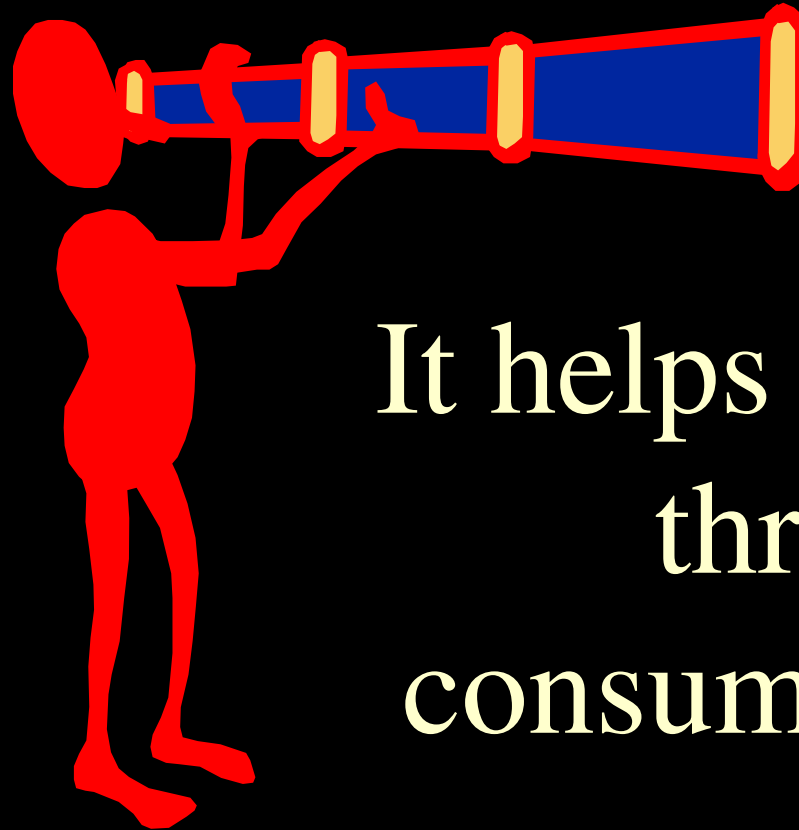


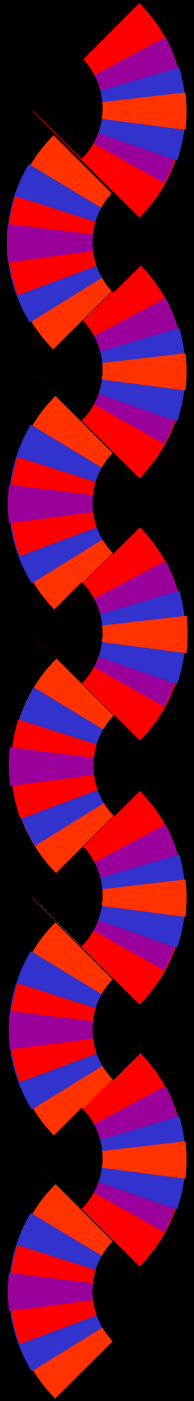
Marketing Research Tools

For BDS Market Development

The power of marketing research?



It helps you look
through
consumers' eyes.



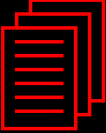


Uses of Marketing Research Tools

- ◆ **Design:** To help choose appropriate market stimulating interventions
- ◆ **Implement:** To simulate the supply of BDS which enterprises demand
- ◆ **Monitor:** To monitor changes in the market for a business service



Uses of Marketing Research Tools

- ◆ Design 
- ◆ Implement
- ◆ Monitor

BDS Market Development Program Design

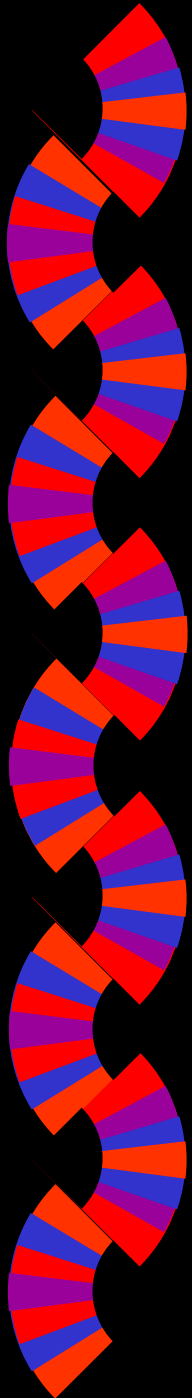
Market Assessment
(Consumer Research)



Identify Key Market Weaknesses



Design Interventions to Address
Market Weaknesses



What happens when we don't ask consumers?

Identified Market Weakness

=

Lack of Market Info



Program Design

=

Provision of Info

Actual Weakness

=

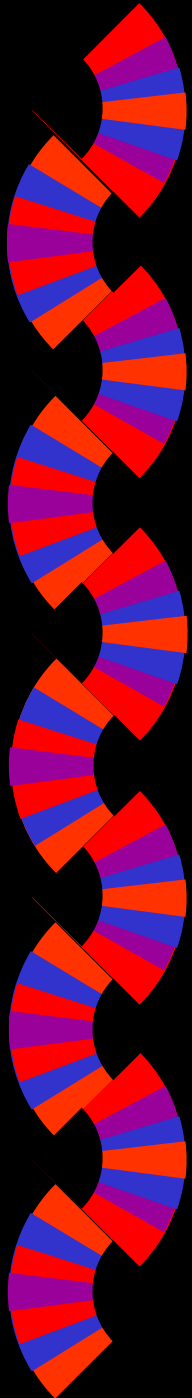
Inappropriate Services



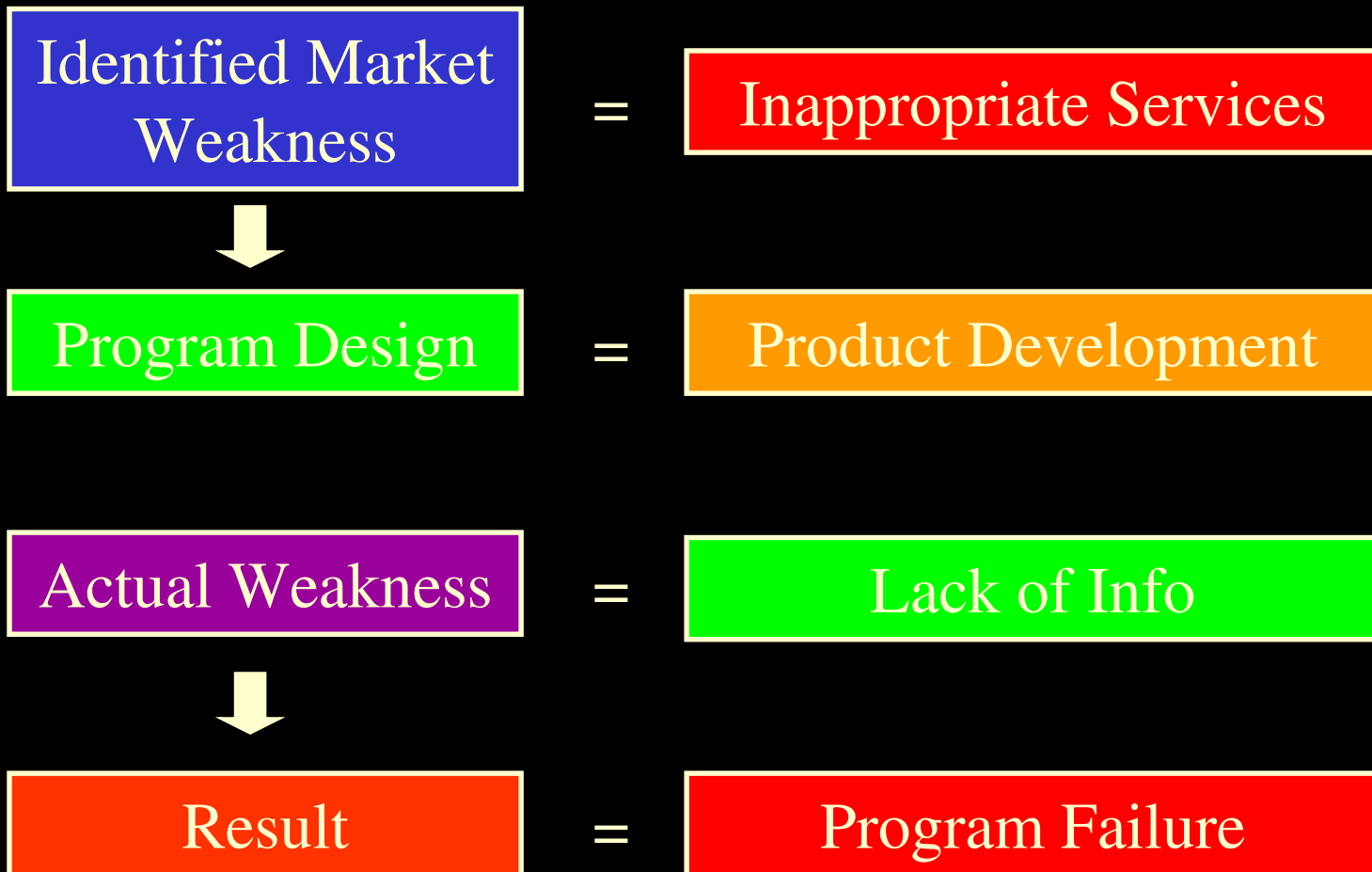
Result

=

Program Failure



What happens when we don't ask consumers?





A Usage Attitude Image Market Study Gathers Information on...

- ◆ Entrepreneurs' awareness of services
- ◆ The providers that entrepreneurs use
- ◆ Entrepreneurs' use and spending on services
- ◆ Why some entrepreneurs do not use services
- ◆ What features are important to entrepreneurs and how satisfied they are
- ◆ Information on entrepreneurs themselves

*A Usage Attitude Image Market Study Can Identify **Supply Weaknesses...***

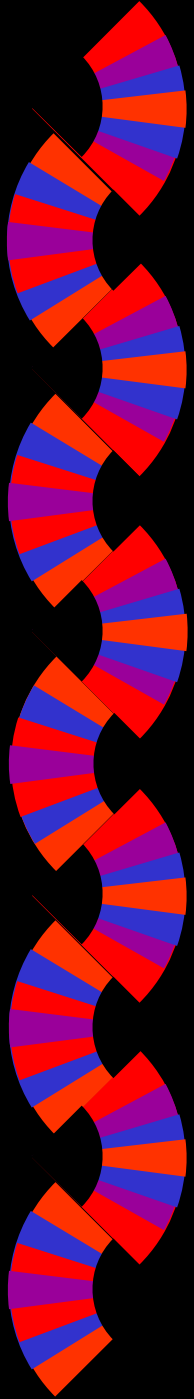
- ◆ services are not available
- ◆ services are not appropriate for some market segments
- ◆ services do not have the features consumers want
- ◆ services are poor quality



A Usage Attitude Image Market Study Can Identify Demand Weaknesses...



- ◆ consumers are not aware of or do not understand services
- ◆ some consumers segments do not see a need for the service
- ◆ consumers use informal substitutes for the service
- ◆ consumers spend little on the service



Usage Attitude Image Market Study

- ◆ Helps pinpoint which market weaknesses are present and the degree of the problem
- ◆ Provides a quantitative picture of the market
- ◆ Provides some qualitative information on the market

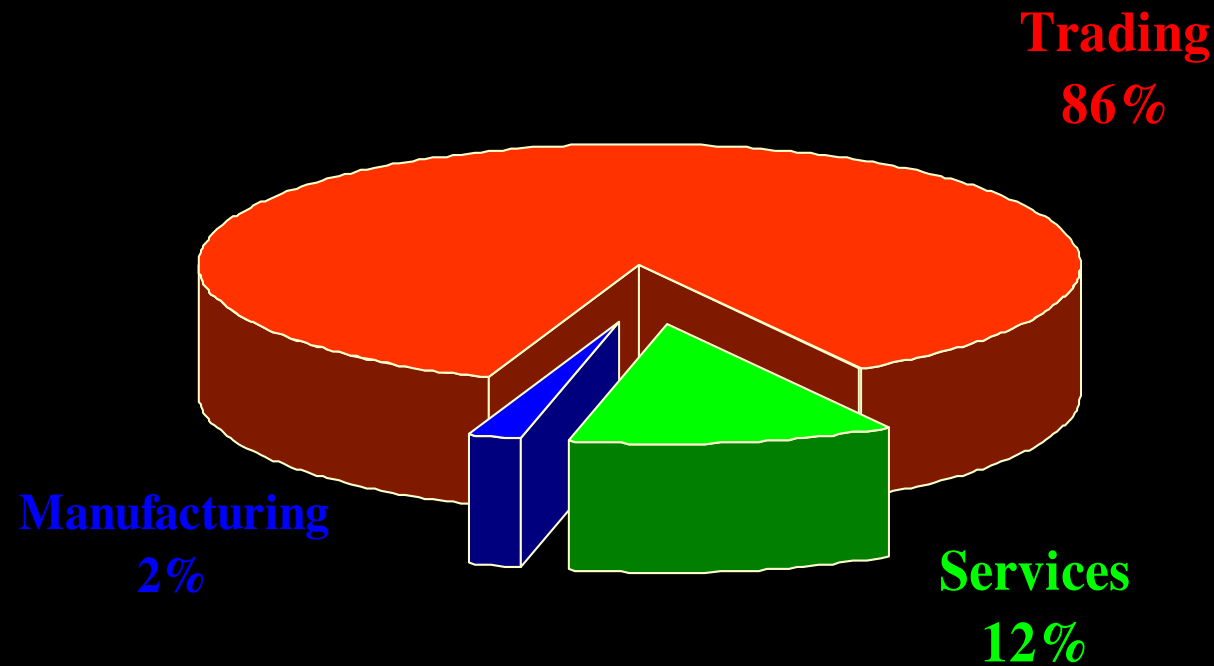


What are the Marketing Issues for Philippine ICT Services?

Service	Awareness	Reach	Retention
Phone	100%	77%	94%
Fax	76%	37%	100%
Telegram	100%	68%	47%
E-mail	28%	7%	*

*The PCO Market from MSEs is
~ US\$5.7 million per year*

MSE PCO Customer Segments



Service Features of Philippine Public Calling Offices

	High Satisfaction	Low Satisfaction
High Importance	<p><u>Strengths</u></p> <ul style="list-style-type: none"> Cleanliness Clarity of connection Comfortable waiting area Friendly/helpful attendants 	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> Accuracy Privacy Confidentiality Comfort while using service
Low Importance	<p><u>Waste</u></p> <ul style="list-style-type: none"> Variety of services 	<p><u>Indifference</u></p> <ul style="list-style-type: none"> Clear layout Waiting time Convenience of location Distance from business



Uses of Marketing Research Tools

- ◆ Design

- ◆ Implement



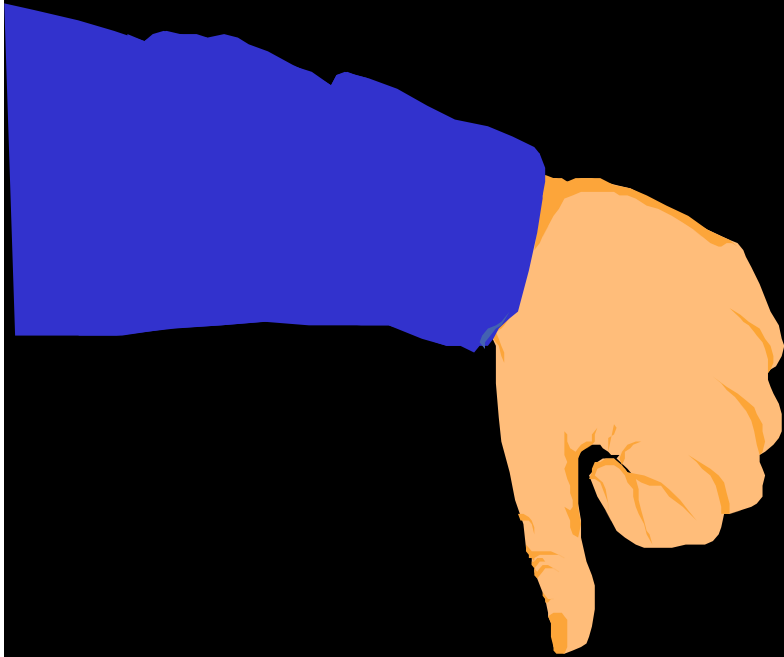
- ◆ Monitor



Tools for Supporting Product and Market Development

- ◆ Usage, Attitude, Image Market Study
- ◆ Focus Group Discussions
- ◆ Product Concept Tests
- ◆ Price Sensitivity Tests

Internet Access for MSEs in the Philippines...



- ◆ MSEs don't want to spend time searching for information
- ◆ If they are going to pay, they want information, not access to a computer

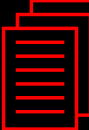


Email for MSEs in the Philippines

- ◆ This service could be added to PCOs with minimal additional costs
- ◆ MSEs were ready to pay market rates for this service
- ◆ Almost half of the respondents were ready to pay twice the price of sending a fax



Uses of Marketing Research Tools

- ◆ Design
- ◆ Implement
- ◆ Monitor 



A brief consumer survey provides:

- ◆ Market Volume (# and \$)
- ◆ Market Penetration
- ◆ Usage and Prices Paid
- ◆ Consumer Satisfaction
- ◆ Segmentation of above
- ◆ Sample of Suppliers and Services



My experience with marketing research...

- ◆ Very useful for identifying market weaknesses and helping suppliers
- ◆ Resource requirements are reasonable
- ◆ Tools are not complicated but it's helpful to have expert advice
- ◆ Donor and supplier needs are different
- ◆ Tools need some adaptation