



Ch5. 하이테크 상품의 마케팅조사





MR for High-Tech: A Paradox?

- **Ignore your customer! (Fortune)**

“It is time to start ignoring the customer. That’s the *only way* to create the kind of breakthrough products and services that can catapult you far ahead of the competition.”

- **소비자 조사는 문제가 많다**

- Fax, VCR, Fed Ex, CNN, PDA
- Rather, believe your gut.
- Compaq PC servers

MANAGING: IDEAS & SOLUTIONS

By JUSTIN MARTIN

IGNORE YOUR CUSTOMER

At least that's what some smart companies like Compaq, Motorola, and Steelcase are doing. Here's when you should do it and why.

It started as a management practice, grew into a mantra, and now it's an all-out mania: listening to the customer. These days customers are variously described as "king," "first," "No. 1," "always right"—basically judge, jury, and executioner. So revered is the "C" word that most companies stand paralyzed, afraid to move without first conferring with them.

But maybe this obsessive devotion has gone too far. A growing number of companies and consultants now believe that it's time to start ignoring the customer. That's the only way, these experts argue, to create the kind of breakthrough products and services that can catapult you far ahead of the competition.

Sound heretical? Well, consider that such companies as Chrysler, Compaq, and Motorola have achieved startling successes by ignoring their customers from time to time. Chrysler, for instance, forged ahead with the original minivan despite research showing that people recoiled at such an odd-looking vehicle. Compaq bet millions on PC network servers in the early 1990s even though customers said they would never abandon their mainframes. Last year Compaq sold \$1.8 billion worth of these PC servers, many to former mainframe users.

Of course, knowing what the customer thinks is still important, especially when it comes to fine-tuning a product or a service. General Motors now regrets hurrying its slow-selling 1992 Caprice onto the market, even though consumers had indicated in tests that, among other things, the rear wheels looked too small. And there's scant reward in showing willful arrogance. That's Intel all over, with the Pentium chip debacle.

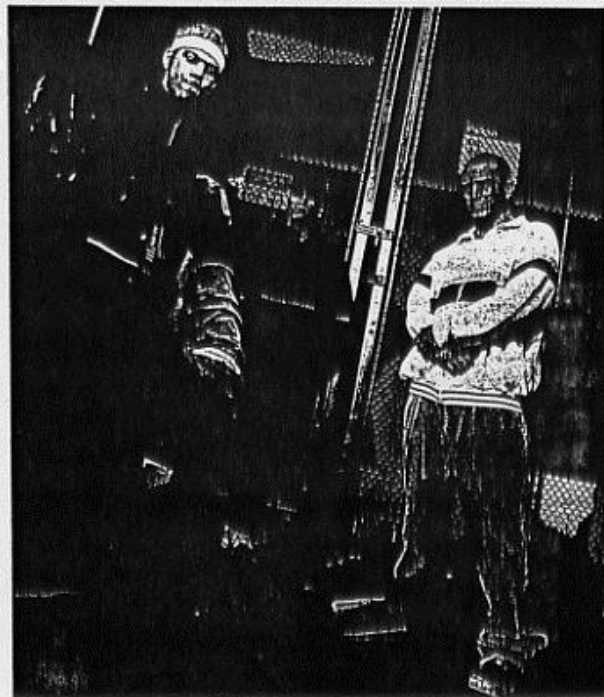
Still, more and more companies are learning that sometimes your customers can actually lead you astray. The danger lies in becoming a feedback fanatic, slavishly devoted to customers, constantly trying to get in even better touch through more focus groups, more surveys. Not only can that distract you from the real work at hand, but it may also cause you to create new offerings

that are safe and bland. Says media mogul Barry Diller, who forged ahead with Fox Broadcasting even though surveys said there was no need for another network: "We become slaves to demographics, to market research, to focus groups. We produce what the numbers tell us to produce. And gradually, in this dizzying chase, our

senses lose feeling and our instincts dim, corroded with safe action."

Tom Kuczmariski, a Chicago management consultant, agrees with Diller, pointing out that playing it safe isn't necessarily the best way to make a buck. In a recent study, Kuczmariski found that fully 90% of so-called new products are simply line extensions, such as Frito-Lay's Doritos Flamin' Hot Tortilla Chips in snack-size bags. This despite the fact that truly original products—the remaining 10%—possess the real profit potential (see chart). Says Kuczmariski: "Too often the emphasis is on coming up with something that's accepta-

Instead of listening to its customers, retailer Urban Outfitters stalks them for fashion ideas.



MANAGING/FORTUNE BOOK EXCERPT

New markets

SEEING THE FUTURE FIRST

key word: "developing industry foresight"

Could you and your team debate a trend for eight hours? Most managers spend far too little energy forging a long-term view of their industry. ■ by Gary Hamel and C.K. Prahalad

ARE YOU competing to dominate your industry's future? To find out, ask yourself three questions we often ask senior managers: First, what percentage of your time is spent on external rather than internal issues—understanding, for example, the implications of a particular new technology vs. debating corporate overhead allocations? Second, of this time spent looking outward, how much is spent considering how the world could be different in five or ten years, as opposed to worrying about winning the next big contract or how to respond to a competitor's pricing move? Third, of the time devoted to looking outward and forward, how much is spent in consultation with colleagues, where the objective is to build a deep-

ABOUT THE AUTHORS

Gary Hamel is a professor at the London Business School. C.K. Prahalad is a professor at the University of Michigan business school. Both consult extensively with companies, and they are co-authors of influential articles, including "Strategic Intent" and "The Core Competence of the Corporation."

ly shared, well-tested view of the future, as opposed to a personal and idiosyncratic view?

The answers typically conform to what we call the 40-30-20 rule. In our experience about 40% of senior executive time is spent looking outward, and of this time about 30% is spent peering three or more years into the future. And of the time spent looking forward, no more than 20% is spent attempting to build a collective view of the future (the other 80% is spent looking at the future of the manager's particular business). Thus, on average, senior management is devoting less than 3% (40% x 30% x 20% = 2.4%) of its energy building a corporate perspective on the future. In some companies the figure is less than 1%.

Our experience suggests that to develop a prescient and distinctive point of view about the future, a senior management team must be willing to spend 20% to 50% of its time over a period of months. It must then be willing to continually revisit that point of view, elaborating and adjusting it as the future unfolds.

The vital first step in competing for the future is the quest for industry foresight. This is the race to gain an understanding deeper than competitors, of the trends and discontinuities—technological, demographic, regulatory, or lifestyle—that could be used

to transform industry boundaries and create new competitive space.

Industry foresight gives a company the potential to get to the future first and stake out a leadership position. It informs corporate direction and lets a company control the evolution of its industry and, thereby, its own destiny. The trick is to see the future before it arrives.

We don't believe any company can get along without a well-articulated point of view about tomorrow's opportunities and challenges. Today many companies seem convinced that foresight is the easy part; it's implementation that's the killer. We believe that creating industry foresight and achieving operational excellence are equally challenging. Many times what are described as today's implementation failures are really yesterday's failures of foresight in disguise. The quality deficit, which cost U.S. automakers so much market share in the 1970s and 1980s, was more than just "poor execution." Detroit didn't suddenly get sloppy, and Japanese carmakers didn't start out with a quality advantage. Japanese auto companies realized decades ago that new and formidable competitive weapons would be needed to beat U.S. car companies in their home market. The new weapons they set about developing were quality, cycle time, and flexibility.

MR for High-Tech: A Paradox?

- **Don't ask the customers (Akio Morita)**

“Instead of doing a lot of market research, we refine our thinking on a product and its use and try to create a market for it by educating and communicating with the public.”

- **Doing marketing research slows new product introduction. (Pearlman at Zenith)**

“Empirically I have not found marketing research to be useful for innovative products.”



혁신의 유형과 마케팅조사



Incremental Innovation



Breakthrough Innovation

Fine-tuning



Ideation

What Went Wrong with Iridium?



Iridium Satellite Solutions[®]

ONE SYSTEM, GLOBALLY.

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[WHAT'S NEW... ▶](#)

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How Iridium Works. [GO](#)

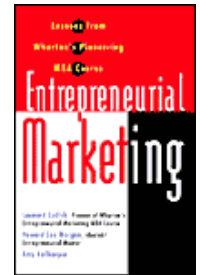
[Send a Satellite Message](#)

[Change Your MDA](#)

Lessons Learned

- Most entrepreneurial failures are those of marketing.

“Marketing decisions are the most important.”
(Lodish in *Entrepreneurial Marketing*)



- Customer research is critical in developing a really new product: **Reality Check**

“The degree to which a product is innovative and the effect of discontinuities on customer evaluation should be examined early in the development process.”
(Veryzer, JPIM 1998)

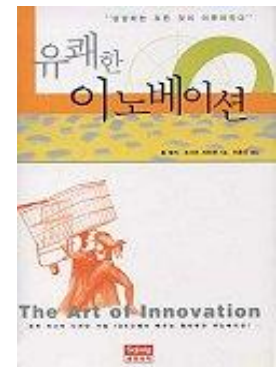
MR for High-Tech Products

- **하이테크 산업에서 마케팅 조사의 용도와 역할**
 - “Discovering” market opportunities
 - 잠재적인 니즈의 파악
 - “Sizing” market opportunities
 - 기본 가정의 검토와 수요예측 -> 시장불확실성의 감소
 - “Fine-tuning” product/market strategies
 - 제품 사양 및 출시 전략의 정교화 -> 완전완비 제품의 설계



“Discovering” Opportunities


- **행운(luck)의 역할**
- **체계적인 시장기회 발견 접근법**
 - **Market-driving (or Intuition-based)**
 - Finding new markets for new (esp. disruptive) technologies: shifting basis of competition
 - **Market-driven (or Research-based)**
 - Observational research
 - Empathic design
 - Lead user process
 - In-depth interview (e.g. Zmet)



Observation Tells What Customers Can't Tell You

- **Observing (what they do) is often more useful than is asking (what they say).**
 - Anthropological approach: Intel
 - Ethnography (e.g. Applied Exploration)
 - Discovering what the customer has already discovered





PLAYBOOK: BEST-PRACTICE IDEAS

Ethnography: Do It Right...

Anthropological research can be a potent tool—or a waste of time and money. Here's how to get the most bang for your buck:

Think Big Thoughts

Ethnography is **most effective when it's used to spot breakthrough innovations**. Don't use it for incremental improvements or to solve small problems. Ethnography works best when the questions are big and broad. "The good time to use it is with futuristic research," says Natalie Hanson, SAP's director for business operations.

Due Diligence

Many companies do not have the resources to hire their own anthropologists or social scientists. So **picking the right consultants can make or break a project**. With many poseurs jumping on the bandwagon, it's important to hire a firm with a track record, client references, and a staff with a mix of skills in social science, design, and business.

Start Early

Using ethnography at the beginning of the product development process is key because **it helps identify consumers' unmet needs**. It's those findings that can inspire a hit product or service. One danger of waiting too long to bring in social scientists is that you might end up with "feature creep," simply adding unnecessary bells and whistles.

Sell, Sell, Sell

Let's face it: Many executives think ethnography is bunk. So **managers must constantly educate others about its value**. Be clear that ethnography is not a cure-all but can spark innovation. "To get people to think about a softer approach is a challenge," says GE's marketing operations manager, Dominic McMahon.

Build a Culture

Organizations that have used ethnography to the greatest effect have usually made such research an integral part of their culture. "I don't believe it is one person's job to figure out user problems," says Alex Lee, president of OXO, a long-time user of ethnography. "What's important is the mindset of the people. Ideas come from every which way."



...and Reap the Rewards

Motorola A732

After observing how popular Chinese-character text messaging was in Shanghai, Motorola researchers developed a cell phone that lets you send messages by writing

directly on the keypad using your finger.



TownePlace Suites

A team of ethnographers and designers from IDEO found that TownePlace guests often turn their bedrooms into work spaces. So it came up with a flexible modular wall unit where there had been only a dining table. Guests can use the unit either as an office or a place to eat.

OXO Hammer

To develop a line of professional-grade tools for consumers, OXO and Smart Design visited contractors and home renovators. One result:

A hammer with a fiberglass core to cut vibration and a rubber bumper on top to avoid leaving marks when removing nails.



Citigroup PayPass

Citigroup teamed up with Doblin Group to brainstorm new payment services for consumers. This summer, Citi will launch a pilot project called PayPass that lets New York City subway riders pay with a special key chain tag that debits their checking accounts.

Sirius S50

Sirius and Ziba Design studied how people listen to music, read magazines, and watch TV. That led them to develop a portable satellite-radio player that is easily loaded with up to 50 hours of digital music for later playback.



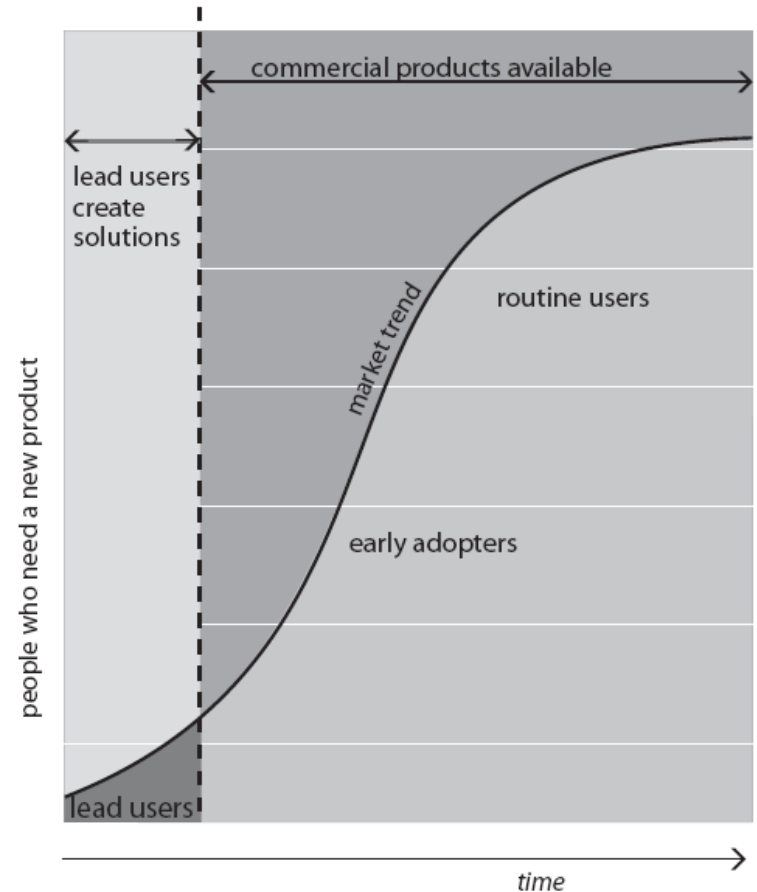


Empathic Design

- **감정이입 (공감共感) 디자인**
 - Watch consumers in their own world
 - Customer visit program
 - Allows marketers to identify
 - Trigger of use
 - Interactions with the user's environment
 - User customization
 - Importance of intangible attributes
 - Unarticulated user needs
 - Process to conduct Empathic Design

Lead User Process

- Lead user process aims to create breakthrough products by identifying lead users and learning from them.
- Who are the lead users?
 - “Lead users have needs that are well ahead of market trends and go far beyond those of average users. Over time, more and more people feel the same need.”
 - Eric Von Hippel



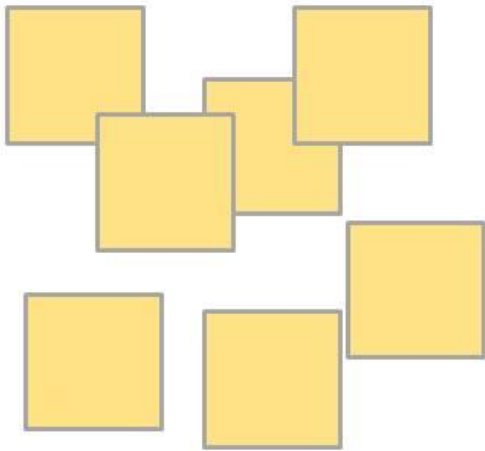


Lead User Process

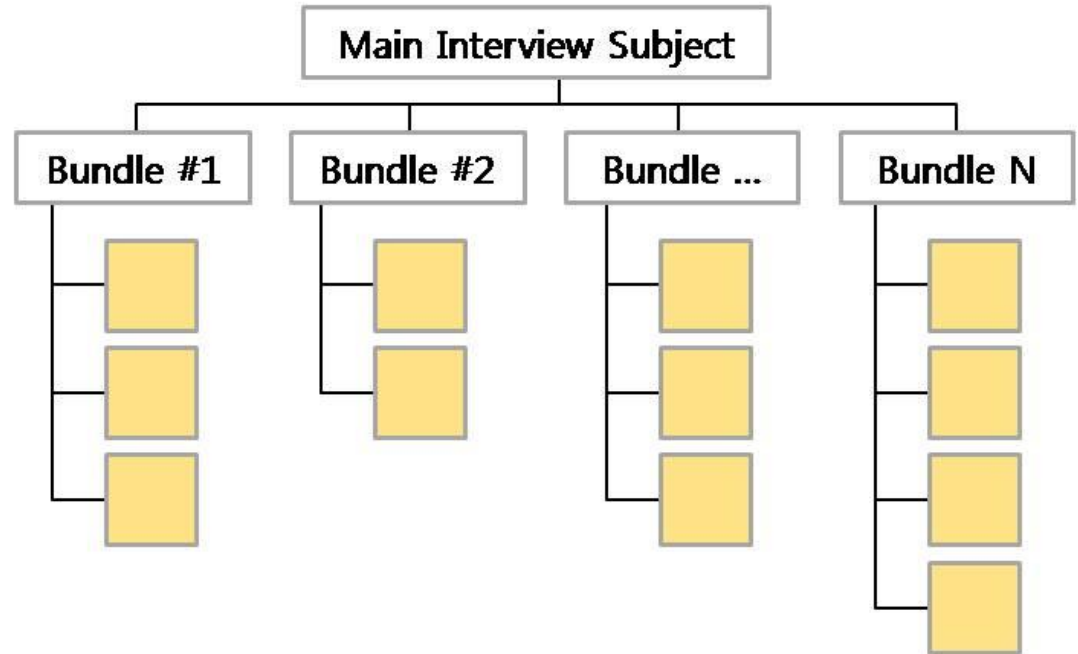
- **선도사용자 프로세스의 5단계**
 - Lay the foundation
 - Determine important market/technical trends
 - Identify and question lead users
 - Develop the breakthroughs (lead user workshop).
 - Project the lead user data onto the larger market.
- **3M Example:**
 - medical imaging
 - surgical drapes

Affinity Diagram

Random Ideas



Affinity Diagram



In-Depth Interviews

- **심층면접을 통한 고객니즈의 파악**
 - **Focus Group Interview**
 - Creative Session
 - Super Groups
 - Deliberate Group
 - **In-depth Interview**
 - Laddering
 - Repertory Grid
 - Echo Technique
 - **ZMET (Zaltman Metaphor Elicitation Technique)**



ZMET

ZMET (Zaltman Metaphor Elicitation Technique)

▶ ZMET 인터뷰 절차

ZMET은 조사대상자가 사전에 준비한 그림을 가지고, 2시간에 걸쳐 진행되는 일대일 심층 면접으로서 다음과 같은 6단계에 걸친 Probing 과정을 통해 주제에 대한 목표고객의 생각과 감정을 대부분 추출할 수 있습니다.

1. Storytelling(그림이야기)



가져온 그림에 대한 이야기 추출

2. Triadic Sort(삼각비교)



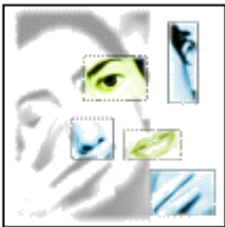
3개 그림 비교 통한 은유추출

3. Metaphor probe(그림들 확장)



그림들 확장 통한 은유추출

4. Sensory Metaphor(감각은유)



5가지 감각을 이용한 은유추출

5. Vignette(동영상 은유)



영화/동영상 스토리 통한 은유추출

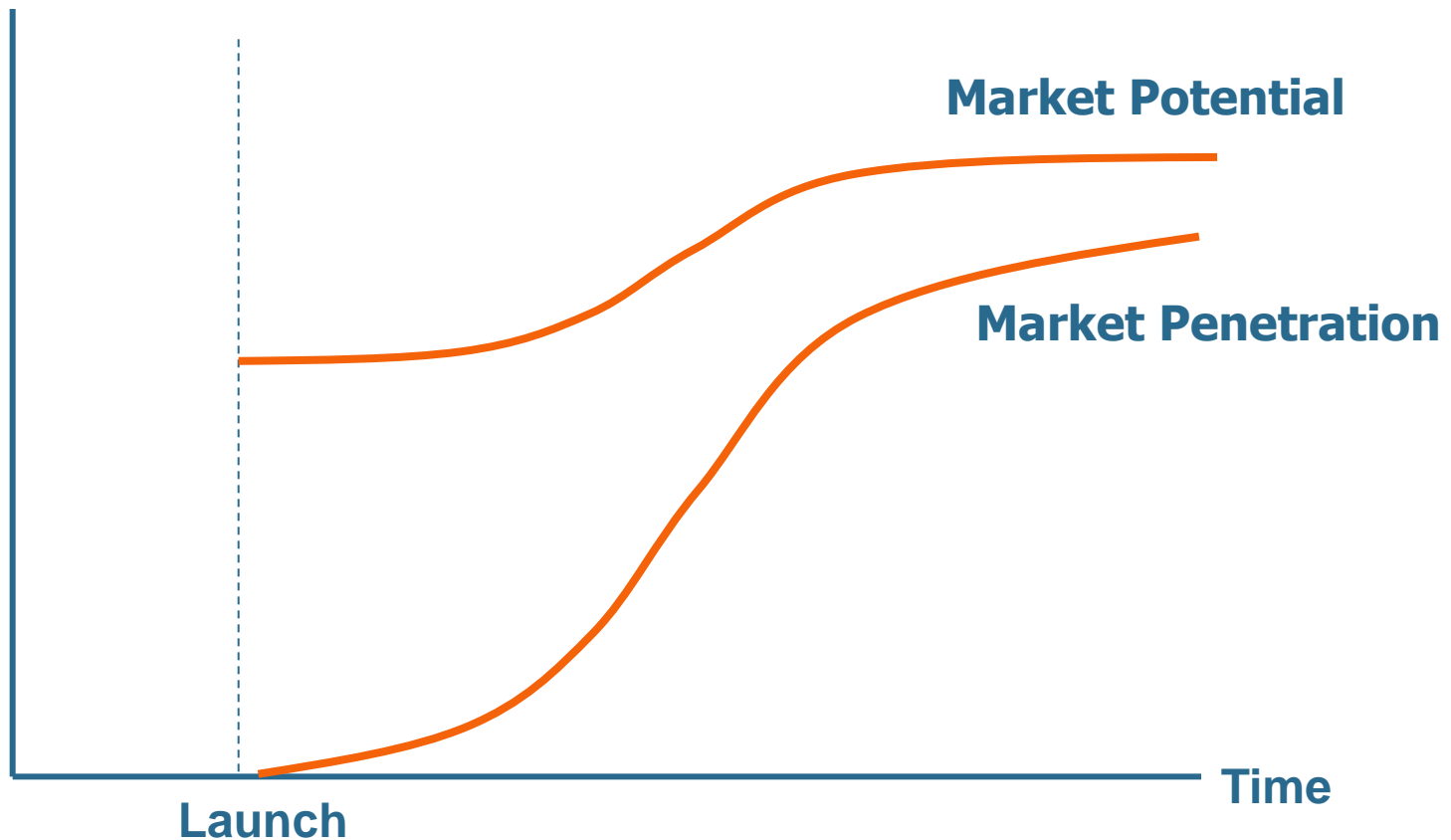
6. Digital Image(플라주)



가져온 그림을 한 장으로 조합하여
주제 요약 표현

“Sizing” Opportunities: Demand Forecast

Cumulative
Adoption





Estimating Market Potential

- **계량적 모형을 이용한 예측기법**
 - Regression analysis
 - Econometric model
 - Input-output analysis
 - Logistic Model

- **시장조사를 통한 예측기법(정성+정량)**
 - Consumer Research
 - Delphi method
 - Historical Analogy
 - Information Acceleration (IA) – enhanced scenarios

Delphi Method

Step1: 전문 패널 선정

Step2: 예측질문 작성, 송부

Step3: 회답분석, 정리

Step4: 예측질문 수정, 송부

수차 반복



Step5: 종합결론 (예측치) 도출

정보가속화 기법

(a) 제품 브로슈어

THE CBC MINI-LAB[®]
from Advanced Medical Technologies

Accurate, In-Office Hematology Results
in MINUTES!

WITH 2-PART DIFFERENTIAL

WHY MAKE YOUR PATIENTS WAIT?
Push-Button, Walk-Away Capability
Makes It Easy to Use
Analysis in only 6 Minutes, giving
9 Hematology Parameters
So why are your patients waiting?
For details, call us toll-free at 800-555-HEMA
Read Next Page

(b) 잡지광고

The CBC Mini-Lab delivers accurate, in-office hematology results in as few as 6 minutes. Your staff assistant can now perform routine blood analyses while your patients are still in your office.

The result. A faster diagnosis. And you don't have to hassle with outside labs.

The CBC Mini-Lab is easy to use. Simple, walk-away capability allows your assistant to place a sample in the machine and press a button. That's it.

So why are your patients waiting?
For details, call us toll-free at 800-555-HEMA

**WHY
ARE YOUR PATIENTS
WAITING?**

Exit

(c) 판매원

Time Left 20:38

Click here for Product Demo	Benefits to Office	Analysis Capabilities	Patient Data Management	Accuracy	Throughput
Features	Price/Payback	ease of Use/Performance	Customer Service	Safety	CLIA
Exit					

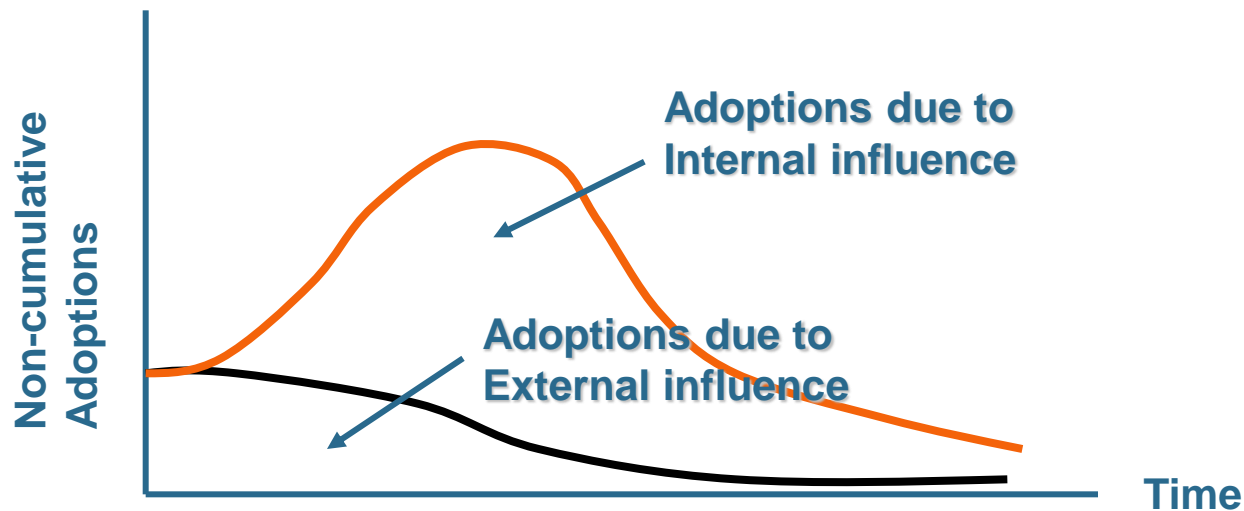
(d) 동료 의사

Time Left 20:38

Lines	Portend Data Management	Analysis Capabilities	Customer Service	Accuracy	
Concerns/Obstacles	Reliability	ease of Use/Performance	Competitive Services	Throughput	Price/Payback
Adv. to Diagnosis	CLIA	Exit			

Estimating Market Penetration: The Bass Model

The Bass model is used to predict first-purchase growth (“diffusion”) of a new product by incorporating “external (innovator)” and “internal (imitator)” influences.



$$n(t) = m [p+qF(t)] [1-F(t)]$$



Bass Model

- **Parameter Estimation: m , p , q**
- **Model refinements and extensions**
 - **Model assumptions and relaxation**
 - **Multi-generation diffusion and the “Law of Capture”**
 - **Individual level diffusion analysis**
- **Analogical diffusion estimation**
- **Other uses of diffusion models**

국가간 모방계수(q)의 비교

	미국	한국	일본	대만
흑백 TV	0.39	0.52	0.59	0.75
세탁기	0.13	0.81	0.19	0.36
에어컨	0.39	0.50	0.47	0.65
승용차	0.29	0.49	0.39	0.45
냉장고	0.16	0.69	0.76	NA
전자계산기	0.43	NA	0.39	0.46
진공청소기	0.15	NA	0.23	NA
라디오	0.38	0.48	NA	NA

스프레드시트 모형: HDTV 수요예측

Key Market Factors:

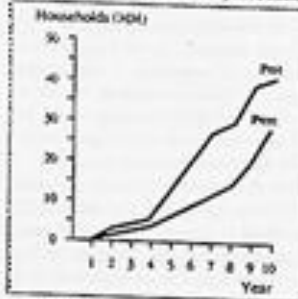
- ✓ Population base
- ✓ Technology
- ✓ Awareness
- ✓ Availability
- ✓ Buying intention

What-if Analysis

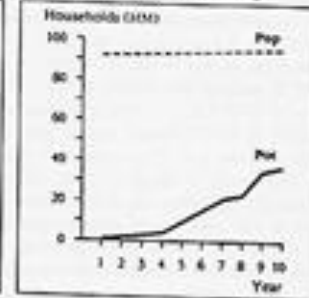
FIGURE 7.2 Market opportunity forecasting: illustrative spreadsheet model for high definition television (HDTV).

Year / period / Model	Market potential (TV households 000)		Technology realization (Judgmental indices)				Program awareness availability (Market survey data)		Average price (Market survey data)		Anticipated market growth (Color TV growth)	
	Pot	Pop	Tek	Awr	Avl	Buy	Pr	% of Pot	Pr			
Year 1	898	93,000	0.50	0.25	0.50	0.12	2,800	50	749			
Year 2	1,488	93,930	0.55	0.40	0.60	0.12	2,800	52	776			
Year 3	3,287	94,869	0.60	0.55	0.70	0.15	1,800	48	1,578			
Year 4	5,232	95,818	0.70	0.65	0.80	0.15	1,800	51	2,668			
Year 5	10,432	96,776	0.80	0.75	0.90	0.20	1,500	47	4,813			
Year 6	17,281	97,744	0.85	0.80	1.00	0.20	1,400	48	8,293			
Year 7	24,567	98,721	0.90	0.85	1.00	0.52	1,200	50	12,084			
Year 8	27,280	99,709	0.95	0.90	1.00	0.32	1,200	56	15,277			
Year 9	58,268	100,706	1.00	0.95	1.00	0.45	1,000	54	29,645			
Year 10	65,845	101,713	1.00	1.00	1.00	0.40	1,000	50	38,480			

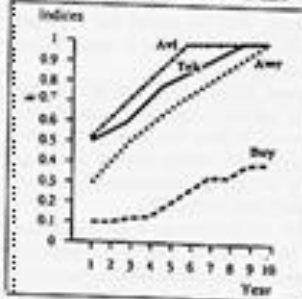
Panel A: Market potential and penetration



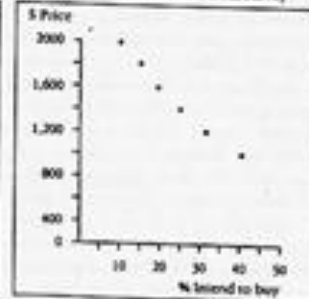
Panel B: Population ceiling



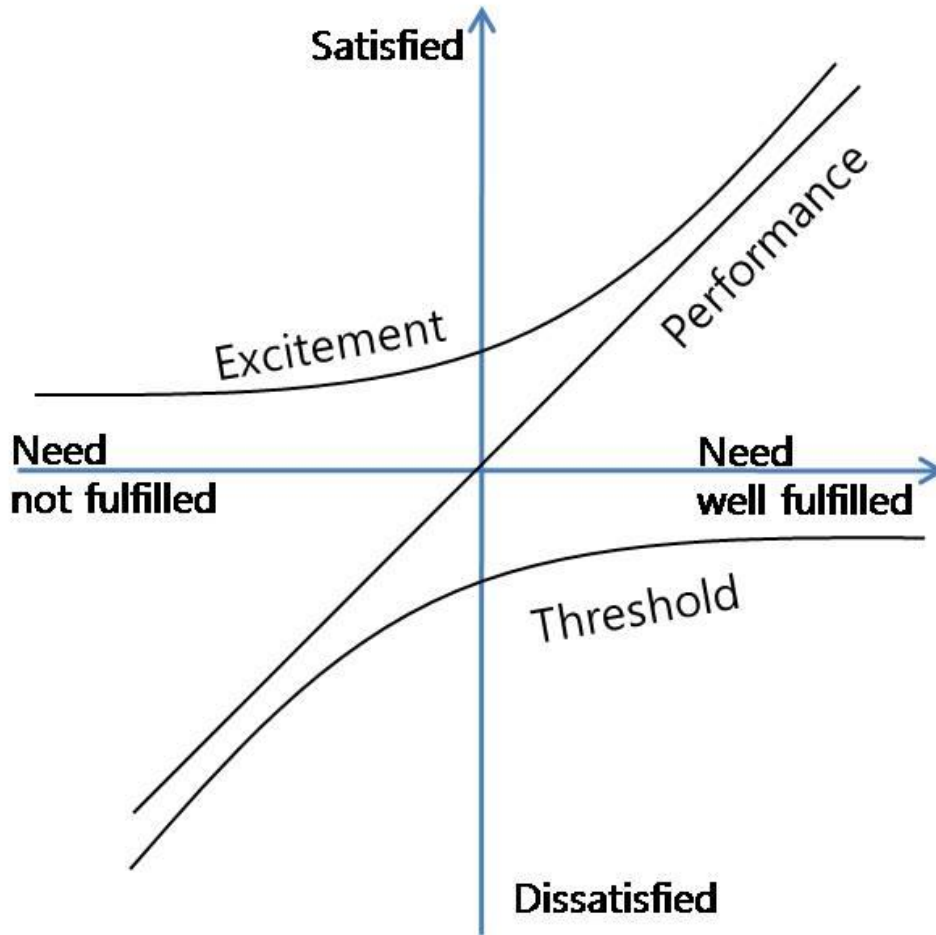
Panel C: Four market factors over time



Panel D: Demand curve from survey



Kano Graph



Market Readers: IT industry

Gartner

