

Making a Good Impression

The Search for New TV Advertising Metrics

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In the turbulence of today's TV advertising scene, what are the folks who control this \$50 billion business trying to measure that is both workable and usable, or, to restate the question the way an advertiser might ask it: "What kind of fools do they take us for?" With multiple TVs and PCs in the home along with home networks and nonlinear devices such as DVDs, SVOD, DVRs and the like, who knows what advertising is actually being viewed in the home and by whom? So why should anyone be willing to pay the CPM rate applied to viewership numbers derived from Nielsen ratings and the like? None we dare say, but the very brave, the misguided or the borderline tipsy.

An imaginary conversation in a darkened TV studio in a land and time far away between 1) a very nervous TV advertising executive and 2) an attractive but anxious agency account staffer, might go as follows:

- 1: "So when and how shall you pay us?"
- 2: "What shall I pay you for?"

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"So why should anyone be willing to pay the CPM rate applied to viewership numbers derived from Nielsen ratings and the like?"

1: "I made many good TV ad impressions this month."

2: "Yes, but you don't even know how to keep score."

1: "Can we agree to obfuscate that fact once more?"

2: "You mean let Nielsen continue the shell game?"

1: "Yes, yes, advertisers are not that finicky."

2: "Right on, they'll never even notice the lack of a real score!"

A need for valid metrics, what a startling concept! When Albert Einstein showed that time itself was not a fixed dimension all standards came to be questioned. So why should we be surprised to find that we can no longer effectively measure TV advertising results, and in good conscience

CMS NewsLine

"Validating the Middle Ground"



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say we can. Say from an estimate of total TV viewers come up with such things as the number of advertising impressions that might have occurred. We seem to have little choice but to muster on in the midst of a statistical disconnect, as we seem to have lost the relationship between what may be going on in the home and what we can say we have measured. At the same time we have high-sounding proclamations about research that is underway at Nielsen and elsewhere to reassure us that soon all will again be well. What else is one to do when monthly billings must be compiled and results reported on some agreed upon basis?

In the three-party game, when played by just two of the parties, it is the left out third party — in this case the advertiser: say a GM, Pepsi, or McDonalds — that may be played for the fool. As in the way that the medical establishment and the insurance industry perform a month-by-month duet to decide how the public shall pay for medical services. Or, when defense contractors and federal authorities settle on the handling of massive spending overruns to be funded by the taxpayers? Or whenever any two parties acting in self-interest are in a position to decide what is fair payment from a disenfranchised third party — say if you dare: a national advertiser like a Budweiser. You don't have to be a media seer to fathom the unstated but seemingly ever-present gentlemen's agreement that pairs the interests of the networks and those of the advertising agencies to obscure and, by a bit of legerdemain, quietly pull the wool over the eyes of those who buy and

pay the bill for TV advertising. Advertising whose efficacy and penetration is in reality most likely unknown and in instances unmeasurable.

After all, for well over a century it has been the custom in the social sciences to play at the application of mathematics to human affairs — as though a Descartes, Newton, LaPlace or Von Neumann were in tow — while assuming that the rest of us may fail to notice that what is achieved is mostly mumbo jumbo. And, when the public does happen to notice, by long experience expect that the public will go along with whatever rule and line their calculators conjure up. As in the established use of I.Q. scores to determine real intelligence, or a reliance on the results of political polls to determine election results in advance and all the rest.

Nonetheless, as long as everyone can agree on the use of these 'soft' numbers and their 'fuzzy' logic, why complain about it when these metrics appear to many to be far better than no numbers at all? Indeed the failure is not in

the capacity of mathematics, statistics and high powered databases to provide usable answers, but in the lack of willingness to dig deep enough to collect the necessary mass of data, process it effectively and pry out valid answers.

As a result, some of our brightest children are at times deemed unfit to go to a top college or university. Similarly, you may recall that as distinguished a citizen as Dwight David Eisenhower was 'measured' to be a rather dull fellow while at West Point — only to become the supreme commander of the allied forces in Europe

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during World War II and then President of the United States. And such nonsense goes on and on. It is only when we happen to notice a particularly absurd misrepresentation and numerical charade or when a great harm has been done that we may feel obliged to reconsider the process and change the metrics game.

That now appears to be the case for the metrics that are used to gauge TV viewership and advertising penetration. While the Nielsen and other TV rating methods did for years provide results that made statistical sense, that day is now long past. What with the majority of homes containing multiple TVs and numerous PCs, DVDs, game consoles and the like, the process has become vastly more complicated. Just about every device is on at the same time and family members are doing their thing in separate rooms. In 40-percent of the homes in the U.S. there is a TV and a PC in the same room with both typically on. Thus, it seems fair to say that what is represented as usable TV ratings today is a far cry from anything that any but the anointed data priesthood would wish to characterize as a sensible measure of TV viewing reality. Instead the gap between the measure and the fact seems to grow wider every day.

What is one to do? After all the CPM pricing game is itself based on a great deal of necessary marketing department guessing, as is the annual bidding contest on TV upfronts for cable and broadcast advertising. So what is the harm if many are satisfied with the current metrics game as it is being played? The answer to this

“After all the CPM pricing game is itself based on a great deal of necessary marketing department guessing...”

question as we know too well from experience is simply that the longer we allow a gross error to fester the greater the chance that pressure for a correction will build up and invariably lead to violent change. In politics such corrections are called coup d’etats or revolutions. In economics we say we have a recession or depression on hand. In marriage perhaps a separation or a divorce is in the offing. In geology it may be called an earthquake or a tidal wave. Better not to let the pressure (for change) mount too greatly as erroneous metrics yield false conclusions that support poor or misguided decisions and so on. Better by far to relieve the pressure as soon as possible by facing the facts on the ground and acting accordingly.

Well then, what are the facts of the matter and what is one to do? In truth no one really knows for sure as media technology makeovers are so rapid and ongoing. One approach that is popular with some large birds and a few media folks is to make believe the problem or danger will simply fade away. In actuality, unless the situation involves imminent danger or has real traction, things may indeed settle down and the ostrich may survive or not — as might the media executive. However, this is not likely to be the case when fundamental technological change is changing the way things work — as when in WWI soldiers were forced — by backward facing generals — to charge again and again into concentrated machine gun fire, only to die by the tens of millions at Verdun and other battlefields. The question for television advertising is: “If there are better metrics that can be formulated, how should they

be applied and by what means can conclusions be drawn that reliably measure TV viewing and the effectiveness of the advertising it contains?”

When historic or fundamental change is taking place, as with today’s electronic media technology and the impact it is having on how many advertising impressions are actually being made, ducking one’s head in the sand is likely to yield a poor or sad result. As in other such matters the approach to finding a proper solution starts with facing up to the problem. In the case of advances to television, we must face the fact that we can no longer correlate the observation that this and that many TVs are on and tuned to particular channels with anything that resembles a measure of how many advertising impressions are likely to be made. Is it sensible to throw away the existing outdated methodology before a full solution is at hand? Indeed it may in this case be necessary to do something soon, as it is generally better to face the hard facts on the ground than to continue in denial. As the poet Edwin Arlington Robinson captured in his famous poem about a man who had trouble living in the present and was stuck in the past, his Minever Cheevy:

*Minever Cheevy, born too late,
scratched his head and kept on thinking.
Minever coughed, and called it fate,
and kept on drinking.*

As another example, think of how the intelligence community employed statistical measures of aluminum tubes, centrifuges, radioactive raw materials and

the like to ‘establish’ the presence of weapons of mass destruction in Iraq. Many remain in denial that someone miscalculated and someone misjudged, in part by the use of inappropriate metrics that failed to measure what was actually going on. In a like manner the acceptance of quasi-metrics and soft ratings numbers as part of the mores of the TV industry will make facing up to that reality hard to achieve. Indeed in the TV industry very powerful forces can be expected to arraign themselves against any challenge to the existing revenue models even though these are based on outdated metrics and false paradigms. Consequently, now is the time to raise the fundamental questions that in the fullness of a good analysis may yield a better understanding of what we can effectively measure, model, quantify and resolve. With a keen sense of caution in the face of such a challenge, we endeavor herein to give a bit of support to this process by concentrating attention on several underlying matters, including:

“...in the TV industry very powerful forces can be expected to arraign themselves against any challenge to the existing revenue models...”

- The impact of the new TV related technologies on consumer behavior;
- TV advertising in the realm of elective advertising forms;
- Underpinnings for new metrics that fit the current situation.

New Technologies and Consumer Behavior

As we consider some of the ways time-shifted trick-play viewing enabled by DVR, DVD and VOD alter overall consumer behavior and the commercial process that underpins TV, caution requires that we start out with the conservative observation that people still want and need schedules, events and destinations. Taking these backbone

constructs away from everyday life, which may sound appealing enough under the banner of greater freedom for the individual, may have its own limitations. For more on this somewhat surprising conclusion, please get a back issue of CMS NewsLine for June of 2003 entitled: *TV Destinations and Events – On Demand TV's Unintended Consequence*.

That noted it is essential to accept that nonlinear TV technology may cause basic changes in the behavior of viewers — changes that some business interests may feel to be detrimental. For example, Next Research and others have reported that TiVo and other PVR and DVR owners skip or fast-forward some 80-percent of all commercials. What does that mean, and how does that compare to channel surfing and muting, behavior that also block TV advertising impressions from occurring? Even more fundamental questions to ponder include:

- Do people watch more or less TV when time shifting is available?
- Do they internalize as many TV advertising impressions?
- Are they as well informed about which goods and services to buy and which brands are best as before?
- Are they exposed to more and better content?
- Do they spend more of their TV time in preferred ways?
- Do they buy fewer consumer goods and services?
- In the long term will these newly empowered 'time shifters' benefit or harm the overall economy and the state of well being of the nation?

In counterpoint, we must beware of the resistance to change that often resonates from local, commercial, political or other parochial — as opposed to national interests, circumstances and conditions. For example, warning that targeting cigarette smoking may hurt the economy of South Carolina and the nation, or that reducing water pollution will prevent Dupont from contributing to U.S. trade balances, and the like are forms of tragic nonsense — they fail to address the bigger picture. Such arguments, while common and appealing to some people, cannot be taken too seriously, as they are secondary to greater needs and more serious considerations. Yet these points of view may have large constituencies and a broad following — so they cannot be ignored.

“...it is essential to accept that nonlinear TV technology may cause basic changes in the behavior of viewers...”

When it comes to time shifting TV content, the facts are in, at least in this house. We tend to watch golf, baseball and hockey in time-shifted mode — whether it is on a live or a previously recorded program. We also prefer to view these programs in 2X to 5X speed, and only go back to 1X when a goal is made, a fight starts or a putt goes in. Then we may use the instant reply and slow-mo capability to view the key scenes again and again, after all a good goal or home run is worth watching a few times more. That's what we do. We cannot help it as golf, baseball and even hockey and boxing are actually very slow games, in the sense that little of importance is going on most of the time. Various DVR models offer multiple FF and REW speeds with the initial boost in the 2X to 5X range. This is definitely the sweet spot for spicing up a dull ballgame. As for commercials — give us that 10X

speed and a nimble finger for when we spy that BMW we are lusting after.

Regarding the TV advertising watched around here, several things are noteworthy: 1) the first and last ads in a 'pod' or sequence of ads have a much greater chance of gaining our attention, 2) once we notice a commercial that interests us, we may watch it a few times in succession, [Data from TiVo research confirms such behavior. —Ed.] 3) if there were an ITV capability by which we could probe more deeply into products and services of interest, we might use it and 4) while we now watch fewer ads, we pay greater attention to the ones we do view — the same way we consume ads in BusinessWeek or the Wall Street Journal. That sporty new WiFi notebook computer or an exotic vacation destination can make us linger on the 'page'. Recently we purchased a new PC for the office — a full-featured Sony Vaio GRT100 laptop for just under \$3000. Prior to that costly purchase we studied numerous TV commercials from Sony and others. The DVR random access and instant replay capability helped in the process, and from there we went online to probe even deeper. Much the same thing can be said of our use of DVD players, VOD services and other nonlinear electronic media services. Used properly these tools make the process of interacting with TV commercials more alike examining ads in magazines than viewing commercials in classical linear television mode. Conclusion, contrary to popular opinion and to the warnings of some doomsayers, advertisers may in the end be better off.

Making Advertising Elective and Effective

Prior to the Civil War it was not uncommon for a slave owner in the South to hold the conviction that the elimination of slavery would destroy the agrarian economy of the South. In the early days of organized labor corporate managers reasoned similarly that trade unions and the higher wages and better working conditions they demanded would in time make quite a few mines and factories inoperable and uneconomic. Further it was suggested that high wages for the uneducated masses could lead to laziness and even drunkenness. Now advertising agencies and broadcast networks appear to be on a somewhat similar track when they profess that ad skipping will surely destroy the main economic underpinning of television. Each of these self-serving and at times mean-spirited justifications has and has

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had little merit either in logic or in history. As to traditional advertising, placing these little seductions on billboards, at bus stops and in airports, newspapers and periodicals is a vast and very successful business, and all such

advertising is a strictly elective noticing and attending activity for the consumer. Note that when we read a newspaper or peruse a magazine we only look at the ads that interest us; we are allowed by right to skip over the rest and we do. Indeed, no one grabs a hold of your head or fixes your eyes and makes you look at an ad about visiting Moscow in winter or on the joys of hiking the Kalahari in summer, just because they may have the power to do so. Advertising works best when it is targeted and elective and when it seeks to seduce by harmonizing its message with the underlying needs, preferences, urges,

idiosyncrasies, and even quirky practices of common people living out ordinary lives; as in ‘put another shrimp on the barbie.’

For more on these topics see back issues of CMS NewsLine for August and October 2002 entitled: *TV Advertising — The End of the Beginning* and *TV Advertising in a Nonlinear World*. For now the question is how to make TV advertising work best as an elective advertising form?

We are nearing the end of an era wherein a somewhat tyrannical advertising paradigm, sheltered by the practical limitations of early TV technology, caused viewers to have little choice but to watch excessive TV advertising, like it or not. They were entrapped by a combination of their own natural ‘layback’ behavior when relaxing at home and the limited technical means then available, to tolerate a good deal of mindless interruption to their leisure. And as all power tends to corrupt and by degree lead to excess, interminable advertising interruptions seem to many to have gotten more disturbing over the years. As the Berlin Wall was coming down some reactionaries worried about the loss of job and pension security that would attend a breakout of freedom. So too with TV advertising, surely the sky will fall if the viewer has a right to choose which advertising to watch. By degree along with visits to the courts the old guard slowly relinquished its union busting practices in the 1920s while defending its right to do so until the very end. Similarly,

“...interminable advertising interruptions seem to many to have gotten more disturbing over the years.”

the defenders of compulsory advertising may continue to grumble, perhaps petition Congress and the Courts for redress, then too retreat into the darkness — and they are near packing their bags.

First the remote control meant you didn’t have to get out of your chair to surf to another channel, then the mute button allowed you to silence the TV pitchman, then the VCR meant that if you had a PhD in electromechanics you could record and trick–play TV content later on. Now the far more advanced and easy to use DVR, DVD player and VOD and SVOD services make such activities much more convenient and allow one to hop and skip along through content and commercials at nX speed. Therefore TV advertising needs to become an elective form, wherein attractiveness, appeal, timeliness, and other such lures draw in

the right audience to view the commercials. Who can forget or could ignore those fabulous Budweiser commercials where frogs, lizards and other anthropomorphic characters would bring a smile and a refreshing pause to leisurely TV

viewing. What a treat! Elective advertising can be a big success and far better in many ways than the shotgun approach to making massive advertising impressions. [Now there’s the rub, it’s really more about metrics and CPMs and advertising billings after all! —Ed.]

Curious as it may seem, it is not the advertisers who need to be reformed so they may enter a new world — as they can be expected out of their long experience as pragmatists to quickly adjust to whatever advertising modes work. The problem is with the priesthood of the

advertising community. These folks truly see themselves as the wizards of persuasion, and they are not prepared to surrender their sword and their shield without a big fight. In their catechism, one of the primary precepts is the absolute requirement for a mass audience, the more the better. Nothing else will do. You can find them preaching that unless you have a mass of at least 10 million viewers; you cannot draw a national advertiser. That is only so because that is how they run the game in the name of these national advertisers. Thus the proclamation that a mass audience is needed is a self-serving self-righteous piece of anachronistic foolishness of their making. Targeted ads to smaller audiences work a lot better and yield better results. They also cost more and are harder to develop and to manage. It is easier by far for Madison Avenue

to feed the same TV advertising gruel to the entire nation then to make the effort to effectively target appropriate audiences with suitable ads. It is in the defense of this belief — in the need for a mass audience — that much of today's TV advertising intransigence rests. And it is in its name that ad skipping and fast-forwarding of commercials is seen as such a threat — not necessarily to the advertisers, but to the ad agencies, the networks and their minions.

Yet in the magazine business everyone seems to acknowledge that Golf Digest is a great place to position advertising for the limited audience of golfers and that Teen Magazine is spot-on to capture the attention of teenage girls, and so on. Everyone does not have to see every ad

and people will elect to view the ads that fit their needs, interests and life styles. Thus Adlink, a cable TV ad placement firm in Los Angeles that serves all the MSOs in the area, is now inserting local cable advertisements that may vary district by district, based on the specific demographics of individual neighborhoods. Now that is smart and much more like it. No need to advertise eight-cylinder four-door Buick sedans in Venice, CA, a place where two-door Chevy Camaros are likely to be a fit better. Those wise folks at The Tribune have made it a practice for years now to promote the idea of aggregating impressions of combinations of print and electronic media over numbers of publications and channels. Now that's the ticket!

"It is easier by far for Madison Avenue to feed the same TV advertising gruel to the entire nation..."

With hundreds of TV channels along with the electronic means to view or to avoid viewing any commercial with ease, the TV advertising folks have got to surrender their time-locked ways and go with the flow and the new technologies. The fact of the matter is that TV advertising will grow and prosper as an elective form just as it does elsewhere. The fact is that the advertisers need TV as an outlet for their message, for that is where the audience is. The answer does not lie in forcing the public to accept foul tasting forced advertising interruptions to their leisure. Instead, better targeting, advertising aggregation and multi-layered ITV advertising means working in conjunction with ever more powerful and flexible technology can win the day, for the audience and for the advertisers. As to the ad agencies, as in all of nature the

old, the feeble-minded and the inflexible may be hurt while the innovative and forward thinking will find new ways to allow TV advertising and its business to prosper.

New Metrics for TV Advertising

What do we really want to count and measure and how do we want to count it, that is the question? Further, when you have the measure of that which you wanted to quantify how do you propose to use it? Finally, how do you propose to rationalize and give meaning to the numbers or estimates you now claim to have captured? It is in these areas that the rubber must meet the road or else advertisers may be misled by their partners the networks and the ad agencies. The old saw about the correlation between teacher's salaries and alcoholism warns us to be careful how we use and misuse numbers — like TV ratings. The envelope if you please.

How wide you cast the net to capture a suitable audience for a specific product, service or brand will dictate not only how many of the right 'fish' you capture, but also the total number and variety of 'fish'. Using the latter to justify paying for the former is a kind of deceit and misrepresentation. What is needed is a much more refined use of mathematical means to screen out the numbers in such a way as to identify and measure that which is of importance. Nothing else will do. This in turn implies a much greater reliance on well-designed databases, statistical analysis tools and workable statistics to place value on advertising within various TV shows. There is no magical answer here, just a big change in

the budgeting arrangement at the advertising houses in order to provide the IT and mathematical means to effectively measure the results of finely parsed TV commercials over multiple networks, channels and devices — taking into full account the practices of the public to ad skip, fast forward, change channel, mute the sound or leave the room while commercials are playing on.

With that set of hopeful conclusions we have come full circle from the sad observation that the social sciences have at times made somewhat of a travesty of the use of mathematics in television and elsewhere, to the present need to greatly sharpen the mathematical tools that we use.

This is indeed a considerable challenge for them to take on, but a challenge that cannot be avoided, that is without continuing to do great harm to the advertisers and running what is beginning to look like a shell game. Great effort and expense will be required to create and implement the new measuring tools, but the advertising industry will gain a great deal as well as it prepares to move forward into an ever more complex arena of true ITV.

So let these new studies begin... and in the words of the old mathematician proclaim at last Q.E.D., expressing the fact that that which was to have been demonstrated has in deed been shown — with better metrics that work and that ensure that advertisers get value for their money and that the TV networks, the content creators and the broadcast, cable and satellite service providers are able to generate the funds

“What do we really want to count and measure and how do we want to count it, that is the question?”

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they require to maintain their art and entertain a willing public. Better metrics are a win-win tool for all.

(Leo Willner and Greg Kalsow contributed to this issue. In order to discuss any of these points with the authors, please e-mail them at: leo@ad-assoc.com, greg@ad-assoc.com)

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—Georgia Pech, Editor

KALSOW'S BACK-CHANNEL: *"Validating the Middle Ground"*

■ What is more chic and (wise guy) smart for two-faced government regulators than to profess to oppose the regulatory environment while actually promoting a dark regulatory scene that nurtures political misdeeds? Like allowing Big Corp to disenfranchise a free public of its broad access to independent news and information media? How about letting one company dominate most media and news in a metro market such as, say, the Quad Cities in Iowa? Is that a backhanded slap at Michael Powell, or an unkind characterization of the aspirations of his 'Laissez Faire' gang at the FCC? Or is it fair commentary on the arrogance of power they display when they forget that in the United States it is the people not they or News Corp who are sovereign. After all, is it not the free press, including the news and editorial departments of independent TV and radio stations, which act as a bulwark against monopoly and totalitarianism? If so, are the proposed changes to media ownership rules, from 35 percent to 35++ percent of importance? You bet they are! As to Powell, that artful dodger, who knows what his multi-speak means, except perhaps that it is time for him to go?

■ Regarding the politic side of media ownership limits and the current battle in Congress and in the Courts, what a resonant chord for media independence has been struck! What a wondrous surprise to find the marshals of the Left and the great generals of the political Right join hands against the threat of a media ownership tyranny by the likes of General Electric (NBC), Disney (ABC), Viacom (CBS) and News Corp (FOX). How refreshing and how American is it for these representatives of the people to rise up against their left-winged and right-winged handlers on such a cause? If Cicero himself were alive to witness this happening he would surely applaud. This counter-attack against the forces of greater media concentration is an expression of the power of the Congress and the Courts to stand up against a highly distracted Executive Branch. On this matter the White House may have lost its way — remember old Dick Nixon

and his wish for imperial military blue White House palace guard uniforms? The evil of a Bin Laden and the well meaning but misguided steps of an Ashcroft may in part underlie the drive to concentrate and more effectively control the media. As to the opposition, the Senators and Congressmen fully understand that a diverse media is necessary for their election, reelection and independence.

■ Should the ongoing experiments at Time Warner Cable — and elsewhere — with Scientific-Atlanta set top boxes containing DVRs, (and HD capability) succeed in reducing cable churn from say 5-percent to some 1-percent per month and to further encourage the digital experience, it will be a very great success for the cable industry. Bravo to that! Hopefully the lessons learned will go far beyond discovering how to successfully face off against DBS service providers, to a renewed realization that it is on the greater empowerment and enjoyment of the viewers that cable's future business success will continue to depend. IBM has for two generations promoted the idea of large data centers away from the people that are concentrated, efficient and all-powerful (and subject to central control). A 1984 precursor if there ever was one. The DVR at the client end can help preserve the idea of the private file, the private library and the private ownership of media content in general. Balancing cable's private network between a powerful head end capability, a broad fibre pipe system and multi-media PC-like client boxes in the homes of its subscribers can mean greater real efficiency for the MSOs and more diversity of usage by its customers. Such an arrangement can also help support the political freedom and independence of its viewers and (possibly) even the survival of Fair Use.

[Your mileage may vary. —RGK]

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