



THE PULSE GROUP

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## Integrated Resources Concept to Completion

Connecting people, ideas, market data and operational experience to provide a robust approach to food, retail and hospitality brand strategy, furthering the overall value proposition.

About Us

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## Seeing the forest through the trees – that’s what we do.



**The Pulse Group** is a market research, economic consulting and strategic planning firm, which specializes in using customer, business and economic information together with competitive intelligence, to provide food, retail and hospitality clients with practical growth, positioning, development and financial strategies. We take great pride in the fact that since this company began in 1994, we have used our skills in research and planning to generate significantly higher levels of customer satisfaction for a wide range of services and help guide the design programs of some world-class facilities. Please visit our web site at [ThePulseGroup.org](http://ThePulseGroup.org) for a comprehensive profile of our firm, including examples of recently completed assignments.

The Pulse Group regularly works with clients to identify the market potential for various services and facilities. We are experts in competitive intelligence techniques, investigating industry best practices and evaluating demographic/economic data. Our projects normally involve in-depth research with customers and users, employing a variety of methods, to better understand motivations for use, decision-making criteria, price sensitivity, attitudes/perceptions and reactions to proposed concepts. In many cases we are asked to undertake financial analyses designed to test the economic viability of proposed projects or provide specific recommendations with respect to target markets, key features, pricing and operating performance.



**#Job 1** --- strategic development, operational & marketing recommendations aimed at increasing sales, enhancing profitability and promoting stronger customer satisfaction.

# our focus



## MARKET ANALYSIS

Market analyses designed to identify market opportunities available for various projects and facilities, providing specific recommendations as to target markets, product definition, product mix, pricing, absorption rates, and development programming.



## BRAND POSITIONING

Studies leading to understanding market size, trends and characteristics, competitive products and estimates of achievable market share -- considering lifestyle characteristics, habits, psychographics, behavior, motivations, and the key factors, driving buying decisions.



## CONCEPT DEVELOPMENT

Concept definition, testing, refinement and strategic planning to assist in the translation of the results of the market analyses -- optimizing project amenities, services and absorption and producing a viable development plan.



## CUSTOMER RESEARCH

Survey research and focus groups to better understand purchasing motivations, decision-making criteria, price sensitivity, attitudes/perceptions and reactions to advertising or public relations materials.



# projects

## BMC INVESTMENTS

### Mixed-Use Concept Development & Positioning

We helped BMC Investments test and position a new mixed-use development in Cherry Creek, Colorado. The project, dubbed The Clayton, consisted of a 45-room boutique hotel, an award winning restaurant, and a private member's club containing "we-work" office space and rooftop pool/event space. Our work entailed conducting approximately 40 personal interviews with key Denver business and social leaders to identify macro and micro trends which could impact the project success, assess interest level in the project, understand the appeal of various project elements (concierge services, workspace, fitness, night club, dining, parking, and entertainment elements), identify potential concept detractors, assess life fit, and determine how to position the project for the long-term

## RENO REDEVELOPMENT AGENCY

### Tourism & Recreation Market Strategy

We assisted city leaders in identifying potential non-gaming recreational attractions and facilities for inclusion in the downtown redevelopment area. To accomplish this objective, we conducted focus group sessions and interviews with residents and with visitors to the area. These interviews allowed us to identify non-gaming, attractions with national appeal that would be utilized by different market segments including residents and tourists. In addition, our analysis included a review of competitive facilities nationally and locally, and a demographic analysis of both the local population and visitors. Strategic recommendations were made for the development of various facilities, including the National Bowling Stadium, which highlighted the area's unique resources and heritage.

## HARD ROCK – LAS VEGAS

### Brand Testing & Market Positioning

We supported the work of the design and planning team with our market analysis and brand testing capabilities, adding to the overall brand strategy for Hard Rock's 300-room casino/hotel in Las Vegas. As part of our work we conducted intercept interviews with visitors to Las Vegas to test the proposed 60's music oriented theme of the proposed casino and the strength of Hard Rock's brand name. The results of our work were utilized to estimate average daily rate and occupancy levels for the proposed casino/hotel and provide insights into the strength of specific target market segments.

# projects



## NIXON PRESIDENTIAL LIBRARY

### Facility Planning & Visitor Strategies

As part of the planning for the Nixon Library's \$25 million dollar 2016-2017 renovation program, The Pulse Group partnered with Manask & Associates to conduct visitor research aimed at creating plans for upgraded hospitality and foodservice facilities, by understanding purchase habits, buying behavior and attitudes/preferences with respect to various conceptual possibilities. The key objectives of the research included developing strategies to increase participation, extend the visitor stay and optimize revenue/earned income for the Foundation. Our work included collaborating with Library staff to develop an intercept survey questionnaire and provided on-site training to Library docents, supervised data collection, tabulated/analyzed results and developed a series of strategies for generating higher levels of earned income.

## SHERATON GRANDE TORREY PINES

### Hotel Amenity and Service Positioning

Sheraton Grande Torrey Pines (SGTP) retained the Pulse Group to assist them in evaluating the service and amenity package offered at the property and in the development of strategies to enhance guests/meeting planners perception of rate value and the property's overall utilization. As part of our work we designed a series of questionnaires and conducted more than 200 interviews with meeting planners and corporate/leisure guests. The interviews focused on hotel selection criteria, the relative importance of various amenities and facilities in the selection process, expectations about luxury hotels and tested various elements of SGTP's service and amenity package against price sensitivity. Our work provided SGTP with an in-depth understanding of methods by which they could structure their amenity and service package to achieve greater guest satisfaction and stronger utilization.

## UNIVERSAL STUDIOS -- HOLLYWOOD

### Restaurant Concept Development

The Pulse Group was retained by Universal Studios -- Hollywood to assist them in assessing consumer acceptance of buffalo meat/products and interest in a themed restaurant concept, in which buffalo meat would be featured. During the course of the engagement we conducted intercept interviews and focus groups with City Walk and Universal Studio patrons, including a segment of international visitors. As part of the interviews we tested perceptions about the taste, texture and pricing of buffalo meat selections on the proposed menu and their interest and willingness to dine at a western themed restaurant. Using the information obtained from the interviews and focus groups, we provided a number of strategic marketing and promotional recommendations, which considered the strength of potential menu items, pricing, locational issues and advertising and public relations messages.



# projects

## GRILL CONCEPTS INC.

### Brand Development & Expansion Strategy

The Pulse Group collaborated with Grill Concepts, Inc., to assist them in crafting an expansion plan for Daily Grill restaurants. As part of our work we conducted approximately 500 interviews with various customer segments, discussing their perceptions of the Daily Grill concept, their frequency of dining at the Daily Grill, their patronage of dining at other non-fast food restaurants, reasons for their patronage at a particular restaurant and key demographic information. Detailed economic, demographic and lifestyle information was also compiled. Using the research, we isolated the “positive chemistry” and/or key market factors which contributed to the relative success of a given location or group of locations. Based on this information we developed strategic marketing recommendations to allow management to refine the existing restaurant concept, enhance its existing operations and create a detailed target area profile, which could be utilized to roll-out the Daily Grill concept nationally.

## EQUINOX FITNESS

### National Brand Expansion Strategy

The Pulse Group was retained by Equinox (voted best gym in America by Fitness Magazine) to help them quantitatively assess the opportunity to grow the Equinox fitness club concept from an east coast to a west coast brand with an initial launch in the Los Angeles market, by better understanding their brand positioning/strengths and likelihood of membership among health club consumers in the LA market. Our scope of services entailed database lifestyle profiling, qualitative focus groups and quantitative targeted telephone surveys. Our analysis allowed us to profile the Los Angeles market area in terms of consumers who had the highest potential of becoming an Equinox club member. Using “lifestyle tags”, we mapped the areas, including zip code, in Los Angeles that represented the highest concentration of potential Equinox consumers to support site selection efforts.

## TUFTS UNIVERSITY

### STEM Conference & Events Center Development

The Pulse Group partnered with Stantec Architects to develop concept/building plans for the conference, event, visitor and retail elements of the Joyce Cummings Center, a planned 140,000 square foot mixed-use academic and University “gateway” project now under construction adjacent to a new MBTA station, on the University’s main campus in Medford, Massachusetts, just outside Boston. The project will include “on demand” flex conference/event/academic space, a visitor tour showcase, a spirit oriented retail gallery, along with a café and areas for catering support. During the course of our work, we: interviewed University stakeholders; completed a competitive analysis of conference/event facilities in the Boston market; evaluated national best practices/trends in the meetings & conference market; collaborated with architectural partners to create a highly efficient market/financial driven plan for the facility; and, provided advice/guidance with respect to managing/structuring event/conference operations.

# projects



## MONTERREY BAY AQUARIUM

### Facility Renovation & Repositioning

Pulse Group professionals, worked as part of team, to develop a strategic plan for redeveloping and repositioning the hospitality & foodservice facilities at Monterey Bay Aquarium. As part of our work we crafted a comprehensive outreach program aimed at better understanding attitudes, preferences, satisfaction and possibilities for new concepts. The program included on-site guest interviews, development & implementation of an online survey and in-depth personal interviews with key donors, trustees, event planners and senior management. Based on the results of the outreach program, we made a series of facilities and program recommendations targeted at building utilization, enhancing guest satisfaction and generating increased revenue.

## ARAMARK CORPORATION

### Food Hall Concept Development

Aramark retained the Pulse Group to examine trends in food hall and public market development focused on demographics, psychographics, social influences and emerging business strategies -- using these insights to craft the conceptual framework for a retail oriented marketplace that could be well positioned to achieve operational success, by offering a variety of self-branded made to order food platforms in concert with other GNG refrigerated and dry grocery merchandising. Our work included a review of the business strategies and market positioning of the major national and regional street boutique grocery players. We also developed case studies of (8) food halls internationally -- major platforms, areas of merchandising focus, major equipment, iconic brand features, principal menuing/merchandising categories, operating/service model, seating, theming, etc. The effort resulted in recommendations for potential platforms and key areas of merchandising focus that we believed could be successfully integrated into a prototype food/retailing concept.

## DUKE UNIVERSITY

### Sarah Duke Gardens Renovation Planning

The Pulse Group collaborated with Duke University to provide market analysis, development planning and financial advisory services in support of the renovation of the facilities at Sarah P. Duke Gardens ("SPDG"). SPDG is currently in the planning process for a \$30 million renovation of the Garden's main facilities, which include event, conference, foodservice, retail, administrative and educational elements. As part of our work, we: conducted interviews with SPDG and University stakeholders; designed and implemented online survey research with University conference/event planners; undertook a competitive market analysis of regional event facilities; completed a best practices review of the event and retail facilities/operations at (10) highly recognized botanical gardens nationally; provided advice and guidance with respect to renovation development planning, toward creating greater market/financial efficiencies; and, developed a financial proforma illustrating the financial impact of our recommendations.

# projects



## CALIFORNIA PIZZA KITCHEN

### Restaurant Concept Development

The Pulse Group was retained by California Pizza Kitchen to assist them in the development of a new fast/casual restaurant concept CPK ASAP, positioned to complement the company's existing sit down concept, as an additional distribution channel. As part of our work we conducted a series of 15 focus groups nationally with current, former and potential users of the existing concept. During these focus groups we explored current dining patterns and behaviors, restaurant selection criteria, changes in dining patterns and behaviors, level of brand commitment including favorite restaurants and reasons for those preferences, reactions to a range of fast/casual concepts and perceptions, images and attitudes towards the California Pizza Kitchen brand. Our work allowed us to provide a framework for the "concept architecture" and market position including menu, service, operational, sales/advertising and design strategies, based on a detailed understanding of consumer motivations, drivers, inhibitors, psychographics and demographics.

## TRUST FOR THE NATIONAL MALL

### Food & Retail Concept Development

The Pulse Group, in association with Manask & Associates, conducted a custom market research study to measure visitor utilization/satisfaction with existing retail operations and assess possibilities for the renovation and repositioning retail concessions on the National Mall in Washington D.C. The study which involved intercept interviews with more than 800 visitors over a two-week period, examined: purchasing habits/patterns: expenditures; attitudes, preferences and satisfaction with existing concepts; the potential for various revenue enhancement options; and, possibilities for new concepts aimed at building utilization and crafting a higher level of per capita spending. With an estimated 24 million visitors per year, the National Mall, referred to as "America's Front Yard", is in need of improvements and restoration and our report provided a series of facility, concept and operational recommendations that will make it operationally sustainable by the National Park Service well into the future.

## RAVINIA FESTIVAL CHICAGO

### Hospitality Strategic Planning

Pulse Group professionals developed a benchmark study on behalf of the Ravinia Festival located in Chicago, Illinois, which entailed a comprehensive review of all hospitality/food operations and included extensive interviews with stakeholders (internal staff, external foodservice contract management staff, and trustees/board of directors, donors and general patrons). Our work also included the development of survey research instruments for each segment, crafting an overall research methodology (respondent and sample size selection), data collection/analysis and providing strategy recommendations with respect to operational efficiency, opportunities to enhance revenue potential and possibilities for new concepts.



the pulse group 25 years , 100's of food, retail, hospitality and tourism projects, one big success story...

# our clients





## PEOPLE

# our partners



**Thomas  
Tucker**

Partner | Food & Hospitality  
Strategy

[thomasdtucker.tt@gmail.com](mailto:thomasdtucker.tt@gmail.com)

(213) 804-0165

Mr. Tucker is an urban planner and Partner with The Pulse Group, with more than 30 years of experience in providing foodservice, retail and hospitality advisory services, to corporate, institutional and governmental clients. Mr. Tucker is recognized nationally as an expert in financial analysis, research, planning, development and operations for all types of hospitality, retail, foodservice and “guest/visitor serving” facilities including: university and corporate dining operations, public attractions, conference/event centers, private clubs, public markets, specialty retail marketplaces, athletic/recreational facilities, museums, cultural centers, hotels, resorts and golf courses



**Kim  
Royster**

Partner | Market Insights &  
Analytics

[kroyster@thepulsegroup.org](mailto:kroyster@thepulsegroup.org)

(213) 840-6257

Ms. Royster is the Partner in charge of market insights and analytics for The Pulse Group and has more than 25 years of experience in market, survey and focus group/community research and strategic planning for corporate, institutional and governmental clients. Kim's areas of specialization include overall research design and methods, data analysis/presentation, large and small group process facilitation and executive level reporting. Kim regularly completes studies and research efforts that involve measuring user/customer attitudes and awareness, testing user/customer preferences/satisfaction, measuring user/customer demand for new facilities/services, and uncovering “what’s missing.”