

*Practical Guide #2*

**LESSONS LEARNED  
FROM THE DUALIMA  
TEST MARKET, 1986**

**SOMARC**

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TEST MARKET, 1986

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# Introduction

Test markets are an important means of providing a realistic evaluation of a marketing program. A test market is basically a situation in which a marketing program is implemented in a limited, but carefully selected, part of the market. A test market is a "dress rehearsal" in which a new product or program is tested in a situation resembling the one that would be faced in a full-scale launching of the product.

In conducting a test market, the planners put on a full advertising and promotional campaign in a small number of representative test cities. The campaign used in these cities is similar to the one that would be used in national marketing. The opportunity to do a trial run of the total plan serves two primary functions. The first is to gain information and, potentially, refine a marketing program before making a total commitment to it. The second is to predict the program's outcome when it is applied to the total market. In the case of Dualima, a three-phase roll-out was planned to introduce a new condom in urban areas of Indonesia. Phase 1 consisted of a three-city test market. The test market results would then be used to guide Phase 2, introduction in Jakarta, Indonesia's largest urban center, followed by Phase 3, which extended the campaign to six additional cities. The national roll-out, then, covered the ten largest urban population centers.

# OBJECTIVES UNDERLYING THE DUALIMA TEST MARKET

In initiating and designing the Phase 1 test market, a number of objectives were defined:

- Determine target audience awareness of, and attitudes toward, Dualima.
- Assess Dualima's standing in comparison to other brands.
- Assess the relative impact of different channels of the mass media campaign.
- Evaluate the current Dualima marketing strategy against specific marketing objectives that had been set for the brand.
- Establish marketing goals for the next phases of the Dualima introduction.

# PLANNING A TEST MARKET

Key objectives for test markets are only of value if they are defined in quantitative terms, although much useful qualitative information is also obtained. The key performance objectives for the Dualima test market were as follows:

Unaided Awareness	45%
Total Awareness	85%
Trial	95%
Regular Usage	10%
Distribution Level	60%

In setting up a test market, managers are faced with a number of important decisions, including selection of test cities, timing, implementation and control of the test, measurement, and strategic decisions.

## *Selection of Test Markets*

The number of cities selected for test marketing depends on the complexity of the test market design and the anticipated scope of the national roll-out. Typically, U.S. test marketers use between two and six cities. Markets are chosen to be representative of characteristics that will affect the national program, or to typify regional characteristics. Additionally, critical markets--those that represent major risks and opportunities for product success or failure--are usually avoided. In this way, if hard lessons are to be learned, they can be learned before major damage is done to the product's ultimate prospects. In the case of Dualima, the three cities chosen, Surabaya, Bandung, and Medan, were located in different parts of the country in order to allow planners to assess regional responses.

## *Timing*

Test markets last anywhere from a few months to more than a year. The longer the product's average repurchase period, the longer the period necessary to observe repeat-purchase rates. Since initial interest may be a poor predictor of a brand's staying power, it is useful to test market long enough to reveal whether a "fatigue factor" will materialize. In addition, interest in a new product is often built only after considerable communications effort has been expended. Therefore, a reasonable time period must be allowed to fairly test a communication program's effectiveness. It also is helpful to plan to have a test market run long enough to allow competing brands\* and other market factors to adjust to see what impact they will have on the results.

The Dualima test markets lasted a total of three and one-half months. Since the condom is a product for which a fairly rapid rate of repeat-purchase may be assumed, this time span was long enough to allow planners to assess repurchase intentions/behaviors. An additional consideration for Dualima was that a test market of several months was needed to determine whether the program had pulled condom users away from other brands. Since the advertising spending for Dualima was relatively heavy, this period also was sufficient to evaluate the communication's effort.

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\*For example, competing brands often respond to new product introductions by temporarily increasing advertising expenditures for their brand. Enough time, therefore, must be allowed for obtaining a clear idea of the "share of voice" the new product will have in the marketplace.

## *Implementation and Control*

In setting up a test market, it is critical to ensure that the marketing program in the test areas is implemented so as to reflect the national program. This requires a clear a priori definition of the scope of the national program so that it may successfully be "decomposed" to a local level. For example, Dualima's campaign budget was allocated to a mix of print (37.1 percent), public relations (24.4 percent), outdoor advertising (15.8 percent), radio (10.2 percent), point of sale (9.3 percent), and direct mail (3.2 percent). This reflected the distribution planned for the national level.

Control of a test market requires being aware of any response made by competing brands and monitoring these reactions to determine their impact on the campaign. Other relevant market factors (e.g., the condition of the country's or region's economy) also should be tracked over time to evaluate effects on the market response.

## *Measurement*

Planners must decide on the types of information to collect in relation to their value and cost. Data may be collected across a range of measures. For example, warehouse shipment data will show gross inventory buying but will not indicate weekly sales at retail outlets. Store audits will show actual retail sales and competitors' market shares but will not reveal the characteristics of buyers. Consumer surveys will provide information about a product's target audience, such as brand and advertising awareness, attitude, trial purchase and repeat purchase intention, and/or behavior.

In conducting their test marketing measurement, Dualima planners initiated a retail audit and a survey to track consumers' awareness, attitudes, and purchase intentions regarding the new condom.

## *The Retail Audit*

The audit was conducted in Bandung, Surabaya, and Medan among apotiks and toko obats. A panel of approximately 50 outlets (half apotiks and half toko obats) in each city was set up, and they were visited every six weeks in three phases. Each phase was comprised of two visits to the shop one week apart.

The data collected included brand stocked by package, quantity of stock by brand, past week sales, and selling price. Phase 1 was conducted in April, Phase 2 in June, and Phase 3 was conducted in August, 1986.

## *The Tracking Study*

The target audience for the tracking study was a randomly selected sample of men aged 18-49. All were in the lower socioeconomic classes (Classes C, D, and E), and none was currently trying to have a child.

To select a sample that would provide information on Dualima's performance among meaningful market segments, three subsamples were chosen: (1) married current condom users, (2) married nonusers of any reliable contraceptive method, and (3) bachelors.

In performing this study, personal interviews were conducted employing two waves of house-to-house interviews in a pre-test/post-test design. A matched quota

sample was used for Wave I versus Wave II. A total of 1,983 interviews were conducted as follows:

#### MARKETS

	Sample Sizes	Launch Date	Pre-Wave Interviewing	Post-Wave Interviewing
Surabaya	660	April 10	April 5-May 9	July 31-August 25
Bandung	657	April 2	April 8-May 17	July 31-August 25
Medan	666	April 2	April 8-May 17	July 31-August 25

Due to the difficulty of finding condom users, pre-wave interviewing took longer than anticipated to complete. As a result, pre-wave interviewing extended into product launch and, therefore, the *pre-wave data do not provide a "clean" baseline*. We can, however, assume that awareness of Dualima was zero prior to the launch because it is a new product.

It is important to note that although the sample was randomly selected, it was not designed to be a national probability sample. The findings are meant instead to be representative of the quota groups from which the subjects were drawn, these are the relevant target audiences for Dualima.

# STRATEGIC DECISIONS

After the test market is completed and the data are collected and analyzed, the manager is faced with interpreting the results and deciding which actions to take. Viewing overall market response provides input for making "go" versus "no-go" product launch decisions. For example, if the test markets indicate acceptable trial and repurchase rates, the decision to go ahead with a national roll-out will be made. If the test markets reveal a high trial and low repurchase rate, customers are not satisfied, and the product should be re-evaluated. If the test markets show a low trial and a high repurchase rate, the product is satisfying its consumers, but more people need to be exposed to it via increased advertising and sales promotion. Finally, if both trial and repurchase rates are low, the decision to drop the product should be considered.

Dualima's performance indicated that the decision for a national roll-out should be a "go." Awareness, trial and repurchase rates were deemed to be acceptable, according to the original objectives set for the brand's performance. Overall, the brand showed enough promise that planners were able to project a viable share of the marketplace.

In addition to these "go" and "no-go" decisions, test market data should be used to shape planners' decisions regarding the fine-tuning of the marketing mix regarding product, price, place, and promotion.

On a more specific decision making level, test markets are used to help program planners address issues related to the "four P's" of the marketing mix:

- **Product** decisions (e.g., Are there any aspects of product performance that require attention? Should any aspect of the product offering, such as package size, be modified?)
- **Price** decisions (e.g., Is the product priced to attract new users among the lower income market segment and at the same time maximize revenue? What margin is required to interest the retail trade in selling the brand?)
- **Place** decisions (e.g., What type of retail outlets should be used in getting a new product into the consumer marketplace?)
- **Promotion** decisions (e.g., What is the most cost-effective media mix, and what product attributes should be promoted?)

The following discussion describes product, price, place, and promotion decisions in the context of issues raised during the Dualima test market.

The Dualima test market revealed no major problems among users of the new condom. Consumer satisfaction was acceptable (53 percent liked it), and repurchase intent was very high (85 percent).

Packaging the new brand was an additional product concern. In the case of Dualima, this question focused on whether to market a six-pack of condoms, along with the presently available set of three- and twelve-packs. Although the survey did not specifically ask whether consumers would be interested in buying six-packs, the data suggest that 14 percent of condom users are separating twelve-packs to purchase six condoms at a time. Based on these data, decision makers may infer some consumer interest in an intermediate level of packaging. An additional benefit to be considered in this context is that a six-pack alternative would result in more shelf space.

## *Specific Decisions on the Marketing Mix: The Role of Test Markets*

## *Product Decisions*

## Price Decisions

Decision makers needed to consider the positioning of the product at the same time they considered the price. The majority of consumers (80 percent) viewed Dualima's price as "average," with an additional 19 percent perceiving the cost to be "cheap." Although on the surface these data would appear to be optimal for reaching the desired lower class target audience, several related questions were relevant. Strategists needed to determine whether switching to a slightly higher price (still falling within consumers' range of acceptance) might attract an even wider consumer market and generate higher revenue for the project if the slightly higher cost was seen as indicating an increase in quality. Alternatively, decision makers might assess the potential for a higher-priced line extension. Another potential benefit of increasing prices is that it allows for higher trade margins. Higher margins provide encouragement to the trade to push Dualima brand through the pipeline. In the case of Dualima, however, the decision was made to roll-out at the test market price, since that price level had received national publicity during the test market phase.

## Place Decisions

Place decisions are made based on what program planners learn about what happened in the distribution channels during the test market. Planners look to identify and explain problems of distribution that keep their products from being available to as many consumers as possible. They then develop strategies for overcoming these problems.

For example, the test market survey revealed that while satisfaction among those who tried Dualima was high, trial by new users was only moderate (3 percent). Considering that the desired potential new user was of low socioeconomic status, Dualima planners considered expanding distribution to include street vendors or other widely accessible, indigenous sources. This may prove to be a worthwhile strategy.

The Dualima tracking study was supported by a retail audit of apotiks and toko obats. A panel of approximately 50 outlets in each of the three target cities was set up, and each was visited every six weeks in three phases. Data were collected on stock, sale, and selling price of condoms. Such data reveal critical points at which a product can get "stuck" in the pipeline, and allow managers to "troubleshoot" and to determine whether the distribution system is working efficiently. If the product is not making it to the outlets ("selling in"), decision makers can be alerted to problems in shipping. If the product is unavailable to consumers, it can also reveal trade uncertainty about maintaining sufficient stock. Lack of good shelf space may reveal trade margin competition or more attractive point-of-purchase displays by competitive brands. In sum, the role of intermediaries (e.g., shippers, purchasing agents, retailers) in the placement process must also be considered as part of the marketing mix. Data on stock, sales, and selling price are indicators that can be followed up to diagnose sources of trade dissatisfaction or indifference and provide useful ideas for overcoming problems and/or inefficiencies in the distribution system.

Based on the results of the retail audit, Dualima planners concluded that salesmen were generally effective in placing Dualima at retail outlets. Eighty-two percent of all outlets studied were carrying Dualima at the close of the test market period. Despite this high sell-in rate, however, stocks of Dualima held in inventory were lower than those of competing brands. Planners, therefore, sought ways to encourage the trade to hold larger inventories of Dualima.

## Promotion Decisions

### MOVING THE PROMOTIONAL MIX

The test market provided Dualima decision makers with critical information on the impact of a particular mix of promotional activities (advertising and public relations) on the target audiences' awareness, image, brand perceptions, purchase intent,

and reported purchases of DualLima condoms. For new product introduction, a test market gives strategists an opportunity to evaluate a promotional plan's success in meeting the crucial objectives of generating consumer awareness and trial. The table below shows the success of the DualLima test market promotion in generating awareness and trial of the DualLima brand, as measured against target objectives:

	Actual (Percent)	Target (Percent)
Top-of-Mind Mentions of DualLima	43	—
Total Unaided Awareness of DualLima	55	45
Total Awareness of DualLima (aided and unaided)	81	85
Advertising Awareness	78	—
Trial of DualLima		25
Condom Users	33	
Nonusers/Noncontraceptors	3	
Repeat Purchase Intentions	82	—

In addition to evaluating these findings against target objectives set for the brand, the DualLima marketing planners gained additional perspective by evaluating the brand's performance against that of the market leaders, Kingtex and Young-Young. The table below shows that in the 3½-month test market period DualLima promotion was able to generate substantially higher awareness and parity levels of trial vis-a-vis that accrued for successful brands that had been on the market as long as 15 years.

AWARENES AND TRIAL OF DUALLIMA BRAND

	DualLima (Percent)	Kingtex (Percent)	Young-Young (Percent)
Top-of-Mind Awareness (first mention)	43	8	5
Total Unaided Awareness (all unaided mentions)	55	15	9
Total Awareness (all aided and unaided mentions)	81	32	22
Total Trial	12	14	9
Condom Users	33	34	23
Noncontraceptors	3	6	3

DualLima strategists also received some overall assurance that heavy mass media promotion of a condom brand (unprecedented in Indonesia) would not lead to a "backlash" from consumers or potential adversaries as a "price" for generating awareness. On the other hand, DualLima planners needed to consider whether they had actually *overspent* on mass media to generate awareness.

A critical decision regarding promotion focuses on the media mix used to promote a new product. In the case of DualLima, radio spots were found to be the most effective media for generating awareness, as shown below:

FIGURE 10-10: MEDIA MIX USED TO GENERATE AWARENESS

All aware of DualLima advertising (N = 312)

Newspaper	33
Magazine	7
Radio	80
Billboard	27
Poster	20
Cinema	4
Sticker	4

NOTE: Test market respondents, if aware of DualLima advertising, were asked where they had seen or heard about it.

Based on these findings and knowledge of the dollars spent in each medium, program planners decided to revise the media allocation to "heavy-up" on radio vis-a-vis newspaper advertising. Despite its substantially lower contribution to generating consumer awareness, some newspaper advertising was maintained due to its importance in gaining the confidence of the trade.

Additional media mix decisions made by the DualLima marketing team dealt with billboard and cinema advertising. Billboards were found to be more effective than expected. While the initial expense of billboards is relatively high, their long "life span" makes them an efficient promotional investment. The test market also allowed DualLima planners to evaluate two different billboard placement strategies. The placement of billboards along main highways, utilized in Surabaya, was clearly shown to be more effective than dispersing them in communities and was, therefore, the placement strategy adopted for the national roll-out.

On the other hand, cinema ads, shown in "photomatic" form in test market theaters, were not as effective in generating awareness as had been anticipated. While expectations for the reach of cinema were low to begin with, this was offset by their low cost for placement. Therefore, the decision was made to maintain cinema ads in the mix during roll-out, but not spend the considerable resources required to transform the cinema spots from photomatic to final production form, as had originally been planned.

A final element of the promotional mix is public relations. Here, the test market revealed an unexpectedly high contribution from publicity associated with the new product launch. The launch activities generated considerable television coverage, providing additional media at no charge. The public relations value of this coverage, as well as its financial assistance to the program, was noted by the marketing team, who planned to recreate it as closely as possible during roll-out.

Along with assessing brand awareness and trial, DualLima strategists assessed the perceptions of DualLima condoms created by the advertising. Not only was brand

awareness high, but the study revealed that the advertising created a positive image of the Dualima product in the minds of consumers, relative to its top-brand competitors, as shown in the table below:

BRAND IMAGE  
(Percent)

	Dualima	Kingtex	Young-Young
Easy to Obtain	68	29	16
Right Size	47	19	14
Leakproof	47	26	16
Thin	47	26	15
Moderate Price	62	19	11
Many Advertisements	78	14	5
Attractive Pack	44	23	14
Good Quality	37	23	14
Most Appealing	52	19	3

Also, by assessing consumers' recall of advertising message content, strategists learned whether the intended advertising message was "getting through" to consumers, and the relationship between message memorability, brand image, and purchase intent. The test market data revealed that the basic "spacing" platform was well communicated, and that the key benefits associated with that platform also came through well.

## *Increasing the Condom Market*

A key program objective was to increase the condom use overall rather than to stimulate brand switching. A number of test market findings revealed success in this area. First, overall awareness of contraceptive methods, including condoms, increased significantly from before to after the test market campaign, as shown below:

(Percent)

	Before Campaign	After Campaign
Pill	62	72
IUD	56	63
Condom	68	77

## *Promoting to the Trade*

Second, the test market showed an increase in positive attitudes toward condoms. They were seen as more practical, natural, reliable, hygienic, and as less offensive and embarrassing after the campaign. Finally, and perhaps most importantly, the test market showed significant trial and regular usage of Dualima condoms among those who had never used *any* contraceptive method before (3 percent and 1 percent, respectively). While these figures appear modest, they represent a sizable absolute number of individuals.

The test market also revealed new opportunities and strategies for condom category growth. For example, the Dualima survey found that condom purchase was a joint decision between husband and wife for 32 percent of those who tried the new product. This suggested the possibility of introducing a new aspect into the promotion—targeting wives of condom users. Also, the test market data on the image of condoms revealed perceived benefits and barriers that suggested promotional strategies to convert nonusers to users. For example, noncontraceptors and condom users saw condoms similarly in terms of their being “good for spacing,” “demonstrating male responsibility,” “decreasing sexual pleasure,” and “being a hindrance during sex.” However, noncontraceptors were significantly more likely than condom users to question the condoms’ reliability and to view them as embarrassing to use and difficult to dispose of. Also, condom users were more likely to recognize that there were no side effects associated with condom use. Taken together, these differences in perception provide clues as to important “leverage points” that may be used to overcome barriers among noncontraceptors.

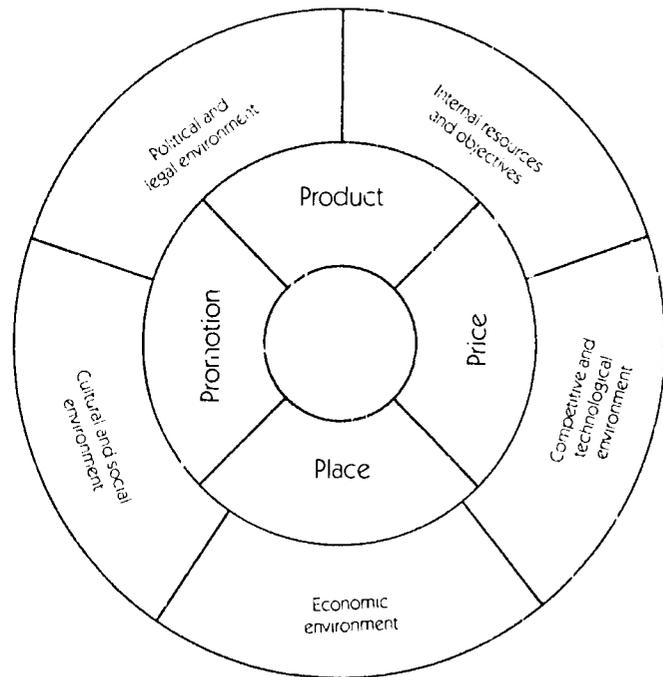
Finally, another strategy for market growth is to increase the intensity of use—the number of products consumed per period of time. The test market revealed that 24 percent of all condom users reported that they did not use condoms every time they had intercourse (i.e., self-report as “use occasionally”). This suggests that later in the life of the Dualima campaign, a “usage reminder” strategy would be worthwhile. Also, Dualima strategists considered a consumer promotion for the “twelve-pack” to encourage greater frequency of condom use and brand loyalty.

Campaign considerations also should evaluate the full range of promotional possibilities, including the development of marketing programs, special offers (e.g., a free razor with each twelve-pack purchase), coupons, etc. These considerations also tie into strategists’ awareness that a new product must be marketed to a multiple audience, that is, to the trade as well as to consumers. While consumers are more likely to be attracted by product attributes, the trade will be drawn to the new item by their desire to make a profit. Considerations regarding how to “buy shelf space” from the retail market (e.g., trade promotions) are an important strategic decision, since product availability is an obvious prerequisite for sales. For example, the retail audit of apotiks and toko obats revealed that while Dualima achieved a high level of distribution—82 percent of the retail sample stocked Dualima by the end of the test market—the Dualima proportion of the stock in trade was lower than its market share. The implication here is that consumer demand will support higher stocks being held by the trade and that higher volumes should be sold into the trade. Since Dualima competes in the standard price market (which represents 95 percent of the overall market), part of the problem was that at identical profit margins (in percentage terms) retailers received substantially higher absolute value from sales from other higher-priced brands on the market. This was compounded by the fact that the other manufacturers began dealing heavily with the trade, offering even higher margins on their twelve-packs. Therefore, the marketing team developed additional incentives and promotional ideas to gain trade support and developed a plan to increase the margin offered to the retailer.

## Perspective: The Fifth "P"

The importance of maintaining a balanced perspective regarding the cultural context of the test market is a final aspect that cross-cultural strategists must consider. Figure 1 illustrates the various environments that shape the research perspective.

Figure 1. The Test Market Perspective



(Adapted from E. Jerome McCarthy, *Basic Marketing: A Managerial Approach*, 7th ed.)

The cultural and social environments in Indonesia were important factors in understanding the meaning of consumers' responses. For example, known differences among the three cities have been useful in explaining variations in product responses (e.g., Surabaya has the most free clinics handing out condoms at no cost). As another example, knowing that Indonesian bachelors are expected to have a low rate of intimacy before marriage provides a context for responses in this direction.

Understanding the prevailing social tendency across cultures to give either a "socially desirable" response or one that will be "pleasing to the interviewer" is also important. The DuaLima study used a "ringer" brand ("Tops") in measuring awareness as a safeguard against such a bias. Responses to this fake brand were a measure of such self-report.

The economic environment also should be considered as a factor shaping the development of a campaign. The price that is considered "average," "cheap," or "expensive" will vary according to economic trends. Analyzing the ways in which the present target audience (the lower socioeconomic classes) might be affected by inflationary cycles, recessions, etc., will assist strategists in staying on target regarding issues of pricing and distribution.

Any advertising campaign also must operate within the political and legal environment of a given country. A thorough understanding of these realities will help decision makers avoid errors that might place the campaign "at risk." Since family planning is a potentially "hot" topic in many countries, strategists should be careful to

## Planning Ahead: A Vital Perspective

assess where their campaign will fit in the context of previous advertising. In certain countries, there may be clear-cut limits, i.e., legal constraints on what can be done. For example, in Indonesia, it was not possible to place television spots to promote Dualima. Other less obvious constraints may also exist (e.g., political sensitivities towards family planning may run high during elections or times of political change).

Introducing a new brand into the marketplace demands that decision makers be aware of the competitive environment. Assessing the ways in which other brands respond (e.g., cutting prices, increasing distribution, attempting to "piggyback" on the new brand, etc.) will provide important insights. For example, Young-Young increased its share of pieces from 31 percent to 58 percent during the test market period, largely through the introduction of "002" in 6-packs and 12-packs. Such new product and package size introductions are common tactics used by established brands to limit retail shelf space available to a new competitor.

Test market researchers should be aware of the need to evaluate consumers' reactions within the competitive marketplace. For example, the Dualima tracking study suggests that a "halo effect" occurred in which the campaign for a new brand of condom stimulated consumers' general awareness of contraceptive methods, including pills and IUDs, as well as other condom brands.

Taking the time to define objectives carefully and to review the larger context of a test market prior to beginning will allow planners to be certain that the test market will directly address their present needs, as well as provide data for future needs, whenever possible. For example, data obtained in a test market also might be used as a baseline for comparison against future tests. Recognizing this possibility beforehand will facilitate the collection of data to address this need.

Giving explicit attention to program objectives is especially important in the area of social marketing. This will allow planners to clarify the final end goals of their overall campaign. In the case of the Dualima test market, it was critical to assess the relative priorities for initiating a campaign to (1) increase general contraceptive use, (2) increase general condom use, (3) improve the condom's image, and/or (4) develop a user base for a specific new product. Depending on the objectives determined ahead of time, the data collected to evaluate outcomes would vary accordingly. It is important to recognize the need to review *specific* trial objectives in an *ongoing* manner. For example, review of the Dualima trial objectives revealed that although Dualima was not meeting the objectives established before the campaign, it was at parity with the market leader. An ongoing analysis of the objectives in light of information gained from the test market will help decision makers to understand the meaning of these numbers.

Once the objectives have been determined, it is important to have a clear definition of the target audience and to choose a sample whose characteristics will match the proposed national target audience. Good planning will also require adequate documentation of a test market campaign. Complete documentation of the reasons for choosing the test market locations, time frame, implementation, data collection, advertising schedules and budgets, campaign outreach, etc., will provide a basis for reviewing test markets for similar products across countries. This consistency will lead to a data base that will enrich social marketing strategists' understanding of the global family planning initiative.

Along with clarifying the test market's objectives, a planning perspective also points out the need to recognize the limitations that managers face in test marketing, such as the cost of the undertaking and the need to reach a decision quickly. The Dualima test market was set within a given time span, and the decision was made to assess a similar marketing mix across the three different regions rather than testing an alternative mix in different locations. Although a more longitudinal approach could have been taken (i.e., to assess the repeat-purchase over a longer period of time), a trade-off between launching a "comprehensive" survey versus the need to find out specific information in a timely manner is often found.

# SUMMARY

Consideration of the five P's - price, place, product, promotion, and perspective---will provide decision makers with a framework within which a campaign may realistically be evaluated. Such an evaluation will lead to a number of benefits, including an increasingly cost-effective allocation of campaign resources in future promotional endeavors. In addition, well-documented records of evaluations will create a data base against which present and future promotional activities may be compared.