



Copernicus
Marketing Consulting
and Research

Whatever Happened to Positioning?

Recent Copernicus Study Confirms the Disappearance of Positioning

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Ask five marketing managers to define positioning, and you will probably get five different answers. By “positioning,” we mean quite simply the message a company wants to imprint in the minds of customers and prospects about its product or service—its brand—and how it differs from and offers something better than competitors. In an advertising context, positioning denotes a motivating, persuasively communicated message that gives targeted prospects a reason why they should think of, act, and remember the advertised product as exclusively able to deliver meaningful benefits.

Today, buyers in every category and every industry have an ever-growing array of brands, products, and services from which to choose, but very little information from companies to help them make their purchase decision. Now more than ever, companies need to effectively communicate the critical differences in their brands, products, and services, yet examples of advertising—the primary vehicle businesses use to make customers aware of their offerings—with a strong positioning message have become quite rare.

The “Anti-Ad” Experience

We first took a closer look at this issue a few years ago when we asked a large cross-sectional sample of Americans to tell us on an unaided basis about brand positioning strategies—what the five leading brands in a wide variety of categories stood for and what they communicated about themselves that made them different from other brands. Disturbingly, fewer than 8 percent of respondents could associate anything with the brands that in any way indicated a recognizable “positioning.” When we gave them everything—the positioning, message, and slogan (i.e., “Have you ever heard Coke use the slogan, ‘It’s the real thing?’”)—we found that the average, fully prompted, completely clued-in positioning awareness score for the top five brands in most goods and services categories fell under 30 percent.

This result may sound fine, but keep in mind that this “high” score hardly reflects the information about a product, service, or brand that buyers actually carry around in their minds. It only shows whether people who get fully detailed descriptions of the messages contained in the advertising can successfully self-report, “Yeah, I’ve seen that ad.” Our research has also shown that recall scores for ads that have *never* run on TV average about half as high as scores for ads that have run, sometimes higher. So when we say close to 30 percent “positioning awareness,” the score includes false awareness and does not accurately reflect genuine campaign penetration.

Much of our earlier research took place during a dark period in advertising history; when agencies and their clients seemed taken by the “anti-ad,” a commercial with often baffling and bewildering imagery and brazen creative fantasy. Supposedly this imagery ensured the ad’s memorability, but usually neglected to provide any information about the brand, what it offered, or why (if you could even figure out the sponsor of the ad) we should consider trying it. Positioning appeared to have hit an all-time low.

Thankfully, the “anti-ad” has passed out of fashion, at least for the most part. Yet the situation for positioning has not improved.

TV Advertising Today

Though the creative excesses of the late '80s and early '90s seem to have given way to a more communicative executional style that conveys the brand name and delivers a reasonably coherent message mentioning product characteristics and attributes, in an informal, non-scientific analysis of a week's worth of recent network prime-time television advertising, we found that, with the exception of a mere handful of commercial executions, advertisers continue to ignore positioning.

To gather the raw material for our recent analysis, we videotaped an entire week's worth of the prime-time commercial fare broadcasted on the local affiliates of the six networks in the Boston market area, one of the top media markets in the U.S. Editing out promotions for the networks' shows, spots for local business, and repetitions of any given commercial execution, we had about 340 different ads for a wide variety of mass market products and services covering multiple brands in virtually all advertised product and service categories, as well as a number of public service announcements (PSAs). We carefully monitored each commercial along three very basic dimensions that make for successfully executed, effective advertising:

1. Evidence of clear brand name communication
2. Clear characteristic/attribute message delivery
3. Evidence of a distinctive selling proposition or positioning having been communicated

After reviewing the tapes we came to some rather discouraging conclusions. A clear majority, approximately 75 percent, of the ads managed to get the name of the sponsor across and a little over half delivered at least the bare rudiments of a message mentioning attributes or product features available—though many of them trivial and/or common, therefore, easily forgettable. But we could say only 24 commercials of the total 340 (23 ads for products or services and 1 PSA), or 7 percent, of the executions we examined communicated any sort of reasonably clear positioning. Consider these results in light of the fact that we made our assessment of potential positioning penetration after attentively viewing each execution, with a completely open and attentive mind, and pausing after each ad before viewing the next to register the performance against the above-mentioned message criteria.

Obviously, under normal television viewing conditions, this level of attention and scrutiny does not exist; suggesting that even some of the more marginally effective commercials we watched might fail to register with typical viewers.

Our high level of scrutiny of the commercials could partially explain the low marks we gave to the positioning efforts of the advertisements. However, if we gave them low marks, then traditional research—because of inattentiveness and forgetting—would most likely yield even lower scores! We undertook this exercise to subject a representative collection of television commercials to professional evaluation and criticism on a topic of highly significant strategic importance under contemporary market circumstances. The ultimate tally of commercials we considered to have effectively positioned their brands actually resulted from *several* exposures to each execution, enhancing the “reliability” of the conclusions and more closely approximating typical repetitive exposure.

Furthermore, in response to the low level of effective positioning performance we perceived in these commercials and as a partial test of the “validity” of our evaluations, we exposed a small group of 8 young marketing professionals to a tape containing approximately 70 of the recorded commercials. These represented a full spectrum of products and services, ads we considered either positioning “failures” or positioning “successes,” and luckily, as it turned out for “validation” purposes, the tape contained an uncharacteristically high concentration of commercials we had considered effective positioning vehicles. We gave the group a very brief reminder of accepted definitions of “positioning,” a checklist containing the same simple criteria we used to evaluate each commercial (name registration, clear message elements, evidence of successful positioning), and exposed to the commercials.

In our prior assessment of this same group of 70 commercials, we considered seven ads and one PSA, to have delivered a clear positioning message. Review of the groups’ evaluations revealed that an encouraging majority (five or more of these viewers) agreed with this assessment for all seven ads and the single PSA, but believed that an additional six commercials—ads we viewed as unsuccessful in delivering a clear position—had, in fact, succeeded.

The group's response prompted us to reevaluate this group of commercials with renewed scrutiny and found one ad for a health and beauty aid, though seemingly "marginally" positioned, to include on the list of successes. But after carefully reviewing the remaining commercials in question, we concluded the other five ads failed to convey a "positioning" even at a marginal level.

Because our "validation check" led to the exoneration of one ad, we additionally reviewed all 340 executions. With the exception of one more "marginally positioned" ad, we could find no basis—even after several repeat viewings of most commercials, for reversing our initial finding. Nor could we change our conclusion that with only 24 ads out of a week's worth of prime-time television commercials possessing the ingredients leading to a recognizable and effective positioning for the advertised product or service, positioning remains on the verge of extinction.

Names But No Message

While our sampling of contemporary television advertising efforts may have revealed a discouragingly small number of effective brand positionings, we found a far more robust three-quarters of the commercials examined clearly registered their brand's name. Unfortunately, in those cases where the spot actually *said* something about the brand, the message all too frequently disappeared into the mists for reasons including:

- A confusing list of features unconnected with corresponding benefits
- Features trumpeted but with no explanation of how they worked or why they should be considered desirable
- Brand presentations that made no attempt to explain how the brand differed in any way from all the other brands available

Why would the marketer expend the effort to get a brand name across without providing a meaningful, compelling reason to remember the name in association with a unique benefit or problem solution? Here we come across another contemporary excuse to abandon the supposedly impossible task of delivering an

effective brand positioning. Distinctive positionings—precluded by the proliferation of brands, the intensity of the competition, and the speed of competitive response—have become obsolete by virtue of these very market conditions, or so the argument goes. According to this perspective, marketers have only one option: beat the competition on the basis of name awareness. Yet without clear product relevance (i.e., distinctive benefits or solutions) consumers have no reason to remember the name.

Strict adherents to the simplistic belief that if the customer doesn't know your name, he/she won't look for you, dot-coms in particular have an obsession for name-awareness-only advertising—an obsession amply reflected in the commercials we evaluated. Priceline.com, for example, presents a remarkably bland undifferentiated execution that informs the viewer of savings on airline tickets and several other services available on the site. Even though other on-line services offer the same thing—many of them more specialized in the services mentioned—Priceline still does not offer a reason to visit its site rather than the competition.

Go.com, however, gets the prize for most vague and unfocused advertising of all the dot-com commercials we reviewed. The spot speaks of “good stuff” all around us, but we need to know how to find it. A promising beginning, but unfortunately the ad tells us nothing about Go.com, what type of “good stuff” they refer to, what they do to help us access this “good stuff,” or how Go.com differs from the multitude of other on-line buyer assistance services.

Storerunner.com might have tied Go.com for vagueness and informational austerity. While they too suggest that only they can help you find things you might want to buy (they offer “the fastest way to shop your stores”), at least they have chosen a name that, beyond identifying their service, actually suggests what they might do for you. Nevertheless, the spot fails to mention how they work for you and reasons why they service you better than similar fast-shopping e-tail sites—or the on-line shopping services provided by traditional brick-and-mortar retailers, for that matter.

Though we have singled-out dot-coms with these examples, we came across this myopic focus on name registration alone in other categories as well. Given that

dot-coms spent well over \$3 billion on traditional media advertising last year (with some estimates as high as \$7 billion), much of it with the single objective of generating name awareness in hopes for web site “hits,” yet went belly-up in spite of their unprecedented spending, dot-coms in particular need to understand the importance of offering and delivering on a compelling and uniquely differentiating brand promise.

Empty Imagery

Several commercial executions epitomize dysfunctional attempts to create a persuasive and memorable impression on the consumer. Predictably, the ads at the top of this list favor imagery over any substantive brand promise.

Take the recent avalanche of advertising in the popular SUV category, for example. Hardly a prime-time television commercial break goes by without an announcement for the newest category entrant or minor makeover to an existing brand. Given the monumental proliferation of alternatives available and the intense competition in the category, we did not find the number and frequency of ads for the different brands surprising. That these very market conditions and the presumably higher level of product involvement among prospective customers has not resulted in earnest attempts by advertisers to identify and communicate compelling, differentiating benefits associated with the brands absolutely shocked us. Many neglect even the moderately useful and customary presentation of features available, instead treating the viewer to 15 to 30 seconds worth of visual imagery which says absolutely nothing about the brand—never mind anything approaching a brand-promoting reason to buy.

The campaign for the Suzuki XL7 embodies the classic throwback to the infamous “anti-ad.” In one soundless execution, a small SUV rapidly rounds a corner and the words, “Stop the Madness” appear on the screen. The spot briefly identifies the vehicle and ends with “Suzuki – It Fits.” After the first review of the ad, we felt confounded by its apparent message: we already have too many SUV’s to choose from and the madness of introducing and advertising the never-ending stream of clones had to stop? Doubting the advertiser intended this interpretation, we viewed the ad a couple more times and noticed that the ad actually began with a *very*

brief quarter-frame view of multiple gas pump nozzles inserted into the filler neck of an unrecognizable vehicle. We became weakly aware of the advertiser's well-veiled suggestion: the advertised brand could save you gas.

This anemic stab at a meaningful and differentiating message disappeared from the second campaign execution for the same brand, and the initially baffling imagery remained so. In a similarly soundless spot, a car speeds through an intersection after which an overhead signal light comes crashing to the pavement. The words (but not the actual product) "Suzuki XL7" appear on the screen followed by "Stop the Madness." The ad ends. Subsequent viewings revealed no further clues as to the bewildering objective of the advertiser. Not only did this ad lack any attribute or benefit mention, as well as any tangible evidence of positioning intentions, but it also failed—just like its other anti-ad predecessors—to adequately register a name linked to the actual product.

The campaign for the Toyota Rav4 SUV suffers from the same imagery-dependent virus, albeit a less virulent strain. In one execution the viewer sees a rather pleasant view of a gleaming silver model [which looks unmistakably similar to all other small SUV's we have seen] set down in the middle of an idyllic forest glade beside a lovely flowing stream. The voice-over identifies the brand's name, remarks on its good looks, the end. The spot stops there. In a second black and white execution for this model, the vehicle sits in the woods in the middle of a rainstorm as people hurriedly load it up with all manner of equipment. The spot adequately identifies the brand, but the tagline, "style that endures," stands curiously at odds with the nature and content of this execution. The commercial, in turn, remains at odds with the duty to herald the brand's benefits or position the brand in some way.

We find distinctive brand benefits even harder to uncover in the advertising for frequently purchased, intensely competitive packaged goods categories like beer. Budweiser's "Whassup" campaign offers the quintessential example of a meaningless and featureless set of executions. In the spots, a set of male friends communicated with each other using the phrase, "Whassup!" and held Budweiser beers in their hands. While they clearly identify Bud as the advertised brand, what the spots communicated about the product remains a mystery. The message we got from the

ad: young men drink our beer and become silly. Not exactly a message we consider indicative of a strong positioning or one that offers a compelling reason to buy Bud versus another brand [which conceivably offers the same outcome of silliness].

Despite the historical evidence of the inability of pure image-oriented advertising to deliver a strong brand positioning—an indispensable element to building and sustaining a brand in most contemporary product and service categories—advertisers continue to churn out commercials dominated by uncommunicative imagery that not only fails to position the brand, but often fails to tell the viewer anything about it—sometimes to even adequately identify it at all!

Many advertisers argue that companies could develop strong product-based positioning strategies during the '50s and '60s when product categories were comprised of far fewer brands and positioning possibilities abounded. Image-based positionings, they state, emerged in the '80s and '90s as a consequence of rampant brand proliferation and the attendant disappearance of non-replicable differentiating product and service benefits. They maintain that this latter executional style can work just as effectively as the traditional “brand distinctiveness/reason why” approach.

In our experience, however, using an image-based positioning gets you about as close to success as reading bumper stickers gets you to spiritual enlightenment.

Insights Into Imagery's Lackluster Performance

In his book, *The New Positioning*, Jack Trout provides some interesting conclusions that explains the inherent weakness of advertising that seeks to create effective positioning statements by relying on imagery without sufficient auditory message elements. Though most advertisers seem to embrace the ancient Confucian aphorism, “A picture is worth a thousand words,” as tantamount to scripture, Trout reports that after analyzing hundreds of effective positioning programs, he did not find one entirely visual program among this group. (He even went so far as to have an expert re-translate the venerable proverb from original Chinese characters and found it to actually read, he claims, “A picture is worth a thousand *pieces of gold*,” not “*words*.”) After consulting prominent psychologists and memory experts, Trout

presents evidence that suggests pictures alone without spoken words in television advertising, are worth very little in efforts to deliver effective and memorable messages. But with the addition of sound—spoken words—commercials can carry more meaningful and far more easily understood and remembered communications.

Although he presents his evidence in some detail, in a nutshell, the ear processes and stores information faster and with greater longevity than the eye. A visual image in general, whether picture or words, his research has found, fades away quickly unless the mind does something to file away “the essence of the idea.” On the other hand, hearing captures stimuli faster and holds onto it considerably longer. Furthermore, and of particular relevance when considering the impact of all those soundless image-based ads that concede to the presence of a few printed words on screen, Trout states that, “Listening to a message is more effective than reading it. Two things are different. First, the mind holds the spoken words in storage much longer, enabling you to follow the train of thought with greater clarity. And second, the tone of the human voice gives the words an emotional impact that printed words alone cannot impart.”

Trout sees “staggering” implications for advertising and calls for a “reorientation from the visual to the verbal point of view.” Visuals still play an important role in advertising, of course, but he points out that pictures need explanation or they can become distracting – or subject to misinterpretation (as we discovered, for example, with Suzuki’s “Stop the Madness” campaign). “In a television commercial, spoken words should carry the sales message,” he says. “Most important, you should never let the pictures and movements overwhelm the sound. When this happens viewers stop listening and little communication takes place.”

Success Without Imagery Dependence

Even in our examination of 340 commercials, we have seen that in the most competitive categories where brand distinctiveness appears minimally, successful positionings based on brand differentiating features and non image-dependent communication approaches can and do exist.

In the overcrowded breath mint category, for example, made even more competitive by the number of alternative breath-freshening products available, the venerable Tic-Tac brand maintains a successful positioning as a highly convenient way to “breathe friendly” in social situations. The execution viewed involved an upbeat, semi-slice-of-life office scenario where effective repetition of the central “breathe friendly” slogan coupled with reference to the advantages of “not too big, not too small,” and “only one calorie,” managed to deliver a reasonably clear, memorable positioning for the brand.

Similarly, most advertisers would feel very challenged to say anything new about dog food or to communicate an effectively differentiating, product-based positioning. Iams nevertheless succeeds with its “mature dog food” by beginning their ad with the attention-getting question, “What if you could reverse the natural aging in your dog’s immune system?” While the voice-over describes the brand’s distinctive benefit, reverse photography of a dog in action provides clear visual communication of the central benefit and brand promise. Brand distinction is reinforced with the claim, “The first dog food for dogs over 5 that reverses immune cells’ aging process,” and the ad concludes with the statement, “Good for today. Good for tomorrow. Good for life.” To which we would add, “Good for motivating positioning.”

In yet another fiercely competitive category characterized by a flood of virtually positionless advertising, that of telephone communications company services, we and our colleagues also agreed that at least one of the many spots viewed from the likes of AT&T, MSN, Verizon, and MCI—an execution for Sprint’s PCS “voice command”—managed to define a clear product-based positioning based on a distinctive benefit. The ad focuses on a man tied to a chair with his arms bound to his sides lying on the floor trying, with a pencil in his mouth, to punch in a call for help on his cell phone. In the background a voice urges him to “Just say it!” The man refuses, struggles to punch in the number with the pencil, but finally gives up and says into the phone, “O.K., Call Malcolm.” The phone speaker responds, “Dialing Malcolm,” followed by an announcement about the voice-activated system available “Only from Sprint.” A clear, complimentary combination of visual and

auditory copy successfully describes a seemingly unique new service with a clear convenience benefit and communicates an effective and differentiating positioning.

Implications for Marketers

Since 1990, the number of new packaged goods introductions has increased almost 100 percent, from 15,879 in 1990 to 31,879 in 2000. From 1999 to 2000 alone, the number of new packaged goods introductions increased 21.2 percent—the largest yearly increase in the past decade. The overwhelming majority of these were either “me-too” brands or modifications to existing products and could claim no innovation in formulation, positioning, packaging, technology, or the creation of a new market, according to the research firm Research Alert. Less than 7 percent of 2000’s crop of new packaged goods was considered to represent any sort of “innovation” along this liberal set of dimensions.

In category after category, companies present individual products and services in ways that make them appear identical to the alternatives available. The majority of advertising campaigns we see portray brands with nothing that endows them with anything approaching a compelling differentiation with associated preference-motivating benefits. As companies abandon efforts to persuasively distinguish their products and services from the competition—often because differentiation appears too difficult, too costly, or impossible to create and sustain—brands move closer to commodity status.

Instead, they produce lackluster campaigns focusing on simple awareness-building and/or prosaic price inducements to spur short-term gains at the expense of customer affiliation and loyalty. As brands continue to multiply and proliferate, leaving consumers to drown in a sea of indistinguishable choices, buyers increasingly respond to the only difference between brand names they can detect—price. And the march toward commoditization quickens its pace.

True, many in the marketing and advertising communities have acknowledged the magnitude of this problem and the need to reverse the tide of almost undifferentiated selling. With closer inspection, however, many of their acknowledgements take the form of vague “pep-talks” about the importance of

“branding” and “brand-building” campaigns. But these terms have become over-used and amorphous; a marketer’s buzz-words *du jour*, as some have described them—their definitions referring to a wide panorama of concepts and activities, many of which have little to do with the primary goal of communicating and establishing unique, long-term relationships between consumer and brand.

Yet in the midst of this popular emphasis on “branding,” a once clear, meaningful, and widely understood concept and strategic marketing imperative—*positioning*—has become neglected, forgotten, or overtaken by an array of branding buzzwords. In fact, some of the more recent best-selling books on marketing/branding, ignore the topic altogether.

In no way do we intend to minimize the fundamental importance of concepts and activities related to the strategic cultivation of brands, their “meaning,” “image,” or “identity.” Rather, we underscore for marketers the jeopardy in which they have placed their brands, companies, and careers by ignoring the strategic distinctiveness and importance of “positioning” and its successful communication within the overall context of “branding.” The science and art of discovering and developing a compelling positioning and delivering on its inherent promise delivers a “brand meaning” and gives substance to the “brand building” that increases brand equity.

We have learned from our informal investigation into contemporary prime-time television advertising that effective brand positionings still exist. And, moreover, their users have carved them into the most competitive of categories, both within Old and New Economy markets. Finding that only the tiniest percentage of a full week’s worth of network commercials communicate a clear, distinctive, and motivating brand identity suggests that positioning remains at risk.