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## When the boundaries of truth and accuracy are crossed

### Effectiveness and efficiency in communicating about trade

#### *Abstract*

The initial question is: Do business journalists and management consultants cross certain boundaries in order to gain attention with their news? According to the schema theory, attention can be achieved when known schemas are broken. Some journalists and consultants seem to take advantage of this effect when reporting on trade. Consciously or unconsciously, they rely on schema discrepancies. Their work is apparently only considered effective and efficient if it attracts attention. However, some journalists do not check the truthfulness and accuracy of their sources. Speed takes precedence over time-consuming source checking. This is against the rules of good journalism. Reasons for this misconduct can be ignorance, time pressure or poor pay. We give some examples of this misconduct. In the end, our answer is: the slow way of checking truth and accuracy loses out to the fast way of attracting attention.

### 1 Crossing boundaries as a means of communication

Due to the multitude of media and a high personal exchange of information, it is becoming increasingly difficult to stand out with factual statements. Could it be that business journalists and consultants are crossing the boundaries of truth and accuracy in order to attract more attention with their messages? We will try to answer this question with schema-theoretical considerations, illustrated by examples of retail communication in Germany.

In our society, which has established a free democratic basic order, each individual has the fundamental right to communicate with every other person on any subject. Such freedom has its boundaries in a set of rules that this society has given itself. In particular, these are rules on competition law, criminal law, civil law and professional regulations which determine who may or may not say what about whom and how this is to be punished in the event of an infringement.

Certain professionals, such as doctors and lawyers, are only authorised to engage in advertising within a fairly narrowly defined framework. Advertising for tobacco products is largely prohibited, and advertising for prescription drugs is completely prohibited. Misleading advertising is prohibited under the “Gesetz gegen unlauteren Wettbewerb” (Law against Unfair Competition, translation HS) (Section 5 UWG) and comparative

advertising is subject to boundaries (Section 6 UWG). Defamation is punishable by imprisonment or a monetary penalty (§ 186 StGB).

Criminal law also applies to fictional and falsified research results with which scientists try to improve their reputation, whether in respected journals or at congresses (cf. Schröder 2018). Obviously, there are also journalists who think they can only gain attention and success through made-up stories. One of them is the journalist Claas Relotius, who worked for the German news magazine “Der Spiegel”, among others (cf. Bouhs 2019). Claas Relotius falsified many of his articles and even invented characters. Internal research and finally a confession by himself uncovered the fraud.

Now, what can be understood by communication? In publications on business administration and especially on marketing, communication is often found as a generic term for various forms of advertising, such as classical advertising, public relations, direct advertising, online advertising. In general, communication can be understood as the exchange or transmission of information. One of the main features of communication is that a sender influences a receiver (cf. Schweiger/Schrattenecker 1986/2017: 12).

What motivates people to communicate, what triggers them to advertise? The terms effectiveness and efficiency, as they are understood in economics, could provide an answer to this question. Applied to communication, *effectiveness* expresses how certain factual goals of communication can be achieved (planning) or have been achieved (control). These factual goals can be very diverse, such as generating attention, convincing people of a position or matter, developing or changing certain attitudes towards a topic, developing preferences for certain objects, inducing certain actions. If the goals are not disclosed, one can only speculate about them. Effectiveness is not about how much effort can or has been expended to achieve such a factual goal. This is expressed by *efficiency* as a formal goal. In other words, the formal goal expresses the extent to which the factual goal is to be or has been achieved, i. e., the number of resources – which can be time and money as well as psychological and physical effort.

How can communication be made effective? Obviously, it must overcome certain barriers in order to be heard, read, seen, understood by the receiver and to lead to the reactions intended by the sender. These barriers appear to have become higher over time, taking the quantity of commercial communication as an example. According to estimates, a person in Germany was confronted with around 650 to 850 advertising messages a day in the 1980s, 2,000 to 3,000 at the turn of the millennium, around 5,000 in 2006 and 10,000 to 13,000 today (cf. Koch 2018). The interesting point about this author’s column is that it will hardly be possible to check the figures, but they probably do generate a high level of attention among certain readers, especially those who are concerned about the design of their advertising messages and the use of communication channels (effectiveness) and the size and distribution of their advertising budgets (efficiency). In this respect, such evidence is itself the subject of this article: Making communication effective. It appears that attention can be achieved with a “lurid” headline and a complex, surprising, hardly verifiable set of figures.

Apart from quantity, quality is a barrier to effective commercial communication. Because communication is also about standing out from other messages in form and content. The more senders use similar form and content, the more the messages are interchangeable, the more difficult it is for receivers to attribute them to the particular senders, and the less able they are to distinguish between the contents (cf. Kroeber-Riel/Esch 1988/2015: 142ff).

Both barriers to effective communication – quantitative and qualitative – have led to new manifestations of commercial communication, advertising, marketing, which can be found under terms such as guerrilla marketing, ambush marketing, mosquito marketing and the like. They are characterised by moments of surprise, the unexpected in unusual places, thus crossing boundaries of the usual (cf. Krieger et al. 2012), sometimes violating boundaries of what is legally permissible.

What can trade communication be? On the one hand, it can be the communication of trading companies, on the other hand, it can be the communication about trading companies. Trading companies can principally communicate with all groups within their environment and with manufacturers, customers, competitors, politicians and other stakeholders in the external environment. Concerning the internal environment, it is the communication of employees of different hierarchical levels. In the following, it is our intention to consider trading companies not as a sender and thus subject, but as a topic and thus object, and to do this with business journalists and management consultancies as senders. The question is: Do business journalists and management consultants cross certain boundaries to (consciously) achieve the desired effectiveness and efficiency with their messages? We will try to give an answer to this question with schema theoretical considerations.

## **2 Looking at boundaries with schematic theories**

Various theoretical fields and theories could be used to investigate what could cause the sender of a message to cross certain boundaries. Possible approaches could include attitudinal research (causing the change of attitudes), the approach of social identity (strengthening ingroups, demarcation from outgroups) and other approaches from behavioural sciences and sociology. Here we incorporate ideas from the field of schema theories; they are attributed to cognitive psychology. There is no unified schema theory, i. e. *the* schema theory, but rather a series of approaches that describe and explain how schemata come about and how they change. They originate, for example, with Bartlett (1932/1995), Downs and Stea (1973, 1977), Schank and Abelson (1977), Rumelhart and Norman (1978) as well as Brewer and Nakamura (1984). We will approach this field by taking up basic statements and commonalities of different approaches as well as a concrete approach to carry out our mind games.

Following one of the forerunners of cognitive psychology, Bartlett in his *Theory of Remembering* stated that a “Schema refers to an active organisation of past reactions,

or of past experiences, which must always be supposed to be operating in any well-adapted organic response” (Bartlett 1932/1995: 201). Bartlett makes some assumptions:

Schemata are [...] living, constantly developing, affected by every bit of incoming sensational experience of a given kind. (Bartlett 1932/1995: 200)

Schemata are active, without any awareness at all, so far as the measure of the changing postures is concerned. (Bartlett 1932/1995: 200)

An organism [...] might be able [...] to construct or to infer from what is present the probable constituents and their order which went to build them up. (Bartlett 1932/1995: 201)

Sensory equipment and the correlated movements are very limited in the range [...]. (Bartlett 1932/1995: 205)

Then the “schema” determined reactions of one organism are repeatedly checked, as well as constantly facilitated, by those of others. (Bartlett 1932/1995: 206)

In other words: People have limited skills to absorb and process information in a world full of stimuli, in a complex situation. Schemata help them respond better to surrounding stimuli. A schema is “producing an orientation of the organism towards whatever it is directed to at the moment” (Bartlett 1932/1995: 207–208).

After different directions developed over several decades with regard to the acquisition, change and functions of schemata, Mandl, Friedrich and Hron (1988: 125–126) summarised some characteristics which, in their view, capture the *construct schema*. In this context, they refer mainly to Schank and Abelson (1977), Rumelhart and Norman (1978), Brewer and Nakamura (1984). Schemata are cognitive structures in which knowledge is represented (e. g. discounters). Schemata have blanks, which are variables that can take on different values (e. g. store brands such as Aldi, Lidl, Netto for discounters). Schemata can be embedded in each other (e. g. discounters as a business form for the superordinate schema retail trade and low prices, self-service and low assortment depth as elementary schemata). Schemata contain generic and episodic knowledge. Schemata have a structure and a process component. Schemata represent knowledge of different content areas. This compilation is not an intersection of the cited works, insofar not the description of a theory, but rather the sum of discernable characteristics of schemata. For a scientific investigation with and on schemata it is therefore essential to disclose to which approach(es) the various statements above refer and whether, in the case of several approaches, they are connectable.

With regard to the *development and change of schemata*, we take into account the considerations of Rumelhart and Norman (1978). They differentiate between three ways of developing and changing schemata: accretion, tuning, and restructuring. Accretion means “adding new data structures to the existing database of memory, following the organization already present” (Rumelhart/Norman 1978: 45). If existing schemata cannot readily accommodate incoming stimuli, changes to the schema system are required, either through modifying (tuning) or restructuring. In case of tuning, the relational structure of the schema remains unchanged. There are two ways of forming new schemata (restructuring). A “new schema can be patterned on an old one, consisting of

a copy with modifications” (Rumelhart/Norman 1978: 46) (patterned generation of schemata). Or “new schemata can be induced from regularities in the temporal and/or spatial configurations of old schemata” (Rumelhart/Norman 1978: 46) (schema induction).

Mandl, Friedrich and Hron (1988: 130) attribute *various functions to schemata*: controlling attention to schematic and non-schematic information, encoding new information, influencing the retrieval and reconstruction of knowledge, as well as the output of knowledge.

The attention effectiveness of schemata depends on the relationship between stored information (schemata) and current information (stimuli). There is a differentiation between schema-consistent and schema-inconsistent information (cf. Mandl/Friedrich/Hron 1988: 130).<sup>1</sup> Accordingly, studies have obtained different results regarding the extent of the attention effect of schema-consistent and schema-inconsistent information. One finding is that schema-inconsistent information triggers higher attention, not least because of cognitive conflict (cf. Mandl/Friedrich/Hron 1988: 131–132). Krieger et al. (2012: 197) referred to numerous studies showing that “novel and unexpected stimuli lead to a focusing of attention”. In our considerations we follow the statement of Krieger et al. (2012: 198) that “schema incongruence, unlike schema congruence, can lead to increased attention”.

If also the predisposition of the receivers to the stimuli (themes) with which they are confronted is taken into account, various effects can be assumed (Figure 1). If current information fits in with stored information, in other words, if it is consistent, previous positive or negative predispositions can be confirmed or reinforced. It can be assumed that such a process requiring little attention also generates little attention – a process within known boundaries, confirmation of what is known, i. e., not a cognitive conflict.

Stimulus versus schema	Predisposition	
	positive +	negative –
Schema-Consistency	confirmation + reinforcement ++	confirmation – reinforcement – –
Schema-Inconsistency	neutralisation 0 reinforcement + negative surprise –	neutralisation 0 reinforcement – negative surprise +

Figure 1: Predispositions, stimuli and schemata – systematics of possible effects (source: own illustration)

<sup>1</sup> Sometimes the terms schema congruence and schema incongruence are also used (see Krieger et al. 2012: 198).

If this fit is missing, i. e., the information is schema-inconsistent, attention is likely to increase as boundaries of the known and familiar are abandoned. The effects can develop into different directions. In the case of a positive predisposition, the inappropriate, the new, on the one hand, can lead to a reinforcement of the predisposition and enrichment of the previous schema (accretion). On the other hand, the inconsistency can surprise negatively, conceivably with a corresponding extension of the previous schema (tuning). Analogously, effects with a negative predisposition are conceivable.

Casually formulated, these combinations reflect the current dilemma of many advertisers: by means of schema-consistency keeping the tried and tested, the known, the familiar, thus not wanting to do anything wrong but also not producing anything outstanding, rather spreading boredom. And in contrast to this, the chance of generating a high level of attention through schema-inconsistency with the crossing of boundaries, with targeted cognitive conflicts, but also the risk of experiencing contradiction or rejection.

Before analysing some examples of trade communication, we will take a look at the work of photographer Oliviero Toscani. He deliberately crossed the boundaries when he made anorexic people, the dead, invalids, oil-covered animals, HIV-infected people and similar objects the subject of his advertising for Benetton. Various images were the subject of legal disputes. As the Bundesgerichtshof (BGH) (Federal Court of Justice) did not want or was not able to assign these forms of advertising to any case group of its previously developed casuistry of unfair or immoral advertising, it created a new case group as a reflection of existing schemata and called it *shock advertising*. In contrast to this, the Bundesverfassungsgericht (Federal Constitutional Court) classified shock advertising of Benetton, which was prohibited by the Federal Court of Justice on several occasions, as not immoral. It regarded corresponding judgments of the BGH as a violation of freedom of opinion (cf. Handelsblatt 2003). A legal appreciation is one side, the actual processing of information the other and the one relevant here.

### **3 Trade communication – boundary cases according to schema theory?**

In the following we will pick out some examples from science editorial offices and management consultancies to consider what effects the contributions have or might have had on readers from the perspective of schema theory.

#### **3.1 When returns are described as utopian and dangerous**

To begin with, we take a look at an example from the banking sector. A bank can be conceived as a retailer of deposits (deposit business) and credits (lending business). For several years, headlines and statements such as the following were published about the then Spokesman of the Board of Managing Directors (2002–2006) and then sole Chairman of the Board (until 2012) of Deutsche Bank AG, Josef Ackermann.

Deutsche Bank should achieve a 25 % return this year, according to the wishes of its chief Josef Ackermann. But this goal is not only utopian – it is also dangerous  
(Die Zeit, von Heusinger 2005)

Ackermann wants 25 per cent return again (Manager Magazin 2009)

Spring results: Ackermann brags about a dream return – According to analysts, Deutsche Bank will again show a return of 25 per cent. Chief Ackermann says there is no false leisureliness with him, ‘just to make sure that everyone comes along’. SPD and CDU are fret and fume – the banker has ‘learned nothing from the crisis’. (Der Spiegel 2009)

Mr. 25 per cent, please be more modest – Deutsche Bank chief Ackermann was carrying in front of him the 25 per cent return target like a monstrosity. Now he has to say goodbye to it – but Ackermann finds this confession difficult to make.  
(Die Süddeutsche, Freiburger 2010)

The unknown faces of Josef Ackermann – Josef Ackermann has never been a popular figure. The former chief of Deutsche Bank made himself unpopular with the demand for a 25 per cent return. A new biography reveals the unknown face of the man from Switzerland.  
(Focus Online 2013)<sup>2</sup>

The question arises how the information “25 per cent return” could have been perceived by the readers. Let us consider three groups of readers. First of all, there may be readers with little knowledge of banking or economics whose knowledge of the banking sector is fragmentary. They have little to do with the term “return”, more with the terms “utopian”, “brag”, “more modest”, “unpopular”, and can thus supplement existing schemata – that of Josef Ackermann or Deutsche Bank in particular or banks in general (accretion). Those terms listed next to return may have attracted attention to the extent that they confirm what is presumed or existing. However, information perceived as consistent generally generates less attention than inconsistent information.

The second group of readers may be practised in reading business news, they are familiar with news about returns on investment of industrial and trading companies. They may also know that the values are often in the single-digit range. They may have paid a lot of attention to the reports as the 25 % return seemed unusually high to them. This

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<sup>2</sup> All translations in this article are Hendrik Schröder’s. The German originals are given in footnotes.  
“25 Prozent Rendite soll die Deutsche Bank dieses Jahr schaffen, so will es ihr Chef Josef Ackermann. Doch dieses Ziel ist nicht nur utopisch – es ist auch gefährlich” (Die Zeit, von Heusinger 2005)  
“Ackermann will wieder 25 Prozent Rendite” (Manager Magazin 2009)  
“Frühjahrsbilanz: Ackermann prahlt mit Traumrendite – Die Deutsche Bank wird nach Einschätzung von Analysten erneut eine Rendite von 25 Prozent vorweisen. Chef Ackermann sagt dazu, bei ihm gebe es keine falsche Gemächlichkeit, ‘nur damit alle mitkommen’. SPD und CDU schäumen – der Banker habe ‘nichts aus der Krise gelernt’.” (Der Spiegel 2009)  
“Mr. 25 Prozent, bitte mehr Bescheidenheit – Deutsche-Bank-Chef Ackermann trug das 25-Prozent-Rendite-Ziel wie eine Monstrosität vor sich her. Nun muss er sich davon verabschieden – doch Ackermann fällt dieses Eingeständnis schwer.” (Die Süddeutsche, Freiburger 2010)  
“Die unbekanntesten Seiten des Josef Ackermann – Ein Sympathieträger ist Josef Ackermann nie gewesen. Mit der Forderung nach einer Rendite von 25 Prozent machte sich der Ex-Chef der Deutschen Bank unbeliebt. Eine neue Biografie enthüllt die unbekannteste Seite des Schweizer.” (Focus Online 2013)

information may have expanded (tuning) or formed new schemata (restructuring) in both cases possibly with negative connotations (“utopian”, “dangerous”).

There is a third group we will discuss in a moment. Before that, it is necessary to clarify statements. Even though the following paragraphs of the above-mentioned contributions occasionally referred to return on equity, the terms “return” or “margin” without the addition of “equity” developed a life of their own. As a consequence, many people believed, and still do, that it was about return on sales. The difference is briefly explained.

Return on sales is a measure often used in commercial practice. It expresses the percentage of sales generated with goods as profit:

$$\text{Return on sales} = \frac{\text{Profit}}{\text{Sales}}$$

However, the return mentioned in connection with Josef Ackermann and Deutsche Bank is a return on capital. A distinction must be made between return on equity and return on total capital. The return on equity expresses  $r_{ROE}$ , the proportion of the profit generated in relation to the average amount of shareholders’ equity employed in a period, the return on total capital,  $r_{ROTC}$ , the proportion of profit and interest on borrowed capital in relation to the average amount of total capital employed:

$$r_{ROE} = \frac{\text{Profit}}{\text{Average shareholders' equity employed}}$$
$$r_{ROTC} = \frac{\text{Profit} + \text{interest on borrowed capital}}{\text{average total capital employed}}$$

To ensure comparability in all cases, it is important to consider whether the return is before or after tax. In addition, it has become common practice in many places to use EBIT, EBITDA and similar figures as additional key profit figures. These are gross profit, i. e., before deduction of the financial result (I) and taxes (T), and additionally excluding depreciation of tangible and amortisation of intangible assets (D, A). The less deducted, the higher the “profit” and the higher the respective return.

In the banking sector, the return on sales is not a useful indicator, as there are no sales with goods. Rather, returns on capital are commonplace here. Deutsche Bank (2006) reported a profit after tax of around EUR 3.5 billion for the 2005 financial year. The shareholders’ equity ratio, i. e. the ratio of equity to total capital, was 14.8 % at the end of 2005, with shareholders’ equity amounting to EUR 20.9 billion, compared with EUR 17.7 billion a year earlier. This results in a return on equity after taxes of

$$r_{ROE} = \frac{3.5 \text{ billion euros}}{(17.7 \text{ billion €} + 20.9 \text{ billion €})/2} = 18.1 \%$$

Increasing the return on equity to 25 %, which we assume to be the after-tax return, would increase the net income – with shareholders’ equity remaining unchanged – by around 37 %, i. e., to approximately EUR 4.8 billion.



For comparison, the figures of Metro Group (2007) for the financial year 2005: sales EUR 55.7 billion, net income after taxes EUR 648 million, shareholders' equity ratio 18.5 %, shareholders' equity EUR 5.3 billion, return on equity after taxes 12.2 %, return on sales after taxes around 1.2 %.

These comparative figures make it clear that even before the 25 % target was issued, the return on equity of Deutsche Bank was considerably higher than that of Metro; the usual return in the trade industry, the return on sales, was significantly lower than the returns on equity of both companies. Anyone who confuses return on sales with return on equity may see a boundary crossed with Ackermann's statements; the measure ("excessive") may no longer fit the previous schemata. This is a way of attracting attention, and it may be possible to consciously achieve negative connotations. One should not forget that a return on equity of 25 % was *one* of Deutsche Bank's *targets*.

Not to forget the third group. For those readers who are familiar with the key figures and the behaviour of such companies, they will not confuse different return figures as far as they perceive schema-consistency, or at best the target value, i. e., the 25 % size, as inconsistent, but ultimately allow the actors to decide which targets they set themselves.

Let us imagine that at each point of the above-mentioned contributions, there would have been return on equity instead of return. The attention caused by schema-inconsistency in terms of content would possibly have been lower, at least for the third group, and thus also the effectiveness. At most, an emotional schema-inconsistency would have been created if the level of the set target and thus the deviation from the current values of the return on equity were perceived as "utopian", "dangerous" etc., in this respect receiving also higher attention and effectiveness. There is no evidence to show whether the authors were aware of their impact and wanted to attract attention by deliberately omitting them, but it is possible to assume that they did.

Is the type of communication described efficient? The question here is how many resources were used. With regard to the use of material resources, it does not matter whether there is a return or a return on equity. It is rather a question of the investment of time, money and effort. When it comes to producing news quickly or reacting quickly to news from the competition, there may not be much time left for research, and the high number of news to be produced – keyword: digital thrust – may mean that journalists do not always have the necessary qualifications. In this respect, high efficiency can be achieved with a meagre use of resources. As a result, on the one hand, we have the combination of high effectiveness with high efficiency and, on the other hand, the combination of low effectiveness with high efficiency. The first combination is probably more desirable for the authors.

However, there is also the question of the effectiveness criteria being used. As we said, one can only speculate about this if the goals are not disclosed. Is it, can it, may it be attention alone, as we have assumed so far? Or might one criterion also be the reputation of the sender? To what extent is it possible to fulfil the criterion of reputation if a certain amount of effort (time, money etc.) is required for this, but the resources are

not sufficient? Apparently, journalists earn less than other professions, freelance journalists significantly less than permanent ones and journalists in online departments of publishing houses less than journalists in print departments (cf. Friedrichsen 2004; Lill 2012; Meedia 2019). We are unable to verify the salary data and we do not know what value monetary remuneration has for good journalistic work. However, we may assume that the pressure for high efficiency can be at the expense of reputation (and thus effectiveness).

### 3.2 Return on sales does not necessarily stand for profit and size

In the article “Ein Baum fürs optimale Sortiment” (A tree for the optimal assortment), the two authors from the German Gesellschaft für Konsumforschung (GfK) write, with reference to a study by the management consultancy OC&C Strategy Consultants: “And while [...] the return on sales of the 50 largest FMCG manufacturers reaches a record 18.2 per cent, the margin in food retailing is usually only 2 to 4 per cent.”<sup>3</sup> (Wolf/Wolframm 2020: 64, translation HS) Based on this statement, they derive a need for action for trade companies which could be best realized with analysis and planning tools from GfK.

By the way: The terms “optimise” or “optimum” have become standard phrases in consulting for more than 20 years. The only trouble is: nobody knows the optimum or nobody can know it. It is a relic of the long outdated, but in many places still taught neoclassical theory featuring homo economicus as the image of man. Today, improving or improvement would be enough, but that obviously does not sound too good and does not chime in too well with existing schemata.

The comparison of returns on sales between producers and retailers is not new, it has been used in scientific opinions, for example when assessing concentration in the food trade in the mid-1990s. Rainer Lademann, who was commissioned by the Council of Trade (Rat des Handels), compared the average return on sales of industrial companies of 2 to 3 % with an average return on sales of trading companies of 0.5 %, and stated that concentration in trade is the consequence and not the cause of oligopolization in industry and that manufacturers are market leaders through diversification into many product groups. As Lademann (1998: 54) put it literally: “This magnitude [i. e. the return on sales in the retail industry] is all the more remarkable as the food trade [...] had to accept a drop in sales in real terms and the return on sales is a *meagre* 0.5 per cent of sales. The *stability* of the profit margins of large companies [meaning manufacturers], which on average are above those of the top 500, is equally interesting” [Translation and emphasis HS].

Which schema-consistency could be addressed here, which schema-inconsistency could be provoked and thus attract attention? Simply put, manufacturers are bigger and better than retailers – expressed in terms of return on sales. For some, this may be a

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<sup>3</sup> “Und während [...] die Umsatzrendite der 50 größten FMCG-Hersteller mit 18,2 Prozent ein Rekordergebnis erreicht, liegt die Marge im LEH meist bei nur 2 bis 4 Prozent.” (Wolf/Wolframm 2020: 64)

confirmation (consistency), for others a surprise (inconsistency). For the following consideration, we leave aside how these returns were calculated, there is some margin; we also neglect the fact that they represent two economic levels, and we assume that both are after-tax returns.

Taking Henkel and Edeka as examples, let us look at how big their profits and sales were in 2007 compared to their return on sales.<sup>4</sup> Indeed, the manufacturer's return on sales is higher than that of the largest company in the retail industry then and now (Table 1). However, if we look at sales and profit, the ratio is reversed. It should also be noted that Henkel generates its results internationally, while Edeka generates its results exclusively in Germany. Henkel does not publish any figures for Germany, in 2007 only aggregated figures for the region Europe/Africa/Middle East which accounted for 65 % of the Group's sales, i. e., around EUR 8.5 billion. With an assumed return on sales equal to that of the company as a whole, this corresponds to a profit of EUR 612 million thus further increasing the gap in favour of Edeka. In fact, it is even greater – if seen in relation to Germany alone.

		Henkel	Edeka
2007	Return on sales	7.2 %	3.6 %
	Sales	EUR 13.1 billion	EUR 30.5 billion
	Profit	EUR 941 billion	EUR 1.1 billion

Table 1: Key figures from Henkel and Edeka for 2007 (Sources: Henkel 2008: 2; Handelsblatt 2008)

If the figures for sales and profit are now presented retrospectively, the first schema-consistency could become a schema-inconsistency and vice versa. If all figures had been presented immediately, what would have led to a schema-consistency and what would have led to a schema-inconsistency would have depended on the respective individual schemata. Depending on the target group – representatives of industry or retail – and thus on their predisposition, such statements can trigger confirmation (consistency) or surprise (inconsistency): positive inconsistency, if an assessment (of concentration in the retail industry) previously perceived as unpleasant now receives a contrary assessment, negative inconsistency in the opposite case. In both cases of schema-inconsistency, it can lead to the extension of an existing schema (tuning) or to the creation of a new schema (restructuring). According to our initial assumption, schema-inconsistency generates more attention than schema-consistency and is, therefore, more effective. However, to consciously generate schema-inconsistency, it is necessary to know the composition of the readership and the interests it represents.

To what extent the communication of their messages is efficient for management consultancies depends on the effort they (have to) make, be it desk research or primary

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<sup>4</sup> In recent annual reports and press releases, Edeka no longer provides information on return on sales.

research. Outsiders will hardly be able to judge this if no corresponding information on the effort is available.

### **3.3 Out-of-Stock in food retail industry – How the €1 billion legend stubbornly persists**

Out-of-Stocks or Out-of-Shelves in food retailing means that goods that should be on the shelf are not there and also concerns the question how the customer reacts to this. For example, customers can switch to a different product in the relevant shop, change shop and buy the product they want in another shop, or they can choose not to buy the product at all. In the latter case, there are no sales for both the manufacturer and the retailer.<sup>5</sup>

In 2006, Rode pointed out: “The two major German research projects on out-of-stocks (OoS) presented their first results at the ECR Day 2006. Representatives of industry and trade estimated the sales losses due to OoS in Germany at EUR 1 billion annually”.<sup>6</sup> (Rode 2006, translation HS) This message, this figure, was taken up, published and multiplied by the media (e. g. Druck 2011) and service providers (e. g. TMS 2013). In 2014, the following was written on a postcard from POSpulse, a market research company: “1 billion € loss for FMCG and retail every year [...] caused by high out-of-stock rates and poorly executed promotions.”<sup>7</sup> (Lebensmittelpraxis 2011). In 2015, GS1 Germany sent out invitations to the seminar “Optimal Shelf Availability – Avoiding out-of-stocks with Know-How” with the following statements: “According to a study on customer behaviour conducted by GS1 Germany, over 14 per cent of consumers leave the shop if they cannot find their desired product. On German supermarket shelves, regularly between 5 % and 10 % of articles are not available and thus cause annual sales losses in the billions for the retail industry and the consumer goods industry.”<sup>8</sup>

Clear reference was made at several points to methodological shortcomings, calculation errors and misinterpretations with regard to the determination of the loss of sales of around EUR 1 billion for food products due to out-of-stock situations (cf. Schröder 2008; Schröder/Kristes 2011; Schröder 2015). A brief overview of the facts of the case:

- Customer reactions were surveyed on the basis of a hypothetical, not an actual out-of-stock situation. In fact, at the time of the survey, all customers held the product in

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<sup>5</sup> A detailed description of this topic can be found in Schröder (2015).

<sup>6</sup> “Die beiden großen deutschen Forschungsprojekte zu Regallücken legten beim ECR-Tag 2006 erste Ergebnisse vor. Vertreter von Industrie und Handel schätzten die Umsatzverluste durch Out-of-Stocks (OoS) in Deutschland auf jährlich 1 Mrd. Euro.” (Lebensmittelpraxis 2011)

<sup>7</sup> “1 Mrd. € Verlust für FMCG und Einzelhandel jedes Jahr ... hervorgerufen durch hohe Out of Stock Raten und fehlerhaft ausgeführte Promotions.”

<sup>8</sup> “Nach einer von GS1 Germany durchgeführten Studie zum Kundenverhalten verlassen über 14 Prozent der Konsumenten das Geschäft, wenn sie ihr gewünschtes Produkt nicht finden können. In deutschen Supermarktregalen fehlen regelmäßig zwischen 5% und 10% der Artikel und verursachen so für den Einzelhandel und die Konsumgüterindustrie jährliche Umsatzeinbußen in Milliardenhöhe.” (GS1 Germany Standards, unpublished seminar invitation leaflet).

their hands and they were now supposed to imagine its non-existence. This cannot lead to valid results.

- To interpret that not buying a product in the out-of-stock situation leads to a total loss of sales of the missing product is highly problematic. And there are several reasons why the percentage of customer reactions that are supposed to lead to a loss of sales must be classified as too high, for example, for shampoos and detergents because people will hardly wash (their hair) less.
- If measurements proved to be valid, they could only be applicable to the examined products and to the examined shops of the hypermarket type. It is not permissible to generalise them beyond that.
- The calculations regarding the extent of the loss of sales due to shortages are incorrect in several respects: a consistent out-of-stock rate was used for the entire year and for the entire product range, thus excluding the replenishment of goods; fictitious sales values were calculated using this rate; sales at manufacturer and dealer level were shown at retail prices; and sales shifts were neglected. It must be concluded that the actual total loss of sales due to shortages is probably significantly lower than the reported amount of around €1 billion.

Regarding the unavailability of goods, the schemata of manufacturers, retailers and end customers are likely to be filled with terms like loss of sales, loss of gross profit, loss of reputation, dissatisfaction, annoyance – in other words, with negative connotations.

In case the messages quoted at the beginning of this chapter represent completely new information for the receiver – unexpectedly high, as yet undocumented losses – a schema-inconsistency exists. The communication presented would therefore be effective if it was aimed at attracting attention. If the numbers are known, the messages trigger schema-consistency, especially through their “mantra-like” repetition. However, if the weaknesses and incorrectness of the figures were disclosed, this could lead to schema-inconsistency and, depending on the predisposition, to a positive (better than expected) or negative (worse than expected) surprise.

The communication is efficient to the extent that the adoption of the research results hardly causes any costs and the results are made available free of charge. The effort consists at best in writing the article. Nevertheless, critical journalists would check the sources and the figures which would be very time-consuming and communication would be much less efficient. As can be read, good journalists distinguish themselves by recognising mistakes, tracking down the truth and informing the audience thoroughly and as objectively as possible (cf. Klumbies 2016). This is not evident in the case described.

In the literature, the following is said about a sense of responsibility:

Journalism contributes to the formation of public opinion through its social role and every publication in a medium can have a personal and/or economic impact on a person or a company. Therefore – quite independently of the journalistic duty of care – it is necessary for the journalist to act responsibly in both research and formulation. It's not only unpleasant to

have to apologise afterwards for a false report, but it may even have legal consequences. To convey an awareness of this high responsibility of journalistic work is our primary task as a school of journalism. Based on generally accepted ethical approaches, the course unit Journalistic Ethics teaches the basics of ethical action within journalistic work.<sup>9</sup>

(Deutsches Journalistenkolleg 2020)

Where these requirements are implemented, they are inversely related to the efficiency of communication in the case described above.

### **3.4 Kill-Thrill-Index – the death list of a management consultancy**

In 2014, the management consultancy Dr. Wieselhuber & Partner published a study entitled “Category Killer. Der stationäre Handel unter Zugzwang” (Category Killer. The offline retail under pressure to move). The empirical study was conducted in cooperation with Facit Research with Timo Renz, Johannes B. Berentzen and Jan-F. Stahlbock as authors (Renz/Berentzen/Stahlbock 2014).

The aim of the study was to examine which retailers are best adapted to online trading and which of them are particularly threatened. For the first area, a “Fit Score Index” was created, for the second a “Kill Thrill Index”. In this chapter context, we focus on the Kill Thrill Index, which is intended to indicate “to what degree the offline suppliers are threatened by potential category killers from the online world”<sup>10</sup> (Renz/Berentzen/Stahlbock 2014: 4). According to the authors, category killers are those retailers who have pushed or are pushing offline retailers out of the market with their online shops: “Amazon has shown how to do it and was the first to have ‘killed’ an entire category.”<sup>11</sup> (Renz/Berentzen/Stahlbock 2014: 3)

The authors come to the following conclusions: “The Kill Thrill gives first indications of a latent threat by a category killer. [...] It is true that a high threat does not necessarily contradict a currently successful position. However, if there is a lack of ‘fitness’ among retailers in an industry, the conditions for potential category killers are favourable.”<sup>12</sup> (Renz/Berentzen/Stahlbock 2014: 30) Specifically 50 traders are listed for whom the management consultancy has determined the so-called Kill Thrill.

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<sup>9</sup> “Journalismus trägt durch seine gesellschaftliche Rolle zur öffentlichen Meinungsbildung bei und jede Veröffentlichung in einem Medium kann sich persönlich und/oder wirtschaftlich auf einen Menschen oder ein Unternehmen auswirken. Deshalb ist es – ganz unabhängig von der journalistischen Sorgfaltspflicht – notwendig, dass der Journalist sowohl bei der Recherche als auch beim Formulieren verantwortungsbewusst zu Werke geht. Es ist nicht nur unangenehm, wenn man sich im Nachhinein für eine Falschmeldung entschuldigen muss, sondern kann möglicherweise sogar juristische Konsequenzen haben. Ein Bewusstsein für diese hohe Verantwortung journalistischer Arbeit zu vermitteln, verstehen wir als unsere vorrangige Aufgabe als Journalistenschule. Die Kurseinheit Journalistische Ethik vermittelt vor dem Hintergrund allgemeingültiger ethischer Ansätze Grundlinien ethischen Handelns innerhalb der journalistischen Tätigkeit.”

<sup>10</sup> “wie gefährdet die stationären Anbieter durch potenzielle Category Killer aus der Online-Welt sind.”

<sup>11</sup> “Amazon hat es vorgemacht und als erstes eine ganze Kategorie ‘gekillt’.”

<sup>12</sup> “Der Kill Thrill gibt erste Hinweise auf eine latente Bedrohung durch einen Category Killer. [...] Eine hohe Bedrohung muss zwar nicht zwingend einer gegenwärtig erfolgreichen Position widersprechen. Kommt jedoch mangelnde ‘Fitness’ der Händler einer Branche hinzu, sind die Voraussetzungen für potenzielle Category Killer günstig.”

At the beginning of their publication, the authors state that category killers trigger the end of offline traders: “For many offline booksellers that meant the end. And also the CD and DVD departments of department stores, supermarkets and electronic retailers shrank noticeably. Nevertheless, Amazon is by no means the only ‘category killer’. Even in categories that have long been claimed to never be successfully marketed over the internet, there are so-called ‘pure online’ traders that worry the industry.”<sup>13</sup> (Renz/Berentzen/Stahlbock 2014: 3) Consequently, these and other statements indicate that the Kill-Thrill index expresses the degree to which the existence of the industries and companies mentioned is threatened – or the index at least indicates lower success in the future unless the companies in questions do not take steps against this development as soon as possible.

Such statements can have far-reaching consequences and raise various questions among other market participants. For example, creditors may ask themselves whether the companies concerned are still able to service their debt or whether they have sufficient creditworthiness for new credits. Customers may be uncertain whether they will be able to redeem their dealer warranty in the event of a claim or whether they will receive services in the post-purchase phase, and suppliers may be puzzled about the solvency and compliance of the companies’ supply contracts. Competitors may speculate on locations that will become available.

All of these questions may be justified if the statements are well-founded and empirically sufficiently reliable. The result is the following: The investigation is deficient and unsuitable to draw the conclusions as they are found in the publication (cf. in detail Schröder 2014: 2ff).

How could the study be modified to realize scientific standards? Information on the theory or theoretical basis of the study, i. e., on the already existing knowledge about the topic would have been expected before it was tested for empirical proof. There is no such information. One conceivable approach would be the Resource Dependence Theory by Pfeffer and Salancik (1978), or at least a framework of investigation such as that developed by Porter (1980) with his model of competitive forces. What is the consequence if such a basis is missing? There are no well-founded, systematically deduced relationships between independent and dependent variables. Everything that follows can only be unsystematic and haphazard.

This particularly concerns the construction of the “Kill Thrill Index”. If statements about the degree of factuality that certain conditions influence competitiveness are to be made, then relevant variables must be selected and put in relation to each other. This requires theory from which variables are derived in a process of conceptualisation and

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<sup>13</sup> “Für viele stationäre Buchhändler bedeutete das das Ende. Und auch die CD- und DVD-Abteilungen der Kaufhäuser, Verbrauchermärkte und Elektrofachhändler schrumpften merklich zusammen. Doch Amazon ist längst nicht der einzige ‘Category Killer’. Auch in Kategorien, von denen lange behauptet wurde, sie würden sich nie erfolgreich über das Internet vermarkten lassen, gibt es ‘Pure Onliner’, die der betreffenden Branche das Fürchten lehren.”

operationalisation (cf. e. g. Homburg/Giering 1996). And this is precisely what is consistently lacking.

Some comments on data collection. The authors write: “More than 8,000 customers of the considered traders were interviewed, constituting a representative picture of the German population”<sup>14</sup> (Renz/Berentzen/Stahlbock 2014: 7, translation HS). Of statistical relevance are, for example, statements about which sampling error was used as a basis, whether a stratified sample is selected and whether a random selection or a deliberate selection was made. There is nothing like this. The fact that the interviewed customers are “a representative picture of the German population” is a useless statement. First of all, statisticians are not familiar with the concept of representativeness or representation, but rather with the concept of sampling error (cf. von der Lippe/Kladroba 2002). Secondly, it is nonsensical to assume that the German population represents the basic population. Such a statement disregards, on the one hand, the fact that not all residents can do their shopping in Germany and, on the other hand, the fact that not all of those who can do so are relevant to the investigation. There is also nothing about the number and names of the experts. In this respect, as in many other places, the study is lacking transparency, a central quality criterion of good research.<sup>15</sup>

Several media have had a strong multiplier effect, attracting attention and publicity for the consultancy. For example, the *Wirtschaftswoche* magazine (in issue 14/2014) takes up the study “Category Killer” with the headline: “The online victims – Who is at risk of store closure?”<sup>16</sup> And the website of *Wirtschaftswoche* also features the following article: “Online attackers – These companies are in danger. More and more stationary traders are getting into trouble because of the growing desire of customers to trade online. Which industries are particularly at risk, which companies are already on the ‘Red List’”<sup>17</sup> (*Wirtschaftswoche* 2014).

Due to the obvious weaknesses of the study, the uncritical acceptance of the results of the study by *Wirtschaftswoche* is to be criticised (what about the sense of responsibility of journalists?) and is tantamount to damaging the reputation of the “ranked” companies.

Other headlines in 2014 were “From Vedes to expert: The list of threatened retailers”<sup>18</sup> (Bender 2014, translation HS) or “The first death list for stationary retailers”<sup>19</sup> (Krisch 2014, translation HS). The headline of a blog “Trade, the web and death”<sup>20</sup> is also conspicuous since it shows deliberate or unintentional proximity to the schema

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<sup>14</sup> “Befragt wurden über 8.000 Kunden der betrachteten Händler, die ein repräsentatives Abbild der deutschen Bevölkerung darstellen.”

<sup>15</sup> Our request to the authors to provide us with the written research design, especially the questions, was rejected.

<sup>16</sup> “Die Online-Opfer – Wo droht der Ladenschluss?”

<sup>17</sup> “Online-Angreifer – Diese Unternehmen sind in Gefahr. Immer mehr stationäre Händler geraten wegen der wachsenden Lust der Kunden am Online-Handel in Bedrängnis. Welche Branchen besonders in Gefahr sind, welche Unternehmen bereits auf der ‘Roten Liste’ stehen.”

<sup>18</sup> “Von Vedes bis Expert: Die Liste der bedrohten Händler”

<sup>19</sup> “Die erste Todesliste für den stationären Einzelhandel”

<sup>20</sup> “Der Handel, das Web und der Tod”



“Garbage, the city and death”<sup>21</sup>, a play by Rainer Werner Fassbinder (cf. Heine 2009) which has been described as scandalous and controversial. The aforementioned headings could also tie in with the existing schemata: threatened traders → threatened animals; death list → RAF.

Within the context of the terms “trade”, “online” and “offline”, the terms “category killer” from the title of the Wieselhuber study and “kill thrill” could establish a new schema (restructuring) if the information does not fit existing schemata. They could also extend an existing schema and thus adapt it (tuning). Due to the fact that in both cases the information differs from existing schemata, a schema-inconsistency is likely, combined with increased attention in communication that is wanted by the management consultancy and supported by some media without exercising journalistic care.

## 4 Conclusion

The initial question was: Do business journalists and management consultants cross certain boundaries to achieve the desired effectiveness and efficiency with their messages? Our answer is: obviously yes.

Our behavioural assumption, based on schema theory, implies that inducing a schema-inconsistency leads to higher attention than inducing a schema-consistency. Schema-inconsistencies lead – if attention is the criterion for effectiveness – to higher effectiveness than schema-consistencies.

The case studies demonstrate that the statements and messages used have the potential to collide with existing schemata, to contradict them, to trigger schema-inconsistency. In this respect, senders use the means of crossing boundaries with their information to stand out from the multitude of stimuli that receivers are exposed to. In this way, their communication is effective.

However, the examples also show that the communicated information does not result from studies following the rules of good scientific conduct (management consultancies) or the rules of good journalism. If consultancies research without tried and tested research designs and present or interpret the results in a tendentious manner, if journalists accept such results without questioning or reviewing them, then discovery and explanation by third parties will ultimately lead to ineffectiveness and inefficiency – or to Claas Relotius from *Der Spiegel* or Gerd Heidemann from *Stern*.

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<sup>21</sup> “Der Müll, die Stadt und der Tod”

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Hendrik Schröder  
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