



# Ch7. 시장형성 및 제품확산전략





# 두 개의 NPD

## ❖ NPD1: New Product Development

- 개발은 기술적 역량에 달려있다.

## ❖ NPD2: New Product Diffusion

- 확산은 마케팅 역량에 달려있다.

## ❖ $NPD1 < NPD2$

- 시장에서 실패하면 개발해도 소용없다.
- Time to Market보다 Time to Acceptance가 중요하다!

# 확산(Diffusion)의 영향요인

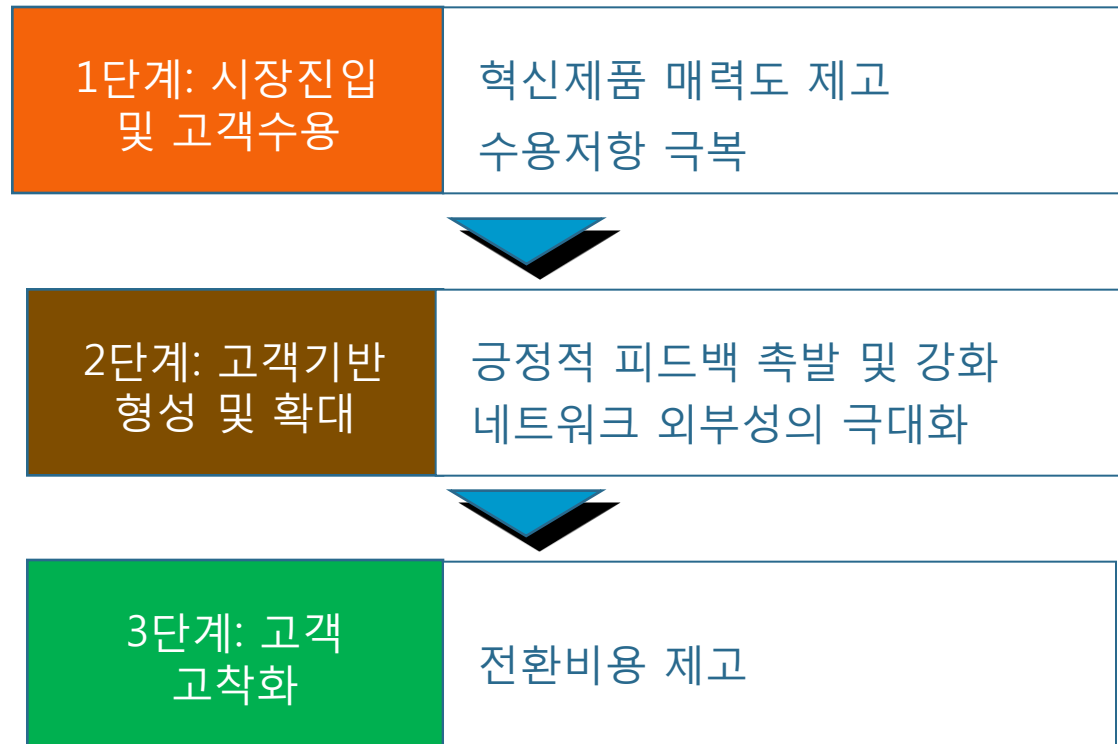
## ■ 확산(diffusion)

- “하나의 혁신이 사회적 시스템의 구성원들 간에 시간에 따라 의사소통 경로를 통해 전파되어 가는 과정”

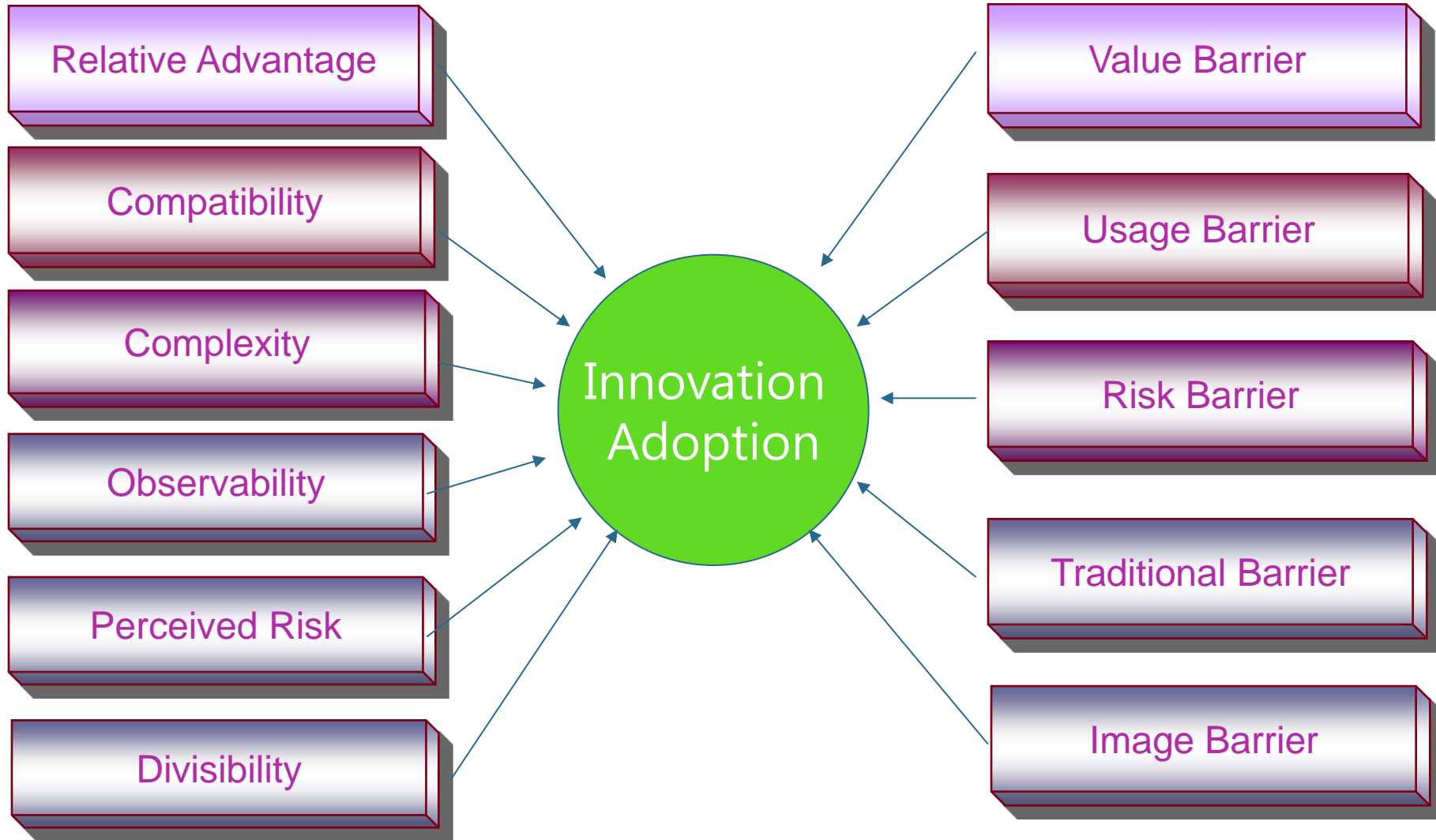
Diffusion is the process by which (1) an **innovation** is (2) **communicated** thru certain **channels** (3) **over time** (4) among the members of a **social system**

- The Innovation
- Social system
- Time
- Communication channels

# 시장형성 및 확대과정 - 단계와 전략



# 혁신 채택에 영향을 주는 요인



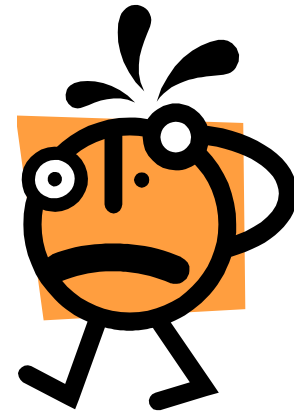
**Innovation Characteristics**

**Barriers to Adoption**

# 혁신저항의 극복

## ❖ 소비자의 혁신저항: “Barriers” to Adoption

- 기능적 장벽
  - Value Barrier
  - Usage Barrier
  - Risk Barrier
- 심리적 장벽
  - Traditional Barrier
  - Image Barrier
- FUD+IM Factor



## ❖ 사회적 저항

- Safety concerns, regulations, etc.



Many innovations fail because consumers irrationally overvalue the old and companies irrationally overvalue the new.

BY JOHN T. GOURVILLE

# EAGER SELLERS

Understanding the  
Psychology of New-Product  
Adoption

# STONY BUYERS

**M**ore than a century ago, Ralph Waldo Emerson is reported to have said, "If a man can write a better book, preach a better sermon, or make a better mousetrap than his neighbor, though he build his house in the woods, the world will make a beaten path to his door." If only marketing innovations were that simple.

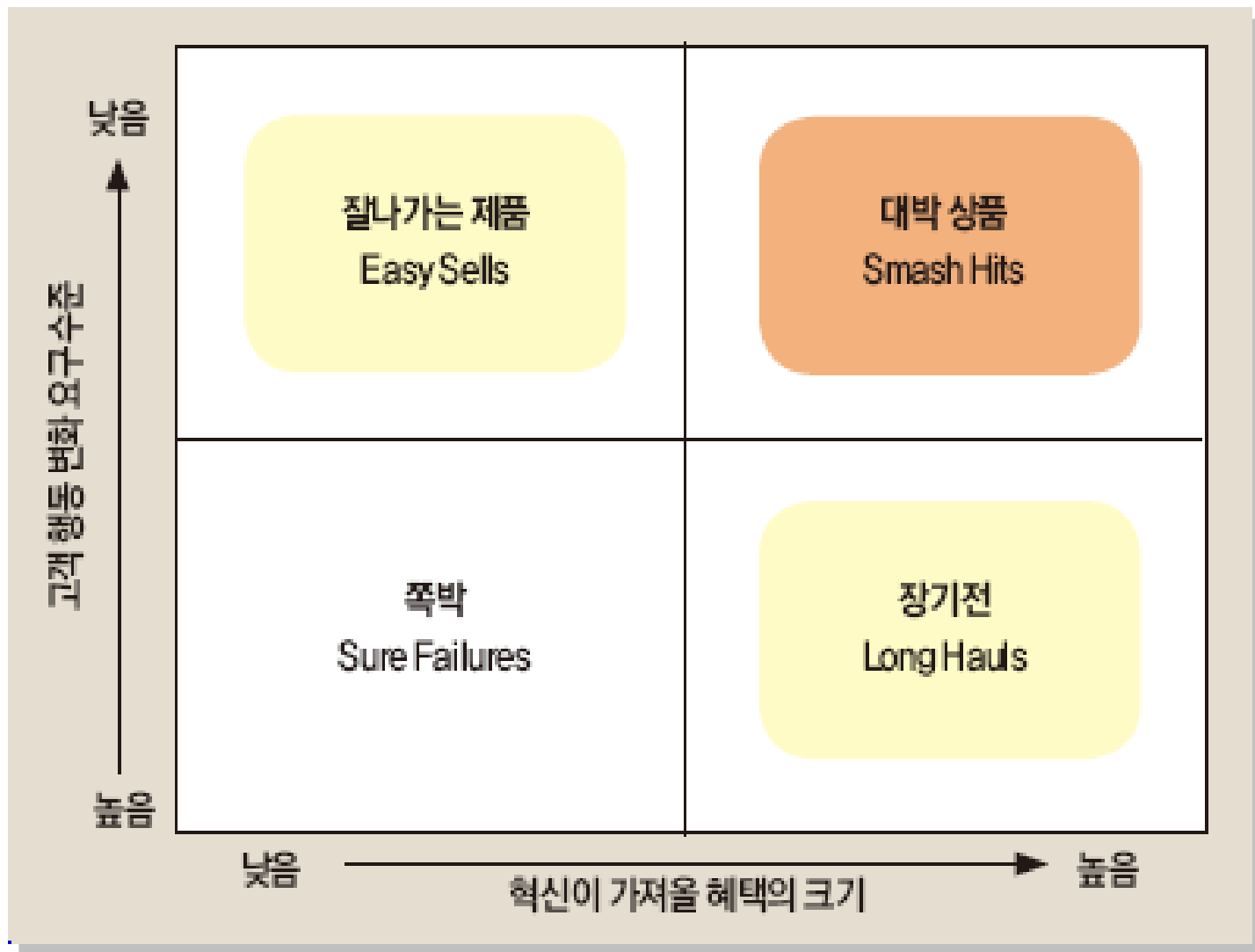
In today's hypercompetitive marketplace, companies that successfully introduce new products are more likely to flourish than those that don't. Businesses spend billions of dollars making better "mousetraps" only to find consumers roundly rejecting them. Studies show that new

ILLUSTRATION

## THE TRADE-OFFS INNOVATIONS DEMAND

Innovation	What Consumers Gain by Buying	What Consumers Lose by Buying
Electric cars	Clean environment	Easy refueling
Digital video recorders	Easy recording	Ability to play rented movies
DVD rentals by mail	Broad selection	Spontaneity
E-books	Easy portability	Durability
Online grocery shopping	Home delivery	Ability to select freshest products
Satellite radio	Broad selection	Free music
Screw-top wine caps	Less spoilage	Elegance of the experience
Segway scooter	Mobility	Health benefits of walking
Wind turbines	Nonpolluting energy	Unobstructed views



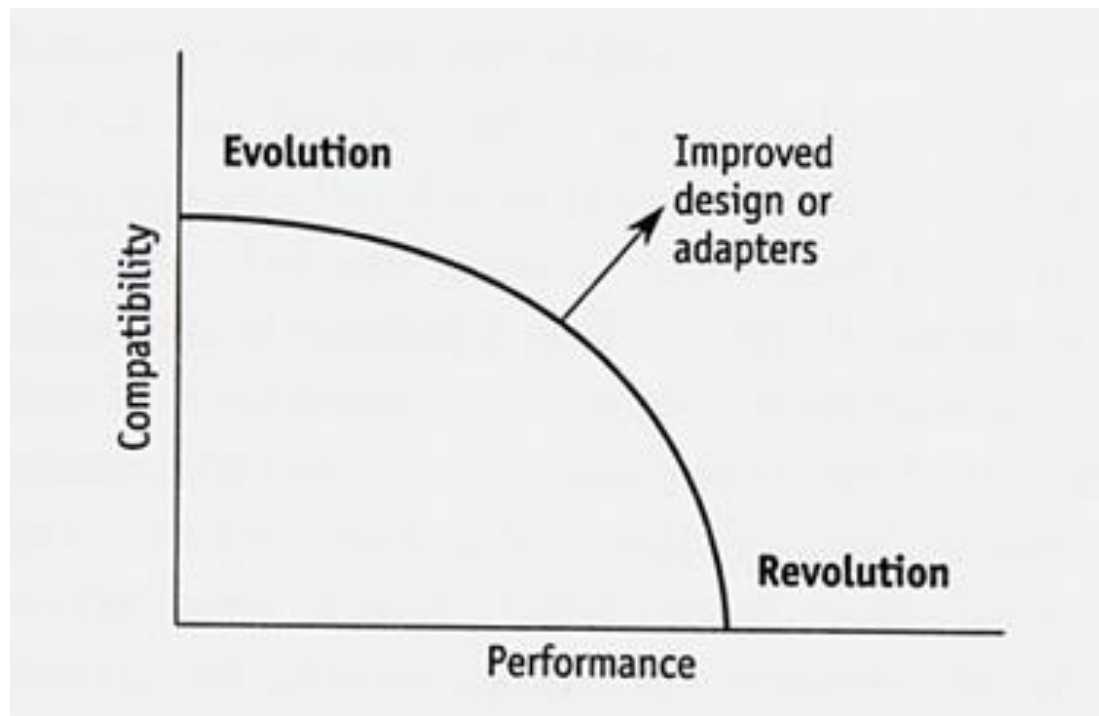


# 초기 고객기반의 형성

## ❖ 성능-호환성 상충관계

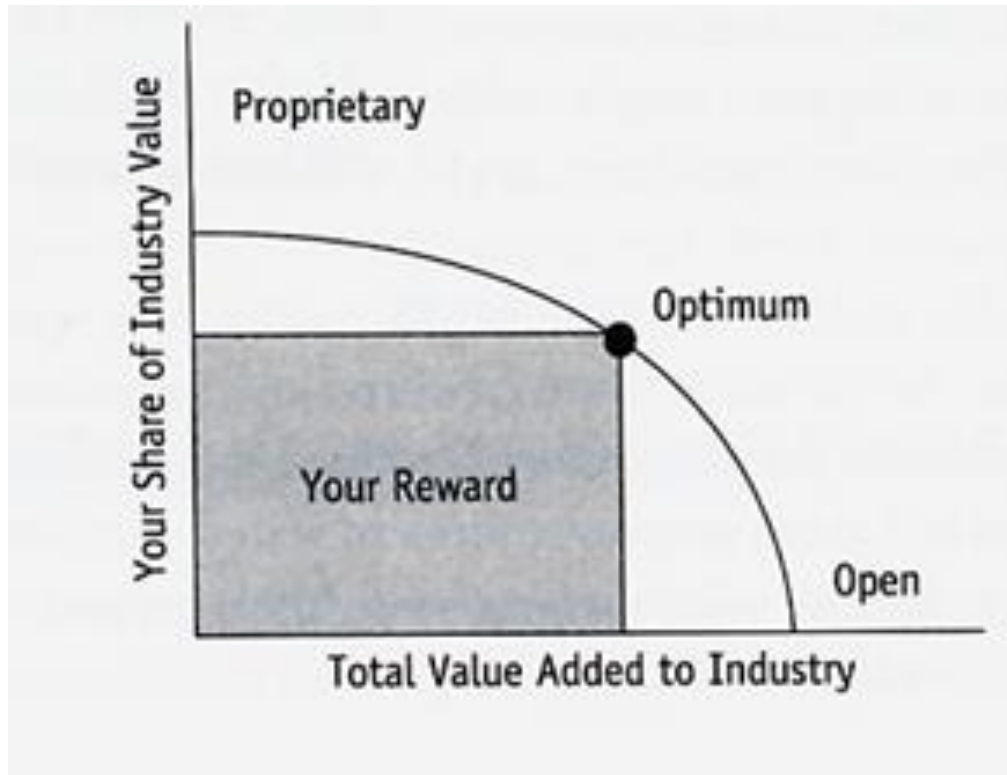
### (Performance-Compatibility Tradeoff)

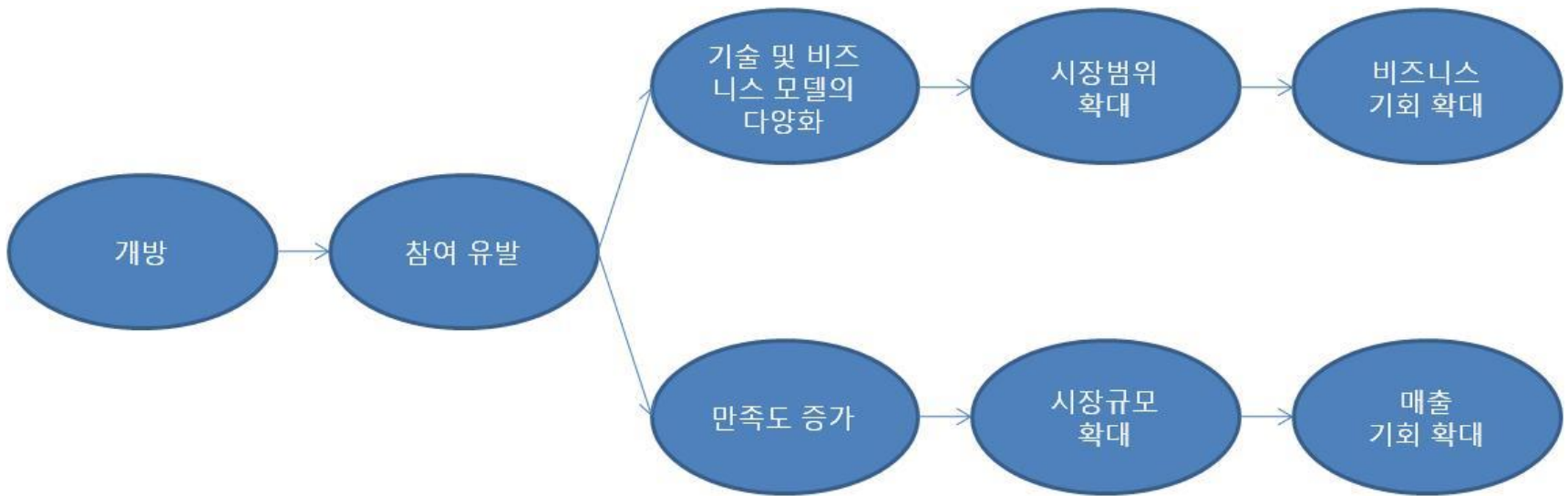
- Evolution Strategy vs. Revolution Strategy



# 초기 고객기반의 형성

❖ 통제냐 개방이냐 (Openness vs. Control)





# 초기 고객기반의 형성

- 4가지 네트워크 본원전략

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*Control*

*Openness*

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*Compatibility*

Controlled Migration

Open Migration

*Performance*

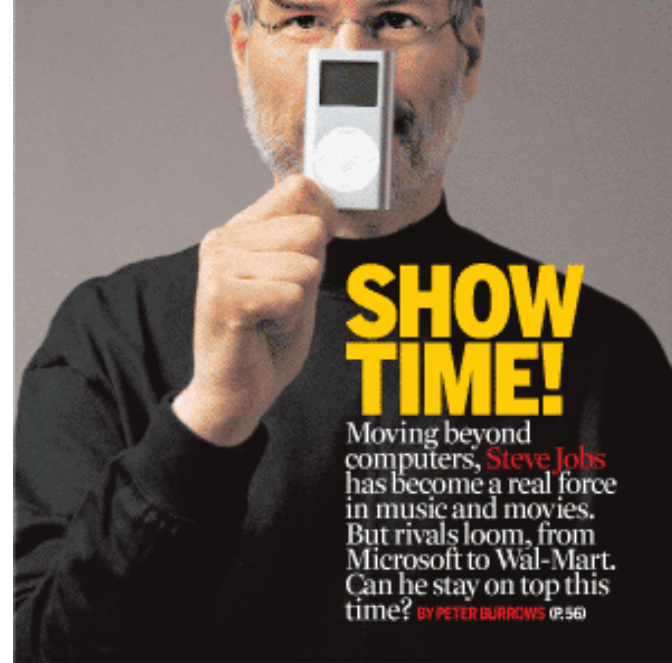
Performance Play

Discontinuity

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**INVESTING THE BEST-PERFORMING BOND FUNDS** (P. 82)    **HIGH TECH THE INDUSTRY'S MOST HATED COMPANY** (P. 78)    **AFLAC WHY ITS DUCKS ARE NOT IN A ROW** (P. 52)



Back in 1997, soon after **Steve Jobs** (left) returned to the company he started, **Michael Dell** (right) was asked at a technology conference what he would do about **Apple Computer**. "What would I do?" Dell joked to the gathered attendees. "I'd shut it down and give the money back to shareholders." Then in January of this year, just as

Dell was beginning what would turn out to be a tumultuous year, Apple's market capitalization reached \$72.13 billion, surpassing Dell's. Jobs sent an e-mail to his employees. "Team, it turned out that Michael Dell wasn't perfect at predicting the future," he wrote. "Based on today's stock market close, Apple is worth more than Dell."

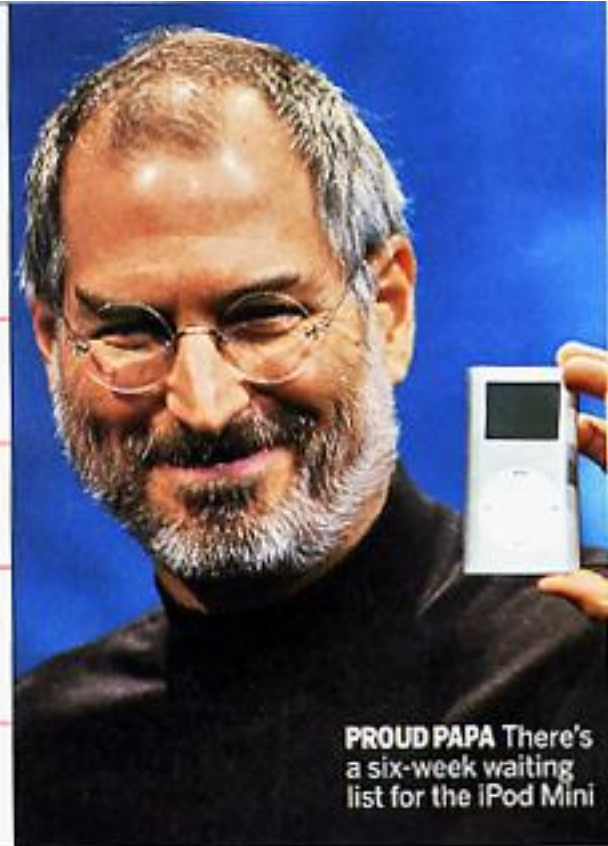


# iPOD 사례: Jobs, 이번엔 제발

## DON'T STOP NOW, STEVE

To cement Apple's lead in the digital-music business, CEO Steve Jobs must address several looming threats:

- 1 PROTECT IPOD'S BLISSFUL KARMA:** When it was new, buyers were enamored of the device's sleek design. But love at first sight is giving way to anger for some customers over crackly sound, battery troubles, and earbuds that won't stay in the ear. Apple needs to fix these quality problems before rivals close the design gap.
- 2 GO BEYOND DOWNLOADS:** Jobs says people want to buy rather than rent their music. But RealNetworks has 450,000 customers for its subscription service, which costs up to \$9.95 a month. Apple should get into the rental game.
- 3 KEEP MICROSOFT IN CHECK:** Microsoft is signing up customers for a technology called Janus that will let subscribers temporarily play rented music on portable players. Apple needs to come up with similar technology.
- 4 REMEMBER THE MAC:** Hewlett-Packard is about to start reselling iPods under its own brand. Apple should find more such partners—say, Amazon.com or Nokia—so iPod technology can become the de facto standard in digital music. As Apple found out with the Macintosh, early innovation is no protection against an onslaught of new rivals.
- 5 DON'T BE GREEDY:** Cutting prices is another way to boost market share and become the industry standard. Apple shouldn't do this right away since it can't even keep up with demand now. But once supply improves, Apple needs to trim iPod prices.



**PROUD PAPA** There's a six-week waiting list for the iPod Mini



BY STEPHEN H. WILDSTROM

## The Music Mess: Advantage, Microsoft

Imagine buying a CD at Best Buy only to discover that it won't work on the CD player you bought at Circuit City. Absurd as it sounds, this sort of situation is the rule rather than the exception in the world of legally downloaded music. This maze of incompatible standards is a threat to online services such as Apple Computer's iTunes Music Store.

The situation is both baffling and infuriating. My iPod can play all the MP3s I rip from CDs or pull from KaZaA (if I used it), but when it comes to legal downloads, it works only with the iTunes store. The Roku SoundBridge that connects my stereo to my computer's stash of digital music can play everything in my iTunes library that I digitized myself—MP3s and the like—but not iTunes Music Store purchases. Similarly, other players handle only music bought from a specific service.

No wonder the market share of legal music downloads remains tiny compared with sales of CDs and the traffic on music-swapping services such as KaZaA. Both let you play your music wherever you want. Record companies insist on using technology to limit the number and types of copies buyers can make of downloaded songs. But the problem isn't the restrictions—it's the incompatibilities. Apple uses a digital-rights management (DRM) system called FairPlay, RealNetworks uses one called Helix, and Microsoft has just introduced a DRM known as Janus.

**IT'S PUZZLING THAT THE INDUSTRY** doesn't see how hard this is on consumers. Apple has chosen an isolationist course. It supports only FairPlay in its products, and it has been unwilling to license other companies either to build FairPlay-enabled players or to sell FairPlay-protected songs. Hewlett-Packard sells iPods co-branded with Apple, but it's not clear whether Apple will enter broader licensing deals. RealNetworks, as before the smallest competitor, is eclectic, promoting a system called Harmony that supports players using its own Helix as well as Microsoft's Janus. It also sells songs for the iPod using its own, unlicensed version of FairPlay.

Microsoft holds the high cards in this game. Much as I hate to see the colossus of Redmond end up dominating yet another market, I believe that is going to happen, and given the current state of affairs, it may be the best outcome for consumers. Microsoft doesn't make player hardware, and



**Gates & Co. focus on compatibility, which is what music lovers want**

MSN Music is a tiny part of its business. The company makes money selling the Windows Server 2003 software required to distribute music or video in Windows Media content, so it profits by having the technology as widely embraced as possible. To promote that, it offers favorable, often royalty-free, licensing of Windows Media technology to music and movie studios and device makers.

When Windows Media 10 and Janus were released in early October, Microsoft took a self-serving step that simplifies things for consumers.

It created a "PlaysForSure" logo for sites that sell Windows Media music and devices that play it. In theory, PlaysForSure music you buy from sources that include Napster, Musicmatch, and Wal-Mart Stores will work on any PlaysForSure player, including products from Dell, Creative, iRiver, Gateway, and newcomer Virgin Electronics.

None of these players is as easy to use as an iPod, these Web sites aren't as easy to use as the iTunes online store, and no rival can match Apple's brilliant marketing. But the gap is narrowing. Virgin Electronics, for one, is part of an empire with proven marketing ability, especially in selling music.

In the end, what consumers care about is getting the music—and in the not-too-distant future, the movies and video—they want and having it play without hassles on the device of their choice. Microsoft's big-ent approach offers a way out of this morass for everyone, except perhaps Apple. ■

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(TOP) PHOTOGRAPH BY ETHAN HILL



**Tech&You**  
BY STEPHEN H. WILDSTROM



## Microsoft Plays a New Zune

Microsoft has never been shy about adapting a good idea when it sees one, so naturally its new Zune music player and download service take a page from Apple's iPod/iTunes business. Zune's large display and wireless capability may well appeal to some users. But they won't be enough to overcome the huge head start Apple enjoys in the market.

Zune represents an abrupt reversal of Microsoft's earlier music strategy, which was supplying software to music vendors and independent hardware makers. These iPod wannabes have improved of late, but they still haven't caught up to Apple, and the various music offerings fall far short of the seamless experience on the iTunes Store. With Zune, Microsoft adopts Apple's model of end-to-end control of hardware, software, and content retailing.

Microsoft hopes Zune's ability to share music will be the killer distinction, as implied in its marketing slogan "Welcome to the Social." The players use Wi-Fi wireless to detect any other Zunes within about a 30-foot radius and send them songs. A shared song can be played just three times in a three-day period unless the owner cables the Zune to a PC and buys the tune from the Zune store. Unlike the player from startup MusicGrenlin, which also offers Wi-Fi sharing, the only wireless downloads the Zune can receive are songs sent from other Zunes.

**THE \$249 ZUNE PLAYER IS AN ATTRACTIVE** design, available in black, brown, or white. It has 30 gigabytes of storage and is about 1/8-in. longer and thicker than the similarly priced 30 GB iPod. But it makes good use of the extra bulk with its substantially bigger 3-in. display. It also has an FM radio. And while the controls lack the elegant minimalism of iPod's scroll wheel they are well designed and efficient. I had some difficulty installing the software—which requires Windows XP Service Pack 2—and getting the player to sync. But I was testing a preproduction version of the program; the problems should be fixed by the Nov. 14 launch.

The Zune player can handle the standard, unprotected audio and video files common to portable players. But when it comes to copy-protected content, it will only take files purchased from Zune Marketplace. Songs and videos protected by earlier versions of Microsoft's own digital rights management software, including PlaysForSure, will not work.

On the screen, the black, gray, and orange hues of the Zune library software have a more modern look than the rather plain-



vanilla iTunes, even though the basic layout is similar. It is a vast improvement over the familiar Windows Media Player.

The Marketplace music store is more problematic. For the sake of consistency with Xbox Live, prices are given in Microsoft points, equal to about 1.25¢, a system that strikes me as silly. Songs are priced at 79 points, which works out to the 99¢ they cost anywhere else. Zune users have the option of a \$15 monthly subscription, which allows unlimited downloads, but the music disappears if the subscription lapses.

The ease of browsing at the store is hindered by the fact that all music is sorted into just eight popular genres and a catchall "more" category, instead of the extensive system of genres and subgenres used by iTunes.

The big problem with the Marketplace is what isn't there. Zune is a much better video player than the iPod, but there are no movies or TV shows for sale, and won't be until Microsoft works out agreements

**Wireless sharing sets it apart from iPod. That might not be enough**

with the studios and networks. Zune can play podcasts, but you can't subscribe to or download them through the Marketplace.

Maybe I am underestimating the desire of people, especially those of the MySpace generation, to share music by a more high-tech method than passing earbuds back and forth. If I'm not, Microsoft's only hope may be to top iTunes' menu of video offerings before Apple comes out with an enhanced video iPod, which could happen as soon as January. It looks like it's going to be a bumpy ride. ■

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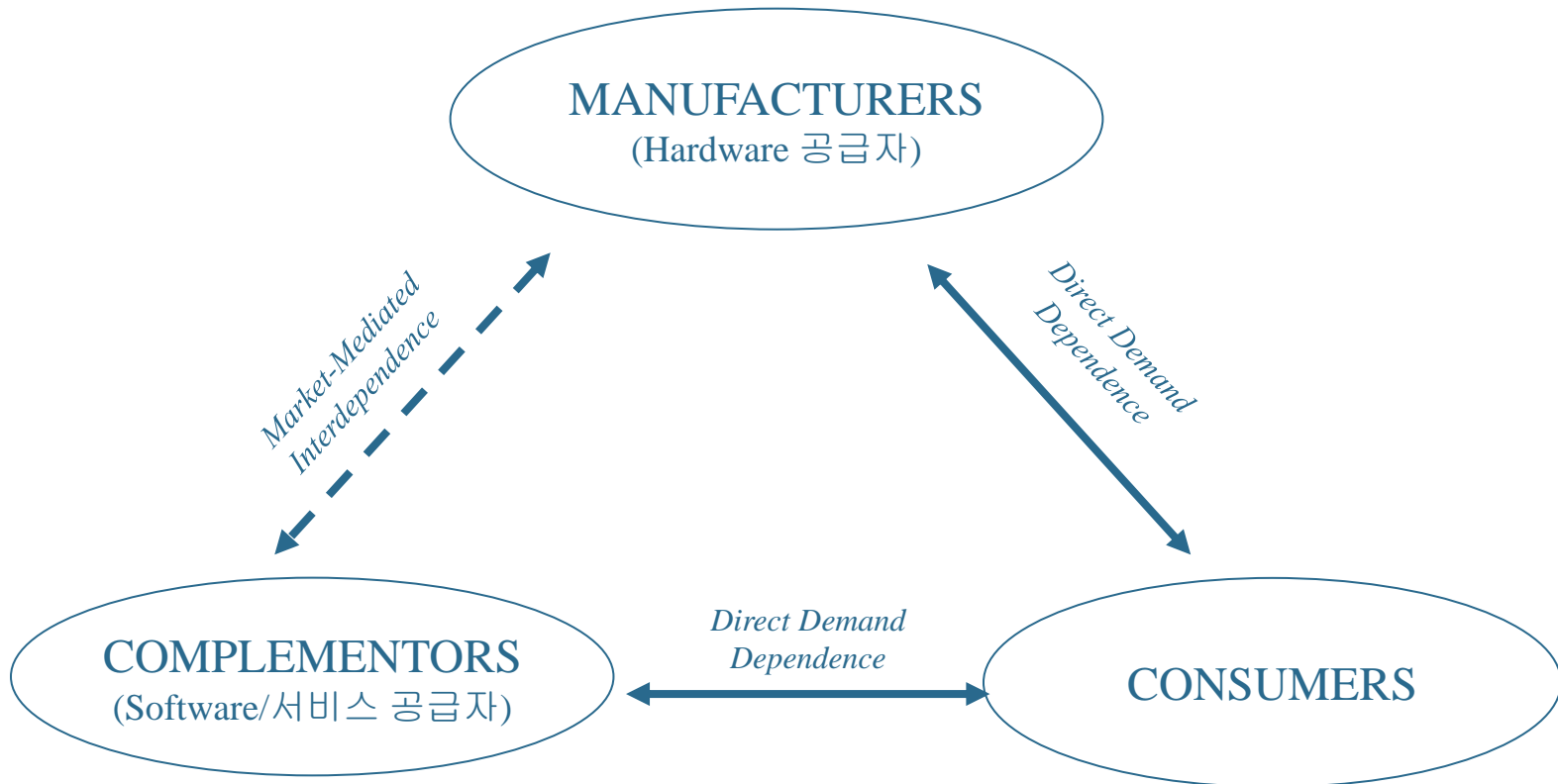


# 네트워크 외부성과 고객기반 확대

- **네트워크 외부성이란?**
  - Whether “real” or “virtual”, the value of connecting to a network depends on the number of other people already connected to it.
  - Demand-side economies of scale
  - “Bigger is better.”
- **“기대”가 중요한 역할을 수행한다: Bandwagon Effect**
- **로컬 네트워크 효과**

# 간접 네트워크 효과

- ❖ The greater the availability of complementary products the more attractive the capital good for consumers.



# The Chicken and Egg Problem

Market	Manufactures	Complementors	"Chicken –and –Egg" Problem
DVD Players	DVD하드웨어 제조업체 (Sony, RCA, Philips)	영화관 비디오가게	DVD 재생기 판매 VS. DVD 영화 콘텐츠와 대여의 가능여부
Electric Vehicles	자동차 제조업체 (GM, Ford, Toyota)	주유소 자동차 정비소	전기 자동차 판매 VS. 자동차 전지 재충전, 자동차 충전 서비스, 타이어 서비스의 가능여부
Personal Digital Assistants (PDAs)	PDA 하드웨어 제조업체 (Apple, 3Com, Casio)	개인 소프트웨어 공급업체	PDA 판매 VS. PDA 소프트웨어의 사용가능여부
Advanced Photography System(APS)	APS 카메라/필름 제조업체 (Nikon, Minolta, Canon)	사진 인화소	APS 카메라/ 필름 판매 VS. APS 필름 인화 서비스의 가능여부
Smart Cards	Smart Card 공급업체 (Mondex, Mastercard, Visa)	소매업자	Smart card의 가입 VS. 소매업체에서 smart card를 받는 여부
Paperless Electronic Books	Paperless book의 하드웨어 제조업체 (Softbook, RocketBook, Everybook)	출판사	Paperless book의 구입 VS. Paperless book에서 사용 가능한 콘텐츠의 구입 가능 여부
Network Computers	Network computer 제조업체 (Oracle, IBM, Sun)	독립된 Java 소프트웨어 프로그래머	Network computer 판매 VS. Java 응용기반 Network computer의 가능여부
Operating systems	Operating system 판매업체 (Microsoft, Apple, Sun)	하드웨어 제조업체 개인 소프트웨어 공급업체	Operation system 설치된 기반 VS. 하드웨어와 소프트웨어의 사용 가능여부
Cable Modems	Cable modem 제조업체 (General Instruments, Motorola, 3Com)	Cable서비스 공급업체	Cable modem 가격 VS. Cable modem 서비스와 콘텐츠의 가능여부

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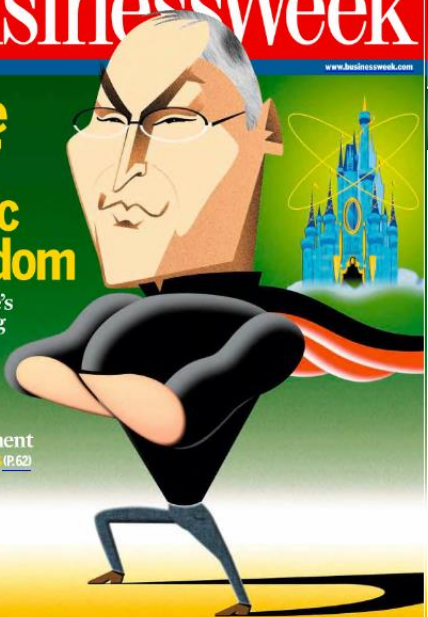
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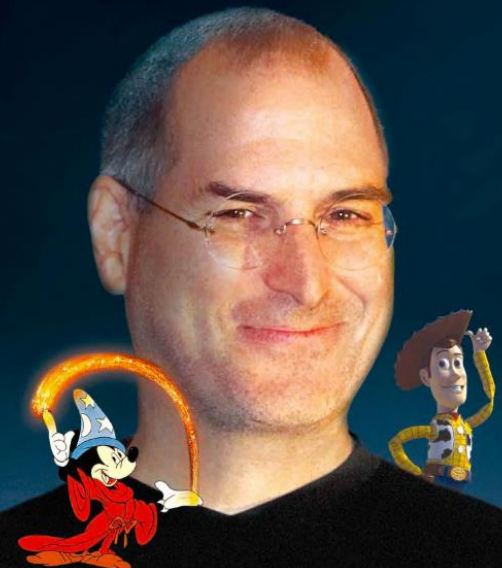
## Steve Jobs' Magic Kingdom

How Apple's demanding visionary will shake up Disney and the world of entertainment

BY PETER BURROWS (p.62)



COVER STORY



## Steve Jobs' Magic Kingdom

How Apple's demanding visionary will shake up Disney and the world of entertainment BY PETER BURROWS AND RONALD GROVER

**EARLY ON A JULY WORKDAY IN 1997, JIM CLINEY, THEN** head of Apple's worldwide operations got the call. McClintock was summoned with other top brass of the beleaguered company to Apple Computer Inc.'s boardroom on its Cupertino (Calif.) campus. Embellished Chief Executive Gil Amelio wanted to time. With an air of barely concealed relief, he said: "Well, I'm glad to report that it's time for me to move on. Take care," McClintock recalls. And he left.

A few minutes later, in walked Steve Jobs, the co-founder of the once-reviled company, had been fired by Apple 12 years before. He had returned seven months earlier as a consultant, when Amelio acquired his NeXT Software Inc. And now Jobs was back in charge. Wearing shorts, sneakers, and a few days' growth of beard, he sat down in a swivel chair and spun slowly, says McClintock, now president of strategy provider Frankel Corp. "O.K., tell me what's wrong with this place," Jobs said. After some mumbled replies, he jumped in: "It's the products! So what's wrong with the products?" Apple executives began offering some answers. Jobs cut them off: "The products SUCK!" he roared. "There's no sex in them anymore!"

The one-time *enfant terrible* of the technology world has calmed down considerably on route to becoming a 60-year-old billionaire. But what hasn't changed is his passion for doing, and saying, just about anything to help create the kinds of products that consumers love. In the nine years since Jobs returned to Apple, his unique modus operandi has sparked broad changes in the world of music, movies, and technology.

New Jobs is stepping into the Magic Kingdom. On Jan. 24, Walt Disney Co. agreed to pay \$74 billion in stock to acquire Pixar Animation Studios, where Jobs is chairman, CEO, and 50.6% owner. As part of the deal, Jobs will become the largest shareholder at Disney and take a seat on the entertainment giant's board. His top creative executive at Pixar, John A. Lasseter, will oversee the movies at both Pixar and Disney's animation studios. Pixar's president, Ed Catmull, will run the business side for the two studios.

The alliance between Jobs and Disney is full of promise. If, as Catmull says, Jobs brings to Disney the same kind of industry-shaking, boundary-busting energy that has lifted Apple and Pixar sky-high, he could help the ailing company become the leading laboratory

## News Analysis & Commentary



**JOBS AND NEW BABY** "I think this is the start of something really big"

CONSUMER ELECTRONICS

### HOLLYWOOD HOLDS ITS BREATH

The iPod—and Disney's blessing—could create a mass audience for video on the go

**W**HEN STEVE JOBS unveiled the much-anticipated video iPod in San Jose on Oct. 12, it was immediately clear that Apple Computer Inc.'s latest gizmo will not transform movies the way the iPod and iTunes have revolutionized music. At least not right away. The new iPod, which has a bigger color screen and more capacity, plays short clips and TV series. And Apple has already started selling music videos and episodes of five Walt Disney Co. TV shows, including *Desperate Housewives*, for \$1.99 through its iTunes Music Store. But there were no movie moguls on hand to help Jobs unveil an online store for full-length features. Selling movie downloads is a lot more complicated than selling singles and albums. Studio bosses continue to fret about piracy, and they are loath to give up a distribution model that allows them to release the same movie over and over in different formats.

That's not to say Apple hasn't again stolen a march on its rivals. Along with the video iPod, the company unveiled a slimmer iMac with a remote control that allows people to use the new computer as a home entertainment appliance. And the Disney deal could lead other TV studios to offer content for \$1.99. "Only Apple could have brought this together," says Van Baker, an analyst with Gartner Inc.

Still, the day when movies will be downloaded to iPods likely remains far off. Disney chief Robert A. Iger appeared at the Apple event and mused about the potential for the Net to "distribute more content to more people, in more places, more often." But studios are terrified of the digital piracy rampant in music. Apple has had no success con-

vincing them to adopt the Fairplay digital-rights-management technology used in iTunes. Apple did agree, however, not to allow people who buy videos or TV shows to burn even a single CD or DVD.

Besides, studios have more to lose than the music industry's top labels did when they cut their landmark deal with Jobs back in 2001. While Hollywood suffered through a funk this summer, the studios are in better shape than their music brethren, thanks largely to a decades-old distribution model that lets studios sell films many times over—first via the box office, then as DVDs, and finally by selling the broadcast rights. As such, studios are balking at shuttering these release "windows" by letting Apple immediately release their latest hits. Even Disney won't make its TV shows available on iTunes until a day after they air.

HURDLES AHEAD

THERE ARE TECHNICAL constraints, too. Using Apple's updated iTunes software, customers can download an hour-long TV show in 20 minutes. At that rate, a full-length movie would take half an hour. And analysts say it would consume half a gigabyte of storage space—or five gigabytes-plus, if the movie was shot in a high-definition version. As a result, experts say online movies will remain a tiny niche until U.S. consumers get speedier broadband connections, slicker home networks, and beefier hard drives. "Broadband needs to connect to pretty display devices in the living room, not just to PCs," says Jim Ramo, CEO of movie download site Movielink.

Jobs is well aware of the hurdles, which explains why the new iPod is a baby step to get a foothold without spooking the studios. But he may be betting that Hollywood will soon be ready to cut a deal. Disney's willingness to let Apple sell its TV shows is a sign that compromise may be in the air. And Iger has hinted that down the road, Disney may collapse the "windows" distribution model. "I think this is the start of something really big," Jobs said. "Sometimes the first step is the hardest one." Apple rivals, take note.

—By Peter Burrows, with Cliff Edwards, in San Mateo, Calif., and with Ronald Grover in Los Angeles

**DEN MASTER** The media-friendlier iMac





Successful innovation requires tracking your partners and potential adopters as closely as you track your own development process.

by **Ron Adner**

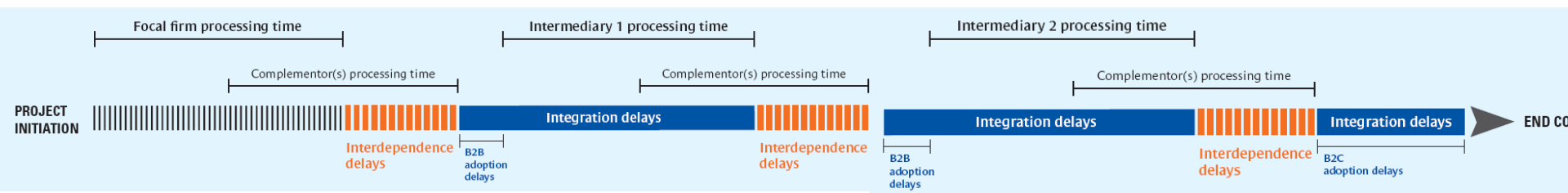
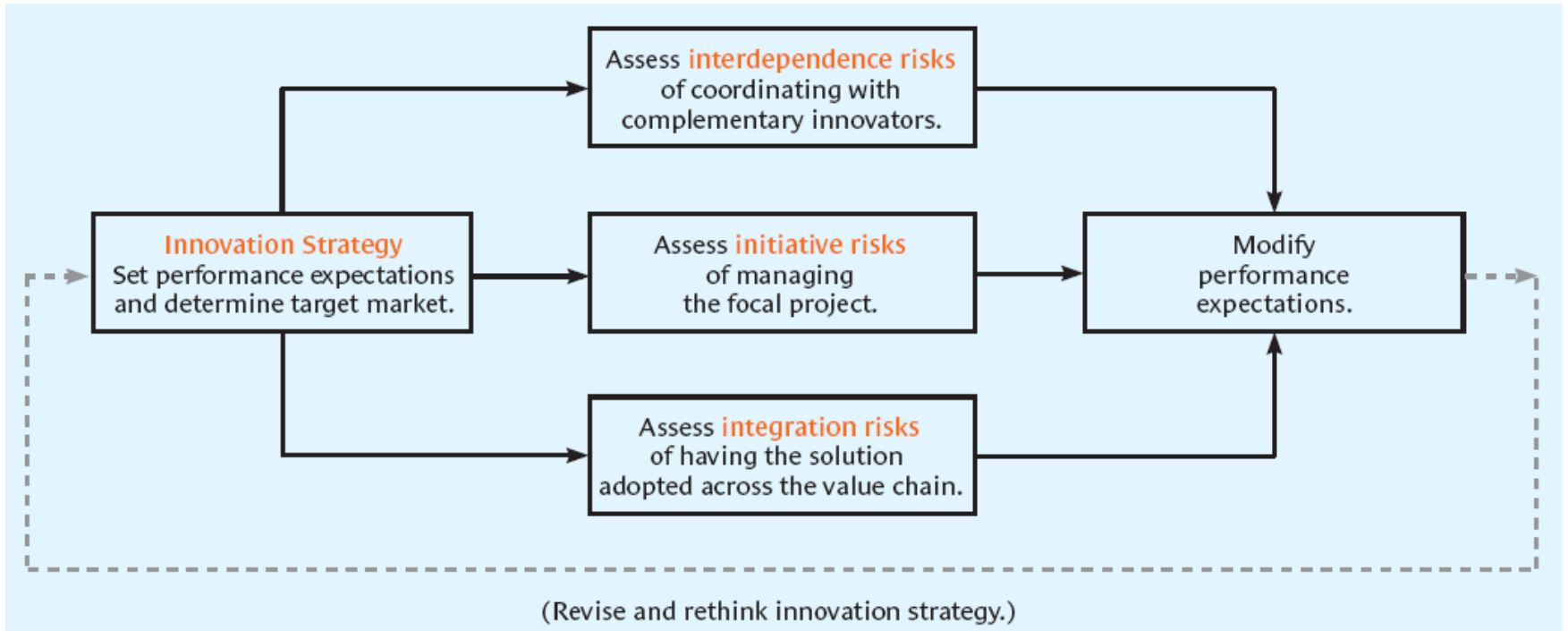
## Match Your Innovation Strategy to Your **Innovation Ecosystem**

**H**igh-definition televisions should, by now, be a huge success. Philips, Sony, and Thompson invested billions of dollars to develop TV sets with astonishingly high picture quality. From a technology perspective, they succeeded: Console manufacturers have been ready for the mass market since the early 1990s. Yet the category has been an unmitigated failure, not because the consoles are deficient, but because critical complements such as studio production equipment, signal compression technologies, and broadcasting standards were not developed or adopted in time. Underperforming complements have left the console producers in the position of offering a Ferrari in a world without gasoline or highways—an admirable engineering feat, but not one that creates value for customers. Today, more than a decade later, the supporting infrastructure is finally close to being in place. But while the pioneering console makers waited for complements to catch up, the environment changed as new formats and new rivals emerged. An innovation that was once characterized as the biggest market opportunity since color TV is now competing for consumer attention in a crowded market space.

The HDTV story is a poster child for the promise and peril of *innovation ecosystems*—the collaborative arrangements through which firms combine their individual offerings into a coherent, customer-facing solution. Enabled by information technologies that have drastically reduced the costs of coordination, innovation ecosystems have become a core element in the growth strategies of firms in a wide

CLAYTON CHRISTENSEN

# Integration Delays



# Palm PDA 사례

How did Palm do to create a winner-take-all market for itself?

- Software Development Kit (SDK)
- Shareware applications
- Penetration pricing
- Beaming, UI
- "Palm Economy" via PalmSource





# Technology & You

BY STEPHEN H. WILDSTROM

## Look Who's Powering Palm

Is the Palm software that powered the first practical handheld in 1996 and redefined mobile computing on the road to oblivion? It sure looks that way, at least for devices such as Palm's popular Treo, which combines voice and e-mail service with the traditional contacts and calendar functions of a PDA. Palm will soon announce a Treo powered not by Palm OS software but

by Microsoft's Windows Mobile 5. And while Palm will sell both Palm OS and Windows Treos for the indefinite future, Microsoft software is likely to dominate the market over time.

The sale of PalmSource, the software arm spun out of the former Palm Computer in 2002, will also affect the future of Palm OS. PalmSource had been struggling both to find more customers and to get its products, particularly a simpler operating system for cell phones, to market. Earlier this year it sold its share of the Palm trademarks back to the hardware arm and put itself up for sale.

As the only significant licensee of Palm OS, Palm was widely expected to buy back the software business—and it tried. But major U.S. and European handset makers jumped into the bidding and drove the price sky-high. "There was a point beyond which we didn't think it made sense," Palm CEO Ed Colligan wrote in an e-mail to Palm employees that was obtained by *BusinessWeek*. After Palm withdrew, Japanese software maker Access, which supplies Web browser technology for the Treo, came up with the winning bid: \$324 million in cash, an 83% premium over the market share price.

**FOR PALM THE ACCESS DEAL** is the least objectionable outcome since it prevented Palm OS from falling into the hands of a competitor. Palm is not likely to shift away from Palm OS as the software behind its Zire, Tungsten, and LifeDrive PDA models. But the market for these nonphone handhelds has been declining for several years as wireless handsets take up more of their functions. And with the acquisition of PalmSource now off the table, Palm can be agnostic about its software choices.

Although I have long been a Palm fan, I have to concede that Microsoft software increasingly makes sense for a converged device like the Treo. The first Pocket PC Phone Editions, which came out three years ago, were ghastly, but



THE ORIGINAL 1996 PALM PILOT

the hardware and software have steadily improved. I tried a Hewlett-Packard iPAQ HW6500, due this fall from Cingular Wireless, and it was nearly as good as a Treo 650, both as a phone and for e-mail—and it uses an older version of the Windows Mobile software. HP used a Treo-like square display instead of the elongated ones used in other Pocket PCs. This left room for a built-in keyboard while keeping the device compact and not too top-heavy for typing. Between the improved software and Palm's Treo design experience, the Windows Treo, expected to hit the market early next year, should at last be as good as the Palm OS-based Treo 650.

The embrace of Microsoft is bound to cause howls of betrayal among Palm faithful. But the time is ripe for Palm to move to Windows Mobile. The hardware inside Treos and Pocket PC phones is virtually identical. Windows Mobile is popular with corporations, especially those whose mail systems are built on Microsoft Exchange and Outlook. And the fact that programs can be written to run on both Treo-size devices and the smaller, cheaper Windows Mobile Smartphones, such as the Audiovox SMT 5600, appeals to both companies and independent software developers.

**Windows Mobile is now nearly as good as Palm's software**

Microsoft may be a company of predatory instincts, but its history of competition with Palm is typical of how it so often wins in the end. With the patience conferred by deep pockets and the determination to keep trying, it can eventually penetrate any market it desires. Palm held off the juggernaut for longer than most, but the time for change is rapidly drawing near. ■

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PHOTO: PHOTOGRAPH BY ETHAN HILL



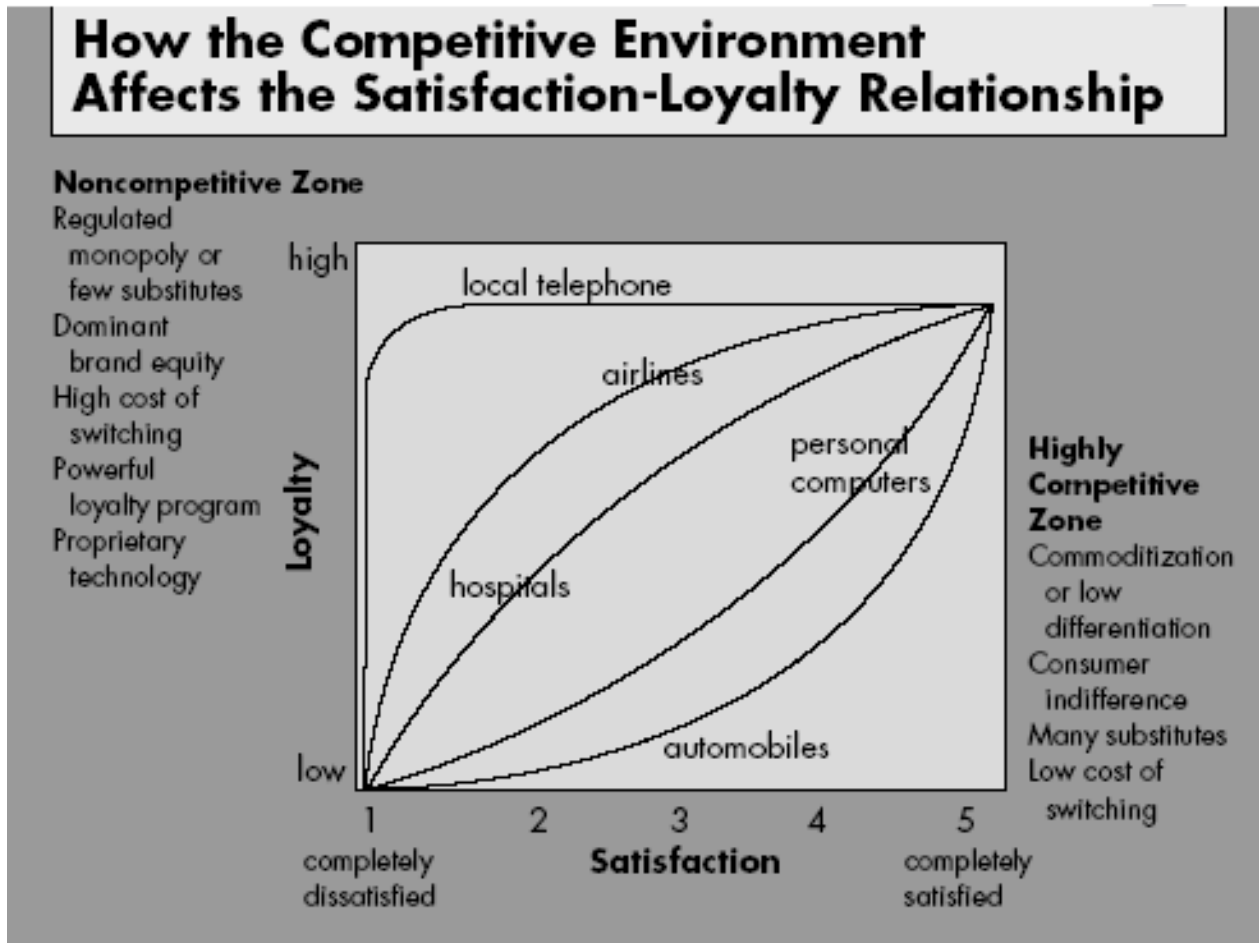
# 고객 Lock-In과 전환비용

- **Lock-in은 하이테크 산업의 보편적 현상**
  - Lock-in은 엄청난 부의 원인인 동시에 고객 입장에서는 두통의 원인
  - Lock-in에 전략적으로 대처하라.
- **Lock-in의 두가지 원천**
  - 네트워크 효과
  - 전환비용



# 전환비용: “Loyalty”의 진짜 이유

## ❖ Satisfaction-Loyalty Link



# 전환비용의 유형

## ■ 절차적 전환비용

- Economic Risk
- Evaluation costs
- Learning costs
- Set-up costs

## ■ 재무적 전환비용

- Benefit loss costs
- Monetary loss costs (transaction costs)

## ■ 관계적 전환비용

- Personal relationship loss costs
- Brand relationship loss costs (non-economic "brand loyalty")



# Switch Campaign by Apple



## Effortlessly switch from a PC to a Mac.

How do I transfer files?

When you upgrade to a new Macintosh, of course you want to bring all your files and information that you've built up over the years with you. Moving bits around can be a tedious process — and aren't computers supposed to automate things so you don't have to do the work anyway?



Move to Mac  
\$49.95  
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Buy Now

**System requirements:**  
**For your PC:**

- Microsoft Windows 98, 98SE, Millennium, 2000 or XP
- 30 MB hard disk space, 32MB RAM, USB Port

**For your Mac:**

- Mac OS X 10.2 Jaguar or later



Move2Mac transfers files from your PC to your new Macintosh and puts everything just where you need it. Tracks from "My Music" on your PC go to the Music folder on your Mac; clips in "My Videos" move to the Movies folder; images in "My Pictures" show up in your Pictures folder; items in

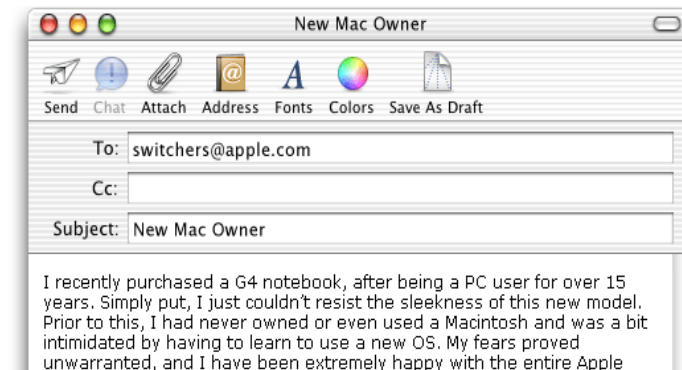
**What happens**  
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**Can Move2M**



**"After I switched to Mac, my only regret was not switching earlier."**

— Juan Proaño, project manager



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# 고객 Lock-In 전술

## ❖ Seller의 Lock-In 전술

- 계약을 통한 lock-in
- 초기투자유도 ("hardware lock-in")
- 상표 특유의 학습훈련 ("software lock-in"): 중독, 습관화
- 정보와 데이터베이스를 활용한 고객관계관리
- 탐색비용 증대
- 로열티 프로그램



## ❖ 고착화 사이클



# No BlackBerry, No Life

"I'm addicted to this thing," says one CEO.  
But what if the connection shuts down?

BY HEATHER GREEN

**W**HAT WOULD A DAY without the BlackBerry be like? John A. Edwardson, chief executive of tech distributor CDW Corp., ponders the question over a breakfast of poached eggs, bacon, and decaf in a Manhattan hotel. He picks up his BlackBerry from the table, turns it over, then can't bring himself to imagine such a dire possibility. "Let me get this out up front: I'm addicted to this thing," he says. "Seriously, in my opinion, this is the most important productivity tool that has come out in my lifetime. You think of something in the middle of the night. Bang. You take care of it right away."

Unless, of course, the BlackBerry gets squashed. While that's a long shot, a U.S. district court judge in Virginia is hearing a case that could lead to the shutdown of BlackBerry service in the U.S., at least temporarily. Patent holding company NTP Inc. is suing Research In Motion Ltd., BlackBerry's Canadian maker, alleging its wireless e-mail technology infringes on NTP patents. Unless the two sides reach a settlement, NTP has asked the judge, who has already ruled that NTP's claims have merit, to turn off RIM's service in the U.S.

**THUMB FUN** An infringement suit could mean black screens

If that were to happen, Edwardson and 2.8 million other BlackBerry addicts from Hollywood to Wall Street would find themselves staring at black screens. It's a serious enough risk that the Justice Dept. filed a motion on Nov. 10 asking the court to ensure that people in the federal government itself would be exempt from any injunction.

So Senate Majority Leader Bill Frist may be able to zip off e-mails to his staffers. But what happens to everyone else? What would the costs be of going without BlackBerry? Well, soccer games, for one. Peggy Foran, executive vice-president at Pfizer Inc., high-tails it out of the office at 3 p.m. on game days so she can root for her daughter from the sidelines. No BlackBerry, no cheering for her. She admits to using it in less admirable spots, too. One time she was so busy typing e-mails in church during Easter mass that her daughters confiscated the machine. "I couldn't go back to not using one," she says.

Anthony Paduano figures he could go without—for about 20 minutes. His law firm, Paduano & Weintraub LLP, is a litigation specialist with 13 senior lawyers in New York. "We advertise ourselves as a little boutique of trial lawyers who can go anywhere and be available anytime," says Paduano. "If you take our BlackBerries away, we wouldn't be able to do that. We would have to spend all our time trying to find a Kinko's."

No wonder people are eager to stay connected. So addicted is Edwardson that he circles his cabin in Wisconsin searching for the nearest spots where he can use his BlackBerry. "Every year it gets closer," he says. "It used to be five miles away. Now there's a hill about two miles away where I can get a signal." ■





# 보완재와 Lock-in



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## MUSIC TO APPLE'S EARS

It seems **Apple Computer's** iPod music player may be doing what years of marketing have been unable to do: persuade PC owners to jump to the Mac. On Nov. 22, **Piper Jaffray** put out a report suggesting that 700,000 or so iPod lovers either have or plan to buy a Mac in the next year, and that 1.2 million more will do so in 2006. The report, which set a target price of \$100, sent Apple shares up 11%, to \$61.35—a four-year-high. But don't look for Apple to make a serious run at **Microsoft's** PC market share. Even with new buyers, Apple will still have less than 3% of the PC market, says Piper Jaffray.

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# Switching Cost의 전략적 활용

## ❖ 전환비용을 낮추어 Lock-in의 고리를 끊는다

- 전환비용이 낮은 파워 유저(power user)를 공략
- Gateway Technology를 통한 연결고리의 제공
- 전환에 대한 subsidy 제공
- Trade-in을 통해 심리적 전환비용 낮춘다

## ❖ 당신이 만일 구매자라면: Buyer의 전술

- 구매 이전: 최대한 sweetener를 요구하라
- 구매 이후: Lock-in을 경계하라. 전환비용 최소화