

> SPSS Conjoint™ 14.0



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Preface

SPSS 14.0 is a comprehensive system for analyzing data. The SPSS Conjoint optional add-on module provides the additional analytic techniques described in this manual. The Conjoint add-on module must be used with the SPSS 14.0 Base system and is completely integrated into that system.

Installation

To install the SPSS Conjoint add-on module, run the License Authorization Wizard using the authorization code that you received from SPSS Inc. For more information, see the installation instructions supplied with the SPSS Conjoint add-on module.

Compatibility

SPSS is designed to run on many computer systems. See the installation instructions that came with your system for specific information on minimum and recommended requirements.

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The *SPSS Statistical Procedures Companion*, by Marija Norušis, has been published by Prentice Hall. A new version of this book, updated for SPSS 14.0, is planned. The *SPSS Advanced Statistical Procedures Companion*, also based on SPSS 14.0, is forthcoming. The *SPSS Guide to Data Analysis* for SPSS 14.0 is also in development. Announcements of publications available exclusively through Prentice Hall will be available on the SPSS Web site at <http://www.spss.com/estore> (select your home country, and then click Books).

Tell Us Your Thoughts

Your comments are important. Please let us know about your experiences with SPSS products. We especially like to hear about new and interesting applications using the SPSS Conjoint add-on module. Please send e-mail to suggest@spss.com or write to SPSS Inc., Attn.: Director of Product Planning, 233 South Wacker Drive, 11th Floor, Chicago, IL 60606-6412.

About This Manual

This manual documents the graphical user interface for the procedures included in the SPSS Conjoint add-on module. Illustrations of dialog boxes are taken from SPSS for Windows. Dialog boxes in other operating systems are similar. Detailed information about the command syntax for features in the SPSS Conjoint add-on module is available in two forms: integrated into the overall Help system and as a separate document in PDF form in the *SPSS 14.0 Command Syntax Reference*, available from the Help menu.

Contacting SPSS

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Introduction to Conjoint Analysis

Conjoint analysis is a market research tool for developing effective product design. Using conjoint analysis, the researcher can answer questions such as: What product attributes are important or unimportant to the consumer? What levels of product attributes are the most or least desirable in the consumer's mind? What is the market share of preference for leading competitors' products versus our existing or proposed product?

The virtue of conjoint analysis is that it asks the respondent to make choices in the same fashion as the consumer presumably does—by trading off features, one against another.

For example, suppose that you want to book an airline flight. You have the choice of sitting in a cramped seat or a spacious seat. If this were the only consideration, your choice would be clear. You would probably prefer a spacious seat. Or suppose you have a choice of ticket prices: \$225 or \$800. On price alone, taking nothing else into consideration, the lower price would be preferable. Finally, suppose you can take either a direct flight, which takes two hours, or a flight with one layover, which takes five hours. Most people would choose the direct flight.

The drawback to the above approach is that choice alternatives are presented on single attributes alone, one at a time. Conjoint analysis presents choice alternatives between products defined by sets of attributes. This is illustrated by the following choice: would you prefer a flight that is cramped, costs \$225, and has one layover, or a flight that is spacious, costs \$800, and is direct? If comfort, price, and duration are the relevant attributes, there are potentially eight products:

Product	Comfort	Price	Duration
1	cramped	\$225	2 hours
2	cramped	\$225	5 hours
3	cramped	\$800	2 hours
4	cramped	\$800	5 hours

Product	Comfort	Price	Duration
5	spacious	\$225	2 hours
6	spacious	\$225	5 hours
7	spacious	\$800	2 hours
8	spacious	\$800	5 hours

Given the above alternatives, product 4 is probably the least preferred, while product 5 is probably the most preferred. The preferences of respondents for the other product offerings are implicitly determined by what is important to the respondent.

Using conjoint analysis, you can determine both the relative importance of each attribute as well as which levels of each attribute are most preferred. If the most preferable product is not feasible for some reason, such as cost, you would know the next most preferred alternative. If you have other information on the respondents, such as background demographics, you might be able to identify market segments for which distinct products can be packaged. For example, the business traveler and the student traveler might have different preferences that could be met by distinct product offerings.

The Full-Profile Approach

SPSS Conjoint uses the **full-profile** (also known as full-concept) **approach**, where respondents rank, order, or score a set of profiles, or cards, according to preference. Each profile describes a complete product or service and consists of a different combination of factor levels for all factors (attributes) of interest.

An Orthogonal Array

A potential problem with the full-profile approach soon becomes obvious if more than a few factors are involved and each factor has more than a couple of levels. The total number of profiles resulting from all possible combinations of the levels becomes too great for respondents to rank or score in a meaningful way. To solve this problem, the full-profile approach uses what is termed a **fractional factorial design**, which presents a suitable fraction of all possible combinations of the factor levels. The resulting set, called an **orthogonal array**, is designed to capture the main effects for each factor level. Interactions between levels of one factor with levels of another factor are assumed to be negligible.

The Generate Orthogonal Design procedure is used to generate an orthogonal array and is typically the starting point of a conjoint analysis. It also allows you to generate factor-level combinations, known as **holdout cases**, which are rated by the subjects but are not used to build the preference model. Instead, they are used as a check on the validity of the model.

The Experimental Stimuli

Each set of factor levels in an orthogonal design represents a different version of the product under study and should be presented to the subjects in the form of an individual product profile. This helps the respondent to focus on only the one product currently under evaluation. The stimuli should be standardized by making sure that the profiles are all similar in physical appearance except for the different combinations of features.

Creation of the product profiles is facilitated with the Display Design procedure. It takes a design generated by the Generate Orthogonal Design procedure, or entered by the user, and produces a set of product profiles in a ready-to-use format.

Collecting and Analyzing the Data

Since there is typically a great deal of between-subject variation in preferences, much of conjoint analysis focuses on the single subject. To generalize the results, a random sample of subjects from the target population is selected so that group results can be examined.

The size of the sample in conjoint studies varies greatly. In one report (Cattin and Wittink, 1982), the authors state that the sample size in commercial conjoint studies usually ranges from 100 to 1,000, with 300 to 550 the most typical range. In another study (Akaah and Korgaonkar, 1988), it is found that smaller sample sizes (less than 100) are typical. As always, the sample size should be large enough to ensure reliability.

Once the sample is chosen, the researcher administers the set of profiles, or cards, to each respondent. The Conjoint procedure allows for three methods of data recording. In the first method, subjects are asked to assign a preference score to each profile. This type of method is typical when a Likert scale is used or when the subjects are asked to assign a number from 1 to 100 to indicate preference. In the second method, subjects are asked to assign a rank to each profile ranging from 1 to the total number of profiles. In the third method, subjects are asked to sort the profiles in terms of

preference. With this last method, the researcher records the profile numbers in the order given by each subject.

Analysis of the data is done with the Conjoint procedure (available only through command syntax) and results in a utility score, called a **part-worth**, for each factor level. These utility scores, analogous to regression coefficients, provide a quantitative measure of the preference for each factor level, with larger values corresponding to greater preference. Part-worths are expressed in a common unit, allowing them to be added together to give the total utility, or overall preference, for any combination of factor levels. The part-worths then constitute a model for predicting the preference of any product profile, including profiles, referred to as **simulation cases**, that were not actually presented in the experiment.

The information obtained from a conjoint analysis can be applied to a wide variety of market research questions. It can be used to investigate areas such as product design, market share, strategic advertising, cost-benefit analysis, and market segmentation.

Although the focus of this manual is on market research applications, conjoint analysis can be useful in almost any scientific or business field in which measuring people's perceptions or judgments is important.

Generating an Orthogonal Design

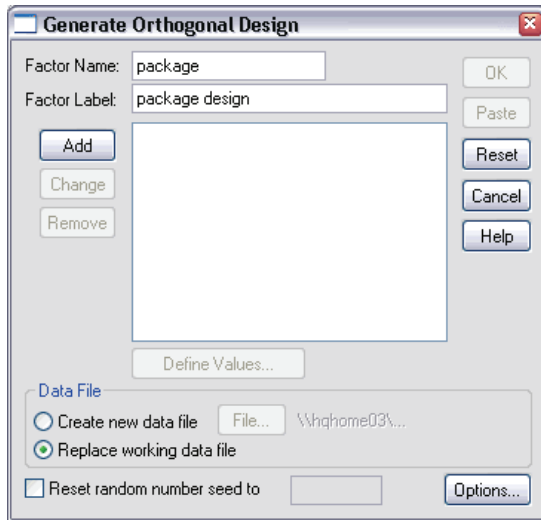
Generate Orthogonal Design generates a data file containing an orthogonal main-effects design that permits the statistical testing of several factors without testing every combination of factor levels. This design can be displayed with the Display Design procedure, and the data file can be used by other SPSS procedures, such as Conjoint.

Example. A low-fare airline startup is interested in determining the relative importance to potential customers of the various factors that comprise its product offering. Price is clearly a primary factor, but how important are other factors, such as seat size, number of layovers, and whether or not a beverage/snack service is included? A survey asking respondents to rank product profiles representing all possible factor combinations is unreasonable given the large number of profiles. The Generate Orthogonal Design procedure creates a reduced set of product profiles that is small enough to include in a survey but large enough to assess the relative importance of each factor.

To Generate an Orthogonal Design

- ▶ From the menus choose:
 - Data
 - Orthogonal Design
 - Generate...

Figure 2-1
Generate Orthogonal Design dialog box



- ▶ Define at least one factor. Enter a name in the Factor Name text box. Factor names can be any valid SPSS variable name, except *status_* or *card_*. You can also assign an optional factor label.
- ▶ Click Add to add the factor name and an optional label. To delete a factor, select it in the list and click Remove. To modify a factor name or label, select it in the list, modify the name or label, and click Change.
- ▶ Define values for each factor by selecting the factor and clicking Define Values.

Data File. Allows you to control the destination of the orthogonal design. You can either create a new dataset containing the orthogonal design, or you can replace the active dataset.

- **Create new data file.** Creates a new data file containing the factors and cases generated by the plan. By default, this data file is named *ortho.sav*, and it is saved to the current directory. Click File to specify a different name and destination for the file.

- **Replace working data file.** Replaces the active dataset with the generated plan.
- **Reset random number seed to.** Resets the random number seed to the specified value. The seed can be any integer value from 0 through 2,000,000,000. Within a session, SPSS uses a different seed each time you generate a set of random numbers, producing different results. If you want to duplicate the same random numbers, you should set the seed value before you generate your first design and reset the seed to the same value each subsequent time you generate the design.

Optionally, you can:

- Click Options to specify the minimum number of cases in the orthogonal design and to select holdout cases.

Defining Values for an Orthogonal Design

Figure 2-2
Generate Design Define Values dialog box

	Value	Label
1:	1	A*
2:	2	B*
3:	3	C*
4:		
5:		
6:		
7:		
8:		
9:		

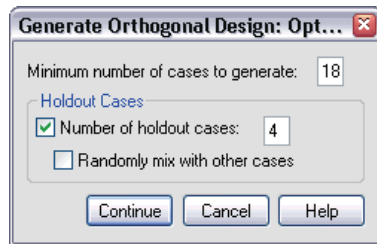
You must assign values to each level of the selected factor or factors. If you have selected one factor, the factor name will be displayed after Values and Labels for. If you have selected multiple factors, the text displays Values and Labels for Selected Variables.

Enter each value of the factor. You can elect to give the values descriptive labels. If you do not assign labels to the values, labels that correspond to the values are automatically assigned (that is, a value of 1 is assigned a label of 1, a value of 3 is assigned a label of 3, and so on).

Auto-Fill. Allows you to automatically fill the Value boxes with consecutive values beginning with 1. Enter the maximum value and click Fill to fill in the values.

Orthogonal Design Options

Figure 2-3
Generate Orthogonal Design Options dialog box



Minimum number of cases to generate. Specifies a minimum number of cases for the plan. Select a positive integer less than or equal to the total number of cases that can be formed from all possible combinations of the factor levels. If you do not explicitly specify the minimum number of cases to generate, the minimum number of cases necessary for the orthogonal plan is generated. If the Orthoplan procedure cannot generate at least the number of profiles requested for the minimum, it will generate the largest number it can that fits the specified factors and levels. Note that the design does not necessarily include exactly the number of specified cases but rather the smallest possible number of cases in the orthogonal design using this value as a minimum.

Holdout Cases. You can define holdout cases that are rated by subjects but are not included in the conjoint analysis.

- **Number of holdout cases.** Creates holdout cases in addition to the regular plan cases. Holdout cases are judged by the subjects but are not used when the Conjoint procedure estimates utilities. You can specify any positive integer less than or equal to the total number of cases that can be formed from all possible combinations of factor levels. Holdout cases are generated from another random plan, not the main-effects experimental plan. The holdout cases do not duplicate the experimental profiles or each other. By default, no holdout cases are produced.
- **Randomly mix with other cases.** Randomly mixes holdout cases with the experimental cases. When this option is deselected, holdout cases appear separately, following the experimental cases.

ORTHOPLAN Command Additional Features

The SPSS command language also allows you to:

- Append the orthogonal design to the active dataset rather than creating a new one.
- Specify simulation cases before generating the orthogonal design rather than after the design has been created.

See the *SPSS Command Syntax Reference* for complete syntax information.

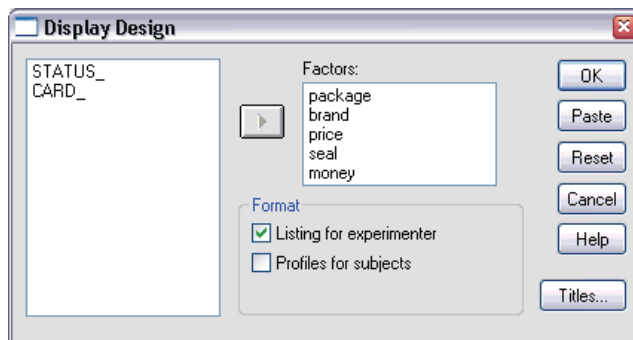
Displaying a Design

The Display Design procedure allows you to print an experimental design. You can print the design in either a rough-draft listing format or as profiles that you can present to subjects in a conjoint study. This procedure can display designs created with the Generate Orthogonal Design procedure or any designs displayed in an active dataset.

To Display an Orthogonal Design

- ▶ From the menus choose:
Data
Orthogonal Design
Display...

Figure 3-1
Display Design dialog box



- ▶ Move one or more factors into the Factors list.
- ▶ Select a format for displaying the profiles in the output.

Format. You can choose one or more of the following format options:

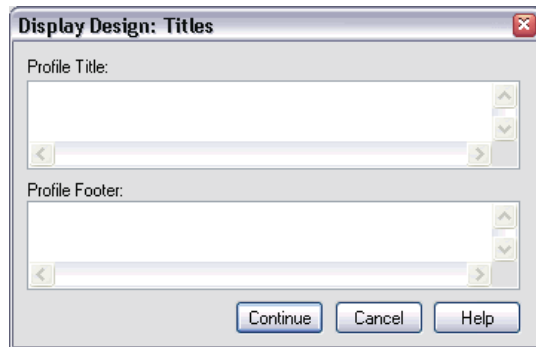
- **Listing for experimenter.** Displays the design in a draft format that differentiates holdout profiles from experimental profiles and lists simulation profiles separately following the experimental and holdout profiles.
- **Profiles for subjects.** Produces profiles that can be presented to subjects. This format does not differentiate holdout profiles and does not produce simulation profiles.

Optionally, you can:

- Click Titles to define headers and footers for the profiles.

Display Design Titles

Figure 3-2
Display Design Titles dialog box



Profile Title. Enter a profile title up to 80 characters long. Titles appear at the top of the output if you have selected Listing for experimenter and at the top of each new profile if you have selected Profiles for subjects in the main dialog box. For Profiles for subjects, if the special character sequence *)CARD* is specified anywhere in the title, the procedure will replace it with the sequential profile number. This character sequence is not translated for Listing for experimenter.

Profile Footer. Enter a profile footer up to 80 characters long. Footers appear at the bottom of the output if you have selected Listing for experimenter and at the bottom of each profile if you have selected Profiles for subjects in the main dialog box. For Profiles for subjects, if the special character sequence *)CARD* is specified anywhere in the footer, the procedure will replace it with the sequential profile number. This character sequence is not translated for Listing for experimenter.

PLANCARDS Command Additional Features

The SPSS command language also allows you to:

- Write profiles for subjects to an external file (using the `OUTFILE` subcommand).

See the *SPSS Command Syntax Reference* for complete syntax information.

Running a Conjoint Analysis

In this release of SPSS, a graphical user interface is not yet available for the Conjoint procedure. To obtain a conjoint analysis, you must enter command syntax for a `CONJOINT` command into a syntax window, and then run it.

- For an example of command syntax for a `CONJOINT` command in the context of a complete conjoint analysis—including generating and displaying an orthogonal design—see “Using Conjoint Analysis to Model Carpet-Cleaner Preference”.
- For complete command syntax information about the `CONJOINT` command, see the *SPSS Command Syntax Reference*.

To Run a Command from a Syntax Window

From the menus choose:

File
New
SPSS Syntax...

This opens an SPSS syntax window.

- ▶ Enter the command syntax for the `CONJOINT` command.
- ▶ Highlight the command in the syntax window, and click the Run button (the right-pointing triangle) on the Syntax Editor toolbar.

See the *SPSS Base User's Guide* for more information about running commands in syntax windows.

Requirements

The Conjoint procedure requires two files—a data file and a plan file—and the specification of how data were recorded (for example, each data point is a preference score from 1 to 100). The plan file consists of the set of product profiles to be rated

by the subjects and should be generated using the Generate Orthogonal Design procedure. The data file contains the preference scores or rankings of those profiles collected from the subjects. The plan and data files are specified with the `PLAN` and `DATA` subcommands, respectively. The method of data recording is specified with the `SEQUENCE`, `RANK`, or `SCORE` subcommands. The following command syntax shows a minimal specification:

```
CONJOINT PLAN='CPLAN.SAV' /DATA='RUGRANKS.SAV'  
/SEQUENCE=PREF1 TO PREF22.
```

Specifying the Plan File and the Data File

The `CONJOINT` command provides a number of options for specifying the plan file and the data file.

- You can explicitly specify the filenames for the two files. For example:

```
CONJOINT PLAN='CPLAN.SAV' /DATA='RUGRANKS.SAV'
```

- If only a plan file or data file is specified, the `CONJOINT` command reads the specified file and uses the active dataset as the other. For example, if you specify a data file but omit a plan file (you cannot omit both), the active dataset is used as the plan, as shown in the following example:

```
CONJOINT DATA='RUGRANKS.SAV'
```

- You can use the asterisk (*) in place of a filename to indicate the active dataset, as shown in the following example:

```
CONJOINT PLAN='CPLAN.SAV' /DATA=*
```

The active dataset is used as the preference data. Note that you cannot use the asterisk (*) for both the plan file and the data file.

Specifying How Data Were Recorded

You must specify the way in which preference data were recorded. Data can be recorded in one of three ways: sequentially, as rankings, or as preference scores. These three methods are indicated by the `SEQUENCE`, `RANK`, and `SCORE` subcommands. You must specify one, and only one, of these subcommands as part of a `CONJOINT` command.

SEQUENCE Subcommand

The `SEQUENCE` subcommand indicates that data were recorded sequentially so that each data point in the data file is a profile number, starting with the most preferred profile and ending with the least preferred profile. This is how data are recorded if the subject is asked to order the profiles from the most to the least preferred. The researcher records which profile number was first, which profile number was second, and so on.

```
CONJOINT PLAN=* /DATA='RUGRANKS.SAV'  
/SEQUENCE=PREF1 TO PREF22.
```

- The variable *PREF1* contains the profile number for the most preferred profile out of 22 profiles in the orthogonal plan. The variable *PREF22* contains the profile number for the least preferred profile in the plan.

RANK Subcommand

The `RANK` subcommand indicates that each data point is a ranking, starting with the ranking of profile 1, then the ranking of profile 2, and so on. This is how the data are recorded if the subject is asked to assign a rank to each profile, ranging from 1 to n , where n is the number of profiles. A lower rank implies greater preference.

```
CONJOINT PLAN=* /DATA='RUGRANKS.SAV'  
/RANK=RANK1 TO RANK22.
```

- The variable *RANK1* contains the ranking of profile 1, out of a total of 22 profiles in the orthogonal plan. The variable *RANK22* contains the ranking of profile 22.

SCORE Subcommand

The `SCORE` subcommand indicates that each data point is a preference score assigned to the profiles, starting with the score of profile 1, then the score of profile 2, and so on. This type of data might be generated, for example, by asking subjects to assign a number from 1 to 100 to show how much they liked the profile. A higher score implies greater preference.

```
CONJOINT PLAN=* /DATA='RUGRANKS.SAV'  
/SCORE=SCORE1 TO SCORE22.
```

- The variable *SCORE1* contains the score for profile 1, and *SCORE22* contains the score for profile 22.

Optional Subcommands

The `CONJOINT` command offers a number of optional subcommands that provide additional control and functionality beyond what is required.

SUBJECT Subcommand

The `SUBJECT` subcommand allows you to specify a variable from the data file to be used as an identifier for the subjects. If you do not specify a subject variable, the `CONJOINT` command assumes that all of the cases in the data file come from one subject. The following example specifies that the variable `ID`, from the file `rugranks.sav`, is to be used as a subject identifier.

```
CONJOINT PLAN=* /DATA='RUGRANKS.SAV'  
/SCORE=SCORE1 TO SCORE22 /SUBJECT=ID.
```

FACTORS Subcommand

The `FACTORS` subcommand allows you to specify the model describing the expected relationship between factors and the rankings or scores. If you do not specify a model for a factor, `CONJOINT` assumes a discrete model. You can specify one of four models:

DISCRETE. The `DISCRETE` model indicates that the factor levels are categorical and that no assumption is made about the relationship between the factor and the scores or ranks. This is the default.

LINEAR. The `LINEAR` model indicates an expected linear relationship between the factor and the scores or ranks. You can specify the expected direction of the linear relationship with the keywords `MORE` and `LESS`. `MORE` indicates that higher levels of a factor are expected to be preferred, while `LESS` indicates that lower levels of a factor are expected to be preferred. Specifying `MORE` or `LESS` will *not* affect estimates of utilities. They are used simply to identify subjects whose estimates do not match the expected direction.

IDEAL. The `IDEAL` model indicates an expected quadratic relationship between the scores or ranks and the factor. It is assumed that there is an ideal level for the factor, and distance from this ideal point (in either direction) is associated with decreasing preference. Factors described with this model should have at least three levels.

ANTIIDEAL. The ANTIIDEAL model indicates an expected quadratic relationship between the scores or ranks and the factor. It is assumed that there is a worst level for the factor, and distance from this point (in either direction) is associated with increasing preference. Factors described with this model should have at least three levels.

The following command syntax provides an example using the FACTORS subcommand:

```
CONJOINT PLAN=* /DATA='RUGRANKS.SAV'  
/RANK=RANK1 TO RANK22 /SUBJECT=ID  
/FACTORS=PACKAGE BRAND (DISCRETE) PRICE (LINEAR LESS)  
SEAL (LINEAR MORE) MONEY (LINEAR MORE) .
```

- Note that both *package* and *brand* are modeled as discrete.

PRINT Subcommand

The PRINT subcommand allows you to control the content of the tabular output. For example, if you have a large number of subjects, you can choose to limit the output to summary results only, omitting detailed output for each subject, as shown in the following example:

```
CONJOINT PLAN=* /DATA='RUGRANKS.SAV'  
/RANK=RANK1 TO RANK22 /SUBJECT=ID  
/PRINT=SUMMARYONLY .
```

You can also choose whether the output includes analysis of the experimental data, results for any simulation cases included in the plan file, both, or none. Simulation cases are not rated by the subjects but represent product profiles of interest to you. The Conjoint procedure uses the analysis of the experimental data to make predictions about the relative preference for each of the simulation profiles. In the following example, detailed output for each subject is suppressed, and the output is limited to results of the simulations:

```
CONJOINT PLAN=* /DATA='RUGRANKS.SAV'  
/RANK=RANK1 TO RANK22 /SUBJECT=ID  
/PRINT=SIMULATION SUMMARYONLY .
```

PLOT Subcommand

The `PLOT` subcommand controls whether plots are included in the output. Like tabular output (`PRINT` subcommand), you can control whether the output is limited to summary results or includes results for each subject. By default, no plots are produced. In the following example, output includes all available plots:

```
CONJOINT PLAN=* /DATA='RUGRANKS.SAV'  
/RANK=RANK1 TO RANK22 /SUBJECT=ID  
/PLOT=ALL.
```

UTILITY Subcommand

The `UTILITY` subcommand writes an SPSS data file containing detailed information for each subject. It includes the utilities for `DISCRETE` factors, the slope and quadratic functions for `LINEAR`, `IDEAL`, and `ANTIIDEAL` factors, the regression constant, and the estimated preference scores. These values can then be used in further analyses or for making additional plots with other procedures. The following example creates a utility file named *rugutil.sav*:

```
CONJOINT PLAN=* /DATA='RUGRANKS.SAV'  
/RANK=RANK1 TO RANK22 /SUBJECT=ID  
/UTILITY='RUGUTIL.SAV'.
```

Using Conjoint Analysis to Model Carpet-Cleaner Preference

In a popular example of conjoint analysis (Green and Wind, 1973), a company interested in marketing a new carpet cleaner wants to examine the influence of five factors on consumer preference—package design, brand name, price, a *Good Housekeeping* seal, and a money-back guarantee. There are three factor levels for package design, each one differing in the location of the applicator brush; three brand names (*K2R*, *Glory*, and *Bissell*); three price levels; and two levels (either no or yes) for each of the last two factors. The following table displays the variables used in the carpet-cleaner study, with their variable labels and values.

Table 5-1
Variables in the carpet-cleaner study

Variable name	Variable label	Value label
<i>package</i>	package design	A*, B*, C*
<i>brand</i>	brand name	K2R, Glory, Bissell
<i>price</i>	price	\$1.19, \$1.39, \$1.59
<i>seal</i>	Good Housekeeping seal	no, yes
<i>money</i>	money-back guarantee	no, yes

There could be other factors and factor levels that characterize carpet cleaners, but these are the only ones of interest to management. This is an important point in conjoint analysis. You want to choose only those factors (independent variables) that you think most influence the subject's preference (the dependent variable). Using conjoint analysis, you will develop a model for customer preference based on these five factors.

This example makes use of the information in the following data files: *carpet_prefs.sav* contains the data collected from the subjects; *carpet_plan.sav* contains the product profiles being surveyed; *conjoint.sps* contains the command

syntax necessary to run the analysis. The files are located in the *tutorial/sample_files* folder of the SPSS installation folder.

Generating an Orthogonal Design

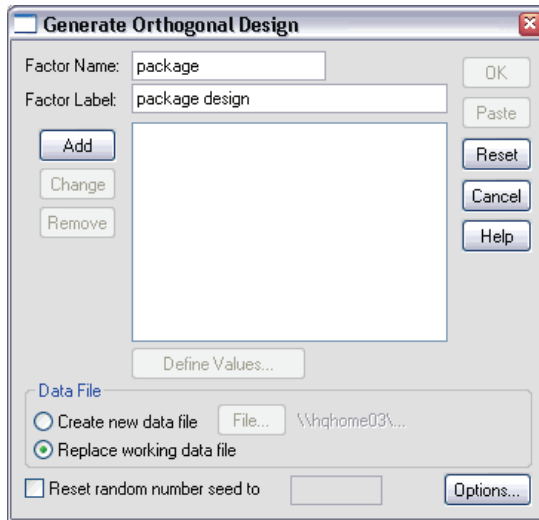
The first step in a conjoint analysis is to create the combinations of factor levels that are presented as product profiles to the subjects. Since even a small number of factors and a few levels for each factor will lead to an unmanageable number of potential product profiles, you need to generate a representative subset known as an **orthogonal array**.

The Generate Orthogonal Design procedure creates an orthogonal array—also referred to as an **orthogonal design**—and stores the information in an SPSS data file. Unlike most SPSS procedures, an active dataset is not required before running the Generate Orthogonal Design procedure. If you do not have an active dataset, you have the option of creating one, generating variable names, variable labels, and value labels from the options that you select in the dialog boxes. If you already have an active dataset, you can either replace it or save the orthogonal design as a separate SPSS data file.

To create an orthogonal design:

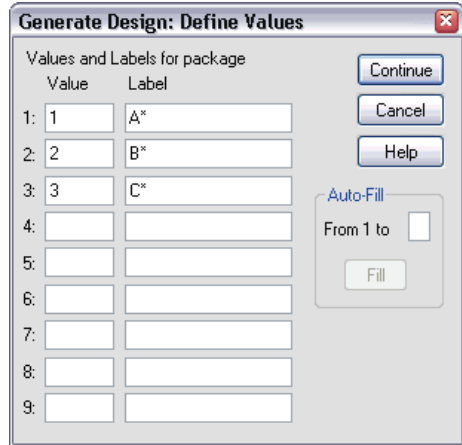
- ▶ From the menus choose:
 - Data
 - Orthogonal Design
 - Generate...

Figure 5-1
Generate Orthogonal Design dialog box



- ▶ Enter *package* in the Factor Name text box, and enter *package design* in the Factor Label text box.
- ▶ Click Add.
This creates an item labeled *package 'package design'* (?). Select this item.
- ▶ Click Define Values.

Figure 5-2
Generate Design Define Values dialog box



- ▶ Enter the values *1*, *2*, and *3* to represent the package designs *A**, *B**, and *C**. Enter the labels *A**, *B**, and *C** as well.
- ▶ Click Continue.

You'll now want to repeat this process for the remaining factors, *brand*, *price*, *seal*, and *money*. Use the values and labels from the following table, which includes the values you've already entered for *package*.

Factor	Values	Labels
package	1, 2, 3	A*, B*, C*
brand	1, 2, 3	K2R, Glory, Bissell
price	1.19, 1.39, 1.59	\$1.19, \$1.39, \$1.59
seal	1, 2	no, yes
money	1, 2	no, yes

Once you have completed the factor specifications:

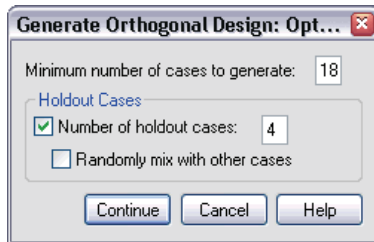
- ▶ Select Replace working data file in the Data File group in the Generate Orthogonal Design dialog box. The generated design will replace the active dataset.

- ▶ Select Reset random number seed to and enter the value 2000000.

Generating an orthogonal design requires a set of random numbers. If you want to duplicate a design—in this case, the design used for the present case study—you need to set the seed value before you generate the design and reset it to the same value each subsequent time you generate the design. The design used for this case study was generated with a seed value of 2000000.

- ▶ Click Options.

Figure 5-3
Generate Orthogonal Design Options dialog box



- ▶ In the Minimum Number of Cases to Generate text box, type 18.

By default, the minimum number of cases necessary for an orthogonal array is generated. The procedure determines the number of cases that need to be administered to allow estimation of the utilities. You can also specify a minimum number of cases to generate, as you've done here. You might want to do this because the default number of minimum cases is too small to be useful or because you have experimental design considerations that require a certain minimum number of cases.

- ▶ Select Number of holdout cases and type 4.

Holdout cases are judged by the subjects but are not used by the conjoint analysis to estimate utilities. They are used as a check on the validity of the estimated utilities. The holdout cases are generated from another random plan, not the experimental orthogonal plan.

- ▶ Click Continue in the Generate Orthogonal Design Options dialog box.
- ▶ Click OK in the Generate Orthogonal Design dialog box.

Figure 5-4
Orthogonal design for the carpet-cleaner example

	package	brand	price	seal	money	STATUS	CARD
14	A*	Glory	\$1.19	yes	no	Design	14
15	B*	K2R	\$1.39	yes	yes	Design	15
16	A*	K2R	\$1.19	no	no	Design	16
17	A*	Bissell	\$1.59	no	yes	Design	17
18	B*	Bissell	\$1.19	no	no	Design	18
19	A*	Bissell	\$1.59	yes	no	Holdout	19
20	C*	K2R	\$1.19	yes	no	Holdout	20
21	A*	Glory	\$1.59	no	no	Holdout	21
22	A*	Bissell	\$1.19	no	no	Holdout	22

The orthogonal design is displayed in the Data Editor and is best viewed by displaying value labels rather than the actual data values. This is accomplished by choosing Value Labels from the View menu.

The variables in the data file are the factors used to specify the design. Each case represents one product profile in the design. Notice that two additional variables, *CARD_* and *STATUS_*, appear in the data file. *CARD_* assigns a sequential number to each profile that is used to identify the profile. *STATUS_* indicates whether a profile is part of the experimental design (the first 18 cases), a holdout case (the last 4 cases), or a simulation case (to be discussed in a later topic in this case study).

The orthogonal design is a required input to the analysis of the data. Therefore, you will want to save your design as an SPSS data file. For convenience, the current design has been saved in *carpet_plan.sav* (orthogonal designs are also referred to as **plans**).

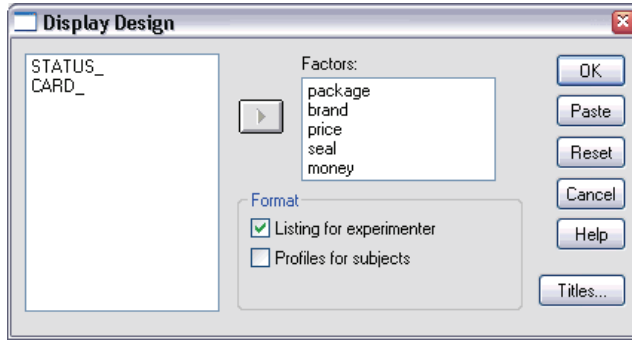
Creating the Experimental Stimuli: Displaying the Design

Once you have created an orthogonal design, you'll want to use it to create the product profiles to be rated by the subjects. You can obtain a listing of the profiles in a single table or display each profile in a separate table.

To display an orthogonal design:

- ▶ From the menus choose:
 - Data
 - Orthogonal Design
 - Display...

Figure 5-5
Display Design dialog box



- ▶ Select *package*, *brand*, *price*, *seal*, and *money* for the factors.

The information contained in the variables *STATUS_* and *CARD_* is automatically included in the output, so they don't need to be selected.

- ▶ Select Listing for experimenter in the Format group. This results in displaying the entire orthogonal design in a single table.
- ▶ Click OK.

Figure 5-6
Display of orthogonal design: Single table layout

	Card ID	package design	brand name	price	Good Housekeeping seal	money-back guarantee
1	1	A*	Glory	\$1.39	yes	no
2	2	B*	K2R	\$1.19	no	no
3	3	B*	Glory	\$1.39	no	yes
4	4	C*	Glory	\$1.59	no	no
5	5	C*	Bissell	\$1.39	no	no
6	6	A*	Bissell	\$1.39	no	no
7	7	B*	Bissell	\$1.59	yes	no
8	8	A*	K2R	\$1.59	no	yes
9	9	C*	K2R	\$1.39	no	no
10	10	C*	Glory	\$1.19	no	yes
11	11	C*	K2R	\$1.59	yes	no
12	12	B*	Glory	\$1.59	no	no
13	13	C*	Bissell	\$1.19	yes	yes
14	14	A*	Glory	\$1.19	yes	no
15	15	B*	K2R	\$1.39	yes	yes
16	16	A*	K2R	\$1.19	no	no
17	17	A*	Bissell	\$1.59	no	yes
18	18	B*	Bissell	\$1.19	no	no
19 ^a	19	A*	Bissell	\$1.59	yes	no
20 ^a	20	C*	K2R	\$1.19	yes	no
21 ^a	21	A*	Glory	\$1.59	no	no
22 ^a	22	A*	Bissell	\$1.19	no	no

^a. Holdout

The output resembles the look of the orthogonal design as shown in the Data Editor—one row for each profile, with the factors as columns. Notice, however, that the column headers are the variable labels rather than the variable names that you see in the Data Editor. Also notice that the holdout cases are identified with a footnote. This is of interest to the experimenter, but you certainly don't want the subjects to know which, if any, cases are holdouts.

Depending on how you create and deliver your final product profiles, you may want to save this table as an HTML, Word/RTF, Excel, or PowerPoint file. This is easily accomplished by selecting the table in the Viewer, right clicking, and selecting Export. Also, if you're using the exported version to create the final product profiles, be sure to edit out the footnotes for the holdout cases.

Perhaps the needs for your survey are better served by generating a separate table for each product profile. This choice lends itself nicely to exporting to PowerPoint, since each table (product profile) is placed on a separate PowerPoint slide.

To display each profile in a separate table:

- ▶ Click the Dialog Recall button and select Display Design.
- ▶ Deselect Listing for experimenter and select Profiles for subjects.
- ▶ Click OK.

Figure 5-7
Display of orthogonal design: Multitable layout

Profile Number 1

Card ID	package design	brand name	price	Good Housekeeping seal	money-back guarantee
1	A*	Glory	\$1.39	yes	no

Profile Number 2

Card ID	package design	brand name	price	Good Housekeeping seal	money-back guarantee
2	B*	K2R	\$1.19	no	no

The information for each product profile is displayed in a separate table. In addition, holdout cases are indistinguishable from the rest of the cases, so there is no issue of removing identifiers for holdouts as with the single table layout.

Running the Analysis

You've generated an orthogonal design and learned how to display the associated product profiles. You're now ready to learn how to run a conjoint analysis.

Figure 5-8
Preference data for the carpet-cleaner example

	ID	PREF1	PREF2	PREF3	PREF4	PREF5	PREF6	PREF7
1	1	13	15	1	20	14	7	11
2	2	15	7	18	2	12	3	11
3	3	2	18	14	16	22	13	20
4	4	13	10	20	14	2	18	16
5	5	13	18	2	10	20	15	9
6	6	15	2	3	12	18	7	20
7	7	13	7	15	18	2	3	10
8	8	15	7	13	4	6	16	8
9	9	20	9	10	11	4	5	13
10	10	8	21	19	17	4	11	12

The preference data collected from the subjects is stored in *carpet_prefs.sav*. The data consist of responses from 10 subjects, each identified by a unique value of the variable *ID*. Subjects were asked to rank the 22 product profiles from the most to the least preferred. The variables *PREF1* through *PREF22* contain the IDs of the associated product profiles, that is, the card IDs from *carpet_plan.sav*. Subject 1, for example, liked profile 13 most of all, so *PREF1* has the value 13.

Analysis of the data is a task that requires the use of command syntax—specifically, the *CONJOINT* command. The necessary command syntax has been provided in the file *conjoint.sps*.

```
CONJOINT PLAN='file specification'
  /DATA='file specification'
  /SEQUENCE=PREF1 TO PREF22
  /SUBJECT=ID
  /FACTORS=PACKAGE BRAND (DISCRETE)
  PRICE (LINEAR LESS)
  SEAL (LINEAR MORE) MONEY (LINEAR MORE)
  /PRINT=SUMMARYONLY.
```

- The *PLAN* subcommand specifies the file containing the orthogonal design—in this example, *carpet_plan.sav*.
- The *DATA* subcommand specifies the file containing the preference data—in this example, *carpet_prefs.sav*. If you choose the preference data as the active dataset, you can replace the file specification with an asterisk (*), without the quotation marks.
- The *SEQUENCE* subcommand specifies that each data point in the preference data is a profile number, starting with the most-preferred profile and ending with the least-preferred profile.

- The `SUBJECT` subcommand specifies that the variable *ID* identifies the subjects.
- The `FACTORS` subcommand specifies a model describing the expected relationship between the preference data and the factor levels. The specified factors refer to variables defined in the plan file named on the `PLAN` subcommand.
- The keyword `DISCRETE` is used when the factor levels are categorical and no assumption is made about the relationship between the levels and the data. This is the case for the factors *package* and *brand* that represent package design and brand name, respectively. `DISCRETE` is assumed if a factor is not labeled with one of the four alternatives (`DISCRETE`, `LINEAR`, `IDEAL`, `ANTIIDEAL`), or is not included on the `FACTORS` subcommand.
- The keyword `LINEAR`, used for the remaining factors, indicates that the data are expected to be linearly related to the factor. For example, preference is usually expected to be linearly related to price. You can also specify quadratic models (not used in this example) with the keywords `IDEAL` and `ANTIIDEAL`.
- The keywords `MORE` and `LESS`, following `LINEAR`, indicate an expected direction for the relationship. Since we expect higher preference for lower prices, the keyword `LESS` is used for *price*. However, we expect higher preference for either a *Good Housekeeping* seal of approval or a money-back guarantee, so the keyword `MORE` is used for *seal* and *money* (recall that the levels for both of these factors were set to 1 for *no* and 2 for *yes*).

Specifying `MORE` or `LESS` does not change the signs of the coefficients or affect estimates of the utilities. These keywords are used simply to identify subjects whose estimates do not match the expected direction. Similarly, choosing `IDEAL` instead of `ANTIIDEAL`, or vice versa, does not affect coefficients or utilities.

- The `PRINT` subcommand specifies that the output contains information for the group of subjects only as a whole (`SUMMARYONLY` keyword). Information for each subject, separately, is suppressed.

Try running this command syntax. Make sure that you have included valid paths to *carpet_prefs.sav* and *carpet_plan.sav*. For a complete description of all options, see the `CONJOINT` command in the *SPSS Command Syntax Reference*.

Utility Scores

Figure 5-9
Utility scores

		Utility Estimate	Std. Error
package	A*	-2.233	.192
	B*	1.867	.192
	C*	.367	.192
brand	K2R	.367	.192
	Glory	-.350	.192
	Bissell	-.017	.192
price	\$1.19	-6.595	.988
	\$1.39	-7.703	1.154
	\$1.59	-8.811	1.320
seal	no	2.000	.287
	yes	4.000	.575
money	no	1.250	.287
	yes	2.500	.575
(Constant)		12.870	1.282

This table shows the utility (part-worth) scores and their standard errors for each factor level. Higher utility values indicate greater preference. As expected, there is an inverse relationship between price and utility, with higher prices corresponding to lower utility (larger negative values mean lower utility). The presence of a seal of approval or money-back guarantee corresponds to a higher utility, as anticipated.

Since the utilities are all expressed in a common unit, they can be added together to give the **total utility** of any combination. For example, the total utility of a cleaner with package design *B**, brand *K2R*, price *\$1.19*, and no seal of approval or money-back guarantee is:

$$\begin{aligned} & \text{utility}(\text{package } B^*) + \text{utility}(K2R) + \text{utility}(\$1.19) \\ & + \text{utility}(\text{no seal}) + \text{utility}(\text{no money-back}) + \text{constant} \end{aligned}$$

or

$$1.867 + 0.367 + (-6.595) + 2.000 + 1.250 + 12.870 = 11.759$$

If the cleaner had package design C^* , brand *Bissell*, price \$1.59, a seal of approval, and a money-back guarantee, the total utility would be:

$$0.367 + (-0.017) + (-8.811) + 4.000 + 2.500 + 12.870 = 10.909$$

Coefficients

Figure 5-10

Coefficients

	B
	Estimate
price	-5.542
seal	2.000
money	1.250

This table shows the linear regression coefficients for those factors specified as LINEAR (for IDEAL and ANTIIDEAL models, there would also be a quadratic term). The utility for a particular factor level is determined by multiplying the level by the coefficient. For example, the predicted utility for a price of \$1.19 was listed as -6.595 in the utilities table. This is simply the value of the price level, 1.19, multiplied by the price coefficient, -5.542.

Relative Importance

The range of the utility values (highest to lowest) for each factor provides a measure of how important the factor was to overall preference. Factors with greater utility ranges play a more significant role than those with smaller ranges.

Figure 5-11

Importance values

package	35.635
brand	14.911
price	29.410
seal	11.172
money	8.872

Averaged Importance Score

This table provides a measure of the relative importance of each factor known as an **importance** score or value. The values are computed by taking the utility range for each factor separately and dividing by the sum of the utility ranges for all factors. The values thus represent percentages and have the property that they sum to 100. The calculations, it should be noted, are done separately for each subject, and the results are then averaged over all of the subjects.

Note that while overall or summary utilities and regression coefficients from orthogonal designs are the same with or without a `SUBJECT` subcommand, importances will generally differ. For summary results without a `SUBJECT` subcommand, the importances can be computed directly from the summary utilities, just as one can do with individual subjects. However, when a `SUBJECT` subcommand is used, the importances for the individual subjects are averaged, and these averaged importances will not in general match those computed using the summary utilities.

The results show that package design has the most influence on overall preference. This means that there is a large difference in preference between product profiles containing the most desired packaging and those containing the least desired packaging. The results also show that a money-back guarantee plays the least important role in determining overall preference. Price plays a significant role but not as significant as package design. Perhaps this is because the range of prices is not that large.

Correlations

Figure 5-12
Correlation coefficients

	Value	Sig.
Pearson's R	.982	.000
Kendall's tau	.892	.000
Kendall's tau for Holdouts	.667	.087

This table displays two statistics, Pearson's *R* and Kendall's tau, which provide measures of the correlation between the observed and estimated preferences.

The table also displays Kendall's tau for just the holdout profiles. Remember that the holdout profiles (4 in the present example) were rated by the subjects but not used by the Conjoint procedure for estimating utilities. Instead, the Conjoint procedure computes correlations between the observed and predicted rank orders for these profiles as a check on the validity of the utilities.

In many conjoint analyses, the number of parameters is close to the number of profiles rated, which will artificially inflate the correlation between observed and estimated scores. In these cases, the correlations for the holdout profiles may give a better indication of the fit of the model. Keep in mind, however, that holdouts will always produce lower correlation coefficients.

Reversals

When specifying LINEAR models for *price*, *seal*, and *money*, we chose an expected direction (LESS or MORE) for the linear relationship between the value of the variable and the preference for that value. The Conjoint procedure keeps track of the number of subjects whose preference showed the opposite of the expected relationship—for example, a greater preference for higher prices, or a lower preference for a money-back guarantee. These cases are referred to as **reversals**.

Figure 5-13
Number of reversals by factor and subject

Factor	price		3
	money		2
	seal		2
	brand		0
	package		0
Subject	1	Subject 1	1
	2	Subject 2	2
	3	Subject 3	0
	4	Subject 4	0
	5	Subject 5	0
	6	Subject 6	1
	7	Subject 7	0
	8	Subject 8	0
	9	Subject 9	1
	10	Subject 10	2

This table displays the number of reversals for each factor and for each subject. For example, three subjects showed a reversal for *price*. That is, they preferred product profiles with higher prices.

Running Simulations

The real power of conjoint analysis is the ability to predict preference for product profiles that weren't rated by the subjects. These are referred to as **simulation cases**. Simulation cases are included as part of the plan, along with the profiles from the orthogonal design and any holdout profiles.

The simplest way to enter simulation cases is from the Data Editor, using the value labels created when you generated the experimental design.

To enter a simulation case in the plan file:

- ▶ On a new row in the Data Editor window, select a cell and select the desired value from the list (value labels can be displayed by choosing Value Labels from the View menu). Repeat for all of the variables (factors).
- ▶ Select Simulation for the value of the *STATUS_* variable.
- ▶ Enter an integer value, to be used as an identifier, for the *CARD_* variable. Simulation cases should be numbered separately from the other cases.

Figure 5-14

Carpet-cleaner data including simulation cases

package	brand	price	seal	money	STATUS_	CARD_
A*	Bissell	\$1.59	no	yes	Design	17
B*	Bissell	\$1.19	no	no	Design	18
A*	Bissell	\$1.59	yes	no	Holdout	19
C*	K2R	\$1.19	yes	no	Holdout	20
A*	Glory	\$1.59	no	no	Holdout	21
A*	Bissell	\$1.19	no	no	Holdout	22
C*	K2R	\$1.19	no	no	Simulation	1
B*	Glory	\$1.19	yes	yes	Simulation	2

The figure shows a part of the plan file for the carpet-cleaner study, with two simulation cases added. For convenience, these have been included in *carpet_plan.sav*.

The analysis of the simulation cases is accomplished with the same command syntax used earlier, that is, the syntax in the file *conjoint.sps*. In fact, if you ran the syntax described earlier, you would have noticed that the output also includes results for the simulation cases, since they are included in *carpet_plan.sav*.

You can choose to run simulations along with your initial analysis—as done here—or run simulations at any later point simply by including simulation cases in your plan file and rerunning CONJOINT. For more information, see the CONJOINT command in the *SPSS Command Syntax Reference*.

Preference Probabilities of Simulations

Figure 5-15
Simulation results

Card Number	ID	Maximum Utility ^a	Bradley-Terry-Luce	Logit
1	1	30.0%	43.1%	30.9%
2	2	70.0%	56.9%	69.1%

This table gives the predicted probabilities of choosing each of the simulation cases as the most preferred one, under three different probability-of-choice models. The **maximum utility model** determines the probability as the number of respondents predicted to choose the profile divided by the total number of respondents. For each respondent, the predicted choice is simply the profile with the largest total utility. The **BTL (Bradley-Terry-Luce) model** determines the probability as the ratio of a profile's utility to that for all simulation profiles, averaged across all respondents. The **logit model** is similar to BTL but uses the natural log of the utilities instead of the utilities. Across the 10 subjects in this study, all three models indicated that simulation profile 2 would be preferred.

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