
CALLERLAB

Square Dance Image Study

Survey of National NFO Panel of 1887 Internet Users

March, 2000

Report Prepared by

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and

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(CMS)

CALLERLAB is concerned about the future of Square Dancing, and is ready to take action

Concerns:

- Significant loss in dancer numbers over past decade
- Reasons for loss unknown
 - Changing population demographics?
 - Changing needs or interests?
 - Dancer dissatisfaction?
 - Poor image of Square Dancing?
- Slow demise of Square Dancing . . .
 - Is it inevitable or reversible?

The Business Decisions

- Should CALLERLAB undertake major marketing effort?
- Should CALLERLAB invest in further research to guide its marketing program?

Preliminary research commissioned as first step in marketing program

Study Objectives

- Conduct a low cost, preliminary study of general public opinion to . . .
 - Assess image of Square Dancing
 - Explore potential for expanding interest in Square Dancing
 - Test viability of “Boomers” as target for marketing efforts
 - Identify other possible marketing targets

The Study

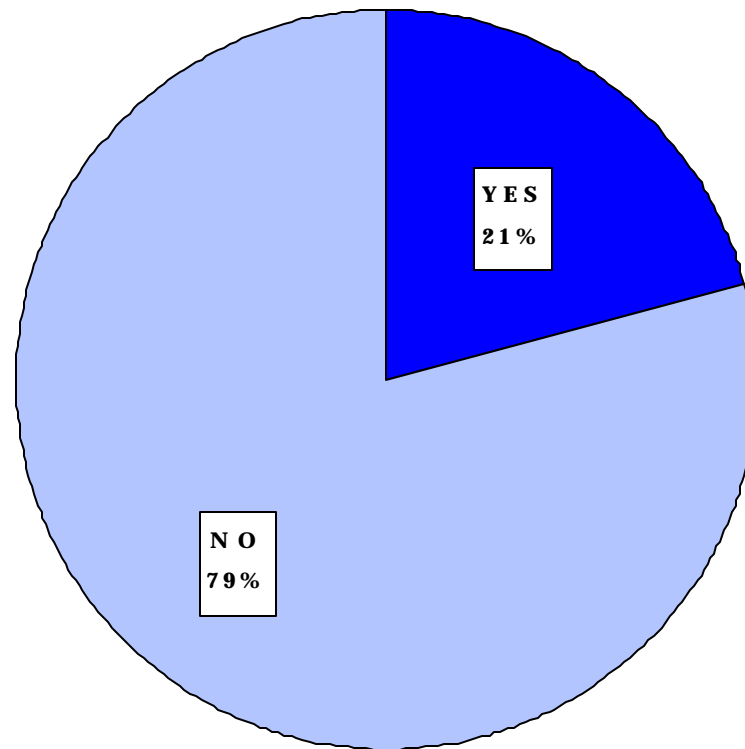
- 1887 respondents to National Family Opinion Internet panel
 - Balanced geographically and demographically
 - But limited by Internet methodology (only 60% of households use the internet)
- Three questions
- Large battery of demographic information

STUDY FINDINGS

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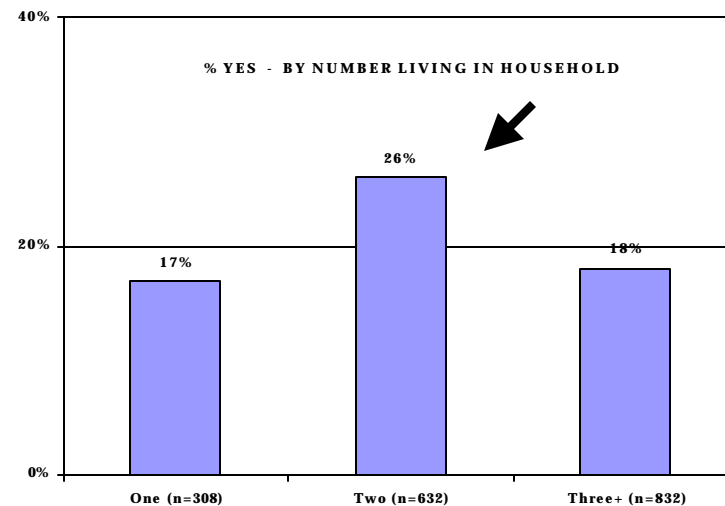
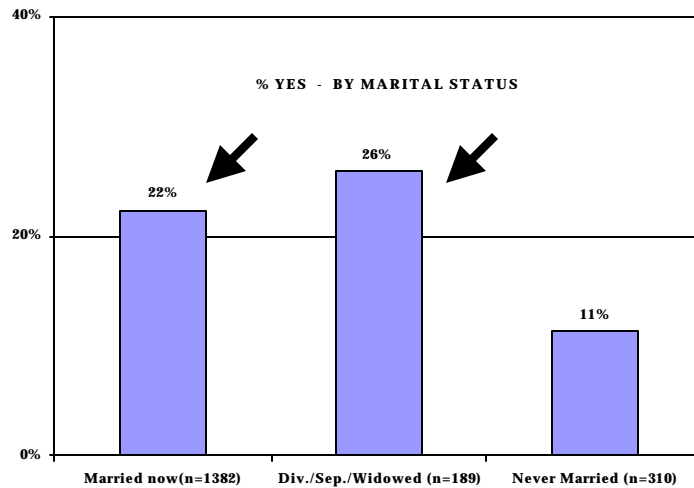
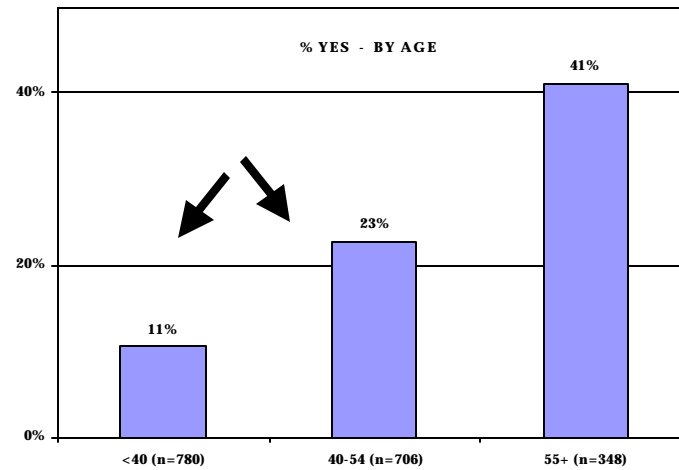
Most adults have not participated in Square Dancing as adults - but a sizeable 21% have participated!

“Have you ever participated, as an adult, in square dancing?”



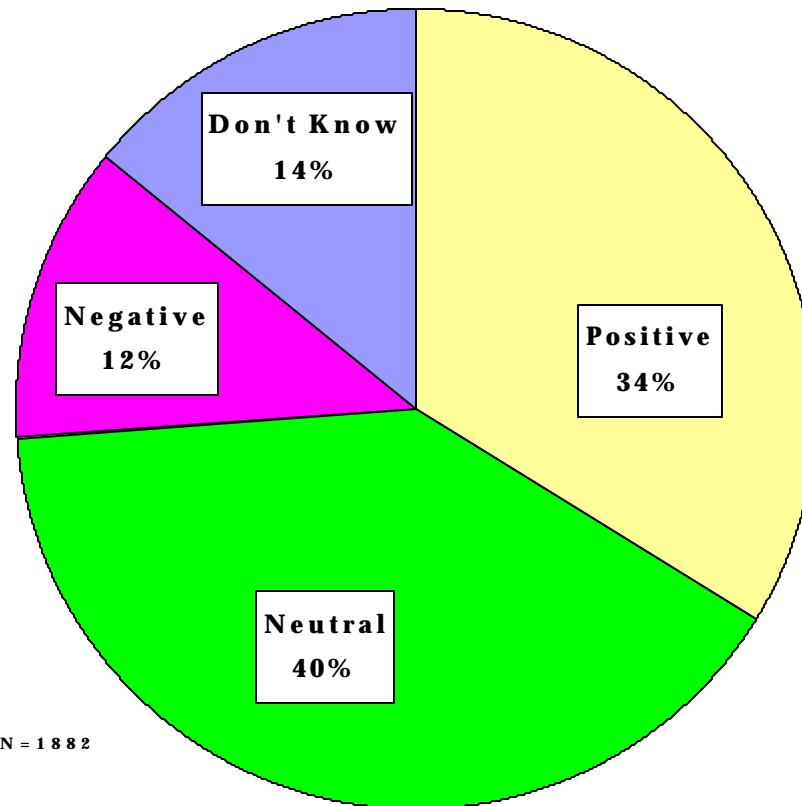
N=1881

Being older, married now or earlier, and living in a two-person household correlate with having square danced as an adult. Household income, gender, and what region of the country people live in do not.

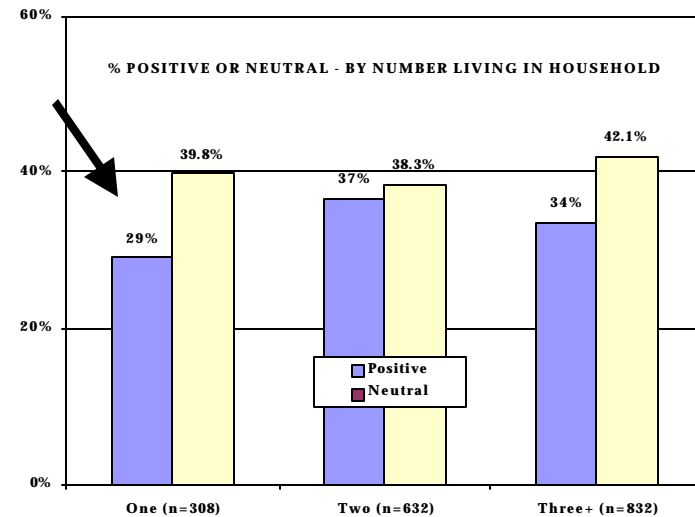
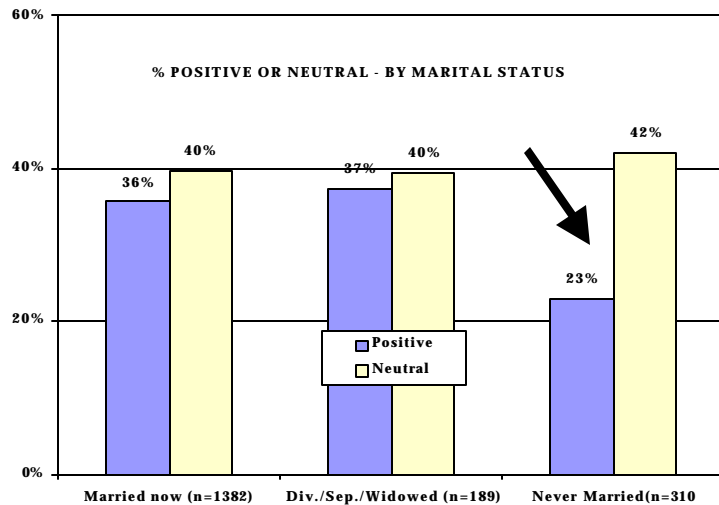
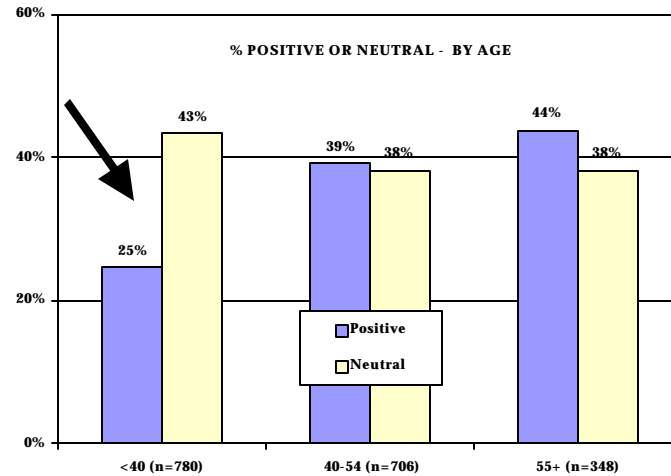


A third of these respondents have a positive view of Square Dancing, and nearly three quarters have a positive or neutral opinion - people with negative opinions of square dancing represent a definite minority.

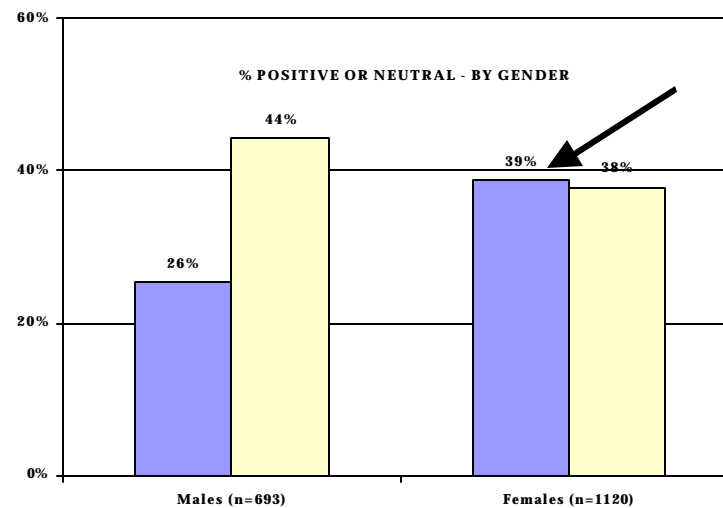
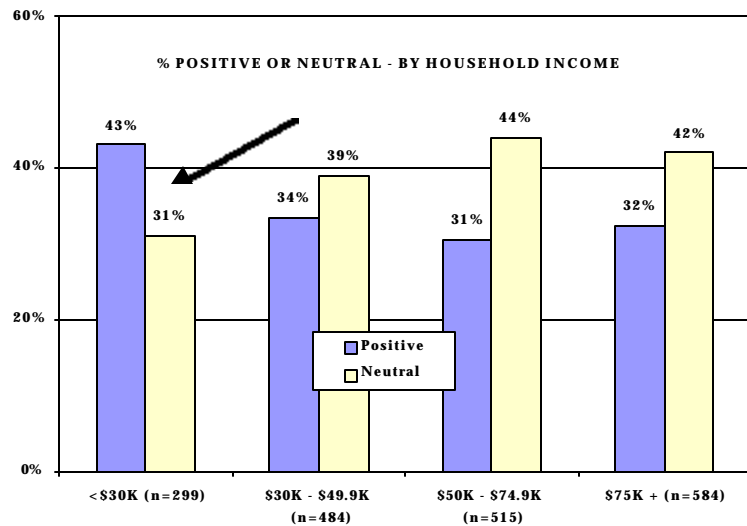
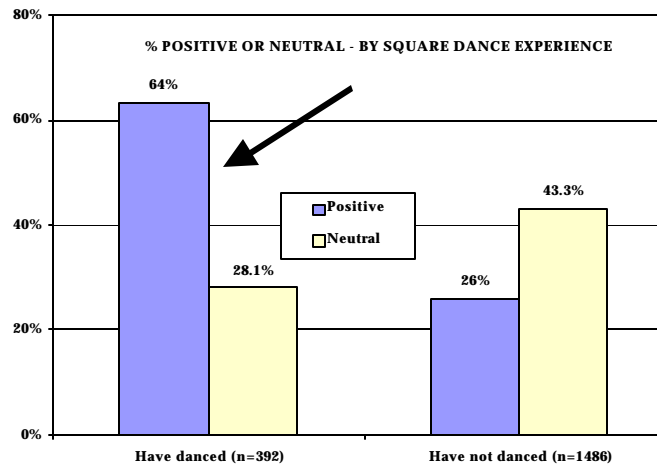
“Would you say you have a positive, negative, or neutral opinion of Square Dancing, or do you not know enough to say?”



Greater age, marriage, and household size correlate significantly with more positive opinions of square dancing - but even those under 40, never married, and living alone remain mainly neutral, not negative.

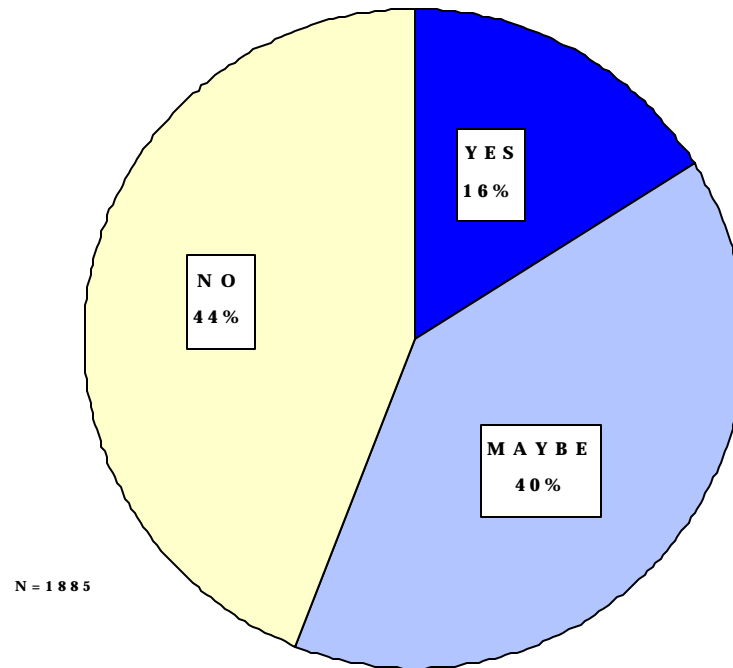


Three new factors correlate significantly with positive opinions of Square Dancing - whether a person has danced as an adult, having a lower household income, and being female.

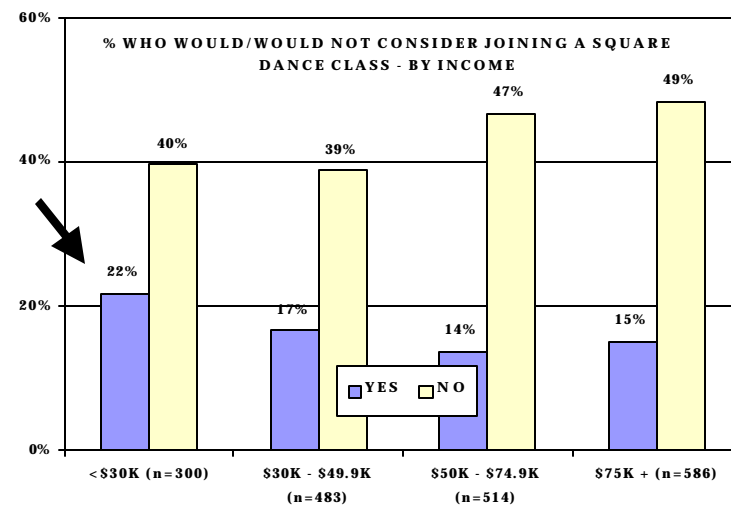
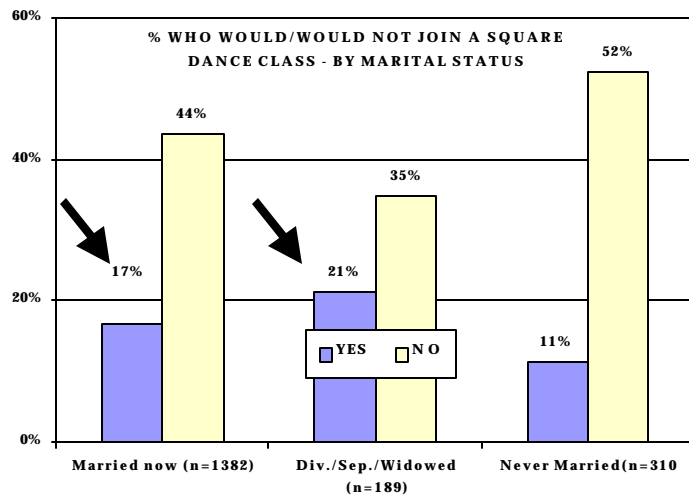
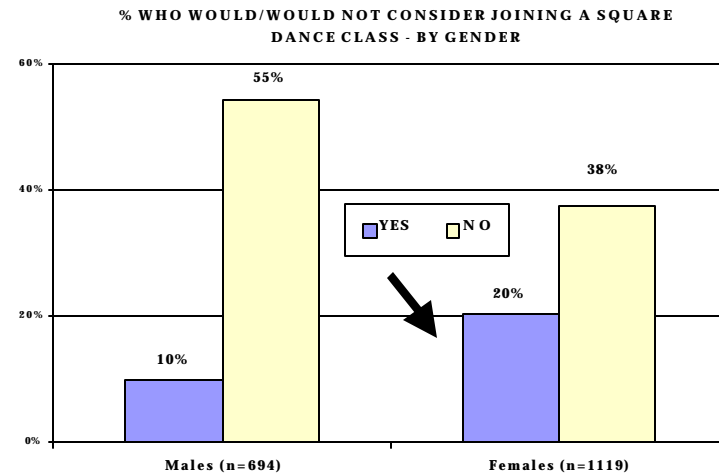
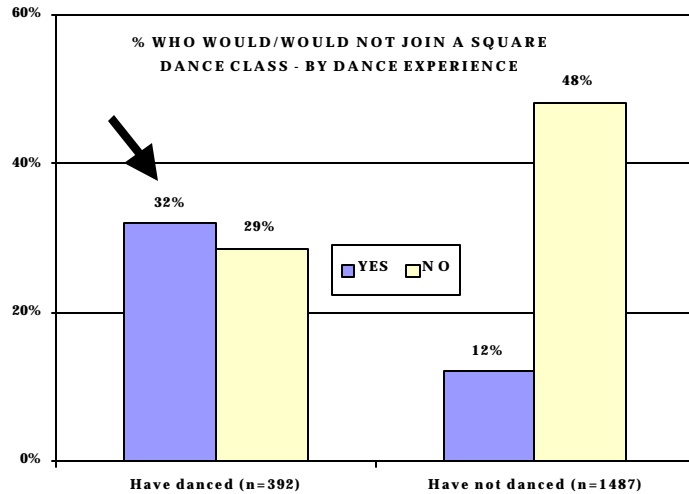


The Square Dance positioning tested in the survey yields more than half of respondents who say they would or might join a class - 16% actually claim they would join a class.

“If you heard that Square Dancing is fun to do, a great activity for meeting and socializing with other adults, and also good for your health, would you consider joining a Square Dance class to learn how to do it?”



Age and household size do not correlate significantly with inclination to join a square dance class. BUT, having danced before, being female, being married now or earlier, and having a lower income definitely do correlate.



Major Conclusions

- Among this national sample of Internet users, direct contact with Square Dancing is minimal - the vast majority (8 in 10) has not participated in this activity as adults.
- Yet, the image of Square Dancing is moderately to strongly positive:
 - Only a small minority has a negative opinion.
 - Most are neutral or better - a third claims to hold positive opinions.
- People who have had direct contact with Square Dancing as adults are much more likely to hold positive opinions of it - experiencing the activity appears to breed good will.
- Contact with Square Dancing is similar across all income levels, yet people with incomes under \$30,000 a year are significantly more apt to say they have a positive opinion of the activity than those who earn more.

Major Conclusions

- Being younger, unmarried, and living, alone reduce the likelihood of having had direct contact with Square Dancing, and opinions of the activity in this group are correspondingly less positive.
- Positioning Square Dancing as Fun-Social-and Healthy would draw one in six to consider joining a class - another 40% says they might consider joining a class.
 - Together, the YES and MAYBE responses to consider joining a class represent more than half of this national sample of Internet users.
- Despite parallel rates of adult experience with Square Dancing among males and females, there are significant differences between male and female responses - females are far more positive than males and far more open to considering Square Dance classes.

In sum, we have learned that . . .

- The general context for Square Dancing is relatively favorable - the activity does not face a major negative image problem.
- There is considerable potential for expanding interest in the activity.
- “Boomers” are a viable target market for Square Dancing, as are people age 55 and over.
- Specific marketing targets could focus on singles, who have been married, and on people with lower household incomes.
- Given the differences in male and female attitudes toward Square Dancing, any marketing “pitch” must leverage the positive female response.

Recommendation

- If a major marketing effort is undertaken on behalf of CALLERLAB, there needs to be further research to understand **why, when the context for Square Dancing is relatively positive, the current level of participation is decreasing**. This information is critical to designing and implementing an effective marketing campaign.

Appendix: About the National Family Opinion (NFO) Internet Survey Panel

- National Family Opinion (NFO) is a nationally known research firm. Its survey panels are made up of people who agree to respond to periodic surveys over the course of one to two years. Their demographic characteristics are balanced to match national US Census percentage distributions in total, and within each geographic division according to: market size, age of household head, annual household income, and size of household. Since demographic questions are established at the beginning of panel membership, each survey cycle can be limited to the questions of interest. Participants in survey panels of this nature tend more often to be female.
- NFO has also established an Internet-based survey panel of 5,000 members, which is balanced on the same US Census characteristics. NFO tracking research indicates that active Internet using households represent only 35.6% of all households. Internet using households tend to be more wealthy, better educated, and more “white” than the general US population.
- Clients using this panel are allowed three closed-end questions per survey cycle, and their questions are floated with items from several other clients. The advantage of using this panel is a broad based and large opinion poll for relatively low cost.
- The only unknown factor is how the mental orientation of people who agree to participate in panel studies compares to that of the total US population. This unknown characterizes all opinion polls that use panels. In the obvious, external factors, the panel matches the general US population, but in psychographic attitudes - who knows? It is, at least, a well respected research method.
- Our survey fielded from March 9 - 14, 2000. Of the 5,000 surveys sent, 1887 were returned, or 38%. Our questions were combined with questions about digital cameras and restaurants. Comparison of the mail out to the returned respondent characteristics indicate that respondents paralleled the mail out sample on the tracked demographic characteristics.
- With respect to how “representative” respondents to this Internet panel survey are of the general public, we can say the following:
 - As with the other NFO panels, there is a higher percentage of female participants in this survey than in the general population. This survey included 59% females, 37% males, and 4% where the gender was not identified.
 - Geographically, the distribution parallels national population statistics.
 - A higher percentage of our respondents are in the middle age ranges - 30 to 39, 40 to 49, and 50 to 59.
 - These respondents are richer, with 58% of households earning more than \$50,000/year, compared to 35% nationally.
 - Finally, there is a smaller percentage of one-person households in our sample (17%) versus 26% nationally.

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