "feet on the street" marketing through sales force, for non-branded product direct mail works best, trade shows and personal interactions also effective</p> <p>J: Search engines- customers promoting our products on the web</p> <p>K: Online communications- easy to maintain and user controlled</p>
<p><b>Consumer</b></p>	<p>A: Life style branding</p> <p>B: Web content must be easy to understand by both consumers and customers alike, can communicate to consumers through host brands-hang tags</p> <p>C: None</p> <p>D: Creating partnerships with firms downstream to communicate with consumers</p> <p>E: Nothing specific</p> <p>F: Drives pull marketing</p> <p>G: Opportunities are there-but difficult to reach successfully for cost</p> <p>H: Be as close to purchase decision as possible- hangtags, in store promotions, etc.</p> <p>I: Opportunities are there-but difficult to reach successfully for cost</p> <p>J: Nothing specific</p> <p>K: Consumers do not find value in our advertising</p>

Table 14: Continued

<p><b>Supply chain segment</b></p>	<p>A: No specifics            B: Trade publications most effective, strong web presence is also important            C: None            D: Establish credibility            E: Nothing specific            F: Creating relationships with customers to promote our products as we promote them            G: Market is saturated- most companies know each other, many opportunities downstream with designers, retailers, and brands            H: Nothing specific            I: Nothing specific            J: Substantiated ads            K: Nothing specific</p>
<p><b>Most effective</b></p>	<p>A: Face to face interactions, collateral, PR and speaking at trade shows/events- makes you the expert and leader, online direct mail- easy and quick updates, hangtags- ads at the time of purchase            B: Reaffirming commitment to industry, trade publications have broad reach and readership, web materials are effective- tracking ability, user controlled content, constant availability            C: Word of mouth            D: Industry level- PR most effective, consumer level- web most effective            E: Print and online media, grass roots and relationship building are also critical            F: Ads that are meaningful across segments            G: Publishing ads in designer and retailer publications, blogs are easily updated and available to anyone with web access            H: Sponsored events and outreach programs are effective- captive audience            I: Product placement in movies- large targeted audience, longevity, product in action. For companies that know us grass roots and face-to-face is the best tactic, for new companies the website is effective            J: Sending out flyers to customers before trade shows to inform of presence at show and promote new things about the business            K: PR and white papers are most effective</p>

At the consumer level, many companies stated that the opportunities in consumer advertising were not clear and that the costs associated with reaching that group may outweigh the benefits. For those that said there were opportunities, making the content available, meaningful, and close to the purchase decision were important. At the supply chain level, the many of respondents did not feel there were many opportunities at the fiber,

yarn, and fabric level. One company went as far to state that the opportunity had shifted downstream to the designers, retailers, and brands because most upstream textile companies were aware of each other. The most effective advertising methods were PR and face-to-face interactions. According to the respondents, being perceived as a leader and building relationships with customers was important component in a successful advertising campaign.

#### *RO3D- Advertising Potential*

Table 15 relates the results of the advertising potential questions. Questions dealt with what the companies viewed to be the potential of advertising for their business and in the market.

#### *Discussion: Advertising Potential*

Areas advertising could potentially influence, other than sales and awareness, were said to that advertising promoted a company to potential employees, built moral for sales force, increased shareholder value, and increased customer knowledge. As a differentiation method, the majority of respondents said that advertising was the most effective way to differentiate their company's products in the market. For companies that said no, most felt that face-to-face interactions and quality products were the best way to differentiate their products.

Table 15

Advertising Potential- Summary Results

Topic	Comments Regarding Advertising Potential
<p><b>Areas advertising can influence</b></p>	<p>A: Advertises your business to potential employees            B: Helps build moral in company, "name in lights" mentality            C: Nothing specific            D: Share holder value            E: Builds relationships and supports customers, recognition downstream            F: Credibility and substantiation            G: Build brand name, educate retailers and designers            H: Perceptions about products and company            I: Perceptions about products and company            J: Building a positive image, building company credibility            K: Requires you to intrinsically know your customer, which is a benefit in itself</p>
<p><b>Advertising as a differentiation method</b></p>	<p>A: Yes, advertising tells your customer why you are better than other competitors            B: Yes, advertising demonstrates commitment to industry and credibility            C: Yes, traditional print advertising has that potential, but it was not effective in our company            D: Yes, if the message is unique and targeted            E: No, quality products and partnerships with companies are most effective            F: Yes            G: No, in addition to advertising, grass roots, face-to-face interactions must verify ad claims. Ads are only as good as the companies and products behind them            H: Yes, ads can build a story around your products and help relate them to your customer/consumer            I: Potentially, ads are a good way to differentiate, but products and company are the main factors            J: Nothing specific            K: Yes, since our ads are linked to our sales pitch</p>

Table 15: Continued

<p><b>Advertising 's ability to influence sales</b></p>	<p>A: Yes, advertising can spark interest that may lead to calls and sales. Advertising promotes company viability and health to the market.</p> <p>B: Potentially, we want to generate interest in our product and receive calls, but do not always result in sales. Have to position your company to take advantage of all opportunities that arise</p> <p>C: Nothing specific</p> <p>D: Yes</p> <p>E: Yes, but it is the relationships that drives the sales</p> <p>F: Yes</p> <p>G: Potentially, we hope advertising translates to sales, but we do not how it does specifically, there are so many promotions going on from different sources, almost impossible to track without explicitly asking a customer</p> <p>H: Yes</p> <p>I: Yes, but we rely more heavily on our sales force for face-to-face interactions to sell the product</p> <p>J: Yes, if ad claims can be substantiated</p> <p>K: Yes, since our ads are linked to our sales pitch</p>
<p><b>Typical return on investment and payback</b></p>	<p>A: The cost of advertising is built into the product, it is hard to judge ROI and payback</p> <p>B: Payback is not immediate, may be years before advertising has real impact. Want to have calls come in and whether they lead to sales or not is uncontrollable. ROI and payback differs company to company. Difficult to track and because most companies do not put forth the effort</p> <p>C: None</p> <p>D: Evaluate each product and make adjustments to tactics, its different for every company, depends on budgets, allocations and where money is spent</p> <p>E: ROI and payback are dependent on the goals set for that customer</p> <p>F: Different for every company</p> <p>G: We do not track ROI or payback, we have benchmarks for sales to each customer</p> <p>H: No set ROI or payback for campaigns, if goals are achieved then tactics do not change</p> <p>I: ROI goals are on a product level- measured through sales figures, typically want to see a payback in under a year</p> <p>J: Look for a 12-18 month payback</p> <p>K: We use product level ROI, PR has best cost/benefit relationship</p>

Table 15: Continued

<b>Growth potential</b>	A:	Growth potential is dependent on sales volume- tactics may change as sales volume increase or decreases
	B:	Online and print advertisements
	C:	None
	D:	Online media, consumer advertising
	E:	Digital communications, but print is not dead- has staying power, important to use a variety of media choices
	F:	No response
	G:	Web 2.0- instant feedback, tracking, mass. Blog page has highest ROI- free, face-to-face is still extremely important
	H:	Online social networking, print not as effective as in past, grass root face-to-face interactions are best
	I:	Nothing specific
	J:	Nothing specific
	K:	Online media-easy to update, large audience

The majority (9 of 11) of respondents said that advertising had the ability to influence sales, citing that advertisements build awareness and can build perceptions in the market. The typical ROI and payback period according to the respondents were not defined and those measures are different for each company. One company in particular said that there is not a dollar for dollar payback, some advertising maybe very expensive with little return, while others may be inexpensive but have a large impact. The area of advertising with the most potential growth was stated to be online media due to the scale and reach. One company related that the growth potential for advertising is dependent on sales, and tactics should be altered as needed.

*RO3E- Advertisement Development Methodology*

Table 16 relates the results of the advertisement development methodology questions. Questions related to how the companies went about developing their advertisements, going from the initial concept, through planning, media selection, and evaluation.

Table 16

Advertisement Development Methodology- Summary Results

Topic	Comments Regarding Advertisement Development Methodology
<p><b>Typical methodology</b></p>	<p>A: Business planning (strategic goals, market planning, marketing activities), work on creative with advertising agency (complete some in house)</p> <p>B: Establish target market, identify target companies, establish talking points for ads, create ads with advertising agency, talk with customers to understand where the industry s going</p> <p>C: Research product gaps, determine what customers find valuable, determine improvements, promote product, most work contracted</p> <p>D: Product specific procedures, determine competitive advantages, assess competitors to determine positioning and differentiation tactics, work with ad agency for creative work, complete creative work</p> <p>E: Relationship oriented, determine markets of interest, determine customer preferences</p> <p>F: Creative brief- elements of brand, determine effective elements, complete creative process, finished product</p> <p>G: No specific methodology, identify target and then develop ads based on preferences</p> <p>H: Determine consumer product preferences, determine consumer media habits and what resonates best, determine what makes them want to try products, pricing limits, create ads, evaluate effectiveness</p> <p>I: No specific methodology, determine objectives, situation analysis, determine most efficient way to meet goals</p> <p>J: Budget, set goals, determine advertising vehicle</p> <p>K: Create product identity, review product attributes, set goals, create a specification sheet- need, performance attributes, and benefits, develop PR, develop white papers, some ads</p>
<p><b>Defining goals</b></p>	<p>A: Share clear goals with ad agency, create specific goals for each customer</p> <p>B: Keep the company name fresh and build new opportunities downstream</p> <p>C: Promote Capabilities</p> <p>D: Goals between segments, we track sales and compare them to advertising efforts</p> <p>E: Establish yearly goals and short term goals- important for media planning, goals is to continually present messages</p> <p>F: Want to be synonymous with quality, build credibility with brand, typically do not reevaluate established goals so long as they are being met</p> <p>G: Educate the retailer, brand, and designer about products and supply chain.</p> <p>H: Tie company objectives with advertising, increase sales, build preference, build strategic alliances and direct marketing</p> <p>I: Product and customer dependent, always sales driven</p> <p>J: Portray our commitment to the industry and our products</p> <p>K: Product and market level goals</p>

Table 16: Continued

<b>Evaluation</b>	<p>A: Difficult to measure due to limited budgets and distance between the supply chain and consumers. If sales are strong we assume advertising is being effective</p> <p>B: Difficult because of lead time between ad debut and products going into finished goods, makes it hard to track, organize, and evaluate individual ads</p> <p>C: None</p> <p>D: Contract external company to determine advertising value, track visitors to website</p> <p>E: Hard to judge at the mill and consumer level, most companies rely on qualitative measures of effectiveness</p> <p>F: Online media tracking, Google ads, make assumptions about sales from traffic</p> <p>G: Google Analytics, compute.com- tracks web performance</p> <p>H: On- line media tracking, break down ads to determine what aspects are most effective, continuous process</p> <p>I: Track sales and compare to advertising timeline</p> <p>J: No formal measurements, gain customer feedback</p> <p>K: Surveys customer feedback, some market testing</p>
<b>Situation analysis</b>	<p>A: Oil prices, economic factors, consumer and industry trends, the housing market, construction markets, military expenditures, furniture trends, healthcare,</p> <p>B: Very expensive and difficult to complete due research. Knowing your customers is the most important thing.</p> <p>C: Look at industry trends and identify opportunities for our business.</p> <p>D: Consumer, brand and retail trends, markets, products currently in the market, pricing, raw material trends</p> <p>E: Overall business trends, technology, innovations, global trends</p> <p>F: Economics, trends, market drivers, channels to market, gaps in marketplace</p> <p>G: Customers, macro industry trends, customer preference and trends</p> <p>H: Economic factors, trends, consumer preferences</p> <p>I: Pricing and cost versus benefit</p> <p>J: Competitors, customer media and information preferences, market trends</p> <p>K: Macon trends, global market viability, where brands and mills are going (geographically)</p>

Discussion: Advertisement Development Methodology

The typical methodology described by the respondent was similar across companies. Most methodologies began at the product level, where important product attributes to be promoted were determined. Market research typically included economic trends, product

innovations, competitors, and various market trends identified as important to their target customer; however, few companies mentioned looking at global trends or advertising trends.

When defining goals, many companies had customer specific goals for sales growth and other factors, yet others were more concerned with remaining visible in the market. Most companies did say that they rarely went back and redefined goals as the campaign progressed. One company in particular stated that they set goals that are more general so as long as their advertisements furthered those goals, they were not changed.

When asked about evaluating the success of an advertising campaign, the majority of the companies said that those activities were difficult and expensive to track. Therefore, most assumed that as long as sales were still strong, advertising was effective. Some companies used tracking software and contracted agencies, but most were undeveloped in this area. Only one company used consumer/customer feedback from the beginning of the development process to establish a baseline before creating the campaign. This company was also the only company to evaluate the campaign formally post implementation. In the situation analysis, most companies concentrated on economic, technology, consumer, and industry trends. Only one company mentioned cost, global trends, or geographic shifts in production.

#### *RO4A-F- Advertising Effectiveness from a Supply Chain Perspective*

Table 17 relates the results of the advertisement effectiveness from a supply chain perspective questions. Questions relate to the company's perspectives about advertising from

a customer's point of view, meaning what preferences these companies have when looking at advertisements in the market.

Table 17

Advertising Effectives from a Supply Chain Perspective- Summary Results

Topic	Comments Regarding Advertising Effectives from a Supply Chain Perspective
<b>Reasons for seeking information</b>	A: Business fit, product information, commercial viability B: Business fit, product information C: Business prospects D: New product innovations, pricing, collaborative efforts E: Most companies come to us F: New business G: Business fit, product information, commercial viability H: Business fit I: Efficiency, cost, innovativeness, sustainability, potential partnerships J: Nothing specific K: Products, collaborative efforts
<b>Information sources</b>	A: Vendors B: Online content, unless prior relationships exist C: Trade shows, trade publications, and past contacts D: Online, print, trade shows E: Internal sources F: Internet, Google, and other online media G: Trade shows, online, trader magazines H: Online, search engines, internal sources I: Trade shows J: Internet, websites K: Internet, print
<b>Most effective media types</b>	A: Face-to-face interactions, printed brochures, advertisements B: Websites, trade publications, trade shows. C: Trade shows, print publications D: Magazines, web E: None F: White papers, PR G: Direct mail, Google alerts H: Print, trade shows I: Trade shows J: Brand names, Internet, websites K: Internet, magazines

Table 17: Continued

<p><b>Determining new suppliers</b></p>	<p>A: Fit with current operations, can we use a product to improve company position or expand markets?            B: Quality for cost, companies with longevity and commitment            C: Integrity, financial viability, and innovativeness            D: Relationships, past experiences, price            E: Reliability, quantity, quality            F: Relationships, trust, credibility, compliance, and reliability            G: Cost for quality, reputation            H: Geographic location, costing, availability, credibility, company fit            I: Innovation leaders, cost leaders            J: Quality, price, relationships, credibility, viability, supply            K: Cost, relevance to company, performance focused, company stability, expertise</p>
<p><b>Elements to look for in advertisements</b></p>	<p>A: Contact information, point of action            B: Relevant, easy to remember contact information, some textual information, call to action            C: Nothing specific            D: Clean, full page, images that "pop"            E: Nothing specific            F: Engaging images, limited text, call to action, some technical information            G: Nothing specific            H: Visual appeal, contacts, technical information            I: Nothing specific, contact information            J: Contact information            K: Products in action, contact information, call to action, small blurb about what the business is about</p>
<p><b>Willingness to pay more</b></p>	<p>A: Not as much as in the past- yes, if the market demands branded product            B: Yes, if quality or benefits are worth the extra cost            C: No, we want to be the innovators            D: No, we are the brander in this situation            E: No, we look more at the company and supply of the product            F: Possibly, but we do not look specifically for brands            G: Yes, as long as they add value or we can add value to the product            H: No, we typically stick with generic products which allows us to create pricing tiers            I: Yes, if it generates value            J: No, not in our business            K: No, typically</p>

## Discussion: Advertising Effectiveness from a Supply Chain Perspective

Reasons for seeking information included new business opportunities or determining business fit was a reason for seeking company or product information (9 of 11). Including information that facilitates new business development or shows interest in these types of activities may be useful when developing new supply chain oriented advertisements (RO4C). The primary information sources cited were the Internet (8 of 11), trade shows (4 of 11), and print (3 of 11) (RO4F). When asked which media type was most effective, the trend was similar, five preferred online advertisements, five preferred printed advertisement, and four preferred tradeshow (RO4B, RO4A). Including a website or link to additional online media may be important to include in supply chain advertisements, since many stated they respond well to online advertisements or seek information online. When respondents were asked what factors they considered, other than cost, when determining new suppliers, most were concerned about the status of the company including factors such as longevity, industry commitment, and credibility (RO4E). This type of information correlates to what some respondents stated they already included in their supply chain advertisements. Elements respondents were looking for in advertisements included a call to action and company contact information (RO4D).

### **Phase III- Consumer Survey Results: Deductive Logic**

#### *Objectives*

RO5: Conduct a quantitative survey to examine the effectiveness of upstream advertising from an end consumer perspective to determine:

RO5A. If the population is aware advertised ingredient product

RO5B. If the population knows the functionality of the ingredient product

RO5C. What features of the advertisement the population feels is most effective

RO5D. If the population looks for the ingredient when purchasing products

RO5E. If the population willing to pay more

RO5F. Where the population seeks product information

RO6: Use data from survey to develop an understanding of the potential of upstream textile advertising focusing on different advertising opportunities including:

RO6A: Print

RO6B: Television

RO6C: Internet

*Key Findings:*

1. The majority of consumers (about 50%) said that they did not look for or prefer branded textile products over generics. In both cases, about 30% of the respondents neither agreed nor disagreed, therefore there is an opportunity to potentially reach these consumers and increase their awareness and favorability of advertised or branded textile products.
2. Consumers surveyed preferred getting their information through product packaging, company web pages, and hangtags. Connecting on-product advertisements with mobile web content may be an effective strategy. Consumers are less likely to seek product or company information from printed sources, television, or newspapers and magazines.

3. For B2C firms, consumers stated that using product comparisons or communicating how the product can solve a problem were sources of advertisement credibility. Only 46.6% of consumers surveyed thought celebrity spokesperson built product or company credibility.

### *Sample Description*

A convenience sample of 165 North Carolina State University students was surveyed. The participants were between the ages of 18 and 23 and up, the average age was 19.38, with a mode of 19. The population was 81.8% female and 18.2% male. See Table 18 for demographic details. As identified by the Outdoor Industry Association's report, consumers of outdoor apparel and equipment are predominantly Baby Boomer (born between 1925-1945, population $\approx$  76Million) and Millennial (born between 1982-2002, population $\approx$  70 million) aged consumers (Keller, 2003). The student population of North Carolina State University provided a large population of Millennial aged consumers. Output summary Tables 19-20 are the results for the individual advertisement questions. Table 21-23 present survey results, the population for each question may vary as some participants failed to answer all questions. The discussion for each section follows each summary table. A copy of the survey can be found in Appendix C and raw survey data can be found in Appendix P.

Table 18

Consumer Survey Results- Demographic Information

<b>Age</b>		
Valid		165
Missing		0
Mean		19.38
Median		19.00
Mode		19
<b>Age Frequency</b>		
Age	Frequency	Percent
18	41	24.8
19	60	36.4
20	37	22.4
21	18	10.9
22	6	3.6
23+	3	1.8
Total	165	100.0
<b>Gender Frequency</b>		
Gender	Frequency	Percent
Male	30	18.2
Female	135	81.8
Total	165	100.0

Table 19

## Consumer Survey Results: Advertisement A - Individual Questions

Advertisement A- Sunbrella, Glen Raven						
Survey Question	Likert Scale					Mean
	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree	
1 Advertisement awareness	<b>56.7%</b> ( n= 93 )	36.0% ( n= 59 )	3.7% ( n= 15 )	3.0% ( n= 5 )	0.6% ( n= 1 )	1.54
2 Understand what product is promoted	4.2% ( n= 7 )	13.3% ( n= 22 )	9.1% ( n= 8 )	<b>57.6%</b> ( n= 95 )	15.8% ( n= 26 )	3.67
3 Advertisement information is useful	2.5% ( n= 4 )	6.1% ( n= 10 )	14.7% ( n= 24 )	<b>66.3%</b> ( n= 108 )	10.4% ( n= 17 )	3.72
4 Consumer identifies with presented content	7.3% ( n= 12 )	28.5% ( n= 47 )	23.0% ( n= 38 )	<b>35.2%</b> ( n= 58 )	6.1% ( n= 10 )	3.04
5 Communicates information effectively	3.6% ( n= 6 )	16.4% ( n= 27 )	18.8% ( n= 31 )	<b>50.3%</b> ( n= 83 )	10.9% ( n= 18 )	3.48
6 Communicates benefits effectively	2.4% ( n= 4 )	15.2% ( n= 25 )	21.3% ( n= 35 )	<b>51.2%</b> ( n= 84 )	9.8% ( n= 16 )	3.51
7 Creativeness of advertisement	6.7% ( n= 11 )	<b>39.0%</b> ( n= 64 )	31.7% ( n= 52 )	20.1% ( n= 33 )	2.4% ( n= 4 )	2.73
8 Advertisement evokes product curiosity	1.8% ( n= 3 )	26.7% ( n= 44 )	24.8% ( n= 41 )	41.2% ( n= 68 )	5.5% ( n= 9 )	3.22
9 Advertisement evokes company curiosity	4.2% ( n= 7 )	4.2% ( n= 49 )	4.2% ( n= 36 )	<b>38.8%</b> ( n= 64 )	5.5% ( n= 9 )	3.12
10 Advertisement appeals to consumer on personal level	16.5% ( n= 27 )	<b>41.5%</b> ( n= 68 )	22.0% ( n= 36 )	13.4% ( n= 22 )	6.7% ( n= 11 )	2.52
11 Advertisement evokes perceptions of quality	0.0% ( n= 0 )	1.8% ( n= 3 )	12.1% ( n= 20 )	<b>69.1%</b> ( n= 114 )	17.0% ( n= 28 )	4.01
12 Advertisement evokes perceptions of company creditability	0.6% ( n= 1 )	3.7% ( n= 6 )	21.3% ( n= 35 )	<b>62.8%</b> ( n= 103 )	11.6% ( n= 19 )	3.81
13 Images and text relate well	0.6% ( n= 1 )	7.3% ( n= 12 )	14.0% ( n= 23 )	<b>62.8%</b> ( n= 103 )	15.2% ( n= 25 )	3.85
14 Consumer wants to experience ad content	1.2% ( n= 2 )	20.0% ( n= 33 )	20.0% ( n= 33 )	43.6% ( n= 72 )	15.2% ( n= 25 )	3.52
15 Consumer would look for product/brand	8.5% ( n= 14 )	<b>36.4%</b> ( n= 60 )	32.7% ( n= 54 )	19.4% ( n= 32 )	3.0% ( n= 5 )	2.72
16 Consumer would consider seeking additional information	3.6% ( n= 6 )	26.1% ( n= 43 )	<b>33.9%</b> ( n= 56 )	<b>33.3%</b> ( n= 55 )	3.0% ( n= 5 )	3.06
17 Consumer would consider purchasing the item	5.5% ( n= 9 )	28.7% ( n= 47 )	<b>36.0%</b> ( n= 59 )	<b>26.8%</b> ( n= 44 )	3.0% ( n= 5 )	2.93
18 Willing to pay more for branded product versus a generic	7.9% ( n= 13 )	26.7% ( n= 44 )	<b>38.8%</b> ( n= 64 )	<b>22.4%</b> ( n= 37 )	4.2% ( n= 7 )	2.88

## Discussion: Advertisement A Survey Results- Individual Questions

RO5A- Is the population is aware of the advertised ingredient product?

The majority of consumers (92.2%) had not seen Advertisement A before.

RO5B- Does the population know the functionality of the ingredient product?

The majority of participants (73.4%) understood what product was being sold, which means that without the pictures or logos, the text and images conveyed what product was being promoted effectively. Most consumers (75.8 %) thought the copy text was useful and 78% of consumers said that the text and images related well with each other. Many respondents (61.2%) thought that there was adequate product performance information and 61% thought the there was adequate product benefit information. This advertisement had the most textual content of all the advertisements used in the survey.

RO5C- What features of the advertisement are most effective?

Only 41.3% of respondents said they indentified with the images or activities in the advertisement, 35.8% did not, and 23.0% had no opinion. Many respondents (58.8%) said that they would like to experience the activities presented in the advertisement, but 58% did not identify personally with the contents of the advertisement. This advertisement used lifestyle-branding methods to convey feelings about boating and using their product, which could be an effective way to develop relationships. Many consumers (46.7%) said they were curious about the product and 44.3% said they were interested in the company based on the advertisement. This information was explained in the copy text very thoroughly and blatantly. However, 45.7% of consumers said that the advertisement was not unique or

memorable, 31.7% had no opinion, and 22.5% said it was unique or memorable. This advertisement used classical pictures and layout with no one element superseding another. However, the advertisement may not have been targeted toward younger consumers as it was taken from a boating/yachting magazine. If the advertisement was targeted toward older consumers, using the combination of the value statement with classical images resonates with Company I's remark regarding how they perceived older and younger consumers seeking information differently (i.e. older consumers need more explicit information while younger consumer tend to want to discover it on their own).

RO5E- Is the population willing to pay more?

Based upon the advertisement content, 22.4% of consumers said they would consider looking for the product in a store, 36.3% would seek additional information, 29.8% would consider purchasing the product based on the advertisement, and 26.6% said they would choose over generic products.

As a whole, the content of the Advertisement A was well received, but it did not encourage the consumer to seek additional information or considered purchasing the product. Of the three advertisements presented, Advertisement A was selected as having the most useful information, the most adequate product information, and product benefit information. Using a short paragraph, or value proposition, the company was able to communicate the product benefits and performance attributes of the product quickly. Advertisement A received the highest average rating for relating text and images and wanting to experience the images presented in the advertisement. Consumers also ranked this advertisement the highest for perceptions of product quality and company credibility.

Table 20

Consumer Survey Results: Advertisement B- Individual Questions

Advertisement B- Wrinkle, Cotton Incorporated						
Survey Question	Likert Scale					Mean
	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree	
1 Advertisement awareness	17.6% ( n= 29 )	21.2% ( n= 35 )	17.6% ( n= 29 )	4.8% ( n= 8 )	<b>32.1% ( n= 53 )</b>	3.24
2 Understand what product is promoted	2.4% ( n= 4 )	6.1% ( n= 10 )	2.4% ( n= 4 )	4.8% ( n= 8 )	<b>57.0% ( n= 94 )</b>	4.05
3 Advertisement information is useful	1.8% ( n= 3 )	22.4% ( n= 40 )	1.8% ( n= 3 )	23.8% ( n= 39 )	<b>39.6% ( n= 65 )</b>	3.30
4 Consumer identifies with presented content	1.8% ( n= 3 )	6.7% ( n= 11 )	1.8% ( n= 3 )	12.1% ( n= 20 )	<b>61.8% ( n= 102 )</b>	3.87
5 Communicates information effectively	3.6% ( n= 6 )	26.7% ( n= 44 )	3.6% ( n= 6 )	10.3% ( n= 17 )	<b>47.3% ( n= 78 )</b>	3.38
6 Communicates benefits effectively	2.4% ( n= 4 )	28.5% ( n= 47 )	2.4% ( n= 4 )	7.3% ( n= 12 )	<b>50.9% ( n= 84 )</b>	3.39
7 Creativeness of advertisement	1.1% ( n= 3 )	6.3% ( n= 17 )	1.1% ( n= 3 )	8.1% ( n= 22 )	<b>31.8% ( n= 86 )</b>	3.80
8 Advertisement evokes product curiosity	1.2% ( n= 2 )	6.7% ( n= 11 )	1.2% ( n= 2 )	13.9% ( n= 23 )	<b>58.8% ( n= 97 )</b>	3.88
9 Advertisement evokes company curiosity	1.2% ( n= 2 )	13.4% ( n= 22 )	1.2% ( n= 2 )	17.1% ( n= 28 )	<b>51.8% ( n= 85 )</b>	3.69
10 Advertisement appeals to consumer on personal level	1.8% ( n= 3 )	10.3% ( n= 17 )	1.8% ( n= 3 )	19.4% ( n= 32 )	<b>55.8% ( n= 92 )</b>	3.67
11 Advertisement evokes perceptions of quality	0.6% ( n= 1 )	14.5% ( n= 24 )	0.6% ( n= 1 )	<b>43.0% ( n= 71 )</b>	37.0% ( n= 61 )	3.31
12 Advertisement evokes perceptions of company creditability	1.2% ( n= 2 )	12.1% ( n= 20 )	1.2% ( n= 2 )	47.3% ( n= 78 )	<b>30.9% ( n= 51 )</b>	3.33
13 Images and text relate well	1.8% ( n= 3 )	7.9% ( n= 13 )	1.8% ( n= 3 )	18.8% ( n= 31 )	<b>55.2% ( n= 91 )</b>	3.76
14 Consumer wants to experience ad content	2.4% ( n= 4 )	21.8% ( n= 36 )	2.4% ( n= 4 )	24.8% ( n= 41 )	<b>42.4% ( n= 70 )</b>	3.33
15 Consumer would look for product/brand	3.0% ( n= 5 )	9.1% ( n= 15 )	3.0% ( n= 5 )	23.0% ( n= 38 )	<b>53.3% ( n= 88 )</b>	3.61
16 Consumer would consider seeking additional information	2.4% ( n= 4 )	12.2% ( n= 20 )	2.4% ( n= 4 )	23.2% ( n= 38 )	<b>53.7% ( n= 88 )</b>	3.54
17 Consumer would consider purchasing the item	1.8% ( n= 3 )	8.5% ( n= 14 )	1.8% ( n= 3 )	16.4% ( n= 27 )	<b>62.4% ( n= 103 )</b>	3.72
18 Willing to pay more for branded product versus a generic	3.6% ( n= 6 )	18.2% ( n= 30 )	3.6% ( n= 6 )	<b>36.4% ( n= 60 )</b>	33.3% ( n= 55 )	3.25

## Discussion: Advertisement B Survey Results- Individual Questions

RO5A- Is the population is aware of the advertised ingredient product?

Most of the consumers surveyed (56%) had seen Advertisement B before, the highest recognition rate of advertisement tested.

RO5B- Does the population know the functionality of the ingredient product?

The majority (86.67%) of the population stated they understood what product was being promoted and 73.94% identified with the images presented in the advertisement.

RO5C- What features of the advertisement are most effective?

However, only 49.7% of participants found the advertising text useful. Most (57.58%) said that the advertisement communicated adequate product performance information and 58.18% said the advertisement communicated adequate product benefit information. This advertisement contained the least amount of text of the advertisements used in the survey. Instead of using a paragraph as Advertisement A did, Advertisement B used very simple and short text to communicate product benefits, along with a very strong image. The majority (80%) of respondents said that the product looked high quality, and 78.18% said that the company looked reputable. Many (67.27%) consumers said that they related to the presented images. Given that the population was over 80% female, there may be a gender bias with this advertisement. Most (76.36%) of consumers surveyed said that based on the advertisement, they would consider looking for this product in consumer goods. This advertisement presents a strong image associated with their product claim. The businessperson is depicted smashing her cloths into a suitcase, not seeming to care because her products are wrinkle resistant. She is presenting an image of a consumer that is very

confident in the product's ability to deliver performance. The woman is also very well dressed, looks successful, and attractive which may influence the likeability of this advertisement among the sample population.

RO5E- Is the population willing to pay more?

The majority of respondents (78.79%) said they would consider purchasing this product and 69.7% said they would choose this product over a generic substitute.

Overall, this advertisement was the most well received across advertisements tested. The advertisement was unique in its design as well as in its presentation. The advertisement embraced the product performance attribute and made the entire advertisement revolve around it. Notice that the background and all objects in the image, with the exception for the model and the cloths in the suitcase, have the "wrinkled paper" effect overlay. This sends a strong message about the performance of the product, in a unique and memorable way. In addition, the advertisement was presented as a "hangtag" in that it looked like a hangtag on a garment, complete with string. These features made this advertisement unique.

Table 21

Consumer Survey Results: Advertisement C- Individual Questions

Advertisement C: Gore-Tex, W. L. Gore						
Survey Question	Likert Scale					Mean
	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree	
1 Advertisement awareness	30.3% ( n= 50 )	<b>46.1% ( n= 76 )</b>	7.9% ( n= 13 )	15.2% ( n= 25 )	0.6% ( n= 1 )	2.10
2 Understand what product is promoted	2.4% ( n= 4 )	27.3% ( n= 45 )	9.7% ( n= 16 )	<b>53.9% ( n= 89 )</b>	6.7% ( n= 11 )	3.35
3 Advertisement information is useful	1.8% ( n= 3 )	23.6% ( n= 39 )	20.6% ( n= 34 )	<b>50.9% ( n= 84 )</b>	3.0% ( n= 5 )	3.30
4 Consumer identifies with presented content	2.5% ( n= 4 )	17.2% ( n= 28 )	17.2% ( n= 28 )	<b>54.6% ( n= 89 )</b>	8.6% ( n= 14 )	3.50
5 Communicates information effectively	1.2% ( n= 2 )	28.5% ( n= 47 )	13.3% ( n= 22 )	<b>49.7% ( n= 82 )</b>	7.3% ( n= 12 )	3.3
6 Communicates benefits effectively	1.2% ( n= 2 )	27.3% ( n= 45 )	20.0% ( n= 33 )	<b>46.7% ( n= 77 )</b>	4.8% ( n= 8 )	3.27
7 Creativeness of advertisement	5.5% ( n= 9 )	<b>38.2% ( n= 63 )</b>	26.1% ( n= 43 )	26.7% ( n= 44 )	3.6% ( n= 6 )	2.85
8 Advertisement evokes product curiosity	1.2% ( n= 2 )	20.0% ( n= 33 )	15.2% ( n= 25 )	<b>60.0% ( n= 99 )</b>	3.6% ( n= 6 )	3.45
9 Advertisement evokes company curiosity	2.4% ( n= 4 )	22.4% ( n= 37 )	25.5% ( n= 42 )	<b>46.1% ( n= 76 )</b>	3.6% ( n= 6 )	3.26
10 Advertisement appeals to consumer on personal level	6.1% ( n= 10 )	31.5% ( n= 52 )	21.8% ( n= 36 )	<b>32.7% ( n= 54 )</b>	7.9% ( n= 13 )	3.05
11 Advertisement evokes perceptions of quality	1.8% ( n= 3 )	11.6% ( n= 19 )	37.2% ( n= 61 )	<b>45.7% ( n= 75 )</b>	3.7% ( n= 6 )	3.38
12 Advertisement evokes perceptions of company creditability	0.6% ( n= 1 )	12.7% ( n= 21 )	<b>46.7% ( n= 77 )</b>	38.2% ( n= 63 )	1.8% ( n= 3 )	3.28
13 Images and text relate well	0.6% ( n= 1 )	8.5% ( n= 14 )	17.0% ( n= 28 )	<b>65.5% ( n= 108 )</b>	8.5% ( n= 14 )	3.73
14 Consumer wants to experience ad content	3.6% ( n= 6 )	25.5% ( n= 42 )	26.7% ( n= 44 )	<b>37.6% ( n= 62 )</b>	6.7% ( n= 11 )	3.18
15 Consumer would look for product/brand	1.8% ( n= 3 )	33.9% ( n= 56 )	26.1% ( n= 43 )	<b>35.8% ( n= 59 )</b>	2.4% ( n= 4 )	3.03
16 Consumer would consider seeking additional information	1.8% ( n= 3 )	23.6% ( n= 39 )	27.3% ( n= 45 )	<b>45.5% ( n= 75 )</b>	1.8% ( n= 3 )	3.22
17 Consumer would consider purchasing the item	2.4% ( n= 4 )	26.7% ( n= 44 )	30.3% ( n= 50 )	<b>37.6% ( n= 62 )</b>	3.0% ( n= 5 )	3.12
18 Willing to pay more for branded product versus a generic	6.7% ( n= 11 )	30.3% ( n= 50 )	<b>36.4% ( n= 60 )</b>	21.2% ( n= 35 )	5.5% ( n= 9 )	2.88

## Discussion: Advertisement C Survey Results- Individual Questions

RO5A- Is the population is aware of the advertised ingredient product?

Most of the respondents 76.36% had not seen this advertisement in the past.

RO5B- Does the population know the functionality of the ingredient product?

Most of the respondents (60.60%) understood what product was being promoted. Many of those surveyed (56.97%) thought the advertisement presented enough product performance information and 51.52% thought it proved enough product benefit information.

RO5C- What features of the advertisement are most effective?

Many of the consumers surveyed (39.4%) said that the information provided in the advertisement was useful and 63.19% identified with the images presented. Many of the respondents (43.64%) said that the advertisement was not unique or memorable. Most respondents (63.64%) were curious about the product and 49.7% were curious about the company. Only 40.61% of participants said the advertisement appealed to them on a personal level. Many consumers (49.39%) surveyed thought the product was high quality and 40% thought the company was credible. Only 44.24% of participants wanted to experience the images presented in the advertisement.

RO5E- Is the population willing to pay more?

Based on the advertisement, 38.18% of participants said they would consider looking for the product in a consumer good, and 47.37% said they would seek additional information based on advertisement content. Many consumers (40.61%) said they would consider purchasing the product but only 26.67% said they would purchase the item over a generic.

In most of the questions, this advertisement received the lowest scores of the three advertisements tested. This advertisement used a large image of its logo in a prominent place on the advertisement, indicating that it was relying heavily on the consumer to recognize the company logo and have some prior knowledge of benefits. This advertisement uses more technically oriented graphics to indicate performance level, but as the survey indicates, the attributes were not communicated well enough to entice the consumer to investigate further.

Table 22

Consumer Survey Results: Advertisement A, B, and C Comparisons

Multi-Advertisement Comparison Question 1: Which advertisement is most visually interesting?		
Advertisement A- Glen Raven	Advertisement B- Cotton Inc	Advertisement C- W. L. Gore
24.8%	<b>63.6%</b>	10.9%
Multi-Advertisement Comparison Question 2: Which advertisement provides the most complete information?		
Advertisement A- Glen Raven	Advertisement B- Cotton Inc	Advertisement C- W. L. Gore
<b>81.8%</b>	11.5%	6.7%
Multi-Advertisement Comparison Question 3: Which advertisement is <b>most memorable or unique</b> ?		
Advertisement A- Glen Raven	Advertisement B- Cotton Inc	Advertisement C- W. L. Gore
14.5%	<b>74.5%</b>	9.7%
Multi-Advertisement Comparison Question 4: Which advertisement has the best layout? (i.e. text vs. image balance, colors, images etc.)		
Advertisement A- Glen Raven	Advertisement B- Cotton Inc	Advertisement C- W. L. Gore
<b>40.6%</b>	40.0%	17.6%
Multi-Advertisement Comparison Question 5: Based on the advertisement alone, and not if you are personally interested in the product, which products would you seek additional information? (mark all that apply)		
Advertisement A- Glen Raven	Advertisement B- Cotton Inc	Advertisement C- W. L. Gore
43.6%	55.8%	<b>56.4%</b>
Multi-Advertisement Comparison Question 6: Based on the advertisement alone, and not if you are personally interested in the product, which products would consider purchasing? (mark all that apply)		
Advertisement A- Glen Raven	Advertisement B- Cotton Inc	Advertisement C- W. L. Gore
40.0%	<b>73.3%</b>	46.1%

#### Discussion: Advertisement A, B, and C Comparison Survey Results- Individual Questions

Advertisement B was selected as the most visually interesting and the most unique, 63.6% and 74.5% respectively. The majority (81.8%) of those surveyed believed Advertisement A, provided the most complete information. Advertisements A and B were close in the number of participants that selected them as having the best layout, 40.6% and 40.0%. When asked which advertisement they would seek additional information for, 56.4% of respondents selected Advertisement C and 55.8% selected Advertisement B. Based on the advertisement alone, 73.3% of participants said that would consider purchasing Advertisement B's product.

#### Discussion: General Advertising Preferences Survey Results

##### RO5C- What features of the advertisement are most effective?

The majority (78.6%) of respondents agreed that product comparisons and using real life examples of the product in use were a good way to establish credibility. This indicates that including this type of information could persuade this group of consumers to consider purchasing a product. Only 46.6% of those surveyed said that endorsements and celebrity spokes persons built credibility. Based on this sample and their preferences, it may not be as effective to use celebrity endorsements or spokes persons to promote products to this group. Most (68.7%) of consumers surveyed said that technical data helped to establish credibility (See Figure 16).

Table 23

General Advertising Preferences Survey Results- Individual Questions

General Advertising Preferences						
Survey Question	Likert Scale					Mean
	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree	
1 Consumer looks for branded textile products	4.8% ( n= 8 )	30.9% ( n= 51 )	27.3% ( n= 45 )	28.5% ( n= 47 )	8.5% ( n= 14 )	3.05
2 Consumer prefers branded textile products	3.0% ( n= 5 )	23.0% ( n= 38 )	37.0% ( n= 61 )	30.3% ( n= 50 )	6.7% ( n= 11 )	3.15
3 Likelihood of seeking information based on advertisements	1.2% ( n= 2 )	16.4% ( n= 27 )	20.0% ( n= 33 )	55.8% ( n= 92 )	6.7% ( n= 11 )	3.50
4 Looks for information in print advertisements	1.8% ( n= 3 )	35.8% ( n= 59 )	29.7% ( n= 49 )	30.9% ( n= 51 )	1.8% ( n= 3 )	2.95
5 Looks for information in television advertisements	3.0% ( n= 5 )	26.7% ( n= 44 )	27.3% ( n= 45 )	41.8% ( n= 69 )	1.2% ( n= 2 )	3.1
6 Looks for information on company maintained websites	0.0% ( n= 0 )	8.5% ( n= 14 )	12.1% ( n= 20 )	60.0% ( n= 99 )	19.4% ( n= 32 )	3.90
7 Looks for information on third party websites	6.1% ( n= 10 )	31.1% ( n= 51 )	22.6% ( n= 37 )	32.3% ( n= 53 )	7.9% ( n= 13 )	3.05
8 Looks for information in newspaper and magazine articles and reviews	2.4% ( n= 4 )	26.7% ( n= 44 )	17.0% ( n= 28 )	47.9% ( n= 79 )	6.1% ( n= 10 )	3.28
9 Looks for information on in-store advertisements	0.6% ( n= 1 )	18.8% ( n= 31 )	23.6% ( n= 39 )	49.7% ( n= 82 )	7.3% ( n= 12 )	3.44
10 Looks for information from store sales personnel	1.2% ( n= 2 )	21.2% ( n= 35 )	21.8% ( n= 36 )	49.7% ( n= 82 )	6.1% ( n= 10 )	3.38
11 Looks for information on on-product hangtags and labels	0.0% ( n= 0 )	7.3% ( n= 12 )	15.8% ( n= 26 )	61.2% ( n= 101 )	15.8% ( n= 26 )	3.85
12 Looks for information on the product's packaging	0.0% ( n= 0 )	8.0% ( n= 13 )	10.4% ( n= 17 )	66.3% ( n= 108 )	15.3% ( n= 25 )	3.89
13 Looking for additional product information	0.0% ( n= 0 )	5.5% ( n= 9 )	14.1% ( n= 23 )	65.0% ( n= 106 )	15.3% ( n= 25 )	3.90
14 Looking for additional company information	1.2% ( n= 2 )	33.1% ( n= 54 )	32.5% ( n= 53 )	29.4% ( n= 48 )	3.7% ( n= 6 )	3.01
15 Product comparisons provide credibility	0.0% ( n= 0 )	2.5% ( n= 4 )	19.0% ( n= 31 )	70.6% ( n= 115 )	8.0% ( n= 13 )	3.84
16 Showing real-life problem/ solutions provide credibility	0.0% ( n= 0 )	3.7% ( n= 6 )	17.8% ( n= 29 )	71.2% ( n= 116 )	7.4% ( n= 12 )	3.82
17 Celebrity spokes persons provide credibility	4.9% ( n= 8 )	22.1% ( n= 36 )	26.4% ( n= 43 )	40.5% ( n= 66 )	6.1% ( n= 10 )	3.21
18 Technical information provide credibility	0.6% ( n= 1 )	6.1% ( n= 10 )	24.5% ( n= 40 )	54.6% ( n= 89 )	14.1% ( n= 23 )	3.75

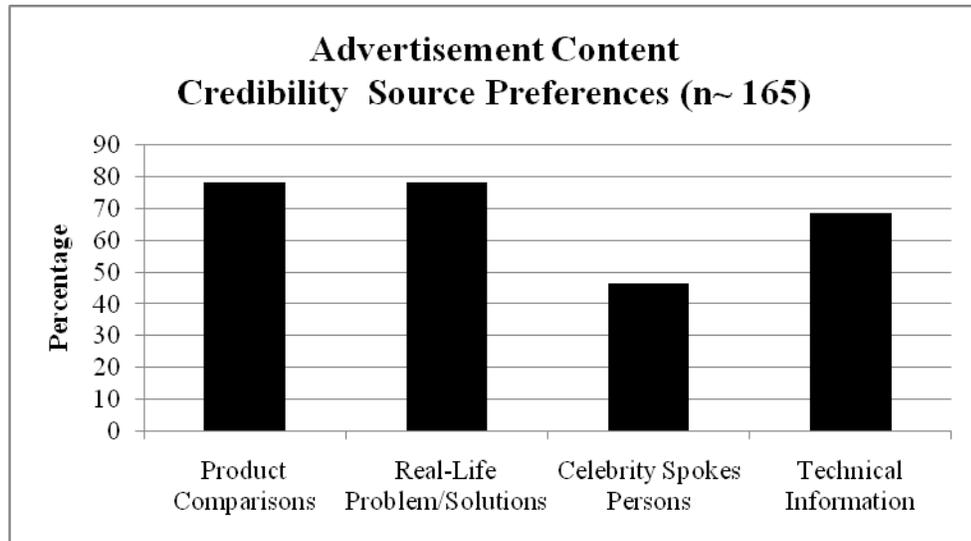


Figure 16: Advertisement Content Credibility Source Preferences

RO5D- Does the population look for the ingredient when purchasing products?

There was no clear trend in whether or not the consumer looks for branded textile components in their products, 37% said yes, 27.3% were neutral, and 35.7% said no (see Figure 17). The trend was similar when consumers were asked if they preferred branded textile components over generics, 37% said yes, 37% were neutral, and 26% said no (see Figure 18). However, 62.5% of those surveyed said they are likely to seek additional information about a product seen in an advertisement.

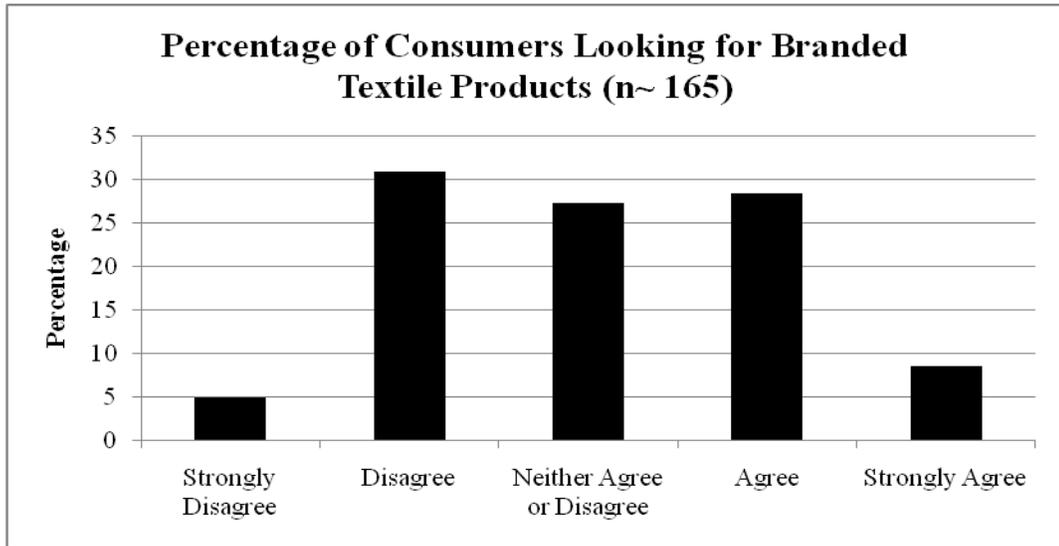


Figure 17: Percentage of Consumers Looking for Branded Textile Products

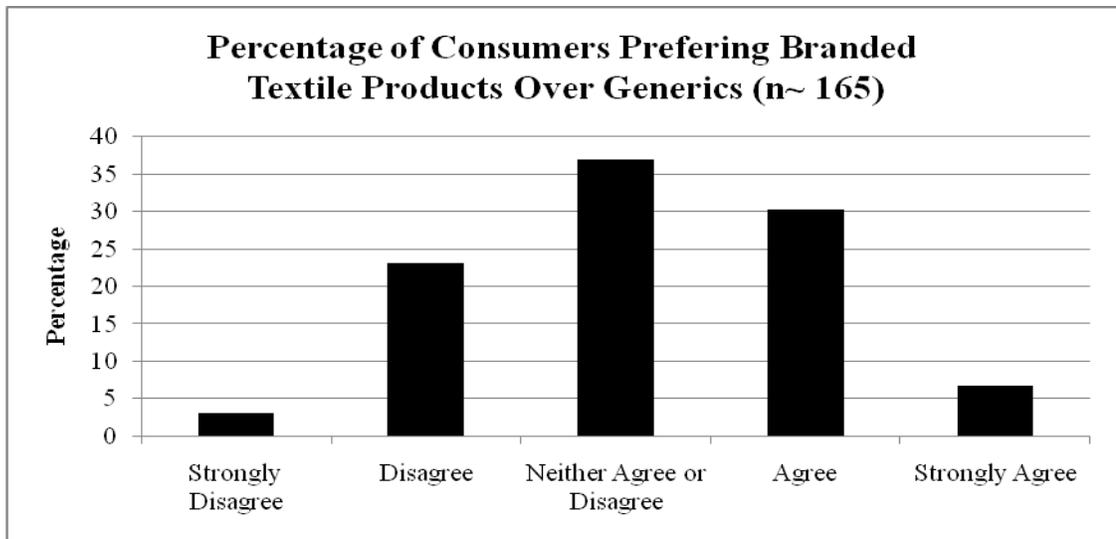


Figure 18: Percentage of Consumers Preferring Branded Textiles Over Generics

RO5F- Where does the population seek product information?

The top information sources were product packaging (81.6%), company maintained websites (79.4%), and hangtags (77.0%). This indicates that consumers are

usually looking for information at the time of purchase, which could mean there are opportunities in including product information on hangtags that link to online resources as Company F indicated. Conversely, the least favored information sources were print (32.7%), third party websites (40.2), and television (43.0%) (see Figure 19). The majority (80.4%) of participants said that when they are looking for information, it is product related, and 33.1% said it was company related.

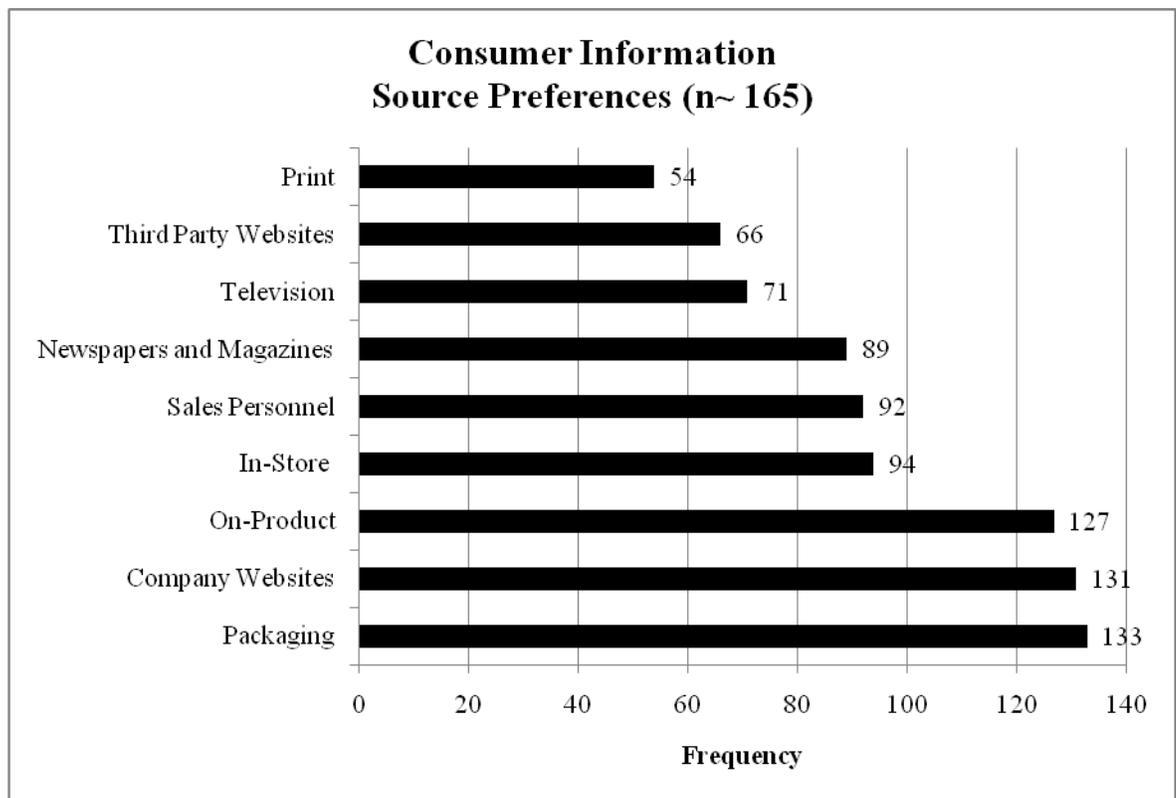


Figure 19: Consumer Information Source Preferences

## **Phase IV- Conceptual Framework Revisions**

### *Objectives*

RO7: Develop a framework that U.S. textile companies can use to develop an upstream advertising campaign.

RO7A: Provide ITT member companies with the knowledge and guidelines differentiate themselves through advertising in a highly competitive market.

From the findings of the research study, a new model was developed that was specifically created to address the methodology, considerations, and market preferences associated with advertising performance textile products (see Figure 20).

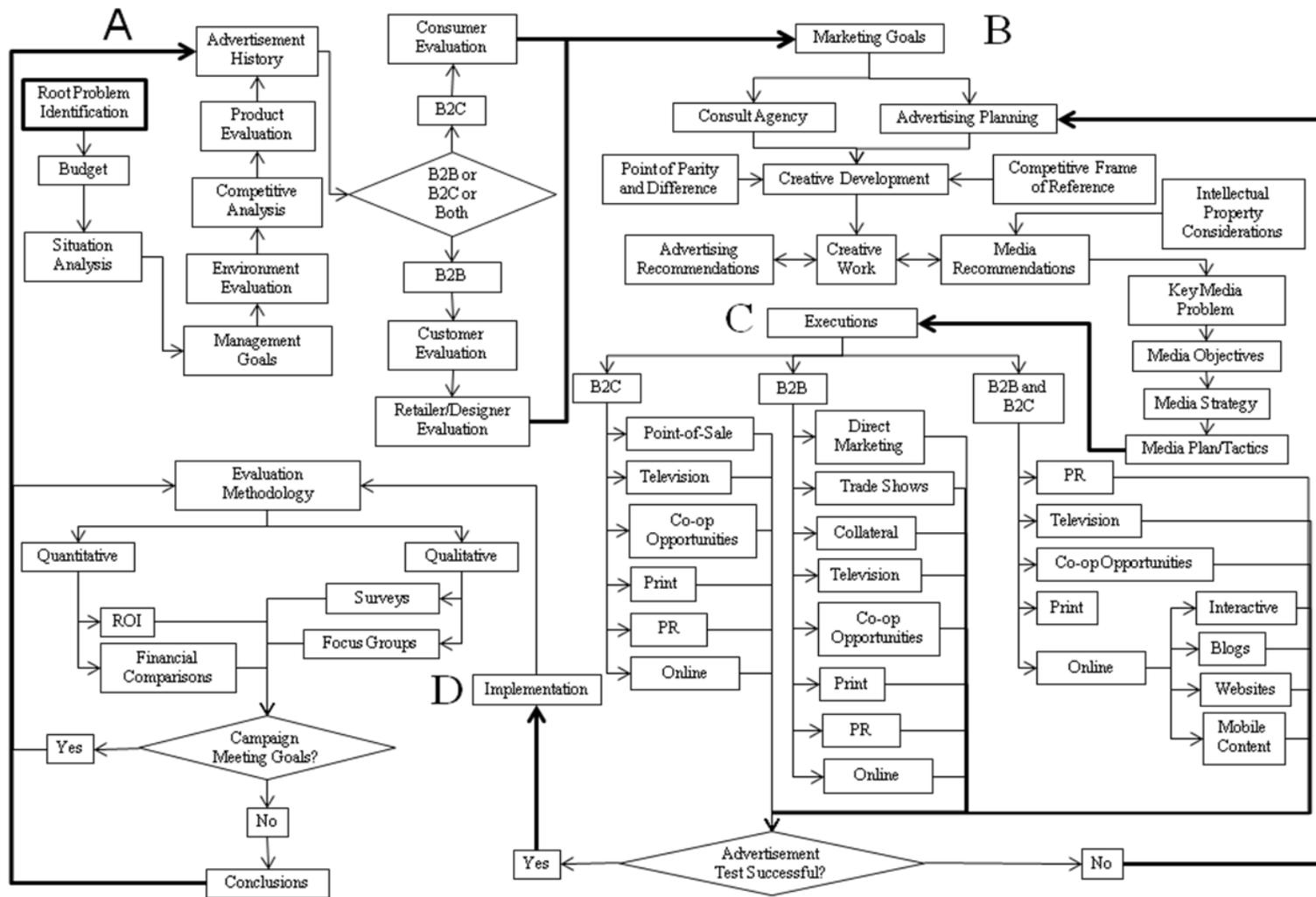


Figure 20: Upstream Textile Performance Product Advertisement Development Process Model

### *Discussion: Model Development*

The Upstream Textile Performance Product Advertisement Development Process Model was developed using the results from Phases I-III. The model was created specifically to account for the considerations of upstream textile firms developing advertisements for the performance textile market. Like the Adapted Advertising Methodology Model (2009), the advertising process was sequential in nature, meaning each activity needed to be completed before the next could commence. However, unlike Adapted Advertising Methodology Model (2009) which was an open loop process, the new model was changed to a closed loop model by creating decision making points that would route the process depending on the answer.

The model is divided into four sections labeled A, B, C and D. Section A is the Situation Analysis and Goal Setting stage. During this stage, firms identify if advertising is the correct course of action, determine the budget and conduct the situation analysis. The activities performed during situation analysis are dependent on the firm's marketing strategy. For a pull strategy, more downstream considerations are required, such as the designer, retailer, and consumer evaluations. For push strategies, firms should concentrate more on the customer. For both push and pull strategies, product evaluation, advertising history, and managerial goal should be included during this step. Companies implementing a push/pull strategy should consider all items listed. From the situation analysis marketing goals are set.

Section B is the Development Considerations segment. In this section, the firm uses the marketing goals to determine the advertising message, determine media types and complete creative work. Once the marketing goals are established the firm can either consult

and advertising agency or commence advertising planning in-house or both. During creative development, point of parity and point of difference are established based upon the product evaluation and target market preferences. The competitive frame of reference involves determining how to position the product in the market, this too is dependent on product and target considerations. From there creative development begins which is split into media and advertising recommendations. Both of these processes interact with the creative portion of the advertisement.

Section C is the Executions stage of the process. Once the message and has been developed and the media plan determined, the execution of the message must be developed. This step determines which media type to use in order to communicate with the target audience effectively. Executions were broken down by target audience (b2b, b2c and b2b/b2c) and media types that were identified as significant are identified with an asterisk. From the result so Phases I-III, it was found that many B2C companies pretested their advertising media with target groups in order to gain their feedback before full implementation. Therefore, the “Advertisement Test Successful?” decision diamond was added. Once the advertisement has been successfully tested, the advertisement can be implemented.

Section D is the Evaluation and Conclusions stage. Although the benefits of advertising may not be immediate, evaluation of the effectiveness of the campaign is important to determine in order to improve future campaigns. Qualitative and quantitative measures should be used depending on the goals set out for the campaign. Results from these metrics should be compared to those of previous finding identified during the situation

analysis. From the literature review and company interviews it was stated that advertising should be evaluated to see if the media was achieving the goals set forth by management. Based upon these findings the “Campaign Meeting Goals?” block was added. If the advertisement is meeting marketing goals, then the campaign should continue and be reevaluated at a later date. If the campaign is no longer meeting goals, then it should be modified or terminated and conclusions drawn for that campaign. Conclusions drawn from previous campaigns should be accounted for during the situation analysis of the next campaign.

It was found that many upstream textile firms used advertising agencies to help them create advertisements, which was not represented in the adapted model. This step was added to Revised Adapted Advertising Methodology Model (2009) early in the development process. After the firms identify critical factors in their situation analysis, an advertising agency can help to determine marketing goals and assist with activities later in the process. Although many companies said that advertisement consultation is expensive and time consuming, it may be an important step, depending on the experience level of the company.

With regard to the opportunities identified in the study, customer and retailer/designer evaluations were added to the situation analysis. This stems from interview respondents stating that new opportunities existed downstream in the supply chain, closer to the consumer. Media recommendations were expanded to show the steps within that activity in order to provide additional clarity. The creative portion of the process was given its own step, as it can be done in-house or external from the company. Another area of the Adapted Advertising Methodology Model (2009) that was missing was there were no examples of

executions. Specific advertising media types were added along with indicators of whether to use that media type in B2B or B2C communications or both. Online media choices were specifically highlighted due their potential for growth, mass appeal, tracking ability, and ease of maintenance. Both consumers and industry representatives, stated that online media was an effective information source and vehicle for advertising.

The Adapted Advertising Methodology Model (2009) also lacked evaluation methodology methods, which from the results of the interviews, was an area many companies struggled. From the industry interviews, the budget step was moved closer to the beginning of the framework because most textile firms begin with a set budget and then determine their advertising activities based upon that budget. Managerial goals were added to ensure that the advertising objectives coincide with the overall objective of the company. The advertisement development recommendations step was split into advertisement planning and creative development to add clarity to the step.

## **CHAPTER V**

### **SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS**

#### **Summary of Research**

The purpose of this research was to examine upstream textile firms that effectively use advertising to differentiate their products in the market. The overall research questions were what factors contribute to an effective advertisement and what are the best techniques to facilitate communication with the customer and final consumer. The study focused on determining the benefits, potential, and challenges of upstream advertising and the most effective strategies of communication with the customer and the end-use consumer. Another research objective was to develop a framework that upstream textile firms can use create to effective advertising strategies to differentiate their products.

To accomplish these goals, a four-phase methodology was employed. Phase I was exploratory in nature and worked to identify companies with successful advertising strategies. Competitive analyses and case studies were used to develop an understanding of current advertising strategies and gather quantitative information about the effectiveness of advertising. Phase II consisted of conducting industry interviews in order to gain primary qualitative information about the benefits, challenges, and opportunities of upstream advertising. In addition, companies were asked to provide a customer perspective of the effectiveness of current advertising efforts. In Phase III, primary research was conducted in order to gain insight into the potential of upstream advertising from a downstream perspective. This research took the form of a quantitative survey administered to selected end-use consumers. Survey data was used to develop an understanding of the potential of

upstream textile advertising focusing on different advertising opportunities including print, television, and the Internet. Finally, Phase IV used the results of Phases I, II, and III to develop a framework that U.S. textile companies can utilize to develop an upstream advertising campaign.

The results of this research provide knowledge of the benefits, potential, and challenges of upstream advertising. By understanding these factors, it will assist companies in determining the cost/benefit relationship of advertising and aid in managerial decision-making. This research will also help to guide companies in their selection of the best media type to fit their target market. In addition, the research will provide a framework for U.S. textile firms to use when implementing an upstream advertising strategy. Finally, this study will provide a means for U.S. textile firms to create perceived value and differentiation. By understanding the nature of the upstream advertising, U.S. producers will be ideally positioned to gain a competitive advantage through differentiation.

### **Summary of Results**

#### *Benefits, Potential, Challenge, and Opportunities of Upstream Advertising*

Both B2B and B2C companies have the opportunity to use advertising to differentiate their products from commodity goods in the performance textile market. Advertising provides a means to communicate product benefits, or other messages, to a target audience. Advertising offers a variety of communication vehicles that can be developed based upon the target's preferences. It has been shown that effective advertising can generate real, measurable changes in product awareness and sales volume. By using advertising to create market perceptions and interactions between products and customers/consumers, companies

can differentiate and create preferences for advertised products, which may lead to increased viability, sales, and product loyalty.

From research and communications with various representatives from both the textile and advertising industries, it was found that there was general agreement about the benefits of advertising. The literature review cited building awareness, increasing profits, and building brands as the benefits of advertising (Sandage, Fryburger, & Rotzoll, 1983, Wright-Isak, Faber, & Horner, 1997). These findings were confirmed by the competitive analysis and case study findings, as well as the industry interview results. From the interviews and case studies, additional benefits included: building credibility, connecting with customers/consumers, and increasing involvement with brands. The most important benefits were found to be building awareness and increasing sales, however, many were quick to say that increasing sales was the ultimate goal. Overall, the results from Phases I-III confirmed the literature in that the benefits and success of an advertising campaign are relative to the goals set out for that campaign by the company (Wright-Isak, Faber, & Horner, 1997).

The literature review cited many challenges including market level and financial level considerations (Sandage, Fryburger, & Rotzoll, 1983; Keller, 2003; Vass, 2005; Haigler, 2008). From the case studies and interviews, both B2B and B2C oriented companies stated that the main challenge was creating relevant advertisements that would connect with the customer/consumer in an effective and lasting manner. Other challenges included costs associated with advertising and data gathering methodologies.

The perceived potential of advertising was varied. The literature and case studies portrayed advertising as an effective way to grow revenues, market share, and awareness by

either collaborating with other firms or creating large scale, multimedia type campaigns (Keller, 2003; Desai & Keller, 2002). However, from conversations with industry representatives, it was clear that the potential for advertising was not as great. Many B2B firms felt that the potential benefit of advertising to the end consumer did not outweigh the cost. This is partially due to the perception that end consumers did not find value in their products and therefore, it would be difficult to make their advertisements relevant. Thus, companies should work to gain customer or consumer level perspectives in order to understand their preferences which can be used to develop more effective advertising campaigns.

From a supply chain standpoint, many companies felt that advertising was only directed toward companies with whom they had not done business in the past. Some companies went as far to say that they knew most of the largest players in their segment of the industry and that there were few new opportunities, however, there may be potential downstream to make connections with brands, designers, and retailers by educating and building preference among those groups. This method seems to be the next logical step, moving from the manufacturing level further through the supply chain and eventually to the end consumer for a pull through strategy.

#### *Strategies Used in the Performance Textile Market*

The data from case studies revealed that television advertising was an effective method to build awareness and increase sales relatively quickly in B2C markets. However, this method is very expensive and may not be appropriate for all companies. For B2B,

printed advertisements were more successful in the supply chain segment than the consumer segment. However, Internet advertising was found to have potential across both groups.

From the product scan, it was found that hangtags and sewn in labels were the main forms of upstream advertising used in B2C marketing. These advertisements place product information in front of the consumer at the time of purchase in an effort to increase the buying potential of the product. Upstream companies concentrated more advertising efforts in the specialty and boutique level stores, which catered to outdoor enthusiasts specifically and sold higher priced goods. If companies are providing products for consumer goods in these locations, hangtags may increase the likelihood of purchase over products with no information. Opportunities also exist in the mass channel, where hangtags are less prevalent; companies could potentially differentiate their products quickly as there are few other ingredient products being promoted. However, communicating product or company benefits to the customer or end consumer was universally cited across data sources as the most important function of advertising, no matter what media vehicle was used.

Industry interviews revealed a variety of advertising tactics ranging from hangtags to sponsored events, but most companies, especially B2B, relied on online, print, and PR as their main media vehicles. This was later confirmed by the supply chain survey where most customers stated they preferred online and printed advertisements. It was said that PR activities can validate advertising claims for potential customer or consumers, which makes using both activities in tandem an effective strategy. Many companies participating in B2C marketing stated that they were willing to provide on-product advertising content to their customers, but most did not insist upon it. If a company's product is close to the end

consumer, hangtags may be an effective differentiation strategy, as nearly all consumers surveyed stated that they looked for on-product advertisements for product information.

*Effective Strategies for Communicating with Industry, Customers, and Consumers*

Companies focusing on B2B advertisements should concentrate on online media, trade shows, and printed advertisements. The respondents confirmed this by stating that they typically look for company or product information on the Internet, at trade shows, and in printed publications, but the Internet was the number one response. Therefore, advertisements using these types of medias may be an effective strategy to build visibility and credibility, as well as differentiate products.

In terms of the content of B2B advertisements, including product performance attributes, using a point of parity and point of difference strategy, as well as acknowledging the interests of the target audience may be an effective strategy. B2B companies also stated that, when looking for information, they were typically trying to determine business fit, related to the possibility of new business ventures. Therefore, as the literature review suggested, creating B2B advertising content that facilitates the business process may be an effective strategy as well. When selecting new suppliers, companies were looking for company credibility, commitment to the industry, and company longevity. Including advertisement content that communicates these attributes, could entice potential customers to initiate contact. The majority of customer respondents (both B2B and B2C) were looking for a call to action and contact information in their advertisements, in addition to product and company information.

For B2C focused strategies, the inclusion of online content should be strongly considered. Consumers surveyed were looking for product information online, through company maintained websites, and on-product hangtags and packaging. Very few looked for information in printed sources, unlike industry customers. This indicates that many consumers are gathering their product information at the time of purchase. Therefore, placing advertisements as close as possible to the time of purchase may entice consumers to purchase one product over another. With mobile web access growing, promoting mobile-web friendly web pages (web pages easily viewable on handheld devices) on hangtags may be an efficient way to provide product information quickly at the purchase decision. Consumers in the sports and leisure segments, especially outdoor apparel and equipment, are interested in the performance attributes of their products and are conscious of brands (including upstream and downstream brands).

As these college-aged consumers move into the work force, they will take these information-gathering habits into their job. Therefore, in order to advertise to these individuals effectively, it will be important to have a strong web presence. As the literature review indicated consumer habits often cross over into the business world, therefore, as the next generation of technology savvy individuals begins to take prominent positions in the industry, taking into account these preferences will be critical (Andrews, 2005). As the case studies and some companies revealed, consumers are looking for ways to connect to their products and companies and, as found through the literature review, outdoor product consumers felt very strongly about the brands they purchased. Again, as with the B2B

strategies, creating these interactions can differentiate products by building relationship and loyalty.

When considering what content should be included in B2C advertisements, consumers surveyed said that product comparisons and relating how products can solve real world problems were the best ways to create credibility for a product or company. Therefore, advertisements that communicate these qualities have the potential to be effective with this consumer segment.

Strategies that include both B2B and B2C audiences should use online advertisements as part of their advertising strategy. Both industry customers and consumers use the online information source to gain product and company information and nearly all company respondents agreed that online media held the most potential for future advertisements. This was also apparent from the case studies where companies would supplement their print and television advertisements with online content. Companies with larger budgets, typically more B2C oriented firms, created entire websites dedicated to a particular campaign, which hosted online content such as games, forums, and other interactive content in an effort to connect with the customer/consumer. Online advertising can be effective for both B2B and B2C audiences, as it can provide targeted messages when coupled with consumer/customer data. Online content can also be distributed on a mass scale, updated quickly, and made available at all times.

#### *Cost Benefit Relationship*

Through data collection and the literature review (Wright-Isak, Faber, & Horner, 1997), it was concluded that the cost benefit relationship was unique to each company and

each campaign, therefore a universal cost benefit measure was unable to be determined. Companies typically knew how much money was spent on an advertisement, but most seemed to do little post campaign evaluation, which makes determining the cost benefit relationship difficult. Quantifying the benefits of advertising was also difficult due to the qualitative benefits of advertising, which are difficult to quantify. For companies to determine the cost benefit relationship more accurately, more effort must be placed in quantifying the effects that advertising has had on their business. From the competitive analysis and case studies, there were several metrics used including sales volume comparisons, web traffic tracking, and surveys. Nevertheless, whatever method is chosen, the evaluation methodology must be repeatable, compared with previous data, measured over a specific time frame, and compared against having not invested advertising at all. Care must be taken when determining the time period for evaluation, as the effects of advertising are not immediate.

## **Conclusions**

1. Advertising has the ability to differentiate products by promoting specific attributes or product characteristics that can distinguish a product in the market. It was also found that advertising has the ability to influence sales by building awareness and creating perceptions of value in the market.
2. Companies indicated that advertising succeeded when a potential customer or consumer was aware of their products before being formally approached. However, sales were still the main indicator of success and most companies agreed that if sales were not strong, advertising tactics would be changed or terminated.

3. For B2B oriented campaigns, the research indicates that companies should focus on online media, tradeshow, and printed advertisements; however, it is also important to include PR and face-to-face interactions in the overall advertising strategy. Advertisements should promote company credibility and interest in new business, while at the same time communicating product benefits and acknowledging of the target's interests. Advertisements to B2B audiences should also attempt to facilitate the business process by providing contact information and a call to action.
4. For B2C oriented campaigns, the research indicates that companies should focus on online and on-product advertisements, as these were main sources of new product and company information among this sample consumer population. The sample also indicated that advertisements that used product comparisons and related how the product could solve a problem were effective at building company credibility.
5. For both B2B and B2C advertising strategies, online advertising was said to have the most potential for growth. Online advertisements provide a constant resource for customers and consumers to find information and interact with the brand, which is key for building relationships and differentiating products. Websites provide the opportunity to reach a large audience and the content is company controlled. Online media also provides automated tracking services that can help evaluate effectiveness and determine the demographics of visitors to the site.
6. The use of on-product hangtags was a popular communication strategy for upstream textile companies participating in the outdoor products market. Surveyed consumers confirmed that they used hangtags as an information source. However, most of the

companies interviewed stated that they would provide hangtags only if the customers requested them. It may be advantageous to promote the use of upstream component hangtags to entities downstream as consumers are using them when making their purchase decision.

7. Both B2B and B2C companies said that making advertisement content relevant was a challenge. Companies can increase the relevancy potential by communicating and surveying their potential customers and consumers in order to determine their advertising preferences and feelings about the product. Many B2B companies stated that advertising to the end consumer was too expensive and that effectiveness was difficult to track. Online and on-product advertisements may be a viable, low cost solution. There were also comments that creativity was a challenge.
8. Many B2B companies felt that there was limited growth potential in the supply chain segment. With the number of textile companies in this country decreasing, many companies are already aware of other businesses in the industry. While it is important to maintain visibility, expanding efforts into the brand, retailer, and consumer segments seems to be the next logical step in building awareness and relationships. Developing messages and products relevant to entities downstream is important for building long-term brand equity and facilitating a pull marketing strategy.
9. As the literature review suggested, a standard cost benefit relationship for upstream textile companies could not be determined for the following reasons:
  - a. Companies stated there was no typical ROI or payback period.
  - b. Goals and benefits of advertising were company specific, if not customer specific.

- c. Not all benefits can be given finite value equivalents and most were not formally measured.
- d. Most companies did not evaluate the cost benefit relationship formally.
- e. Most companies tracked sales volume changes over the duration of the campaign to assess effectiveness, but the effects of advertising are aggregate which limits the accuracy of this method

### **Limitations**

1. This study was specifically limited to the upstream textile firms participating in the sports and leisure segment of the performance textile market. Companies interviewed are representative of the upstream segment of the industry, but not the entire industry. Therefore, the results presented in this report cannot be generalized for all segments or all product categories.
2. Participants in the consumer survey are limited, but are representative of the population. Because a non-probability convenience sample was used during the study, the results presented in this report cannot be generalized for the entire population. Biases in awareness may have occurred due to fact that upstream companies have sponsored events and programs on the College of Textiles campus.
3. Respondent bias may be present in surveys and interviews, due to their willingness or unwillingness to disclose certain data.
4. Advertising is only one component of promotional activities. While companies can achieve success through other promotional avenues, this study only focuses on the advertising portion of the mix.

5. Due to the markets and consumer preferences of the Raleigh/Cary, North Carolina area, the availability and selection of products and publications identified in this study are limited. Therefore, the results of this study are geographically limited and cannot be applied to all geographic areas.

### **Recommendations**

1. The research sample was restricted to upstream customers but companies said that there were opportunities to collaborate with firms downstream. Future studies could include retailers, brands, and designers in their interview and survey populations.
2. Across data sources, online advertising was said to have the most potential. Future work could concentrate on this specific media type.
3. PR was said to be an effective advertising method. Future studies could focus on this media type specifically.
4. Hangtags and on-product promotions seemed to be a common, yet underutilized advertising media. Future studies could focus on this form of advertising to determine what consumers look for in on-product advertisements and what products have the most opportunity to utilize this form of advertising.
5. Many companies said they did little to measure advertising effectiveness. Future studies could research what measurements are most efficient at measuring certain effectiveness attributes for specific market segments.
6. Many companies said they chose to work with advertising agencies. Future studies could investigate how to go about selecting advertising firms and what activities companies should be outsourcing verses completing in-house.

7. As consumers reduce their spending, and are more conscious of where their money is spent, “cause marketing” may be a viable strategy. Future studies could explore the viability of this method as it relates to the textile industry.
8. Online social networking sites are a growing avenue for advertisers, future studies could examine the applicability of using these in a strategy for advertising textile products.

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## APPENDIX

## **APPENDIX A: INITIAL COMPANY SAMPLE**

Number	Company Name	Product Category
1	A. B. Carter, Inc.	Yarn, Fabric
2	Abercrombie's Textiles	Fabric
3	ABJ Enterprises Inc	Fabric
4	Ace Plastics Inc	Fiber
5	Acme Distributor Sales	Fabric
6	Action Plastics Inc	Fiber
7	Adele Knits	Fabric
8	AEP Industries Inc	Fiber
9	Alamac American Knits LLC	Yarn, Fabric
10	Allandale Knitting Co Inc	Yarn, Fabric
11	Albemarle Cotton Grower Co-Op	Fiber
12	Alexander Fabrics Inc	Fabric
13	Allen & Jordan	Fabric
14	Alliance-Carolina Tool & Mold	Fiber
15	Amcot Inc	Fabric
16	American & Efird Inc	Yarn
17	American Fabrics International Inc.	Fabric
18	American Fibers & Yarns Co	Yarn
19	American Home Furnishings Alliance	Fabric
20	American Knitting Co Inc	Fabric
21	American Lockstitch	Fabric
22	American Olympus Fiberglass	Fiber
23	Ameritex Yarn Corp	Yarn
24	Amesbury Group Inc	Fabric
25	Amital Spinning Corp	Yarn
26	Apex Aridyne Corp	Fabric
27	Applied Thermoplastic Rsracs	Fiber
28	Archer Trim	Fabric
29	ASC Intl	Fabric
30	Ash Kourt Industries	Fabric
31	Asheboro Elastics Corp	Fabric
32	Ashland Distribution	Fiber
33	Association of the Nonwoven Fabrics Industry	Fabric
34	ATEX Technologies, Inc	Fabric
35	Autoverters Inc	Fabric
36	Axis Technical Fabrics	Fabric
37	Badger Sportswear Inc	Fabric

Appendix A: Continued

38	Bamberger Polymers	Fiber
39	Barnet USA	Yarn
40	Barnhardt Manufacturing Co	Fabric
41	Basofil Fibers, LLC	Fiber, Yarn, Fabric
42	BELDING Hausman Inc	Fabric
43	Bell's Cotton Gin	Fiber
44	Beverly Knits Inc	Fabric
45	BGF Industries Inc	Fabric
46	Blue Devil Textiles Inc	Fabric
47	Bolcof Plastic Materials Se	Fiber
48	Bowen Cleaners	Fabric
49	Bridgeport Fabrics Inc	Fabric
50	Brittan & Sons Recycling Inc	Fiber
51	Bromley Plastics Corp	Fiber
52	Burke Mills Inc	Fabric
53	Burke Mills Inc	Yarn
54	Burke Narrow Fabric Corp	Fabric
55	Burlington Drapery Co	Fabric
56	Burlington Industries Inc	Fabric
57	Burlington Menswear	Yarn
58	C L Sourcing & Sales	Fabric
59	C L Sourcing & Sales	Yarn
60	C N Clark Co	Fabric
61	Cameo Fibers	Fiber
62	Cardinal Health	Fabric
63	Cargill Cotton	Fabric
64	Carolace Embroidery	Fabric
65	Carolina American Knits, Inc.	Fabric
66	Carolina Color Corp	Fiber
67	Carolina Cotton Classing Agcy	Fabric
68	Carolina Cottonseed Co	Fiber
69	Carolina Glove Co	Fabric
70	Carolina Mills, Inc	Yarn
71	Carolina Resin Distributors	Fiber
72	Carolina Trim	Fabric
73	Caron International	Yarn
74	Carpenter Co Inc	Fiber

Appendix A: Continued

75	Carriff Corporation Inc	Fabric
76	Casual Knit	Fabric
77	Cavalier Specialty Yarn Co USA	Fabric
78	Cavalier Specialty Yarn Co USA	Yarn
79	Cedar Valley Fabrics Co	Fabric
80	Chambers Fabrics Inc	Fabric
81	Charles Craft Inc	Yarn, Fabric
82	Charles D Owen Mfg Co	Fabric
83	Cinderella Knitting Mills	Fabric
84	Clariant Corp	Fiber
85	Coastal Carolina Gin	Fiber
86	Coastal Plains Gin Co	Fiber
87	Coats America	Yarn, Fabric
88	Cocona Inc	Fiber, Yarn, Fabric
89	Collins & Aikman Corp	Fabric
90	Cone Mills Corp	Fabric
91	Contempora Fabrics Inc	Fabric
92	Copland Fabrics Inc	Fabric
93	Corner Cotton Gin Inc	Fiber
94	Cortina Fabrics Inc	Fabric
95	Cotton Growers Warehouses	Fabric
96	Cotton Inc	Fiber
97	Coville Inc	Fabric
98	Covington Upholstery Fabrics	Fabric
99	Craftex Mills Inc Of PA	Fabric
100	Craven County Gin & Cotton Co	Fiber
101	Cs Systems Co Inc	Fiber
102	CT-Nassau Corp	Fabric
103	Culp Inc	Fabric
104	Culp Ticking	Fabric
105	Cumulus Fibers Inc	Fabric
106	Custom Fabrics Inc	Fabric
107	Custom Products Inc	Fiber
108	D. M. Gunn Consulting Services, LLC	Yarn, Fabric
109	DAK Americas	Fiber
110	Dak Americas LLC	Fiber
111	Dawn Processing Co Inc	Yarn

Appendix A: Continued

112	Decorator Industries Inc	Fabric
113	Delta Apparel Co-Maiden Plant	Fabric
114	Designer's Workroom Inc	Fabric
115	Dicey Fabrics Inc	Fabric
116	Domestic Industries	Fabric
117	Drapery Boutique Inc	Fabric
118	Drapery Studio	Fabric
119	Drum Filter Media Inc	Fabric
120	Du Pont Melinar Resins	Fiber
121	DU Pont Teijin Films	Fiber
122	Dynayarn USA Admin & Daytime	Yarn
123	Dynea	Fiber
124	Early Bird Knitting Mills	Fabric
125	Eastern Plastics Co	Fiber
126	EAT Inc.	Fabric
127	Ebbtide Polymers Corp	Fiber
128	Eden Yarns Inc	Fabric
129	Edgecombe Cotton Growers Inc	Fiber
130	Edwards Cotton Co	Fabric
131	Elastic Fabrics Of America	Fabric
132	Elastic Products Div	Fabric
133	Eldon-Psi	Fiber
134	Enfield Cotton Gin Inc	Fiber
135	Ensley Corp	Fiber, Fabric
136	Fabriccraft	Fabric
137	Fabron Limited	Fabric
138	Facemate Corp	Fabric
139	Fairystone Fabrics Inc	Fabric
140	Farmers Gin Co	Fiber
141	Feil & Davidson, Inc.	Yarn
142	Fiber Associates	Fabric
143	Fiber Dynamics Inc	Fabric
144	Fiber Society	Fiber
145	Flag Factory Inc	Fabric
146	Flexlon Fabrics Inc	Fabric
147	Forster Textile Mills Inc	Fabric
148	Freudenberg Nonwovens LP	Fabric

Appendix A: Continued

149	Frontier Spinning Mills	Yarn
150	Galey & Lord Industries Inc	Fabric
151	Gates Cotton Gin Inc	Fiber
152	Gem Knitting	Fabric
153	General Elastic Corp	Yarn
154	George C Moore Co	Fabric
155	Georgia-Pacific Corp	Fiber
156	Gersan Industries Inc	Fiber
157	Glen Raven, Inc.	Yarn, Fabric
158	Graham Plant	Yarn
159	Green Spun Textured Knits	Fabric
160	Green Valley Co LLC	Fiber
161	Griffin Tubing Co Inc	Fabric
162	Growers Ginning Co	Fiber
163	Guilford Mills Inc	Yarn, Fabric
164	H & T Sales & Distribution Inc	Fabric
165	H K Research	Fiber
166	Hamrick Industries	Fabric
167	Hanes Dye & Finishing	Fabric
168	Hanes Narrow Fabrics	Fabric
169	Hanesbrands Inc	Fabric
170	Harvey Gin & Cotton Co	Fiber
171	Heritage Cabinets & Woodwork	Fabric
172	Heritage Knitting Co LLC	Fabric
173	Hexcel Reinforcements Corp	Fiber
174	Hexion Specialty Chemicals	Fiber
175	Hickory Brands Inc	Fabric
176	Hickory Springs Mfg Co	Fiber
177	Hickory Throwing Co	Yarn, Fabric
178	Hickory Yarns	Yarn
179	Hickory Yarns, Inc	Yarn
180	Hoke Cotton Warehouse	Fabric
181	Hoke LTD	Fabric
182	Hornwood, Inc.	Fabric
183	Huber Textile Inc	Fabric
184	Hurricane Accu Sports Inc	Fiber
185	Inno Knits, LLC	Fabric

Appendix A: Continued

186	Innofa USA	Fabric
187	Interface Fabrics Group	Fabric
188	International Fabrics, Inc.	Fabric
189	International Textile Market	Fabric
190	Invista	Fiber
191	IPS	Fabric
192	Irwin-Leatherman Cotton Co	Fabric
193	J & J Knitting	Fabric
194	J & K Fashions Inc	Fabric
195	J D Stanley & Co Inc	Fabric
196	Jackson's Hairs & Nails	Fabric
197	Jacob's Textile Sales	Yarn
198	Jazzy Textiles Inc	Fabric
199	Joan Fabrics Corp	Fabric
200	Johnson, Alsey B	Fabric
201	Jones County Cotton Gin Inc	Fiber
202	Karastan	Yarn
203	Karl Mayer North America	Fabric
204	Kem-Wove Inc	Fabric
205	Ken Smith Yarn Co	Yarn
206	Kimberly-Clark	Fabric
207	Kings Mountain Knit Fabrics	Fabric
208	Klockner Petaplast	Fiber
209	Knit Creations	Fabric
210	Knit-Wear Fabrics Inc	Fabric
211	Kordsa INC	Fabric
212	Label Service Inc	Fabric
213	LANETEX INC	Fabric
214	Lantal Textiles Inc	Fabric
215	Lan-Tex Inc	Fabric
216	Leviton Manufacturing Co	Fabric
217	Lexington Industries Inc	Fabric
218	Lin Pac Plastics	Fiber
219	Lin-Tex	Fabric
220	LIT Industries Inc	Fiber
221	Magnolia Manufacturing	Yarn
222	Mallard Creek Polymers Inc	Fiber

Appendix A: Continued

223	Mastercraft Fabrics LLC	Yarn, Fabric
224	Mayo Knitting Mill, Inc.	Fabric
225	Mc Kenzie Taxidermy Supplies	Fiber
226	Mc Michael Mills Inc	Yarn, Fabric
227	Mc Murray Fabrics Inc	Fabric
228	Meder Textile Co Inc	Fabric
229	Miami Thread	Yarn
230	Michael S Becker Inc	Yarn, Fabric
231	Midway Gin Co	Fiber
232	Milliken & Company	Fabric
233	Miltex Industries	Fabric
234	Mini-Bin Storage	Fabric
235	Mitchell Industries	Fiber
236	Modern Densifying	Fiber
237	Mohawk Industries Inc	Yarn
238	Mohican Mills Inc	Fabric
239	N J Enterprises	Fabric
240	NAMPAC Packaging Div	Fiber
241	Nancy King Textile Co	Fabric
242	Narrow Fabric Industries	Fabric
243	Natex Inc	Fabric
244	National Mastercraft Inds Inc	Fabric
245	National Spinning	Yarn
246	National Spinning Co	Yarn
247	National Textiles LLC	Yarn, Fabric
248	Neptco Inc	Fabric
249	Neptune Incorp	Fiber
250	New Century Yarns	Yarn
251	New River Fabrics Inc	Fabric
252	Nonwovens Cooperative Research Center	Fabric
253	Norco Textiles Inc	Yarn
254	North Carolina Spinning Mills	Yarn
255	Northampton Warehouse	Fabric
256	Norwood Yarn Sales	Yarn
257	Nova Knitting Machinery	Fabric
258	Nova Yarns	Yarn, Fabric
259	Noveon Inc	Fiber

Appendix A: Continued

260	Oakdale Cotton Mills	Yarn, Fabric
261	Old Town Drapery Shop Inc	Fabric
262	O'Mara Inc	Fabric
263	O'Mara Texturing Corp	Yarn, Fabric
264	Outdura	Fabric
265	P Collins LTD Fabrics	Fabric
266	Paola Yarns Inc	Yarn
267	Parkdale Mills Inc	Yarn, Fabric
268	Parrott Canvas Co	Fabric
269	Patrick Yarn Mills Inc	Yarn
270	Paxar Corp	Fabric
271	Pearson Textiles Inc	Fabric
272	Perfection Fabrics	Fabric
273	Performance Fibers	Yarn
274	Pharr Yarns LLC	Fiber, Yarn, Fabric
275	Pioneer Plant	Fabric
276	Pitt County Gin	Fiber
277	Plastic Express Corp	Fiber
278	Plastics Connection Inc	Fiber
279	Plastiflex Co Inc	Fiber
280	Podisco Inc	Fiber
281	Polygal Inc	Fiber
282	Polymer Group Inc	Fabric
283	Polymer Resources LTD	Fiber
284	Polyreps Inc	Fiber
285	PPG Industries Inc	Fiber
286	PPG Industries, Inc.	Yarn, Fiber
287	Precision Fabrics Group	Fabric
288	Preserve Resources, Inc.	Fiber, Yarn, Fabric
289	Prestige Fabricators Inc	Fabric
290	Producer's Gins & Warehouse	Fiber
291	Pure Country Inc	Fabric
292	QST Industries Inc	Fabric
293	Quality Gin Co Inc	Fiber
294	Quality Textile Co	Fabric
295	Queen City Mfg Inc	Fiber
296	Radici Spandex	Fiber, Yarn

Appendix A: Continued

297	Ramtex Inc	Yarn, Fabric
298	Randolph Knitting Inc	Fabric
299	Reichhold Inc	Fiber
300	Rem-Tex	Fabric
301	Resinall Corporation	Fiber
302	Rhino Linings Of Charlotte	Fiber
303	Ribbon Enterprises Inc	Fabric
304	Rich Square Cotton Gin Inc	Fiber
305	Richmond Yarns Inc	Yarn
306	Riddle & Co LLC	Fabric
307	Robela Knit Shop LTD	Fabric
308	Rocky Mount Cord Co	Fabric
309	Roger's Knitting Co	Fabric
310	Rohm & Haas Co	Fiber
311	Rolling Hills Cotton Gin	Fiber
312	Roman Knit Inc	Fabric
313	Roselon Industries of NC Inc	Fabric
314	Rosemary Bonded Warehouse	Fabric
315	Royal Home Fashions Inc	Fabric
316	Russ-Knits	Fabric
317	Rutland Plastic Tech Inc	Fiber
318	Sack-Ups	Fabric
319	Saertex USA	Fabric
320	Sample Group Inc	Fabric
321	Sampson Gin Co Inc	Fiber
322	Sapona Manufacturing Co Inc	Yarn, Fabric
323	Saunders Thread Co	Yarn
324	Saunders Thread Company	Yarn
325	Sca Packaging	Fiber
326	Schneider Mills, Inc.	Yarn
327	Seaboard Textile Inc	Fabric
328	Securall Inc	Fabric
329	Shenandoah Furniture Inc	Yarn
330	Sherman Textile Co	Fabric
331	Shuford Mills LLC	Yarn, Fabric
332	Shurtape Technologies Inc	Yarn, Fabric
333	Simon Textile Co	Fabric

Appendix A: Continued

334	Slosman Corp	Fabric
335	Smith Cotton Gin	Fiber
336	South Eastern Protein Inc	Fiber
337	South Fork Industries Inc	Fabric
338	Southern Gin & Fertilizer Co	Fiber
339	Southern Hosiery Mills Inc	Fabric
340	Southern Resin Inc	Fiber
341	Specialty Textiles Inc	Fabric
342	Spray Cotton Mills	Yarn
343	Spruce Pine Mica Co	Fiber
344	Standard Tytape Co	Fabric
345	Stevenson & Vestal	Fabric
346	Stitch Count	Fabric
347	Sun Belt Textiles Inc	Yarn
348	Sunray Inc	Fiber
349	Supreme Corp	Yarn
350	Supreme Knits Inc	Fabric
351	Susan Roediger Knits	Fabric
352	Swift Galey	Yarn, Fabric
353	Syncot Plastics Inc	Fiber
354	Synthetic Yarn and Fiber Association (SYFA)	Fiber
355	Synthetic Yarn and Fiber Association (SYFA)	Yarn
356	Tailored Chemical Products Inc	Fiber
357	Tarheel Cotton Co	Fiber
358	TC2	Fabric
359	Textile and Apparel Manufacturers and Merchants	Yarn, Fabric
360	Textile Extension Education (TexED)	Fiber, Yarn, Fabric
361	Textile Inc	Fabric
362	Textile Network Concepts, Inc.	Yarn
363	Textile Piece Dyeing Inc	Fabric
364	Textile Tape Weavers Co	Fabric
365	Textile Technology Center at Gaston College	Yarn, Fabric
366	The Jacquard Center	Fabric
367	The Oriole Mill	Fabric
368	The Quantum Group	Fabric
369	Thomasville Dixel Inc	Fiber
370	Tietex Interiors	Fabric

Appendix A: Continued

371	TK Holdings	Fabric
372	Toho Carbon Fibers	Fiber
373	Triangle Polymers Inc	Fiber
374	Tri-County Gin Inc	Fiber
375	Tri-Tex Inc	Fabric
376	Tuscarora Yarns Inc	Fabric
377	Tuscarora Yarns Inc	Yarn
378	U S Fiberglass Products Inc	Fiber
379	Uco Fabrics Inc	Fabric
380	Ultra-Flex	Fabric
381	Unifi Inc	Yarn, Fabric
382	Unifour Finishers Inc	Fabric
383	Unifour Finishers Upholstery	Fabric
384	Universal Fiber Systems	Fiber, Yarn
385	Universal Fibers	Yarn
386	Valdese Manufacturing Co	Fabric
387	Valdese Weavers Inc	Fabric
388	Viking Polymers LLC	Fiber
389	W & W Gin Inc	Fiber
390	W J Carey & ASSOC LLC	Fiber
391	Wade Manufacturing Co	Fabric
392	Ward & Nixon Cotton Gin Inc	Fiber
393	Warp Knit Mills	Fabric
394	Warp Technologies Inc	Yarn
395	Washington Penn Plastics	Fiber
396	Waverly Mills Inc	Yarn
397	Weldon Gin Co	Fiber
398	Wellman Inc	Fiber
399	West Point Home Inc	Fabric
400	Whitakers Gin Co Inc	Fiber
401	Williamston Yarns	Yarn
402	Wilson County Gin & Cotton Co	Fiber
403	Windsor Wood Inc	Yarn
404	Wolfe Brothers Distributing Co	Fiber
405	Wolfe Industries	Fiber
406	Woodland Mills	Yarn
407	Woodville Supply Inc	Fiber

Appendix A: Continued

408	World Elastic Corp	Fabric
409	World Fibers	Yarn
410	Worldtex Inc	Yarn
411	Wrap Spun Yarns Inc	Yarn
412	Xerium Technologies Inc	Fabric
413	Yarntex Corp	Yarn

## **APPENDIX B: INTERVIEW INSTRUMENT**

Respondent Name:  
Company:  
Position:  
Years in Position  
Years with Company:  
Years in Industry:

The focus of this survey is access the benefits, challenges, and potential of upstream advertising (sometimes called ingredient advertising). Upstream advertising may include fiber, yarn, or fabric promotions depending on supply chain position. Some examples of successful advertising companies and brands include W.L. Gore's Gore-Tex®, Invista's Lycra®, and Intel® microprocessors.

1. What have been your company's biggest advertising success and failure and what lessons have you taken from them? What does your company view as the benefits of advertising? Which areas does your company value most? What companies do you believe are effective ingredient advertisers?
2. Do you believe that advertising is necessary for success in the sports and leisure market segment? Do the tactics for this segment differ from other product segments? In general, what market segments do you believe are under and over advertised?
3. What is your typical methodology for taking the advertising concept through implementation and evaluation? What step is most challenging? When developing your initial situation analysis what activities do you consider?
4. What are your primary goals across all campaigns? How often do you reevaluate these goals? How does your company define and evaluate advertising success?
5. What media opportunities do you foresee as being influential in the coming years and what steps is your company taking to take advantage of these opportunities? Does your company believe that there are opportunities in advertising directly to end consumer as well as industrial consumers? Why or why not?
6. What type of advertising media do you feel is most effective at communicating product or company information? Do your target consumers/customers respond well to your current advertising efforts? What elements do you think make an effective b2b and b2c advertisement? What tactics can be applied across trade and consumer advertisements?

7. What areas of your business does your company believe advertising has the potential to influence? What media types deliver the best return on investment? Are advertising and marketing the best ways to influence customers and differentiate your products? What is the typical expected ROI and payback period for a major advertising campaign?
8. When advertising to both industrial customers and end consumers, what are the biggest challenges in reaching these markets successfully? What aspects of advertising planning do you feel are often underdeveloped during planning, both in terms of your company and with the industry?
9. What are some reasons why you seek new information about products or companies? When choosing new suppliers, where do you seek information? Does advertising influence which companies you seek first? Do you look for certain elements or information in advertisements? What advertisement types do you prefer? Other than cost, what factors influence your supplier selection? Is your company willing to pay more for branded or heavily advertised products?

## **APPENDIX C: CONSUMER SURVEY**

### Study Information:

The focus of this study is to evaluate the effectiveness of upstream textile advertisements. Upstream advertisements are those advertisements that promote fiber, yarn, or fabric components to be used in the production of consumer goods. The fibers, yarns, and fabrics depicted in these advertisements are not sold directly to consumers, but through other company's products. For example, Gore-Tex is sold to The North Face for production of jackets, consumers purchase the jacket, and therefore the consumer is purchasing Gore-Tex. The following questionnaire asks you to relate your opinions about the upstream textile advertisements presented on the screen. The advertisements are from consumer magazines and depict products offered by upstream textile companies (i.e. fiber yarn and fabric manufactures). These advertisements are designed to promote the upstream manufactures' product so that consumer will look for their brands in the product they purchase. The company and product names have been removed from the advertisements to prevent any biases.

Approximate time to complete survey: 15-20 minutes

### Part 1 Directions:

Complete the questionnaire for Advertisements A-C as the advertisements are presented on the screen. There are three advertisements used in the study and each advertisement will be presented on the screen individually. Once all participations have completed each survey for the presented advertisement, the next advertisement will be presented until all are complete. Please shade in the box corresponding with your answer. When you have finished each section, please wait for further instruction.

### Part 2 Directions:

Advertisements A-C will be shown again on the same screen. Please compare the advertisements and answer the following questionnaire. Please shade in the box corresponding with your answer. When you finish part 2, proceed to part 3.

### Part 3- Directions:

Please answer the following questions related to your personal information gathering preferences. Please shade in the box corresponding with your answer. Once you have completed this section, you are finished with the survey.

**Please circle the appropriate information:**

**Gender**

- Male
- Female

**Age**

- 18
- 19
- 20
- 21
- 22
- 23+

<b>Part 1- Advertisement A Questions (1/3)</b>						
<b>Questions</b>		<b>Strongly Agree</b>	<b>Agree</b>	<b>Neither Agree or Disagree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>
1	I have seen advertisements for this product in the past					
2	I understand what product is being promoted					
3	The information in the advertisement is useful					
4	I identify with the products or activities presented					
5	The advertisement communicates enough <b>product performance</b> information to interest me in the product					
6	The advertisement communicates enough product <b>benefit information</b> to interest me in the product					
7	The advertisement is memorable or unique					
8	The advertisement makes me curious about the <b>product</b> in the ad					
9	The advertisement makes me curious about the <b>company</b> in the ad					
10	The advertisement appeals to me on a personal level					
11	Based on the advertisement's content, the product seems to be high quality					
12	Based on the advertisement's content, the company appears to be creditable and reputable company					
13	The images used in the advertisement relate well to the text information					
14	The images used in the advertisement make me want to experience what is pictured (either by performing an activity or purchasing the product)					
15	Based on the advertisement's content, I would consider looking for this product/brand when making my next purchase					
16	If a product in a store contained this brand/product I would consider <b>seeking additional information</b>					
17	If a product in a store contained this brand/product I would consider <b>purchasing the item</b>					
18	If a product contained this brand/product I would consider paying more for that product than a product containing generic products (ex. a branded fiber vs. polyester)					

Part 1- Advertisement B Questions (2/3)						
Questions		Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
1	I have seen advertisements for this product in the past					
2	I understand what product is being promoted					
3	The information in the advertisement is useful					
4	I identify with the products or activities presented					
5	The advertisement communicates enough <b>product performance</b> information to interest me in the product					
6	The advertisement communicates enough product <b>benefit information</b> to interest me in the product					
7	The advertisement is memorable or unique					
8	The advertisement makes me curious about the <b>product</b> in the ad					
9	The advertisement makes me curious about the <b>company</b> in the ad					
10	The advertisement appeals to me on a personal level					
11	Based on the advertisement's content, the product seems to be high quality					
12	Based on the advertisement's content, the company appears to be creditable and reputable company					
13	The images used in the advertisement relate well to the text information					
14	The images used in the advertisement make me want to experience what is pictured (either by performing an activity or purchasing the product)					
15	Based on the advertisement's content, I would consider looking for this product/brand when making my next purchase					
16	If a product in a store contained this brand/product I would consider <b>seeking additional information</b>					
17	If a product in a store contained this brand/product I would consider <b>purchasing the item</b>					
18	If a product contained this brand/product I would consider paying more for that product than a product containing generic products (ex. a branded fiber vs. polyester)					

<b>Part 1- Advertisement C Questions (3/3)</b>						
<b>Questions</b>		<b>Strongly Agree</b>	<b>Agree</b>	<b>Neither Agree or Disagree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>
1	I have seen advertisements for this product in the past					
2	I understand what product is being promoted					
3	The information in the advertisement is useful					
4	I identify with the products or activities presented					
5	The advertisement communicates enough <b>product performance</b> information to interest me in the product					
6	The advertisement communicates enough product <b>benefit information</b> to interest me in the product					
7	The advertisement is memorable or unique					
8	The advertisement makes me curious about the <b>product</b> in the ad					
9	The advertisement makes me curious about the <b>company</b> in the ad					
10	The advertisement appeals to me on a personal level					
11	Based on the advertisement's content, the product seems to be high quality					
12	Based on the advertisement's content, the company appears to be creditable and reputable company					
13	The images used in the advertisement relate well to the text information					
14	The images used in the advertisement make me want to experience what is pictured (either by performing an activity or purchasing the product)					
15	Based on the advertisement's content, I would consider looking for this product/brand when making my next purchase					
16	If a product in a store contained this brand/product I would consider <b>seeking additional information</b>					
17	If a product in a store contained this brand/product I would consider <b>purchasing the item</b>					
18	If a product contained this brand/product I would consider paying more for that product than a product containing generic products (ex. a branded fiber vs. polyester)					

<b>Part 2- Multi-Advertisement Questions (1/1)</b>				
<b>Questions</b>		<b>Advertisement</b>		
		<b>A</b>	<b>B</b>	<b>C</b>
1	Which advertisement is <b>most visually interesting</b> ?			
2	Which advertisement provides the <b>most complete information</b> ?			
3	Which advertisement is <b>most memorable or unique</b> ?			
4	Which advertisement has the <b>best layout</b> ? (i.e. text vs. image balance, colors, images etc.)			
5	Based on the advertisement alone, and not if you are personally interested in the product, which products would you <b>seek additional information</b> ? (mark all that apply)			
6	Based on the advertisement alone, and not if you are personally interested in the product, which products would consider <b>purchasing</b> ? (mark all that apply)			

<b>Part 3- General Questions (1/3)</b>						
<b>Questions</b>		<b>Strongly Agree</b>	<b>Agree</b>	<b>Neither Agree or Disagree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>
1	I typically look for branded fibers, yarns, and fabrics when purchasing performance based products (ex. Gore-Tex®, Lycra, etc.)					
2	I prefer purchasing products containing branded fibers, yarns, and fabrics (ex. Gore-Tex®, Lycra, etc.)					
3	It is likely that I will seek additional product/company information based on an advertisement					
4	When I am looking for additional product information or what products contain the branded textile component, I look for <b>print advertisements</b>					
5	When I am looking for additional product information or what product contain the branded textile component, I look for <b>television advertisements</b>					
6	When I am looking for additional product information or what product contain the branded textile component, I look for <b>company maintained websites</b>					
7	When I am looking for additional product information or what products contain the branded textile component, I look for <b>third party websites</b>					
8	When I am looking for additional product information or what products contain the branded textile component, I look for <b>newspaper and magazine articles and reviews</b>					
9	When I am looking for additional product information or what products contain the branded textile component, I look for <b>in-store advertisements</b>					

10	When I am looking for additional product information or what products contain the branded textile component, I look for <b>store sales personnel</b>					
11	When I am looking for additional product information or what products contain the branded textile component, I look for <b>on-product hangtags and labels</b>					
12	When I am looking for additional product information or what products contain the branded textile component, I look for <b>information on the product's packaging</b>					
13	When I seek additional information, I am typically looking for more product information before purchasing					
14	When I seek additional information, I am typically looking for more company information before purchasing					
15	Product comparisons provides product/company credibility					
16	Showing how the product can solve a real-life problem provides product/company credibility					
17	Celebrity spokes persons or national icons provide product/company credibility					
18	Technical information and graphics provide product/company credibility					

**APPENDIX D: IRB SUBMISSION FORM**





**North Carolina State University  
Institutional Review Board for the Use of Human Subjects in Research  
GUIDELINES FOR A PROPOSAL NARRATIVE**

**In your narrative, address each of the topics outlined below. Every application for IRB review must contain a proposal narrative, and failure to follow these directions will result in delays in reviewing/processing the protocol.**

**A. INTRODUCTION**

1. Briefly describe in lay language the purpose of the proposed research and why it is important.

*The purpose of this research is to examine upstream textile firms that effectively use advertising to differentiate their products in the market. The overall research question is what factors contribute to an effective advertisement and what are the best techniques to facilitate communication with the customer and final consumer. The study will focus on determining the benefits, potential, and challenges of upstream advertising and the most effective strategies of communication with the customer and the end-use consumer. Another research objective is to develop a frame work that upstream textile firms can use create effective advertising strategies differentiate their products.*

*To accomplish these goals a four-phase methodology will be employed. Phase I is exploratory in nature and identifies companies with successful advertising strategies. Case studies will be used to perform a competitive analysis to develop an understanding of current advertising strategies. Phase II consists of conducting industry interviews in order to gain primary qualitative and quantitative information about the benefits, challenges, and opportunities of upstream advertising. In addition, companies will be asked to provide perspectives as customer related to the effectiveness of current advertising efforts. In Phase III, primary research will be conducted in order to gain insight into the potential of upstream advertising from a downstream perspective. This research will take the form of a quantitative survey administered to selected end-use consumers. Survey data will also used to develop an understanding of the potential of upstream textile advertising focusing on different advertising opportunities including print, television, and the Internet. Finally, Phase IV will use the results of Phases I, II, and III to develop a framework that U.S. textile companies can use to develop an upstream advertising campaign.*

*The results of this research will provide knowledge of the benefits, potential, and challenges of upstream advertising. By understanding these factors, it will assist companies in determining the cost/benefit relationship of advertising and aid in*

*managerial decision making. This research will also help to guide companies in their selection of the best media type to fit their target market. In addition, the research will provide a framework for U.S. textile firms to use when implementing an upstream advertising strategy. Finally, this study will provide a means for U.S. textile firms to create perceived value and differentiation. By understanding the nature of the upstream advertising, U.S. producers will be ideally positioned to gain a competitive advantage through differentiation.*

2. If student research, indicate whether for a course, thesis, dissertation, or independent research.

*Thesis*

## **B. SUBJECT POPULATION**

1. How many subjects will be involved in the research?

*In person and phone interviews :31*

*End consumer surveys: 195*

2. Describe how subjects will be recruited. Please provide the IRB with any recruitment materials that will be used.

*In person and phone interview subjects:*

*Subjects be contacted via letter, e-mail, or phone depending on available contact information. Contact letter is attached.*

*End consumer surveys:*

*Subjects will be recruited through email solicitation. Contact letter is attached.*

3. List specific eligibility requirements for subjects (or describe screening procedures), including those criteria that would exclude otherwise acceptable subjects.

*Company interview selection criteria:*

- *North Carolina textile firms listed in the North Carolina Textile Connect website, or found to have high product or company visibility as found through product scans or consumer media scans.*
- *Listed as a fiber, yarn, or fabric manufacturer or supporting agency on the North Carolina Textile Connect value chain or listed as a an advertising agency that works with fiber, yarn, or fabric manufacturers*
- *For manufacturers, identified as serving the sports and leisure markets with branded textile components*
- *Advertises to consumers, trade or both market segments*
- *Interview subjects from those companies should work in the advertising or marketing fields, or be involved in the adverting planning*

*Consumer survey selection criteria*

- *NC State students enrolled in the consumer behavior (TAM 385) or introduction to product evolution (T 102) classes in the spring 2009 semester at NC State University.*
- *Must be 18 years of age.*

4. Explain any sampling procedure that might exclude specific populations.

*Company interviews:*

*The initial population considered for the study included all North Carolina textile firms listed in the North Carolina Textile Connect website, this included approximately 2,300 companies. Based on the study's definition of an upstream firm, the population was reduced to 413 companies that were listed as fiber, yarn, and fabric manufactures and supporting agencies across market segmentations on the North Carolina Textile Connect value chain. All twelve sectors of performance were included in this initial population.*

*From these 413 upstream firms competing across segments, companies identified as serving the sports and leisure markets were selected. This was completed by viewing company websites, trade magazines, and information provided by North Carolina Textile Connect. Based on the definition of sports and leisure and product offerings, 36 companies were identified as participating in the sports and leisure market. From these 36 companies servicing the sports and leisure segment, companies that used branding as a differentiation method were identified Companies were considered to participate if they either supplied the market segment with their own privately held brands such as Sunbrella® from Glen Raven, or by using other ingredient brands such as US Supima*

*Outlast® by Buhler Quality Yarns (Supima® and Outlast® are third party ingredient brands). Of the 36 companies, 30 firms used branding to compete in the sports and leisure segment.*

*Mini case studies were performed on the 30 identified firms. For each company, products and markets of interest were identified as well as specific brands used to compete in the sports and leisure segment. Companies were also evaluated on their participation in consumer and/or industry level advertising. Companies that were identified as advertising in either of these two markets were considered for interviews. A consumer and trade magazine scan was used to identify companies advertising to these segments. Print advertisements were examined in publications held in the Burlington Textile Library at North Carolina State University and Borders bookstore located in Cary, NC. Trade magazines spanned all segments of the supply chain including, chemical, fiber, yarn, fabric, apparel and fashion publications. Consumer publications included sports and leisure magazines in the areas of home décor, hunting and fishing, marine boating, and sports and fitness. Of the 30 identified companies, 19 companies were selected for interviews.*

*In addition to the North Carolina companies identified in the scan, five additional companies were included in the interview sample. From researching trade magazines, Buhler Quality Yarns Corp was identified as a major upstream advertiser with print advertisements in many prominent industry magazines. Buhler also promotes their yarns with product level hangtags and participates in various trade shows around the world. In addition, Lycra and CORDURA, both Invista brands, were selected due to their prominence in industry and consumer advertising. Lycra is a strong global brand that promotes its products across target audiences through print, product level, and internationally sponsored events. CORDURA, another prominent brand, was identified in consumer magazines, on products, and sponsored events across the country. W.L. Gore with its Gore-Tex brand was identified as a key advertising player as it was the most heavily advertised product in the product scan. W.L. Gore places hangtags on nearly all consumer level products that use their fabrics, as well as sponsoring many outdoor sporting events and awards. Finally, to gain perspectives from a purely advertising point of view, Bosch and Co. and French West Vaughn were selected. These companies have researched and created advertising campaigns for companies such as Burlington Worldwide and Coco Cola.*

*Consumer survey:*

*Student populations were identified based on the faculty's openness to participate in the study. Faculty and student populations were selected based upon the course content and relative knowledge of advertising and products. Students enrolled in TAM 385 or T 102*

*during the spring 2009 semester at NC State University were selected based upon their knowledge of advertising tactics as well as familiarity with textiles in general. In order to participate in the survey, student must be enrolled in either of the two classes and be at least 18 years of age. Students will not be allowed to take the survey more than once.*

5. Disclose any relationship between researcher and subjects - such as, teacher/student; employer/employee.

*None*

6. Check any vulnerable populations included in study:

- minors (under age 18) - if so, have you included a line on the consent form for the parent/guardian signature
- fetuses
- pregnant women
- persons with mental, psychiatric or emotional disabilities
- persons with physical disabilities
- economically or educationally disadvantaged
- prisoners
- elderly
- students from a class taught by principal investigator
- other vulnerable population.

7. If any of the above are used, state the necessity for doing so. Please indicate the approximate age range of the minors to be involved.

### **C. PROCEDURES TO BE FOLLOWED**

1. In lay language, describe completely all procedures to be followed during the course of the experimentation. Provide sufficient detail so that the Committee is able to assess potential risks to human subjects. In order for the IRB to completely understand the experience of the subjects in your project, please provide a

detailed outline of everything subjects will experience as a result of participating in your project. Please be specific and include information on all aspects of the research, through subject recruitment and ending when the subject's role in the project is complete. All descriptions should include the informed consent process, interactions between the subjects and the researcher, and any tasks, tests, etc. that involve subjects. If the project involves more than one group of subjects (e.g. teachers and students, employees and supervisors), please make sure to provide descriptions for each subject group.

*Company interviews:*

- 1. The 31 selected companies will first receive a notice email explaining the nature of the project and requesting their optional participation. See attached email sample. The email will also contain a list of questions to be answered during the interview.*
- 2. If the company confirms their participation they will receive another email confirmation with a listing of available times in which to interview. Companies will then select the time and return the email. If a time cannot be reached, then phone interviews will be arranged. If the company declines, a thank you letter will be sent.*
- 3. In person interviews will be conducted either at the company location or at the College of Textiles depending on convenience. At that time the consent form will be signed and dated. For phone interviews, an electronic copy of the consent form will be sent for their review and a signed copy will then be mailed back prior to the interview.*
- 4. Interviewees will be asked a series of questions related to advertising and marketing (see attached questionnaire).*
- 5. Once the interview is complete, the secession will end and a thank you letter will be sent.*
- 6. No additional contact with the interviewee is required.*

*Consumer survey:*

- 1. Faculty teaching the TAM 385 and T 102 class will be contacted via email asking for their participation in the survey. The letter will request that the faculty allow the researcher to administer a survey to their class during the lecture.*
- 2. A copy of the consent form will be presented to each student prior to each survey.*
- 3. Once completed, survey will begin. During the survey, three advertisements will be presented to the students with the company and product names blocked out. The participants will then fill out the survey based on their opinions about the ads. In the next section of the survey, students will be asked to compare the same three ads and make comparisons. Finally, the last section asks the participants to relate their media and information gathering preference. Once they complete this section the survey is over.*
- 4. Once the participants have finished with the survey no additional contact is required.*

2. How much time will be required of each subject?

*Survey: 15-20 minutes*

*Interview: 1 hour to 1:30 , depending on answer detail*

**D. POTENTIAL RISKS**

1. State the potential risks (physical, psychological, financial, social, legal or other) connected with the proposed procedures and explain the steps taken to minimize these risks.

*Possible legal risks exist due to subjects disclosing confidential information. However, respondents will be asked not to divulge any information they are uncomfortable sharing. In addition, the sample population will be masked and any information that could identify subjects (or companies) will be removed.*

2. Will there be a request for information that subjects might consider to be personal or sensitive (e.g. private behavior, economic status, sexual issues, religious beliefs, or other matters that if made public might impair their self-esteem or reputation or could reasonably place the subjects at risk of criminal or civil liability)?

*No*

- a. If yes, please describe and explain the steps taken to minimize these risks.

- b. Could any of the study procedures produce stress or anxiety, or be considered offensive, threatening, or degrading? If yes, please describe why they are important and what arrangements have been made for handling an emotional reaction from the subject.

*No*

3. How will data be recorded and stored?

*Survey responses will be taken in hard copy format and then transcribed into excel.*

*Interview responses will be recorded via paper and pencil, as well as a tape recorded.*

*Papers and recording devices will be kept in a locked filing cabinet at the research's residence. When project is complete, all materials will be destroyed.*

- a. How will identifiers be used in study notes and other materials?

*Survey results will be stored with survey number, only to track the response rate for the survey. Any information linking survey numbers with consumers or company respondents will be destroyed after Phase III data collection (survey) is complete. Interview results will be alphabetically coded to mask company identifiers. Any information linking code letter and company names will be destroyed upon completion of the study. The only identifiers of interview results will be the level of the respondent in the company and the years of experience in the company and the industry.*

- b. How will reports will be written, in aggregate terms, or will individual responses be described?

*Results will be reported in aggregate and generic terms. In the case that an individual response is noted, reference will be made to the alphanumeric company code (i.e., "Company A has used this tactic successfully").*

4. If audio or videotaping is done how will the tapes be stored and how/when will the tapes be destroyed at the conclusion of the study.

*The recording device used will be kept at my personal residence in a locked drawer. Digital audio files will be kept in a folder on my password protected PC at my personal residence. Once the interviews are completed and transcribed, the audio files will be permanently deleted from the device as well as the computer.*

5. Is there any deception of the human subjects involved in this study? If yes, please describe why it is necessary and describe the debriefing procedures that have been arranged.

*No*

**E. POTENTIAL BENEFITS**

*This does not include any form of compensation for participation.*

1. What, if any, direct benefit is to be gained by the subject? If no direct benefit is expected, but indirect benefit may be expected (knowledge may be gained that could help others), please explain.

*Indirect benefits include understanding the market potential and effectiveness of current advertising campaigns in various segments of the supply chain. This includes perspectives from end consumers and, customers. This research will also help in determining what aspects of different advertising media these groups find appealing and encourages them to seek additional product or company information. Industry interviews will help determine what are the benefits, challenges, opportunities and potential of upstream advertising, as well as giving insights into their strategic planning methodology. These insights will help other companies be more effective in their advertising efforts and help the textile industry as a whole.*

**F. COMPENSATION**

1. Explain compensation provisions if the subject withdraws prior to completion of the study.

*None*

2. If class credit will be given, list the amount and alternative ways to earn the same amount of credit.

*None*

**G COLLABORATORS**

1. If you anticipate that additional investigators (other than those named on **Cover Page**) may be involved in this research, list them here indicating their institution, department and phone number.

*None*

2. Will anyone besides the PI or the research team have access to the data (including completed surveys) from the moment they are collected until they are destroyed.

*No*

#### **H. CONFLICT OF INTEREST**

1. Do you have a significant financial interest or other conflict of interest in the sponsor of this project? *No*

2. Does your current conflicts of interest management plan include this relationship and is it being properly followed? *No*

#### **I. ADDITIONAL INFORMATION**

1. If a questionnaire, survey or interview instrument is to be used, attach a copy to this proposal.
2. Attach a copy of the informed consent form to this proposal.
3. Please provide any additional materials that may aid the IRB in making its decision.

#### **J. HUMAN SUBJECT ETHICS TRAINING**

\*Please consider taking the [Collaborative Institutional Training Initiative](#) (CITI), a free, comprehensive ethics training program for researchers conducting research with human subjects. Just click on the underlined link.

#### Attachments:

1. Interview initial contact letter
2. Consumer survey initial contact letter
3. Informed consent forms for interviews (one for face-to-face interviews and one for phone interviews)
4. Informed consent forms for consumer surveys
5. Interview instrument
6. Consumer survey
7. Images associated with consumer survey

**APPENDIX E: IRB CONSENT FORMS**

**North Carolina State University**  
**INFORMED CONSENT FORM for RESEARCH**  
**(For face-to-face interviews)**

Analysis of the Market Potential and Effectiveness of Upstream Textile Advertising

Principal Investigator: Charles Ian Raulston  
William Oxenham

Faculty Sponsor: Nancy Cassill,

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**What are some general things you should know about research studies?**

You are being asked to take part in a research study. Your participation in this study is voluntary. You have the right to choose to take part in the study, or not take part in the study, or to stop participating at any time. The purpose of research studies is to gain a better understanding of a certain topic or issue. You are not guaranteed any personal benefits from being in a study. Participation in the research study may pose risks. In this consent form, you will find specific details about the research in which you are being asked to participate. If you are unclear about any area of this form, it is your right to ask the researcher for clarification or more information. A copy of this consent form will be provided to you. If at any time you have questions about your participation, do not hesitate to contact the researcher(s) named above.

**What is the purpose of this study?**

The purpose of this research is to examine upstream textile firms that effectively use advertising to differentiate their products in the market. The overall research questions are what factors contribute to an effective advertisement and what are the best techniques to facilitate communication with the customer and final consumer? The study will focus on determining the benefits, potential, and challenges of upstream advertising and the most effective strategies of communication with the customer and the end-use consumer. Another research objective is to develop a framework that upstream textile firms can use create effective advertising strategies differentiate their products.

**What will happen if you take part in the study?**

If you agree to participate in this study, you will be asked to interview with the researcher. This interview should take one hour to 1:30, depending on the length of your responses and the intensity of discussion.

**Risks**

Possible legal risks exist due to disclosure of confidential information; however, subject and company names will be coded. These code numbers will be stored with the data, and the master list of names and codes will be kept in a separate location. Information that could identify subjects will be removed in the reporting of information. Please do not divulge any information that you are uncomfortable sharing.

**Benefits**

The benefit of this research is that it will provide a model for upstream textile manufactures to use in developing successful advertising campaigns. This model could be used as a way for these companies to differentiate their products in the market.

**Confidentiality**

The information in the study records will be kept strictly confidential. Data will be stored securely in on the researcher’s personal computer, which are password protected and firewalled, and under lock and key. Code numbers will be created for your name and company name; these code numbers will be the only identifiers stored with the data. The master list linking codes to subject and company names will be kept in a separate location than the data in order to minimize the potential of linking the data to you and your company. Any identifying information, such as product brand names, company names and you name will be removed when reporting the data. No reference will be made in oral or written reports, which could link you to the study.

**Compensation**

There is no compensation for participating in the study.

**What if you have questions about this study?**

If you have questions at any time about the study or the procedures, you may contact the researcher, Charles Ian Raulston, at 2401 Research Drive, Box 8301, Raleigh, NC 27695, ciraulst@ncsu.edu, or 336-803-0125.

**What if you have questions about your rights as a research participant?**

If you feel you have not been treated according to the descriptions in this form, or your rights as a participant in research have been violated during the course of this project, you may contact Dr. Arnold Bell, Chair of the NCSU IRB for the Use of Human Subjects in Research Committee, Box 7514, NCSU Campus (919/515-4420) or Mr. Matthew Ronning, Assistant Vice Chancellor, Research Administration, Box 7514, NCSU Campus (919/513-2148).

**Consent To Participate**

*“I have read and understand the above information. I have received a copy of this form. I agree to participate in this study with the understanding that I may withdraw at any time.”*

**Subject's signature**\_\_\_\_\_

**Date** \_\_\_\_\_

**Investigator's signature**\_\_\_\_\_

**Date** \_\_\_\_\_

**North Carolina State University**  
**INFORMED CONSENT FORM for RESEARCH**  
**(For phone interviews)**

Analysis of the Market Potential and Effectiveness of Upstream Textile Advertising

Principal Investigator: Charles Ian Raulston  
William Oxenham

Faculty Sponsor: Nancy Cassill,

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**What are some general things you should know about research studies?**

You are being asked to take part in a research study. Your participation in this study is voluntary. You have the right to choose to take part in the study, or not take part in the study, or to stop participating at any time. The purpose of research studies is to gain a better understanding of a certain topic or issue. You are not guaranteed any personal benefits from being in a study. Participation in the research study may pose risks. In this consent form, you will find specific details about the research in which you are being asked to participate. If you are unclear about any area of this form, it is your right to ask the researcher for clarification or more information. A copy of this consent form will be provided to you. If at any time you have questions about your participation, do not hesitate to contact the researcher(s) named above.

**What is the purpose of this study?**

The purpose of this research is to examine upstream textile firms that effectively use advertising to differentiate their products in the market. The overall research questions are what factors contribute to an effective advertisement and what are the best techniques to facilitate communication with the customer and final consumer? The study will focus on determining the benefits, potential, and challenges of upstream advertising and the most effective strategies of communication with the customer and the end-use consumer. Another research objective is to develop a framework that upstream textile firms can use create effective advertising strategies differentiate their products.

**What will happen if you take part in the study?**

If you agree to participate in this study, you will be asked to interview with the researcher. This interview should take one hour to 1:30, depending on the length of your responses and the intensity of discussion.

**Risks**

Possible legal risks exist due to disclosure of confidential information; however, subject and company names will be coded. These code numbers will be stored with the data, and the master list of names and codes will be kept in a separate location. Information that could identify subjects will be removed in the reporting of information. Please do not divulge any information that you are uncomfortable sharing.

**Benefits**

The benefit of this research is that it will provide a model for upstream textile manufactures to use in developing successful advertising campaigns. This model could be used as a way for these companies to differentiate their products in the market.

**Confidentiality**

The information in the study records will be kept strictly confidential. Data will be stored securely in on the researcher’s personal computer, which are password protected and firewalled, and under lock and key. Code numbers will be created for your name and company name; these code numbers will be the only identifiers stored with the data. The master list linking codes to subject and company names will be kept in a separate location than the data in order to minimize the potential of linking the data to you and your company. Any identifying information, such as product brand names, company names and you name will be removed when reporting the data. No reference will be made in oral or written reports, which could link you to the study.

**Compensation**

There is no compensation for participating in the study.

**What if you have questions about this study?**

If you have questions at any time about the study or the procedures, you may contact the researcher, Charles Ian Raulston, at 2401 Research Drive, Box 8301, Raleigh, NC 27695, ciraulst@ncsu.edu, or 336-803-0125.

**What if you have questions about your rights as a research participant?**

If you feel you have not been treated according to the descriptions in this form, or your rights as a participant in research have been violated during the course of this project, you may contact Dr. Arnold Bell, Chair of the NCSU IRB for the Use of Human Subjects in Research Committee, Box 7514, NCSU Campus (919/515-4420) or Mr. Matthew Ronning, Assistant Vice Chancellor, Research Administration, Box 7514, NCSU Campus (919/513-2148).

**Consent To Participate**

*“I have read and understand the above information. I have received a copy of this form. I agree to participate in this study with the understanding that I may withdraw at any time.”*

**Subject's signature**\_\_\_\_\_

**Date** \_\_\_\_\_

**Investigator's signature**\_\_\_\_\_

**Date** \_\_\_\_\_

**North Carolina State University**  
**INFORMED CONSENT FORM for RESEARCH**  
**(For consumer surveys)**

Analysis of the Market Potential and Effectiveness of Upstream Textile Advertising

Principal Investigator: Charles Ian Raulston  
William Oxenham

Faculty Sponsor: Nancy Cassill,

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**What are some general things you should know about research studies?**

You are being asked to take part in a research study. Your participation in this study is voluntary. You have the right to choose to take part in the study, or not take part in the study, or to stop participating at any time. The purpose of research studies is to gain a better understanding of a certain topic or issue. You are not guaranteed any personal benefits from being in a study. Participation in the research study may pose risks. In this consent form, you will find specific details about the research in which you are being asked to participate. If you are unclear about any area of this form, it is your right to ask the researcher for clarification or more information. A copy of this consent form will be provided to you. If at any time you have questions about your participation, do not hesitate to contact the researcher(s) named above.

**What is the purpose of this study?**

The purpose of this research is to examine upstream textile firms that effectively use advertising to differentiate their products in the market. The overall research questions are what factors contribute to an effective advertisement and what are the best techniques to facilitate communication with the customer and final consumer? The study will focus on determining the effectiveness of current upstream advertisements in the market, as well as determining what communication media types are most effective at influencing product or company interest. This information will be used to develop a framework that upstream textile firms can use create effective advertising strategies differentiate their products.

**What will happen if you take part in the study?**

If you agree to participate in this study, you will be asked to complete an online survey. This survey should take between 10 and 20 minutes.

**Risks**

There are no risks to you or your privacy by participating in the survey. You are not required to divulge any information that you do not feel comfortable revealing.

**Benefits**

The benefit of this research is that it will help develop a model for upstream textile manufactures to use in developing successful advertising campaigns. This model could be used as a way for these companies to differentiate their products in the market.

**Confidentiality**

The information in the study records will be kept strictly confidential. Data will be stored securely in on the researcher’s personal computer, which are password protected and firewalled, and under lock and key. Other than a number assigned to each survey for response rate tracking, no identifiers will be used to link your specific answers to any survey. No reference will be made in oral or written reports, which could link you to the study.

**Compensation**

There is no compensation for participating in the study.

**What if you have questions about this study?**

If you have questions at any time about the study or the procedures, you may contact the researcher, Charles Ian Raulston, at 2401 Research Drive, Box 8301, Raleigh, NC 27695, ciraulst@ncsu.edu, or 336-803-0125.

**What if you have questions about your rights as a research participant?**

If you feel you have not been treated according to the descriptions in this form, or your rights as a participant in research have been violated during the course of this project, you may contact Dr. Arnold Bell, Chair of the NCSU IRB for the Use of Human Subjects in Research Committee, Box 7514, NCSU Campus (919/515-4420) or Mr. Matthew Ronning, Assistant Vice Chancellor, Research Administration, Box 7514, NCSU Campus (919/513-2148).

**Consent To Participate**

*“I have read and understand the above information. I have received a copy of this form. I agree to participate in this study with the understanding that I may withdraw at any time. I am at least 18 years of age.”*

**Subject's signature** \_\_\_\_\_

**Date** \_\_\_\_\_

**Investigator's signature** \_\_\_\_\_

**Date** \_\_\_\_\_

## **APPENDIX F: INITIAL CONTACT LETTERS**

## **Interview Initial Contact Email**

Date

Contact Name

Salutation if no specific contact name

I received your contact information through (insert source) and I am contacting you regarding my graduate research study. Through my initial research, your company has demonstrated leadership and success in advertising to both end consumers as well as companies in your supply chain. My study focuses on how advertising can be used as a differentiation method for upstream textile firms (those providing fibers, yarns, and fabrics to downstream entities), including the benefits, potential, and challenges of implementing an effective advertising strategy as well as perspectives on current advertising practices. I would like to extend an invitation to your company to participate in this study in an effort to improve the overall performance of the US textile supply chain. Your participation is voluntary. I feel that your company will serve as a strong example of the possibilities and potential of upstream advertising. If your company does choose to participate, your confidentiality will be secured and your company name will not be mentioned in any published or presented materials.

I will be conducting interviews in your area on the week of \_\_\_\_\_. I would like to set up a time to meet with members of your advertising, marketing, promotional department, or outsourced advertising firm during this week if possible. If an on-sight visit is not possible during that week, I would like to schedule a conference call when convenient. The questionnaire that will be administered during the meeting is attached for your review. I will be following up with you via phone or email in the new few days. Please let me know if you will be available to participate during that week or if there is another individual that I should contact.

Sincerely,

Ian Raulston  
Graduate Student  
NCSU/ITT  
[ciraulst@ncsu.edu](mailto:ciraulst@ncsu.edu)

Under the guidance of:  
Nancy L. Cassill, Ph.D.  
Department Head  
Professor –NCSU  
[Nancy\\_Cassill@ncsu.edu](mailto:Nancy_Cassill@ncsu.edu)

William Oxenham, Ph.D  
Associate Dean  
Professor- NCSU  
[William\\_Oxenham@ncsu.edu](mailto:William_Oxenham@ncsu.edu)

W. Gilbert O'Neil, Ph.D  
President ITT  
P.E.  
[wgoneal@itt.edu](mailto:wgoneal@itt.edu)

Erin Parrish Ph.D  
Associate Professor- ECU  
President – ITT  
[parrisher@ecu.edu](mailto:parrisher@ecu.edu)

## Consumer Survey Initial Contact Email

Date

Contact name,

I am Ian Raulston a NC State graduate student at the College of Textiles and I am interested in working with you and your (insert course name) class to aid me in my thesis research. My thesis focuses on analyzing the effectiveness and potential of upstream textile advertising. Part of my research objectives are to gather insights from consumer groups about what they consider effective advertisements as well as what specific elements of those ads are most appealing. I would like to come into your classroom in mid to late February and present some images and a questionnaire to your students and gather their feedback. It should take less than 30 minutes total and we can schedule the survey at your convenience. If you have any questions about the survey or study please email me at the address below.

Thank you for your consideration,

Ian Raulston  
Graduate Student  
NCSU/ITT  
[ciraulst@ncsu.edu](mailto:ciraulst@ncsu.edu)

Under the guidance of:  
Nancy L. Cassill, Ph.D.  
Department Head  
Professor –NCSU  
[Nancy\\_Cassill@ncsu.edu](mailto:Nancy_Cassill@ncsu.edu)

William Oxenham, Ph.D  
Associate Dean  
Professor- NCSU  
[William\\_Oxenham@ncsu.edu](mailto:William_Oxenham@ncsu.edu)

W. Gilbert O'Neil, Ph.D  
President ITT  
P.E.  
[wgoneal@itt.edu](mailto:wgoneal@itt.edu)

Erin Parrish Ph.D  
Associate Professor- ECU  
President – ITT  
[parrisher@ecu.edu](mailto:parrisher@ecu.edu)

**APPENDIX G: IRB EXEMPTION LETTER**

**NC STATE UNIVERSITY**

Campus Box 7514  
Raleigh, North Carolina 27695-7514

919.515.2444 (phone)  
919.515.7721 (fax)

From: Joseph Rabiega, IRB Coordinator  
North Carolina State University  
Institutional Review Board

Date: February 4, 2009

Project Title: Analysis of the Market Potential and Effectiveness of Upstream Textile Advertising

IRB#: 65-09-01

Dear Ian:

The research proposal named above has received administrative review and has been approved as exempt from the policy as outlined in the Code of Federal Regulations (Exemption: 46.101.b.2). Provided that the only participation of the subjects is as described in the proposal narrative, this project is exempt from further review.

NOTE:

1. This committee complies with requirements found in Title 45 part 46 of The Code of Federal Regulations. For NCSU projects, the Assurance Number is: FWA00003429.
2. Any changes to the research must be submitted and approved by the IRB prior to implementation.
3. If any unanticipated problems occur, they must be reported to the IRB office within 5 business days.

Please provide a copy of this letter to your faculty sponsor.

Sincerely,

Joseph Rabiega  
NCSU IRB

## **APPENDIX H: PRODUCT SCAN RESULTS**

## National Specialty Chain- REI

National Specialty Chain- REI									
Product	Host Brand	Product Type	Ad Type	Ad Location	Textile Ingredient Brand	Upstream Firm	Size of Ad Compared to Host Brand's Ad	Price Point	Additional Comments
1	Bellwether	Jacket	Hang tag	Attached	3M Scotch Light Reflective	3M	same	\$99.00	Ingredient attributes
			Hang tag	Attached	Tecore LX	Tahsin Industrial Corp	larger		Ingredient attributes and contact information
2	REI	Jacket	Hang tag	Attached	Polartec Thermal Pro	Polartec	larger	\$75.00	Ingredient attributes
3	Patagonia	Baselayer shirt	Sticker	Attached	Insect Shield	ExOfficio	smaller	\$80.00	Ingredient attributes
			Hang tag	Attached	Insect Shield	ExOfficio	same		
4	Mountain Hardware	Baselayer shirt	Hang tag	Attached	Visa Endurance Smart Fabric	Milliken	same	\$45.00	Ingredient attributes
5	REI	Jacket	Hang tag	Attached	PrimaLoft	Albany International Corp	same	\$199.00	Ingredient attributes
6	Arc' Teryx	Bottoms	Hang tag	Attached	Polartec	Polartec	larger	\$175.00	Ingredient attributes
7	The North Face	Jacket	Hang tag	Attached	Polartec	Polartec	same	\$155.00	Ingredient attributes
8	REI	Sleeping bag	Hang tag	Attached	Thermolite	ADVANSA	larger	\$59.00	Ingredient attributes
			Hang tag	Attached	Tactel	Invista	larger		Ingredient attributes
9	Merrill	Hiking shoe	Hang tag	Attached	Gore-Tex	W.L. Gore	same	\$79.99	Ingredient attributes
10	Black Diamond	Gloves	Hang tag	Attached	Gore-Tex	W.L. Gore	larger	\$56.00	Ingredient attributes
11	Swany	Gloves	Hang tag	Attached	PrimaLoft	Albany International Corp	same	\$70.00	Ingredient attributes
			Hang tag	Attached	Comfortmax Radiant	Du Ponte	same		Ingredient attributes
			Hang tag	Attached	Typora Insert	iKOLON	same		Ingredient attributes
12	Manzella	Gloves	Hang tag	Attached	PrimaLoft	Albany International Corp	same	\$50.00	Ingredient attributes
			Hang tag	Attached	Wind Stopper	W.L. Gore	same		Ingredient attributes
13	Burton	Gloves	Hang tag	Attached	Gore-Tex	W.L. Gore	same	\$54.00	Ingredient attributes
14	Outdoor Research	Gloves	Hang tag	Attached	Gore-Tex	W.L. Gore	same	\$79.99	Ingredient attributes
15	Seirus	Gloves	Hang tag	Attached	Thinsulate	3M	same	\$32.00	Ingredient attributes
16	REI	Cap	Hang tag	Attached	PrimaLoft	Albany International Corp	same	\$39.50	Ingredient attributes
			Hang tag	Attached	eVent Fabric	eVent	larger		Ingredient attributes
17	Kokatet	Weightier	Hang tag	Attached	Neoprene	Du Ponte	same	\$129.00	Ingredient attributes

## National Specialty Chain- Dick's Sporting Goods

National Specialty Chain- Dick's Sporting Goods									
Product	Host Brand	Product Type	Ad Type	Ad Location	Textile Ingredient Brand	Upstream Firm	Size of Ad Compared to Host Brand's Ad	Price Point	Additional Comments
1	The North Face	Cap	Hang tag	Attached	Lycra	Invista	same	\$20.00	Ingredient attributes
2	The North Face	Jacket	Hang tag	Attached	Polartec	Polartec	same	\$165.00	Ingredient attributes
3	The North Face	Gloves	Hang tag	Attached	Polartec Power Stretch	Polartec	larger	\$30.00	Ingredient attributes
			Sew in label	On product	Polartec	Polartec	N/A		
4	Field and stream	Jacket	Hang tag	Attached	Hydroproof Ultra	W.L. Gore	small	\$59.99	Ingredient attributes
5	Field and stream	Sleeping bag	Logo	On package	Thermolite	ADVANSA	N/A	\$39.99	Ingredient attributes
6	Wigwam	Sock	Logo	On package	Cotton	Cotton, Inc.	N/A	\$12.00	
7	Wigwam	Sock	Logo	On package	Coolmax	ADVANSA	N/A	\$12.00	Ingredient attributes
8	Merrill	Hiking shoe	Hang tag	Attached	Gore-Tex	W.L. Gore	N/A	\$89.99	Ingredient attributes
9	Wolverine	Hiking boot	Sticker	On package	Thinsulate	3M	N/A	\$159.99	Ingredient attributes
10	Field and Stream	Hunting boot	Sticker	On package	Gore-Tex	W.L. Gore	N/A	\$89.00	Ingredient attributes
			Sew in label	On product	Thinsulate ultra	3M	N/A		Ingredient attributes
11	Field and Stream	Hunting boot	Sew in label	On product	Gore-Tex	W.L. Gore	N/A	\$70.00	Ingredient attributes
			Sew in label	On product	Thinsulate	3M	N/A		Ingredient attributes
12	Timberland	Hiking boot	Metal plate	On product	Gore-Tex	W.L. Gore	N/A	\$90.00	Ingredient attributes
13	Wolverine	Hunting boot	Metal plate	On product	Gore-Tex	W.L. Gore	N/A	\$199.00	Ingredient attributes
			Sew in label	On product	Thinsulate	3M	N/A		Ingredient attributes

## Mass/Big Box Retailer- Target

Mass Big Box Retailer- Target									
Product	Host Brand	Product Type	Ad Type	Ad Location	Textile Ingredient Brand	Upstream Firm	Size of Ad Compared to Host Brand's Ad	Price Point	Additional Comments
N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	

## Mass/Big Box Retailer- Wal-Mart

Mass Big Box Retailer- Wal-Mart									
Product	Host Brand	Product Type	Ad Type	Ad Location	Textile Ingredient Brand	Upstream Firm	Size of Ad Compared to Host Brand's Ad	Price Point	Additional Comments
1	Herman Survivor	Hunting boot	Logo	On package	Thinsulate	3M	N/A	\$53.00	
			Sew in label	On product	Thinsulate	3M	N/A		
			Hang tag	Attached	Thinsulate	3M	larger		Ingredient attributes
2	Herman Survivor	Hunting boot	Logo	On package	SympaTex	SympaTex	N/A	\$83.00	
			Sew in label	On product	SympaTex	SympaTex	N/A		
			Hang tag	Attached	SympaTex	SympaTex	larger		Ingredient attributes
3	Ozark Trail	Boot	Logo	On package	Thinsulate	3M	N/A	\$34.99	
			Sew in label	On product	Thinsulate	3M	N/A		
			Hang tag	Attached	Thinsulate	3M	larger		Ingredient attributes

## Local Specialty Boutique- Great Outdoor Provision Co.

Local Specialty Boutique- Great Outdoor Provision Co.									
Product	Host Brand	Product Type	Ad Type	Ad Location	Textile Ingredient Brand	Upstream Firm	Size of Ad Compared to Host Brand's Ad	Price Point	Additional Comments
1	Lowa	Hiking Boot	Metal plate	On product	Gore-Tex	W.L. Gore	brass pin	\$189.99	
2	Mountain Hardware	Backpack	Hang tag	Attached	Cordura	Invista	smaller	\$90.00	Ingredient attributes
3	OR	Hat	Hang tag	Attached	Gore-Tex	W.L. Gore	same	\$49.50	Ingredient attributes
4	The North Face	Jacket	Hang tag	Attached	Gore-Tex	W.L. Gore	same	\$199.00	Ingredient attributes
5	Mountain Hardware	Jacket	Hang tag	Attached	ReviveX	ReviveX	smaller	\$70.00	Ingredient attributes
6	The North Face	Hiking Shoe	Sew in	On product	Gore-Tex	W.L. Gore	N/A	\$65.00	
7	Mountain Hardware	Jacket	Hang tag	Attached	Gore-Tex	W.L. Gore	smaller	\$65.00	Ingredient attributes

**APPENDIX I: COMPANY INTERVIEW RESULTS: ADVERTISING  
IN THE SPORTS AND LEISURE MARKET**

## Appendix I1: Company A Interview Results-

<b>Topic</b>	<b>Company A's Comments Regarding Advertising in the Sports and Leisure Market</b>
<b>Competitive necessity</b>	<p>Advertising is necessary for product categories that require more market penetration or recognition in order to be competitive against larger, or more well known brands.</p> <p>Advertising necessity should be determined by product segment, some segments make more sense than others.</p> <p>Products close to the end consumer typically receive more advertising dollars. PR plays a large role along with advertising.</p>
<b>Differences in tactics</b>	<p>Sports and leisure products receive more advertising focus because the segment is typically more competitive and yields higher margins.</p> <p>Advertisements for sports and leisure products typically include more product-focused content while commodity product ads are more company focused.</p> <p>Sports and leisure products use print ads, brochures, hangtags and on-product labels, trade shows, face-to-face interactions, websites and direct mailers to communicate while commodity products typically only use direct mailings and face-to-face talks.</p>
<b>Development</b>	<p>Promotions are typically determined by market and tailored to the preference of that market.</p> <p>For products where brand name or product name is important, it is less important to promote the company name, however, when customers are more concerned about the quality or longevity of the company, it is more appropriate to build the company name.</p> <p>The customer must see value in advertising or it is not necessary to advertising that product. Direct mail and face-to-face communications would suffice in those situations.</p>
<b>Successful companies</b>	<p>Gore-Tex</p> <p>Waterproof breathable fabrics</p> <p>Fiber companies seem to promote their products more heavily than other segments</p>

### Appendix I2: Company B Interview Results

Topic	Company B's Comments Regarding Advertising in the Sports and Leisure Market
<b>Competitive necessity</b>	No, we are not trying to build a consumer brand at this time, but if a company is interested in competition, we will provide support through logos and hangtags. We do more business-to-business advertising, but we will help our host brands in any way we can.
<b>Differences in tactics</b>	It depends on what markets you are most interested in. If it is a new market for the company and there is a large opportunity, it may be best to focus advertising in that market and try to dive in for a big impact. Have to establish the company first and then promote individual brands or products. Builds credibility for the company which increases product acceptance. We provide hangtags and signage for host brand companies that ask for it. Mostly for performance and sports markets.
<b>Development</b>	We try to develop ads that show our product performing as good as or better than the branded alternative. This helps to position our products as a low cost alternative and our advertisements that point of parity with the quality and the cost as a point of difference.
<b>Successful companies</b>	From our company's perspective, machinery companies tend to have good advertisements. Exxon Chemical and Eastman Chemical do a good job staying in front of the customer. Apparel is typically over advertised just because the segment is struggling in the U.S. because of overseas competition Polyester fibers do not seem to be advertising as much as other fibers types.

### Appendix I3: Company C Interview Results

Topic	Company C's Comments Regarding Advertising in the Sports and Leisure Market
<b>Differences in tactics</b>	We do not differentiate our advertising for different product.
<b>Development</b>	Our advertising has been through our successful customers. We have seen little success with print or trade magazine advertisements. Where we have gotten feedback is from companies asking how we can use our technology to help their business. We promote our expertise, capabilities, and ability to solve problems and make products better.
<b>Successful companies</b>	Combination of exposure in trade shows and advertising. Cocona is an effective company because not only do their products have hangtags on them but they have an easily identifiable symbol that they have become synonymous with their company.

**Appendix I4: Company D Interview Results**

<b>Topic</b>	<b>Company D's Comments Regarding Advertising in the Sports and Leisure Market</b>
<b>Competitive necessity</b>	No, traditional advertising is not necessary so long as you are presenting your message in a unique way that is meaningful to the customer or consumer. Today, it can be done through PR and relationship development. But 5 years ago then I would say yes advertising is essential
<b>Differences in tactics</b>	Yes and no, we look at the segment and the competition in that market. We specifically target each market segment differently. For most products, we use PR or one on one relationship building. For performance products, we use a variety of media types ranging from hangtags, to PR, to product level websites.
<b>Development</b>	Our main media vehicle is PR, which is either put out by our company or jointly with companies we collaborate with. We also use hangtags on end use products, which are linked to our website. We wanted to create a connection with consumers and we are accomplishing this by educating the consumer, through the hangtags, and adding supplemental information to what our host brands present. We also designed our hangtags to be interactive, where consumers can go online and enter a code to access a special feature about the product. Traditionally, our company has not use print advertising
<b>Successful companies</b>	Polartec Splenda

## Appendix I5: Company E Interview Results

Topic	Company E's Comments Regarding Advertising in the Sports and Leisure Market
<b>Competitive necessity</b>	<p>Right now is the time for advertising to be effective.</p> <p>It's important to be visible when the economy is in a down turn to let customers know you are still there and able to help their business</p>
<b>Differences in tactics</b>	<p>We try to tailor our ads to speak to specific groups by researching and talking with customers and finding out what is important to them, what trends they are following, and what their preferences are.</p> <p>We combine that information with the message we want to present so that we can position ourselves to be as successful as we can be.</p> <p>When putting together the campaign we take into account the differences between the product segments, the copy text and images may be different, but our message is still consistent.</p> <p>Even though it is the same product, it has many uses and we try to tailor our advertisements to the specific end use.</p>
<b>Development</b>	<p>We have evolved from a blanket style advertising approach using a more generic ad to a very iconic, emotional pitch. We have a specific ad image, which is not related to the product specifically, that has become associated with our company and our brands. This image is now tied very close to our company and highly recognized in our industry.</p> <p>We use PR events and event type promotions that promote our company and our message. We may not see direct sales from those events, but it still reminds our customers that we are still a viable and healthy company.</p> <p>To build synergies, we use specific colors and images in our ads that are consistent with our company colors across market segments.</p>
<b>Successful companies</b>	<p>Lycra Linsing BASF Sunbrella</p>

## Appendix I6: Company F Interview Results

<b>Topic</b>	<b>Company F's Comments Regarding Advertising in the Sports and Leisure Market</b>
<b>Competitive necessity</b>	<p>Yes, the outdoor consumer is very aware of brands and they like to be told about the products and feel connected with their brands.</p> <p>We advertise our product in action and build a story behind it. We typically present strong images that the target would respond well to.</p>
<b>Differences in tactics</b>	<p>The general approach is the same, but we adapt our ads to fit the market segments and what they find meaningful.</p> <p>You have to know your target intrinsically in order to be effective.</p>
<b>Development</b>	<p>We try to create awareness for our products by promoting our superior product attributes.</p> <p>We use consistency in our ads as well as promoting our integrity and compliance in our industry ads.</p> <p>We are very careful with what claims we make in our marketing and advertising</p> <p>We try to develop ads that are appealing on the emotional level by tailoring our message in a way that resonate with our target.</p> <p>We want to create an aspirational ad that depicts real people using the product that makes the target want to complete the story for themselves</p>
<b>Successful companies</b>	<p>Intel</p> <p>Lycra</p> <p>Gore-Tex</p> <p>NutraSweet</p>

## Appendix I7: Company G Interview Results

Topic	Company G's Comments Regarding Advertising in the Sports and Leisure Market
<b>Competitive necessity</b>	<p>It seems like in order to be successful in this segment you have to advertise. The really successful companies all make advertising claims about superiority and then deliver. That is what we are trying to do.</p> <p>Our tactics do not change across product categories just because we are not large enough yet.</p> <p>We use direct advertisements in the performance product area since it is still new to that business.</p> <p>We trying to promote out company in general, we use "catch all" print advertisements in strategic publications.</p> <p>But we do not advertise the products that we do not have a direct U.S. supply chain partnership with (i.e. products that we sell to retailers that are later processed in other countries)</p>
<b>Development</b>	<p>Our tactics have evolved as our company has grown and changed. We used to create generic advertisements in trade magazine but everyone knows our company in the industry.</p> <p>We want to promote the quality of our product and the services gained by doing business with our company. Not only are we providing a top quality product that will enhance the quality of the end product, we offer sourcing help.</p> <p>We promote other manufacturers that we work that we know will add value to the product and make it more successful.</p>
<b>Successful companies</b>	<p>Cotton Inc Supima Lansing</p>

### Appendix I8: Company H Interview Results

Company H's Comments Regarding Advertising in the Sports and Leisure Market	
<b>Competitive necessity</b>	Because of our unique position in the market, it is important to advertise in this segment.
<b>Differences in tactics</b>	We use different advertising tactics depending on the product category or end use. For performance products, we try to use people who are active in the trade or consumer segment to promote our products. But we may use different tactics in the home furnishings or apparel segments, it just depends on what the target finds meaningful. As for trade, we put out white papers and mostly printed media and events to promote our products and brands.
<b>Development</b>	Our ads attempt to reach a broad audience using economies of scale. We focused on spreading our message through a variety of media types including, print, online, television, and sponsored events.
<b>Successful companies</b>	Lycra Supima Intel Cotton Inc.

### Appendix I9: Company I Interview Results

Company I's Comments Regarding Advertising in the Sports and Leisure Market	
<b>Competitive necessity</b>	If you have a superior product, and your sales team is effective at promoting and selling the product then it is not as necessary to advertise in this segment. Because we are so customer focused and target them individually, it less important to blanket the market with ads for our company.
<b>Differences in tactics</b>	We promote our performance-based products more heavily than others, especially those that have been engineered to fit certain markets. We try to advertise ourselves as a solutions company.
<b>Development</b>	Our marketing activities are geared toward specific customers. We typically develop a promotional piece for new products, mostly to direct mail to customers. We rely heavily on our customers to promote our products downstream.
<b>Successful companies</b>	W.L. Gore Trivantage In general, Apple is a very effective advertiser because through their products and advertisements they are attempting to build loyalty that will last a lifetime.

### Appendix I10: Company J Interview Results

<b>Company J's Comments Regarding Advertising in the Sports and Leisure Market</b>	
<b>Topic</b>	
<b>Competitive necessity</b>	Yes, in this market segment there are many established brands that retailers, customers, and consumers are already aware of. A new comer to this segment needs to differentiate their products in order to stand out and advertising is a good way to do that. A company can compete by cutting margins and try to come in at a lower price but that is not as effective in the long term. We want to build a value proposition.
<b>Differences in tactics</b>	Our performance brands are the only brands we advertise, we do manufacture some other goods but they are mainly promoted through direct mail, if anything.
<b>Development</b>	We want to portray that we are providing a performance product and that we are passionate about our business. Our ads try to present aesthetically pleasing products, yet at the same time promote the performance attributes that make our product superior.
<b>Successful companies</b>	Lycra Scotchgard

### Appendix I11: Company K Interview Results

<b>Company K's Comments Regarding Advertising in the Sports and Leisure Market</b>	
<b>Topic</b>	
<b>Competitive necessity</b>	Yes, because of the tremendous growth potential of this market you have to be ready to stand out and take advantage of opportunities.
<b>Differences in tactics</b>	Our tactics are similar between segments. Sports related product receive the most attention, but military and automotive seem to get the least "public" advertising. On the consumer side we tried to promote the emotional appeal of our products by using more artistic images, however, our target did not respond. We learned that the emotional strategy was not effective in our segment of the performance market. In the past, we have held seminars for retailers and brands to help them better develop their supply chains. We explain how to use a product, as well as what to look for when purchasing materials.
<b>Development</b>	We try to build a story for our products. Our most important products are our performance products, where we promote strength, durability, and other specialized uses. Though we are focused on the performance attributes, we include a lot of technical information in our advertisements, but do so in an appealing way. PR is a good starting point because you can get the message out rather quickly and to a variety of publications at a lower cost than a print advertisement. We also develop white papers and present at trade show whenever we can.
<b>Successful companies</b>	BASF was successful at giving extra value to their customer's products and their ads captured that. W.L. Gore

**APPENDIX J: COMPANY INTERVIEW RESULTS: ADVERTISING BENEFITS**

## Appendix J1: Company A Interview Results

<b>Topic</b>	<b>Company A's Comments Regarding Advertising Benefits</b>
<b>Defining success</b>	<p>Success in advertising is when consumers know your product in the market.</p> <p>Advertising is the initial touch with a customer and it is meant to generate interest that may lead to sales. Ads are not designed to close the sale.</p> <p>Typically assume that 1/2 of advertising is effective.</p>
<b>Benefits</b>	<p>Builds brand awareness and recognition among potential buyers.</p> <p>Builds confidence in the company by promoting stability and longevity</p> <p>Creates buzz about products.</p> <p>Defines what the products mean to the consumer/customer</p> <p>Advertising has the potential to build the brand, the company, and sales</p> <p>Advertising can also create credibility and buzz about the product and give the feeling that a company is everywhere.</p> <p>Builds company name for potential employees.</p>
<b>Evaluating methods</b>	<p>It is difficult to measure effectiveness or recognition so far back in the supply chain.</p> <p>Can monitor volumes of customer calls and correlate that to the campaign's timeline.</p> <p>Use publications that offer reader response cards, this allows for direct tracking</p>
<b>Elements of effective advertising</b>	<p>Advertisements should highlight a specific product attribute that makes it superior to other products in the market.</p> <p>Developing and including logos for product advertisements makes your product easily recognizable without having to read text. Logos are also more memorable than text alone.</p> <p>The message in the advertisement should build the name and increase visibility of the product name and logo.</p> <p>For company focused advertisements, the ad must reassure customers that the company is taking steps to remain competitive and financially stable.</p> <p>Advertisements must contain a point of action, contact information, a website, or some other directive text that tells the customer what to do next or where to find information or products.</p> <p>Advertisements are a good way to communicate that the firm is aware and knowledgeable about trends in the market.</p>

## Appendix J2: Company B Interview Results

Topic	Company B's Comments Regarding Advertising Benefits
<b>Defining success</b>	<p>Success for our company would be while the promotions are going on the sales team is getting some leads but to actually see "success" in the short term (under a year) is very rare.</p> <p>Because if this lead-time, our company typically focuses on company centered advertisements that keep the company name inform of the customer.</p> <p>An advertising campaign would be considered a success if the company can get its product out into the market in a reasonable period of time, whether advertising was the reason or not.</p>
<b>Benefits</b>	<p>Sometimes it is what does not happen, that is the benefit.</p> <p>Keeps their name in front of their customers.</p> <p>Advertising is worth it even if we are not getting new direct sales, it reinforces that we are committed to textiles and the industry.</p> <p>Makes you look at your customers and really get to know them which lead to other benefits.</p> <p>Builds your presence in the market so when opportunities arise and new markets become available your company is already known, and through the previous advertising will hopefully be accepted as a leader.</p>
<b>Evaluating methods</b>	<p>Have to look up to 5 years back to see the results of a campaign and by that time, it is very difficult to attribute success to one advertisement or another.</p>
<b>Elements of effective advertising</b>	<p>Creating trade brands, especially for commodity products help easy identify your products in the market.</p> <p>Branding the company was especially important when competing in small markets with few competitors</p> <p>Need to let them know about the longevity of the company and commitment to the industry</p> <p>Not so much specific text or images, it's understanding what the customer wants and pulling together the product and the message that satisfies the customer.</p>

### Appendix J3: Company C Interview Results

Company C's Comments Regarding Advertising Benefits	
<b>Topic</b>	
<b>Defining success</b>	We want to send a message that we are here and we can help with your business
<b>Benefits</b>	We do not see a lot of value advertising through traditional advertising methods. We seem to have a better response by word of mouth through our customers. We provide products to several leading companies and they are our biggest promoters. One on one relationships with leading companies are most important, through their contacts we gain new business.

### Appendix J4: Company D Interview Results

Company D's Comments Regarding Advertising Benefits	
<b>Topic</b>	
<b>Defining success</b>	For promotional success, volume growth is key.
<b>Benefits</b>	Building credible brand awareness, promoting company viability, increasing sales.
<b>Evaluating methods</b>	We do not specifically measure how effective our ads are, we track traffic to our websites and get feedback, but we do not measure awareness or recognition.
<b>Elements of effective advertising</b>	Consistent messages that can be built upon. We focus on brand or product level advertisements, not so much on company advertising. Ads must have callout or call to action. Being credible is also important.

### Appendix J5: Company E Interview Results

Company E's Comments Regarding Advertising Benefits	
<b>Topic</b>	
<b>Defining success</b>	When someone we have not done business with already knows about us.
<b>Benefits</b>	Keeping the company visible to the mills, brands, and retailers. We have aligned our business to try to take advantage of the opportunities each of these groups present. We want the our customers to know we support them but at the same time we want the brand or retailer to recognize our product when its presented or mentioned. Building awareness and the relationships between our company and our customers.
<b>Evaluating methods</b>	We do not have any way to quantify the effectiveness of our advertising because they do not always lead to sales calls or inquires. We should know every company that may use our product, so our ads are mainly focused on maintaining visibility and awareness of our products.
<b>Elements of effective advertising</b>	Image needs to stop people in their tracks and cause them to look. The image needs to be compelling with valuable copy text. The copy needs to present the message quickly and easily. There has to be a request for action. For direct ads it is more pronounced.

### Appendix J6: Company F Interview Results

Topic	Company F's Comments Regarding Advertising Benefits
<b>Defining success</b>	Creating long-term brand and company value. We consider it a success if we are 100% sure our message is true and that we feel comfortable presenting it to the market. We dive into substantiation of marketing claims, it is very important to our company.
<b>Benefits</b>	Supports our brand and our company by promoting the integrity of our claims.
<b>Evaluating methods</b>	We use a physiological response monitoring systems in focus groups that detects different physiologic responses participants experience while looking at ads. This allows us to see which are being effective and causing a real response with the participant.
<b>Elements of effective advertising</b>	Engaging images that appeal to the target. We like to use images that create a story and make the target want to experience what is in the image. Consistency in the message and developing the brand image is also important for creating long-term brand equity.

### Appendix J7: Company G Interview Results

Topic	Company G's Comments Regarding Advertising Benefits
<b>Defining success</b>	We define success as when we approach someone that we have never done business with or contacted and they already know about our company.
<b>Benefits</b>	Advertisements hopefully generate new business for the company and promote our brand. We want to be known as THE supplier in our product category and advertising is a good way to create those perceptions in the market, so long as the products are performing at that level. Promoting our company and product names to build recognition. We want to set up the initial connection between us and the designers and retailers. We want to help educate them about the abilities our company and what we can offer them. Most designers or retailers do not know what factors affect the quality of the final product. We want to build the reputation of our company and products through our ads so that when we talk to them we have some pre-established credibility.
<b>Evaluating methods</b>	We never know how effective we really are. We assume that when sales are good we are being effective in our advertising. We rely a lot on our customers to promote our business.
<b>Elements of effective advertising</b>	We promote our supply chain and our customers with our ads. We want to offer the whole package when a company chooses us as their supplier. Ads include company name and logos and we use customer buzz words to let the consumer know we understand what they want

### Appendix J8: Company H Interview Results- Advertising Benefits

Topic	Company H's Comments Regarding Advertising Benefits
<b>Defining success</b>	Our ads are geared to increase sales by appealing to consumers through a particular product attribute. We want the consumer to take notice of the ad and then remember it at the time of purchase. If we can accomplish that goal then the campaign was a success.
<b>Benefits</b>	We use advertising to increase the favorability of our product in the market, mold consumer perception, and increase sales.
<b>Evaluating methods</b>	Use focus groups to gain feedback and assess the effectiveness of our campaign.
<b>Elements of effective advertising</b>	The media type we choose is dependent on the message we are trying to convey. For universal messages that will have appeal across market segments and customers, we use a mass media approach. However, if we are trying to highlight a particular attribute about our product we may use a direct approach by placing ads in specific magazines or journals that potential customers are likely to read.

### Appendix J9: Company I Interview Results

Topic	Company I's Comments Regarding Advertising Benefits
<b>Defining success</b>	When we change a perception in the marketplace to one that favors our products. However, all success is still ultimately measured by sales.
<b>Benefits</b>	It depends on the message; generally, advertising helps to establish a marketing message in the mind of the target. The benefit is what you set out to accomplish and that varies from customer to customer.
<b>Evaluating methods</b>	After we implement the decision, we allow the media to take affect and then compare sales over the period. Depending on the results of the analysis, we determine whether to scale up, pull back, hold steady, or terminate the campaign.
<b>Elements of effective advertising</b>	We want to "lead our customers to water" not exactly make them drink. We want to tell them about our capabilities, our products, and what we are about, but we do not want to force our message on them. We want them to draw their own conclusions and then contact us when they are ready. We find that with younger people, they like to draw their own conclusions, but with older people, we seem to have to lay our message out a little more aggressively.

### Appendix J10: Company J Interview Results

Topic	Company J's Comments Regarding Advertising Benefits
<b>Defining success</b>	Sales are the main thing. We also consider advertising successful, when we have never approached someone specifically and they either contact us or already know about our products or company. For a consumer to come into a store and ask for our product by name is the ultimate success.
<b>Benefits</b>	It builds awareness with retailers. Building awareness and keeping our name in front of customers is important. We want people to see our name and know who we are.
<b>Evaluating methods</b>	We do not measure effectiveness formally.
<b>Elements of effective advertising</b>	Emphasizing product attributes as well as the esthetic appeal of our products. We want bring out the product attributes that sets our products apart from the competition. Images and strong copy text. Some technical information depending on the target audience. Promoting company credibility.

### Appendix J11: Company K Interview Results

Topic	Company K's Comments Regarding Advertising Benefits
<b>Defining success</b>	Increasing sales is the ultimate success, at the end of the day, which is what matters most.
<b>Benefits</b>	Building awareness among customers by letting them know you are an invested player in the market. Advertising shows commitment to the industry, people are always looking to see if you are still innovative, active, and committed.
<b>Evaluating methods</b>	We use surveys of our customers as well as potential customers to test their awareness, but it is difficult to understand why a customer contacted you without explicitly asking.
<b>Elements of effective advertising</b>	Our ads are very product attribute heavy because our market responds well to that type of advertisement. We try to make our ads universally appealing because though we target certain groups, others may see our ads and we want them to be just as interested as our target. We typically use images of our products in action, using more of a direct message.

**APPENDIX K: COMPANY INTERVIEW RESULTS:  
ADVERTISING CHALLENGES**

### Appendix K1: Company A Interview Results

Topic	Company A's Comments Regarding Advertising Challenges
Consumer level	Determining how effective the advertisements really are among groups.
Industry level	Determining where you need to be in terms of where you need to place your advertisements in order to have the biggest impact. Establishing what frequencies and what publications to place advertisements.
Managerial	Meeting deadlines for trade shows and publications is the most difficult part of the planning process. Market research and customer analysis. Research gathering must be collaborative between marketing, sales, and management to ensure that the information is as correct and complete as possible. Determining where the budget can be spent most effectively. Tracking who is seeing the ads and then measuring how effective they are. Evaluation methodology.

### Appendix K2: Company B Interview Results

Topic	Company B's Comments Regarding Advertising Challenges
Consumer level	It is very expensive. We do use some hangtags with product or website information, but we do not push it.
Industry level	Determining which media channels or avenues will put the company where it needs to be in order to take advantage of opportunities. Understanding what the customers want and what messages need to be presented.
Managerial	Finding enough quality information in the first steps of the research. You have to understand that there is no instant gratification, especially when you have a long lead-time between ad implementation and product to market. Research and evaluation are typically the areas that are least developed.

### Appendix K3: Company C Interview Results

Topic	Company C's Comments Regarding Advertising Challenges
Consumer level	We do not feel that the consumer finds value in the products we produce; they are more concerned with the product level attributes. Industry however, is very interested.
Managerial	Having the mindset to go out and take a chance on something new, which breaks with traditional textile companies.

### Appendix K4: Company D Interview Results

Topic	Company D's Comments Regarding Advertising Challenges
Consumer level	Making your product and your message relevant to the consumer.
Industry level	Making sure we are doing business with companies that are going to be around. Demonstrating to these companies that your company is a credible company. It is getting tougher to distinguish, which means it is more important for us, a credible company, to promote that.
Managerial	Because of our position in the supply chain, the lead-time is very long between product launch and the product becoming part of a product in a store. Therefore, aligning all the media and promotional items to follow the other business operations is a real challenge. Coming up with a creative angle that will be unique and find resonance with your target. Determining how to position the product to promote growth. How do we keep challenging ourselves to be creative?

### Appendix K5: Company E Interview Results

Topic	Company E's Comments Regarding Advertising Challenges
Consumer level	Is consumer recognition desirable? It depends on what company you talk to.
Industry level	Meeting the requirements of the physical properties for the application of our product and finding new applications and potential customers for our product. We have to keep our name in front of potential customers and active seek new opportunities.

### Appendix K6: Company F Interview Results

Topic	Company F's Comments Regarding Advertising Challenges
Consumer level	Not as prevalent in ingredient advertising. We are currently expanding into this area. We are always looking for new ways to reach our targets customers in a way that is meaningful, emotionally stimulating, and will resonate long term. Finding the best way to do this is the biggest challenge.
Industry level	We assess the value chain and appeal to specific markets accordingly. Because we are a global company, it is difficult to assess potential customers and keep track of them all, which makes advertising difficult.
Managerial	Finding that one message that speaks universally to all groups because you are putting so much money behind it you cannot afford to wrong.

### Appendix K7: Company G Interview Results

Topic	Company G's Comments Regarding Advertising Challenges
<b>Consumer level</b>	Too expensive. We feel that by engaging the designers and retailers we rely on them to communicate the benefits of our product to the end consumer.
<b>Industry level</b>	We feel that this segment is saturated, everyone knows our company. The next logical step was to move down the supply chain to the retail and designer level in order to create a pull effect for our products. Changing the mindset of the retailer and designer is the most difficult challenge. There are so many preconceived notions about how to source and where to source, we concentrate on educating these groups about our not only products and company, but that it is still cost effective to source in the U.S.. The industry as a whole does a poor job at letting retailers, designers, and brands know they are out there. You cannot expect them to pick up a textile manufacturing trade magazine, most do not know about them, so you have to bring the message to them.
<b>Managerial</b>	Creating new and creative messages that still deliver the core message. We want to make sure our ads are eye catching and new so that potential customers do not simply skip them over saying "I've seen that before". It is always a challenge to find that small pocket of opportunity in the market.

### Appendix K8: Company H Interview Results

Topic	Company H's Comments Regarding Advertising Challenges
<b>Consumer level</b>	The biggest challenge is developing ads that will break through the noise of everyday life and make people stop and look at them. With consumers, it is what "sticks" and we try to present media that "sticks" the best.
<b>Industry level</b>	In industry, the biggest challenge is understanding the call to action, what causes them to pick up the phone and call us. When we figure out what that is, we can make a strategy of it.
<b>Managerial</b>	It is difficult to set objectives with each target segment. We have to determine what is going to be the most meaningful for the target group. Each group is diverse and values elements differently. We have to decide whether to approach the message from a functional or a creativity standpoint, it all depends on the target's preferences. In addition, within those groups, different people respond differently, and because of that, we have to try to determine which will be the most effective across the segment. Do not fool yourself by thinking you know what your customer wants, it changes constantly and what worked in the past may not work in the future. It best to do your own primary research when possible.

### Appendix K9: Company I Interview Results

Topic	Company I's Comments Regarding Advertising Challenges
<b>Consumer level</b>	Consumer ads are very limited other than the product placements we have done. But for consumers it is hard to justify the expense.
<b>Industry level</b>	Finding something to talk about. We have to have a reason to make an advertisement, and sometimes things do not change. We know some customers find ads useful and some do not and we develop our strategy around that.
<b>Managerial</b>	Having complete and accurate information, without it, you are dooming yourself from the beginning.

### Appendix K10: Company J Interview Results

Topic	Company J's Comments Regarding Advertising Challenges
<b>Consumer level</b>	When we advertised to the consumer, all we had was some requests for colors and samples, but we did not feel that the campaign was effective. Have to be pretty far along in your brand development to be effective on the consumer level. We feel that it is not fair to advertise at the consumer level because they do not have access to the products and cannot purchase them through us. For a fraction of the cost we can advertise to people that actually buy our product directly.
<b>Industry level</b>	Differentiating your product in a market that has many products that claim to be as good as yours but actually fall short. Erodes the industry as a whole and makes it more difficult for companies that do perform to seem credible.
<b>Managerial</b>	Determining effectiveness Having the capital to support your advertising goals and aspirations. Creativity is also an issue. Our goal is to sell our textile component, and often we present our product by showing a finished good. When you do that, the ad looks like it is for the end product not our product. However, when you just present your product, it looks very industrial, which is not what we are looking for. It is difficult to sell your product and not the finished good. It is hard for an ad agency to come in and live and breathe your product the way your company does, so sometimes it is easier for you to do the work in house. Using agencies are also time consuming and expensive. It seems that by the time we get an agency up to speed and develop an ad that we like, we could have done it ourselves for half the cost.

### Appendix K11: Company K Interview Results

<b>Topic</b>	<b>Company K's Comments Regarding Advertising Challenges</b>
<b>Consumer level</b>	The consumer has pushed prices down which leaves little extra revenue to advertise, especially consumer advertising which is the most expensive.
<b>Industry level</b>	It is hard to keep all your promotional and advertising materials up to date. Businesses change and products change, overhauls may be necessary.
<b>Managerial</b>	The most difficult thing is determining all the benefits of the product. We may not know about a benefit that the customer may find really important. We do use customer feedback, but we may miss the big picture in the advertisement. Testing is important, but even then you do not know if you are pitching the right angle.

**APPENDIX L: COMPANY INTERVIEW RESULTS:  
ADVERTISING OPPORTUNITIES**

## Appendix L1: Company A Interview Results

Topic	Company A's Comments Regarding Advertising Opportunities
<b>Media choices</b>	<p>There are new possibilities with online direct mailings, so long as they are meaningful and infrequent. Too many mailings and they no longer serve their purpose and become a nuisance to the recipient.</p> <p>Using celebrity spokes persons or involving them in creating products can lead to mass exposure for the brand.</p> <p>It is important to place advertisements in publications that will stay with a customer for long durations such as catalogues or directories that a customer may keep and refer back to time and again. This allows the customer to see your advertisement over and over.</p> <p>Creating web addresses of product names that link back to the company's product page is a good way to redirect traffic back to the home site without having to maintain separate websites. (Ex. <a href="http://www.productname.com">www.productname.com</a> links back to the main company page highlighting that product). By routing back to the home page, it allows the customer to see the other products your company produces.</p>
<b>Consumer segment</b>	<p>Life style branding creates a unique opportunity to connect with customers. It allows a company to promote their products by showing them in action while at the same time appealing to the personal interests of their customers</p>
<b>Most effective</b>	<p>The best way to influence customers is through face-to-face interactions. Collateral or leave behinds brochures have the best return on investment. PR is also effective because it makes our company the expert, whether we are or not.</p> <p>Direct electronic mailings are also a good way to remind customers of your products and brands so long as the frequency is correct.</p> <p>Hangtags are also very effective because they place ads in front of potential customers at the time of the purchase decision.</p>

### Appendix L2: Company B Interview Results

Topic	Company B's Comments Regarding Advertising Opportunities
<b>Media choices</b>	<p>Websites, trade journals, trade shows and online media.</p> <p>Industry trade journals are a good method for a catch all approach because a wide variety of potential customers that read them. However, product specific trade journals offer the chance to market specifically certain products or product attributes.</p> <p>You just have to determine where the company needs to be and where the customers will find the information useful.</p> <p>Because the textile industry is more traditional, publications and trade shows are still important but online content is growing and will continue in the future.</p> <p>Have to be transparent and let people know your company is out there.</p>
<b>Consumer segment</b>	<p>With online content, you want to have information presented in a way that anyone can understand it, but at the same time have enough information that customers will find it useful. This is especially important if you have customers over a wide geographic area.</p> <p>We use a trickle through method to communicate with end consumers through host brands.</p> <p>As of now, the expense of consumer advertising out weights the benefits. There is opportunity there, but at this time, we do not think it is a good move for us.</p>
<b>Supply chain segment</b>	<p>Trade publications are the most effective way to advertise to industrial customers.</p> <p>A strong web presence is also important.</p>
<b>Most effective</b>	<p>Being able to provide innovative products and reaffirming the company's commitment to the industry is the key to effective advertising</p> <p>Web materials are effective because the company can track traffic, control the content, and the cost is known. It is easily maintained and it makes all parties involved happy because it is always there and ready.</p> <p>The trade publications have the greatest potential because so many people in the industry read them.</p>

### Appendix L3: Company C Interview Results

Topic	Company C's Comments Regarding Advertising Opportunities
<b>Media choices</b>	<p>We do some collaborating with organizations that allow us co co-advertise and promote our products jointly. These are mostly print brochures and product highlights. Though we do pay for a portion of it, we do very little promotions solely on our own.</p> <p>We participate in trade shows to support our customers and provide information.</p>
<b>Most effective</b>	<p>Word of mouth.</p>

### Appendix L4: Company D Interview Results

Topic	Company D's Comments Regarding Advertising Opportunities
Media choices	Web based advertising and websites are growing, but we expect big changes in the way companies advertise in the next few months
Consumer segment	Yes, there is potential to build brands and create partnerships with firms downstream. However, you have to convey your message in a unique way to stand out in the market.
Supply chain segment	Establishing credibility.
Most effective	In terms of industry level ads, PR is the best. For consumers, web seems to be working the best. We try to drive consumer traffic to our website and make that content meaningful for them.

### Appendix L5: Company E Interview Results

Topic	Company E's Comments Regarding Advertising Opportunities
Media choices	Must factor in a PR component. Your media choices do not always have to be focused on driving the sale, just being present is sometimes enough. Digital communications are of the most importance. You have to keep the media fresh and relevant to all potential audiences.
Most effective	Print and online media have been the most successful for our company. Grass roots and trade shows are crucial for that relationship building aspect of the business.

## Appendix L6: Company F Interview Results

Topic	Company F's Comments Regarding Advertising Opportunities
<b>Media choices</b>	<p>Web 2.0 and speed of information is growing. People want it yesterday and when they are looking for products, many are going online in the store to gain product information and having your messages easily accessible may help the customer choose your product or host product.</p> <p>Grass roots marketing and getting out into the market are also important. We want to create programs that reach out to people and make them feel connected. It is part of our emotional approach to our branding. People want something to be meaningful for them and if we can do that, we build a long-term relationship between our products and those customers.</p>
<b>Consumer segment</b>	<p>Consumer advertising is important because they tell the retailer what they want, the retailer, tells the supplier, and the supplier tells the mills and so on down the stream, so creating that relationship with the consumer to demand your products is critical for a pull through marketing strategy.</p>
<b>Supply chain segment</b>	<p>Creating relationships with our customers to promote our brands as we promote them.</p>
<b>Most effective</b>	<p>Ads that are meaningful across segments.</p>

### Appendix L7: Company G Interview Results

<b>Topic</b>	<b>Company G's Comments Regarding Advertising Opportunities</b>
<b>Media choices</b>	<p>Trade advertisements are a big part of our strategy; we have seen a lot of success in advertising in apparel sourcing magazines in strategic geographic areas. We also use online media, through our direct emailers and blog. We have found that most retailers and brands do not know where to look for U.S. suppliers or advertisements, so we bring our ads to them and have been extremely successful. The designers and retailers don't purchase our product, they purchase the finished good, our company approaches the business as if you specify our product in your product, we will do everything we can to support your company and supply chain. We use hangtags when customers request them. Most requests are from smaller companies.</p> <p>Direct email and trade magazines have been the most successful. These medias have the potential to be seen by a large audience and still deliver a tailored message.</p> <p>Trade brochures are not as timely and are quickly out dated; because of this, we tend not to use as many collateral prices in our advertising efforts.</p>
<b>Consumer segment</b>	There are opportunities in consumer advertising, but it is difficult to reach them effectively. If we had the budget, we would love to do it, but some companies do not want consumers to know who their suppliers are.
<b>Supply chain segment</b>	This market is saturated and most people know who each other are. Therefore, the opportunities lie further down the supply chain. This results in a pull type strategy.
<b>Most effective</b>	Publishing ads in designer and retailer publications has been the most successful. Our web blog is also a big communicator that we can send all potential clients to.

### Appendix L8: Company H Interview Results

<b>Topic</b>	<b>Company H's Comments Regarding Advertising Opportunities</b>
<b>Consumer segment</b>	You want to be as close to the purchase decision as possible. This may include in store promotions, on-product promotions, or other media.
<b>Most effective</b>	We participate in a lot of sponsorships and event planning as a form of outreach to consumers, we find that this allows us to promote the various attributes of our product effectively to a captive audience.

### Appendix L9: Company I Interview Results

Topic	Company I's Comments Regarding Advertising Opportunities
Media choices	<p>We use a lot of event level advertising where we bring in customers or potential customers and interact with them in a social setting so they can see how our company operates without feeling pressured.</p> <p>For non-brand related promotions, we use direct marketing tactics.</p> <p>The majority of our marketing is done with "feet on the street" we rely heavily on our sales force to promote our products.</p> <p>Trade shows and personal interaction are also a key to our marketing success</p>
Consumer segment	There are opportunities and we have had success, but it is very costly.
Most effective	<p>Our most effective tactic has been product placements in movies. We have had huge success with bringing our products to a mass audience through this tactic. The featured product was very relevant to the movie viewer and it showed our product in action. Though it is expensive to do, you cannot beat the reach.</p> <p>For people that know our company, grass roots styled, faced to face interactions are the best. Nevertheless, for people that do not, the website is a very effective.</p>

### Appendix L10: Company J Interview Results

Topic	Company J's Comments Regarding Advertising Opportunities
Media choices	Search engines, we have seen many of our customers promoting our products on their websites. We are not sure we want to encourage more of this or let it grow organically.
Supply chain segment	Because the market is filled with so many companies trying to step in with inferior products, holding suppliers to the same standards we hold for ourselves will be important. We can substantiate our product and often they cannot and it ends up eroding our potential business and hurts our product category.
Most effective	We send out flyers prior to major shows so that the customer knows we will be there and for those that do not know us, they get to see a little bit about who we are and encourage them to come by and talk with us.

### Appendix L11: Company K Interview Results

Topic	Company K's Comments Regarding Advertising Opportunities
Media choices	Online provides many opportunities, there are many resources on the web. It is easy to maintain and you control the content.
Consumer segment	We have found that most consumers do not find value in our advertising.
Most effective	PR and white papers have been the most effective for our company. We then supplement that with additional media. We want to convince the customer that we can make their product better.

**APPENDIX M: COMPANY INTERVIEW RESULTS: ADVERTISING POTENTIAL**

### Appendix M1: Company A Interview Results

Topic	Company A's Comments Regarding Advertising Potential
<b>Areas advertising can influence</b>	Advertises your business to potential employees.
<b>Advertising as a differentiation method</b>	Advertising tells your customer why you are better than anyone else in the market. Companies that advertise demonstrate that they are viable and healthy which can differentiate them for competitors.
<b>Advertising 's ability to influence sales</b>	Advertising is an effective differentiation method because it has the ability to spark interest which then can lead to company calls and eventually sales.
<b>Typical ROI and payback</b>	Because the cost of the advertising is built into the price of the product, the advertising budget should be 1-2% of projected sales It is hard to judge the payback for a campaign since it is difficult to track the response rate or effectiveness of the advertising.
<b>Growth potential</b>	The growth potential for advertising is dependent on the sales. If a product is doing well then it is typically safe to assume that the advertising is working. However, if sales are declining, it may not be the fault of the advertiser, but the best option may be to scale back advertising.

### Appendix M2: Company B Interview Results

Topic	Company B's Comments Regarding Advertising Potential
<b>Areas advertising can influence</b>	Helps to build moral in the company. Seeing your name in lights mentality. For the sales force, the advertisements make them feel confident in their company and their products because they know that their company is reputable and they have all these brochures and collateral to back them up.
<b>Advertising as a differentiation method</b>	It is a good way to differentiate your company, because by advertising you are saying that the company is committed to the market, the industry, and that the business is in it for the long haul, which signals to customers that the company is worth doing business with.
<b>Advertising 's ability to influence sales</b>	From a purely advertising point of view, we want the phones to ring for our client. Moreover, what the client chooses to do with the calls is not up to us, but we want to make sure that they have the ability to take advantage of every opportunity.
<b>Typical ROI and payback</b>	The effects of advertising will mostly likely not be immediate, it make take months or years for the advertising to make an impact. It just depends how far back the company is in the supply chain before the advertisements turn into sales. The ROI and payback depends from company to company, typically confidential. It is difficult to track because most companies do not want to take the time or effort required to find out their ROI or payback.
<b>Growth potential</b>	Online media and print.

### Appendix M3: Company C Interview Results

<b>Topic</b>	<b>Company C's Comments Regarding Advertising Potential</b>
<b>Advertising as a differentiation method</b>	Traditional print advertising in general does have that influence, but for our company we did not find that to be true

### Appendix M4: Company D Interview Results

<b>Topic</b>	<b>Company D's Comments Regarding Advertising Potential</b>
<b>Areas advertising can influence</b>	Share holder value.
<b>Advertising as a differentiation method</b>	Yes, especially if you can deliver your message in a unique way that your target responds well to.
<b>Advertising 's ability to influence sales</b>	Advertising can influence sales and that is the measure at the end of the day.
<b>Typical ROI and payback</b>	We evaluate each product, determine if it is still financially viable, and adjust tactics and strategies based on our findings. As long as we can justify the investment, we will do it. It is different for every company. It depends on budgets, how it is allocated, and how you spend your money.
<b>Growth potential</b>	Online media and consumer advertising

### Appendix M5: Company E Interview Results

Topic	Company E's Comments Regarding Advertising Potential
Areas advertising can influence	Building the relationships and supporting our customers to grow our businesses Having recognition downstream
Advertising as a differentiation method	Having a quality product and a partnerships with the company and brands has been an effective way to differentiate Advertising and PR are important components but cannot do it alone
Advertising 's ability to influence sales	It has the potential to increase sales call and so forth, but it's the relationship that develops after the initial connect that drives the sale
Typical ROI and payback	Customer dependent and our goals for a particular product or customer
Growth potential	Digital is hot right now, but print is not dead. It is smaller than it used to be. But print has the staying power that online does not have. A magazine may sit on a desk for weeks and be referred to time and again. It is important to be in a variety of media.

### Appendix M6: Company F Interview Results

Topic	Company F's Comments Regarding Advertising Potential
Areas advertising can influence	Credibility and ad substantiation
Advertising as a differentiation method	Yes
Advertising 's ability to influence sales	Yes
Typical ROI and payback	NA
Growth potential	Online

### Appendix M7: Company G Interview Results

Topic	Company G's Comments Regarding Advertising Potential
<b>Areas advertising can influence</b>	We use advertising to build the brand name of the company and promote our products. We want to educate the retailer and designer about our product and then hopefully influence them to adopt and specify our products.
<b>Advertising as a differentiation method</b>	Advertising cannot do it alone. There must also be the grass roots, face-to-face conversations that verify the ad's claims. Advertising is only as good as the products and company behind it
<b>Advertising 's ability to influence sales</b>	We hope that advertising translates into sales, but we do not know how advertising specifically influences sales figures. There are so many activities and promotions we get through our customers that we do not know where the awareness comes from but if it results in a sale then advertising has done its job, one way or another.
<b>Typical ROI and payback</b>	Our ROI and payback are not specifically tacked. Goals and benchmarks for sales are more customer specific.
<b>Growth potential</b>	Web 2.0 is great because of the instant feedback it can provide. We can track a variety of metrics such as who is coming to our site and in what volumes. Our blog page has the highest return on investment since it was free and we tell everyone to check it out. We post new things about our company and what trade shows or magazine we will be in etc. Online avenues allows us to communicate with the mass market, but face to face interactions are still extremely important

### Appendix M8: Company H Interview Results

Topic	Company H's Comments Regarding Advertising Potential
<b>Areas advertising can influence</b>	Sales, perceptions, awareness
<b>Advertising as a differentiation method</b>	Advertising can help build your brand's or product's story and helps you to relate your brand or product to the customer or consumer. This relationship will hopefully differentiate your product or brand in the market.
<b>Advertising 's ability to influence sales</b>	Yes
<b>Typical ROI and payback</b>	We do not have a set ROI or payback period for an ad campaign. If we are making our goals, we typically just continue with what we are doing.
<b>Growth potential</b>	Online social networking may be effective with other mass media costs increasing. Print methods are not as effective as they used to be, but it depends on the message. However, sometimes you do not know what the objective is and that is when grassroots, face-to-face interactions are best.

### Appendix M9: Company I Interview Results

<b>Topic</b>	<b>Company I's Comments Regarding Advertising Potential</b>
<b>Areas Advertising can influence</b>	For our company, we mostly look at sales and market perceptions
<b>Advertising as a differentiation method</b>	Ads are a good way, but the product and the company are the real differentiating factors. You can have great ads but if your product or company is not there to back it up, then you will not be successful in the long run.
<b>Advertising 's ability to influence sales</b>	Ads do have that ability to influence sales, but we rely more on our sales team and face-to-face interactions to close the deal.
<b>Typical ROI and payback</b>	We have ROI goals on a product level, measured through sales figures, and we typically want to see a payback in under a year.

### Appendix M10: Company J Interview Results

<b>Topic</b>	<b>Company J's Comments Regarding Advertising Potential</b>
<b>Areas advertising can influence</b>	Sales, awareness, building a positive image, and credibility for our company.
<b>Advertising as a differentiation method</b>	It is effective, if you do it right, meaning that you can substantiate your claims through your product's performance. In this product segment, there are many players and sometimes, when your company is trying to make a name for itself, advertising may be the quickest way to grow visibility.
<b>Typical ROI and payback</b>	With our target audience, we look for a 12-18 month payback period.

### Appendix M11: Company K Interview Results

<b>Topic</b>	<b>Company K's Comments Regarding Advertising Potential</b>
<b>Areas advertising can influence</b>	Being effective in advertising really requires you to know your customer, which in itself is a great tool.
<b>Advertising as a differentiation method</b>	It is a good way, since our advertisements are very close to our sales pitch.
<b>Advertising 's ability to influence sales</b>	We link our advertising messages with our sales pitches.
<b>Typical ROI and payback</b>	We have product level ROI, but as far as advertising, the best form is PR since the cost is reasonable and the reach is potentially large.
<b>Growth potential</b>	Online media because it is easy to update and it can be seen by a large audience.

**APPENDIX N: COMPANY INTERVIEW RESULTS:  
DEVELOPMENT METHODOLOGY**

## Appendix N1: Company A Interview Results

Topic	Company A's Comments Regarding Advertisement Development Methodology
<b>Typical methodology</b>	<p>The process begins with a business plan, which lays out the strategic goals of the company and where the company wants to go. The plan looks at projected sales by market, market viability, budgets, and what advertising and marketing activities the company wants to participate in.</p> <p>It is typically best to handle as much of the advertising design and layout development through email in order to keep costs low.</p> <p>The more advertisement development that can be done in house, the less expensive the campaign will be.</p> <p>When competing with an established competitor or product an effective strategy is to model your product's advertising strategy around theirs.</p>
<b>Defining goals</b>	<p>When working with an advertising agency, have clear goals and ambitions about what product attributes need to be promoted and what excites the customer.</p> <p>Creating customer or market segment write up with specific inventory increases for selected customer or blanket sales goals is an effective way to set and achieve specific goals</p>
<b>Evaluation</b>	<p>Evaluation is difficult because of limited budgets, time and distance between the supply chain segments and the final consumer.</p> <p>Typically, if product sales are stable or growing, we assume that the advertising is being effective.</p>
<b>Situation analysis</b>	<p>Our situation analysis considers, oil prices, economic factors, consumer and industry trends, the housing market, construction markets, military expenditures, furniture trends, healthcare, and others to get a feel where markets are going in the future.</p> <p>Strategic competitive and customer analyses are also completed during this phase</p>

## Appendix N2: Company B Interview Results

Topic	Company B's Comments Regarding Advertisement Development Methodology
<b>Typical methodology</b>	Assuming it is a new product, we have an establish target market before the product is created. We try to understand what segments we want compete in and what companies we are trying to go after in order to make the best strategic advertising decisions. We then try to establish the talking points about the product. We then go back and forth with the advertising agency. We do some guerrilla style research, meaning talking with customers and other suppliers to get an idea where the industry is going.
<b>Defining goals</b>	The goal for the company is to sell products but because of the lead times between when the advertisements debut and when the product make it to market the goal of the advertising is to keep the name fresh and continue to build new opportunities while the product continues down the value chain. Some pounds per year goals but the advertisements do not affect those goals much.
<b>Evaluation</b>	It is very difficult because the advertising campaign may come out a year or more before any of the product actually makes it into a consumer product on the shelf. There is such a long lag time it makes it difficult to evaluate the effectiveness of a specific advertisement. Because of the lead-time, it is difficult to track and organize.
<b>Situation analysis</b>	Very difficult and expensive to research. Understanding what the customer's needs are going to be and adapt advertisements to reflect the satisfaction of these needs is critical.

## Appendix N3: Company C Interview Results

Topic	Company C's Comments Regarding Advertisement Development Methodology
<b>Typical methodology</b>	We knock on doors and research how to make some technologies happen that customers find valuable. We determine if we can improve a product in the market and if we can, we set out promoting that product. But most of our work is done through customer requests. Once other companies hear about the work we have done for these companies, we typically get calls that may turn into new business.
<b>Situation analysis</b>	We look at what is going on in the industry and identify opportunities for our business.

## Appendix N4: Company D Interview Results

Topic	Company D's Comments Regarding Advertisement Development Methodology
<b>Typical methodology</b>	<p>The procedure we use depends on the product. Once the product is about 70% of the way developed, the marketing department and research and development come together and try to determine our competitive edge.</p> <p>We also look at competitors, to determine how we can differentiate our products in the market.</p> <p>Once we have our brand story 80% finished we meet with an agency to bring creative work. However, it depends on the product and goals to what we do with the campaign. Our marketing team tries to get our ideas as fleshed out as possible before we begin working with an agency.</p>
<b>Defining goals</b>	<p>It varies, from segment to segment. Where we can, we track our product to determine sales volume compared to advertising efforts.</p> <p>Our main goals are to promote our products and build credibility and awareness for our brands.</p>
<b>Evaluation</b>	<p>We pay for a company to calculate our advertising value from our media coverage, meaning how many advertising dollars would we had to have spent to get the same coverage that the media coverage generated.</p> <p>Because we use a code system that is linked to our website, we can track to see how many people are buying the product and going to our website. It is very effective.</p>
<b>Situation analysis</b>	<p>Consumer trends, markets, products currently in the market, pricing, raw material trends.</p> <p>We also look at trends from brands and retailers.</p>

### Appendix N5: Company E Interview Results

Topic	Company E's Comments Regarding Developing a Strategy or Campaign
<b>Typical methodology</b>	Our methodology is more relationship oriented, working toward building our relationship with specific customers. When we determine a market we want to focus on, we jump in and try to determine what those customers are looking for, whether it is trends or information preferences. For example, we include more technical information in our manufacturing advertisements, while we may leave that out in a retail oriented advertisement.
<b>Defining goals</b>	We establish yearly goals as well as short terms goals. Especially in media planning where we must determine which shows we want to be in or what magazines we want to work with. We typically try to maintain our current level of recognition in the manufacturing segment but at the same time grow in the retail and brand segments. Our goal is to continually present messages.
<b>Evaluation</b>	An individual buying a product in a store with our product in it may or may not know our company or our product. We cannot really track this. At the mill level it is still hard to judge Research companies do exist that track consumer habits, but there is very little done in the supplier or retail level. Most companies rely on more qualitative measures such as word of mouth and others to judge how effective their advertisements are.

## Appendix N6: Company F Interview Results

Topic	Company F's Comments Regarding Developing a Strategy or Campaign
<b>Typical methodology</b>	<p>We start with general outreach to our segments. We look for ways to grow our business either through new products, product extensions or modifications.</p> <p>The process starts with the brand understanding where they fit into the market place and what elements about the brand are most important. We complete a creative brief, which lays out all the elements the brand is looking for. The creative team then decides which elements are most effective, have the best emotional appeal, and resonate best with the target.</p> <p>Then we go about the creative work and eventually produce a finished product.</p>
<b>Defining goals</b>	<p>We want to become synonymous with quality and durability. We want to own the names.</p> <p>Building a credible message that resonates with the target.</p> <p>We do not typically reevaluate our goals, we try to have broader overall goals and work towards them and so long as the message is not straying then we typically keep doing what we are doing.</p>
<b>Evaluation</b>	<p>We use online media tracking. We use Google ads, which monitors clicks and traffic. We can see location and even IP address which is not available with print ads. With our online sites, we want to transfer interest to sales. While we cannot say what sales were a result of the ads, we can track the traffic and then make an assumption of about what percentage resulted in sales.</p> <p>We try to design those checks into the campaign.</p>
<b>Situation analysis</b>	<p>We look at economics, trends, and market drivers.</p> <p>We also evaluate channels to market and identify gaps in the market place.</p>

## Appendix N7: Company G Interview Results

Topic	Company G's Comments Regarding Advertisement Development Methodology
<b>Typical methodology</b>	<p>We really do not have a methodology per say. We typically just identify a target customer or market and then develop an advertisement based upon their preferences and what product attributes we want to promote.</p> <p>We make a great product, address the concerns of our customers, and offer transparency.</p>
<b>Defining goals</b>	<p>One of our primary goals is education. We try to promote the fact that product costs do not end at delivery. They end when the retailer sells the product and we want to improve their products by increasing their quality. Though that may be a higher initial cost, retailers have found that by making a higher quality product initially increases consumer appeal and can lead to additional full price sales. The argument is that it is better to spend a little more initially and not have to discount as heavily to move product.</p>
<b>Evaluation</b>	<p>We use Google Analytics, which tells us hit rates and traffic for our banners and websites.</p> <p>We also use compete.com to compare web performance between our site and our competitors</p>
<b>Situation analysis</b>	<p>We are very customer focused in our initial analysis. We try to identify what is important to the customer and tailor our message appropriately.</p> <p>We do look at macro trends such as sustainability and organic but focus on customer or market specific preferences and trends that they are interested in.</p>

## Appendix N8: Company H Interview Results

Topic	Company H's Comments Regarding Advertisement Development Methodology
<b>Typical methodology</b>	<p>In our situation analysis, our company begins by talking with the end consumer to determine what they like about the product. This can be done through surveys or focus groups. We then find out what their media habits are, where they seek information, and what resonates with them best. Then we try to determine what makes them want to try a product and how much they are willing to spend. This information allows us to construct an advertisement based on a variety of metrics for maximum impact.</p> <p>We then evaluate the effectiveness of the campaign through a variety of metrics, which we then validate and make changes to the campaign.</p>
<b>Defining goals</b>	<p>We try to tie our company objectives with our advertising.</p> <p>Our goals are to increase sales and build preference for our product. We also try to build strategic alliances for sales promotions and direct marketing.</p> <p>To achieve these goals, we must look for the driver that is most effective, identify which need it satisfies, and understand its limits.</p>
<b>Evaluation</b>	<p>We use advertising tracking programs with our online media to measure traffic, favorability, and clicks. We monitor this continuously and compare changes over time and against major promotions.</p> <p>We try to break down the advertisements to understand what specific elements customers or consumers find most appealing. We may have several versions of an advertisement with small changes in each, which we then assess which is most effective.</p>
<b>Situation analysis</b>	<p>We look at economic factors, trends, and consumer preferences.</p>

### Appendix N9: Company I Interview Results

Topic	Company I's Comments Regarding Advertisement Development Methodology
<b>Typical methodology</b>	<p>We do not follow a specific methodology that covers all advertising. But we typically develop our advertisement around a single product. We then determine our objectives and situation analysis. We then decided the most efficient method of meeting those objectives.</p> <p>The methodology depends on the market segment and what we hope to accomplish through our ads.</p> <p>With our unbranded products, we use more company and capability advertising, while with branded products we promote the brand name.</p> <p>We want to build momentum until it sticks and then back off a bit and reassess our goals.</p>
<b>Defining goals</b>	Goals depend on the market or product segment we are promoting, but our consistent goal is to drive sales.
<b>Evaluation</b>	<p>We typically track sales over time and then compare it to when we believe the advertisements took effect. This allows us to see the timeline of our advertisements as well as their effects on sales.</p> <p>When we complete these studies, we do account for market factors and seasonality of product sales.</p>
<b>Situation analysis</b>	We look at pricing mostly. We want to determine if it is better to create ads or keep that money to grow the business. Advertising is a luxury.

### Appendix N10: Company J Interview Results

Topic	Company J's Comments Regarding Advertisement Development Methodology
<b>Typical methodology</b>	We look at our budget, set our goals based upon the market we are participating in, and then determine what advertising vehicle will be most effective at accomplishing those goals.
<b>Defining goals</b>	Our goal is to present our ads and our company in a way that portrays our commitment to the industry and our products.
<b>Evaluation</b>	We do not evaluate our advertising effectiveness formally, but we do talk to our customers and get feedback from them.
<b>Situation analysis</b>	We look at competitors and benchmarks, we survey customers to find out their media and information habits, and we research market trends.

## Appendix N11: Company K Interview Results

<b>Topic</b>	<b>Company K's Comments Regarding Advertisement Development Methodology</b>
<b>Typical methodology</b>	<p>We start at the brand level; we create a product identity to differentiate our products from commodity goods. We then go through a review of product attributes and set goals for the product.</p> <p>Once that is complete, we have a specification sheet that then becomes the basis for the sales flyer, which explains the need, performance attributes, and benefits. The flyer is then posted on our website and given to sales personnel. Flyer are also emailed to a customer list that we feel would respond well.</p> <p>Then working with a PR agency, a PR piece is written which is sent out to a list of 20-30 editors of print and online publications. We still use products as our main anchor point.</p> <p>We then write white papers to get the word out to the product market.</p>
<b>Defining goals</b>	We define our goals based upon the product and where we want to be in that particular market.
<b>Evaluation</b>	We use surveys and talk with customers to get feedback about how we are doing and their awareness of our products. We do some market testing of products and ads to see what is most important to customers
<b>Situation analysis</b>	We do not typically look at macro issues. We look globally to determine where potential new markets are and then decided if we want to advertise in that region. We look to see where the brands and mills are going and try to promote our products and services by competing on availability, capacity, and geographic location.

**APPENDIX O: COMPANY INTERVIEW RESULTS:  
ADVERTISING EFFETENESS**

### Appendix O1: Company A Interview Results

Topic	Company A's Comments Regarding Advertising Effectiveness from a Supply Chain Perspective
<b>Reasons for seeking information</b>	To determine if the product fits core competencies of the company, will it enhance a market we are already servicing, would it enhance current products so that they could expand into a new market.
<b>Information sources</b>	The best information comes from vendors, because they tell you what competitors are doing. Sometimes a company can leak certain information into market place through vendors because one knows they are telling the competitors what one says.
<b>Most effective media types</b>	Face to face and printed brochures and advertisements
<b>Determining new suppliers</b>	Primarily based upon fit with current activities and machinery. Determine if the product can improve or expand out current markets.
<b>Elements to look for in advertisements</b>	Contact information or point of action
<b>Willingness to pay more</b>	Not as much as we used to. If the generic product performed the same and was cheaper, we would go with the unbranded product unless the end market demands the branded component.

### Appendix O2: Company B Interview Results

Topic	Company B's Comments Regarding Advertising Effectiveness from a Supply Chain Perspective
<b>Reasons for seeking information</b>	Business fit Product information
<b>Information sources</b>	The web is the most dominate information source, unless there are prior relationships.
<b>Most effective media types</b>	Websites, trade publications, and trade shows.
<b>Determining new suppliers</b>	Looking for quality for the cost. We look for companies that have longevity and commitment but it depends on the product of interest.
<b>Elements to look for in advertisements</b>	Relevant contact information that is easy to remember. Enough information to catch interest and then a clear call to action.
<b>Willingness to pay more</b>	If the quality or benefits are worth the extra cost, then yes.

### Appendix O3: Company C Interview Results

Topic	Company C's Comments Regarding Advertising Effectiveness from a Supply Chain Perspective
Reasons for seeking information	Business prospects
Information sources	Trade shows, trade publications, and past contacts
Most effective media types	Trade shows and print publications let you see what is going on very quickly.
Determining new suppliers	We do look at advertisements and evaluate if they are in line with our business We look for integrity, financial viability, and innovativeness
Willingness to pay more	No, we want to be the innovators.

### Appendix O4: Company D Interview Results

Topic	Company D's Comments Regarding Advertising Effectiveness from a Supply Chain Perspective
Reasons for seeking information	New product innovations Pricing Collaborative efforts
Information sources	Online Print Trade shows
Most effective media types	Magazines Web Typically, I do not like to be bombarded with advertisements, I like to go and seek the information for myself.
Determining new suppliers	Relationship Past experiences Price
Elements to look for in advertisements	Clean ads, full page, images that "pop"
Willingness to pay more	No, we are the brander in this situation.

### Appendix O5: Company E Interview Results

<b>Company E's Comments Regarding Advertising Effectiveness from a Supply Chain Perspective</b>	
<b>Information sources</b>	Most companies approach us. We use many internal sources.
<b>Determining new suppliers</b>	Reliability Quality Quantity
<b>Willingness to pay more</b>	No, we look more at the company and supply of the product

### Appendix O6: Company F Interview Results

<b>Company F's Comments Regarding Advertising Effectiveness from a Supply Chain Perspective</b>	
<b>Reasons for seeking information</b>	New business
<b>Information sources</b>	Internet, Google, and other online media
<b>Most effective media types</b>	White papers PR
<b>Determining new suppliers</b>	Relationships, trust, credibility, compliance, and reliability.
<b>Elements to look for in advertisements</b>	At consumer level, an engaging visual that appeals to the target and limited text. We want to be on a conversational level with the consumer to build an image. At the trade level, the webpage is the call to action. We want give a little more technical information and explain how we are better than the other products. We use both brand and company advertising on this level.
<b>Willingness to pay more</b>	We do not specifically look for brands; it is more of a quality and performance issue. If a brand name comes with that then great.

## Appendix O7: Company G Interview Results

Topic	Company G's Comments Regarding Advertising Effectiveness from a Supply Chain Perspective
<b>Reasons for seeking information</b>	Does it fit into our current operations? Is the company product reputable? Will the product enhance our current products Will the product enhance the end product for our customers Is it commercially viable?
<b>Information sources</b>	Trade shows Online Trade magazines
<b>Most effective media types</b>	Direct email and Google alerts are ways that we can get information without having to look for it, it is very convenient.
<b>Determining new suppliers</b>	We look for quality for the cost and the reputation of the business
<b>Elements to look for in advertisements</b>	We do not look for anything in particular.
<b>Willingness to pay more</b>	Yes, as long as they add value or we can add value to the product.

### Appendix O8: Company H Interview Results

<b>Topic</b>	<b>Company H's Comments Regarding Advertising Effectiveness from a Supply Chain Perspective</b>
<b>Reasons for seeking information</b>	Is it a product I need or can I use it in my business
<b>Information sources</b>	Online, search engines, contacts within our company
<b>Most effective media types</b>	Print and trade shows
<b>Determining new suppliers</b>	Geographic location Costing Availability Credibility Fit with company
<b>Elements to look for in advertisements</b>	Visual appeal, contacts, and technical information for trade ads.
<b>Willingness to pay more</b>	No, we typically stick with generic products, which allow us to create pricing tiers.

### Appendix O9: Company I Interview Results

<b>Topic</b>	<b>Company I's Comments Regarding Advertising Effectiveness from a Supply Chain Perspective</b>
<b>Reasons for seeking information</b>	We look for efficiency, cost, innovativeness, sustainability, and potential partnerships.
<b>Information sources</b>	Our company prefers trade shows, because of the interactive nature.
<b>Most effective media types</b>	Trade shows
<b>Determining new suppliers</b>	We look for innovation leaders, cost leaders, and what value they can bring to our company.
<b>Elements to look for in advertisements</b>	Nothing specific Contact information
<b>Willingness to pay more</b>	Yes and No. If a branded or well know product generates value for our company then yes we would consider purchasing it over a generic product.

### Appendix O10: Company J Interview Results

<b>Topic</b>	<b>Company J's Comments Regarding Advertising Effectiveness from a Supply Chain Perspective</b>
<b>Information sources</b>	Internet, websites
<b>Most effective media types</b>	Brand names, Internet, websites
<b>Determining new suppliers</b>	Quality and price are the main drivers, relationships, credibility, viability, supply
<b>Elements to look for in advertisements</b>	Contact information

### Appendix O11: Company K Interview Results

<b>Topic</b>	<b>Company K's Comments Regarding Advertising Effectiveness from a Supply Chain Perspective</b>
<b>Reasons for seeking information</b>	Products, collaborative efforts
<b>Information sources</b>	We go to the Internet if we do not know them, or look in a magazine.
<b>Most effective media types</b>	Online ads and PR
<b>Determining new suppliers</b>	Cost, relevance to company, performance focused, company stability, expertise
<b>Elements to look for in advertisements</b>	Specific examples of products in action Contact information Call to action Small blurb or what the business is about
<b>Willingness to pay more</b>	Typically no.

**APPENDIX P: CONSUMER SURVEY RESULTS: INDIVIDUAL ADVERTISEMENT  
ASSESSMENT RESPONSES**

**Appendix P1: Consumer Survey Results- Response Totals for Question 1**

<b>Statistics For Question 1 Results Across All Three Advertisements</b>				
<b>“I have seen advertisements for this product in the past”</b>				
		A1	B1	C1
N	Valid	165	165	165
	Missing	0	0	0
	Mean	1.54	3.24	2.10
	Median	1.00	4.00	2.00
	Mode	1	4	2

**Appendix P2: Consumer Survey Results- Response Totals for Question 2**

<b>Statistics For Question 2 Results Across All Three Advertisements</b>				
<b>“I understand what product is being promoted”</b>				
		A2	B2	C2
N	Valid	165	165	165
	Missing	0	0	0
	Mean	3.67	4.05	3.35
	Median	4.00	4.00	4.00
	Mode	4	4	4

**Appendix P3: Consumer Survey Results- Response Totals for Question 3**

<b>Statistics For Question 3 Results Across All Three Advertisements</b>				
<b>“The information in the advertisement is useful”</b>				
		A3	B3	C3
N	Valid	165	165	165
	Missing	0	0	0
	Mean	3.72	3.30	3.30
	Median	4.00	3.00	4.00
	Mode	4	4	4

**Appendix P4: Consumer Survey Results- Response Totals for Question 4**

<b>Statistics For Question 4 Results Across All Three Advertisements</b>				
<b>“I identify with the products or activities presented”</b>				
		A4	B4	C4
N	Valid	165	165	163
	Missing	0	0	2
	Mean	3.04	3.87	3.50
	Median	3.00	4.00	4.00
	Mode	4	4	4

**Appendix P5: Consumer Survey Results- Response Totals for Question 5**

<b>Statistics For Question 5 Results Across All Three Advertisements</b>				
<b>“The advertisement communicates enough product performance information to interest me in the product”</b>				
		A5	B5	C5
N	Valid	165	165	165
	Missing	0	0	0
	Mean	3.48	3.38	3.33
	Median	4.00	4.00	4.00
	Mode	4	4	4

**Appendix P6: Consumer Survey Results- Response Totals for Question 6**

<b>Statistics For Question 6 Results Across All Three Advertisements</b>				
<b>“The advertisement communicates enough product benefit information to interest me in the product”</b>				
		A6	B6	C6
N	Valid	164	165	165
	Missing	1	0	0
	Mean	3.51	3.39	3.27
	Median	4.00	4.00	4.00
	Mode	4	4	4

**Appendix P7: Consumer Survey Results- Response Totals for Question 7**

<b>Statistics For Question 7 Results Across All Three Advertisements</b>				
<b>“The advertisement communicates enough product benefit information to interest me in the product”</b>				
		<b>A7</b>	<b>B7</b>	<b>C7</b>
N	Valid	164	165	165
	Missing	1	0	0
	Mean	2.73	3.80	2.85
	Median	3.00	4.00	3.00
	Mode	2	4	2

**Appendix P8: Consumer Survey Results- Response Totals for Question 8**

<b>Statistics For Question 8 Results Across All Three Advertisements</b>				
<b>“The advertisement makes me curious about the product in the ad”</b>				
		<b>A8</b>	<b>B8</b>	<b>C8</b>
N	Valid	165	165	165
	Missing	0	0	0
	Mean	3.22	3.88	3.45
	Median	3.00	4.00	4.00
	Mode	4	4	4

**Appendix P9: Consumer Survey Results- Response Totals for Question 9**

<b>Statistics For Question 9 Results Across All Three Advertisements</b>				
<b>“The advertisement makes me curious about the company in the ad”</b>				
		<b>A9</b>	<b>B9</b>	<b>C9</b>
N	Valid	165	164	165
	Missing	0	1	0
	Mean	3.12	3.69	3.26
	Median	3.00	4.00	3.00
	Mode	4	4	4

**Appendix P10: Consumer Survey Results- Response Totals for Question 10**

<b>Statistics For Question 10 Results Across All Three Advertisements</b>				
<b>“The advertisement appeals to me on a personal level”</b>				
		A10	B10	C10
N	Valid	164	165	165
	Missing	1	0	0
	Mean	2.52	3.67	3.05
	Median	2.00	4.00	3.00
	Mode	2	4	4

**Appendix P11: Consumer Survey Results- Response Totals for Question 11**

<b>Statistics For Question 11 Results Across All Three Advertisements</b>				
<b>“Based on the advertisement's content, the product seems to be high quality”</b>				
		A11	B11	C11
N	Valid	165	165	164
	Missing	0	0	1
	Mean	4.01	3.31	3.38
	Median	4.00	3.00	3.00
	Mode	4	3	4

**Appendix P12: Consumer Survey Results- Response Totals for Question 12**

<b>Statistics For Question 12 Results Across All Three Advertisements</b>				
<b>“Based on the advertisement's content, the company appears to be creditable and reputable company”</b>				
		A12	B12	C12
N	Valid	164	165	165
	Missing	1	0	0
	Mean	3.81	3.33	3.28
	Median	4.00	3.00	3.00
	Mode	4	3	3

**Appendix P13: Consumer Survey Results- Response Totals for Question 13**

<b>Statistics For Question 13 Results Across All Three Advertisements</b>				
<b>“The images used in the advertisement relate well to the text information”</b>				
		A13	B13	C13
N	Valid	164	165	165
	Missing	1	0	0
	Mean	3.85	3.76	3.73
	Median	4.00	4.00	4.00
	Mode	4	4	4

**Appendix P14: Consumer Survey Results- Response Totals for Question 14**

<b>Statistics For Question 14 Results Across All Three Advertisements</b>				
<b>“The images used in the advertisement make me want to experience what is pictured (either by performing an activity or purchasing the product)”</b>				
		A14	B14	C14
N	Valid	165	165	165
	Missing	0	0	0
	Mean	3.52	3.33	3.18
	Median	4.00	4.00	3.00
	Mode	4	4	4

**Appendix P15: Consumer Survey Results- Response Totals for Question 15**

<b>Statistics For Question 15 Results Across All Three Advertisements</b>				
<b>“Based on the advertisement’s content, I would consider looking For this product/brand when making my next purchase”</b>				
		A15	B15	C15
N	Valid	165	165	165
	Missing	0	0	0
	Mean	2.72	3.61	3.03
	Median	3.00	4.00	3.00
	Mode	2	4	4

**Appendix P16: Consumer Survey Results- Response Totals for Question 16**

<b>Statistics For Question 16 Results Across All Three Advertisements</b>				
<b>“If a product in a store contained this brand/product I would consider seeking additional information”</b>				
		A16	B16	C16
N	Valid	165	164	165
	Missing	0	1	0
	Mean	3.06	3.54	3.22
	Median	3.00	4.00	3.00
	Mode	3	4	4

**Appendix P17: Consumer Survey Results- Response Totals for Question 17**

<b>Statistics For Question 17 Results Across All Three Advertisements</b>				
<b>“If a product in a store contained this brand/product I would consider purchasing the item”</b>				
		A17	B17	C17
N	Valid	164	165	165
	Missing	1	0	0
	Mean	2.93	3.72	3.12
	Median	3.00	4.00	3.00
	Mode	3	4	4

**Appendix P18: Consumer Survey Results- Response Totals for Question 18**

<b>Statistics For Question 18 Results Across All Three Advertisements</b>				
<b>“If a product contained this brand/product I would consider paying more for that product than a product containing generic products (ex. a branded fiber vs. polyester)”</b>				
		A18	B18	C18
N	Valid	165	165	165
	Missing	0	0	0
	Mean	2.88	3.25	2.88
	Median	3.00	3.00	3.00
	Mode	3	3	3