



Ipsos Observer

The Survey Management, Data Collection and Delivery Specialists



HELLO

my name is

David Shanker

Tuesday 14th September

Cereal, Milk,
Eggs, Loaf of Bread,
Vanilla Ice Cream,
Baked Beans

Tuesday 14th September

Ipsos Observer

How market
research can
evolve...

Let's focus on
evolution and
key issues...

Contemporary Surveys

Listening to Consumers

Crowd Sourcing

~~Contemporary Surveys~~

~~Listening to Consumers~~

~~Crowd Sourcing~~

Actually this is
all about change
and thinking
differently...

A Starting Point



The current challenges facing the industry
are long standing

added-value

accountable

integrating-quant

clarity

data-overload

actionable

integrating-qual

Executives talk about the importance of deep consumer insight ...but struggle to achieve it.

“Only 35% of executives describe their consumer insight capabilities as best in class”

“90% of companies use research as a tactical resource rather than a true strategic tool”

BCG

THE BOSTON CONSULTING GROUP

November 2009

There are 2 key things to take out from this...

1. The majority of research activities are not best in class – therefore we can only assume they are average or worse
2. The reality that research is still not seen as a true strategic tool is a real wake up call

Why are things perceived to be wrong?

We know about the symptoms but what are the causes?



Why are things perceived to be wrong?

We know about the symptoms but what are the causes?

- Research has gone from being a “cottage” industry to one that has arguably been industrialised
- With a focus on
 - price
 - standardisation
 - speed - in response to increasingly rigorous deadlines
- Which has created uniformity...
- Where the emphasis is on excellence in process rather than genuine excellence in innovation

And...

- And this has changed the balance of research expertise from the people working in the business
 - The majority have an operational focus
 - They appear to have less experience in broader things but more expertise in specific ones
 - There is less space to be different
 - Arguably leading to a lack of curiosity and less desire to find out anything other than the obvious

And things are not just standing still

There are also a number of other factors at play

cultural and behavioural changes

instant information

mouse click away

“sense and respond”

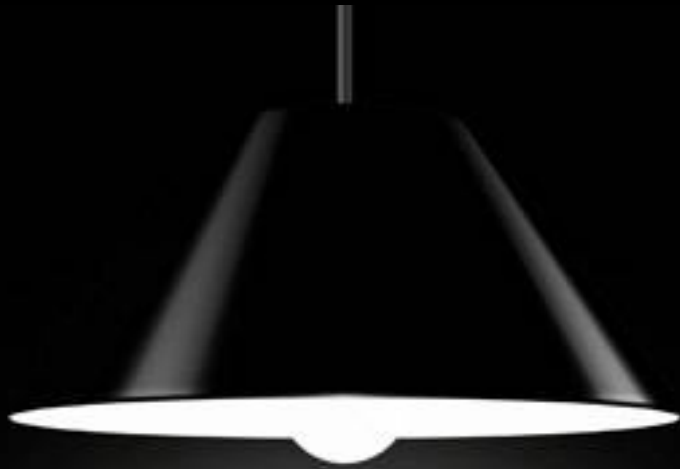
We are all becoming experts

And things are not just standing still

There are also a number of other factors at play

- The same **cultural and behavioural changes** that are affecting the consumers also affect us (the practitioners) and these trigger things affecting the Market Research process itself
- We are all used to **instant information**, data becomes easier to collect and we live in a world where things are just a **mouse click away**
- There is a rise in demand for “**sense and respond**” research... providing on-going data that allows for immediate action – partly just because it’s available – not because it’s always needed
- **We are all becoming experts** – think of our own Facebook activities, and we assume we can easily replicate these relationships in a business context with consumers

Overall this takes us to...



- An industry striving to evolve and aware of on-going challenges but (according to BCG) generally not succeeding
- An industry working with established processes that don't necessarily encourage the business to evolve and think differently
- And within this we see cultural change affecting the way research should be approached not only with consumers, but also the people working in the MR industry themselves

So what should we do about it?

BREATHE

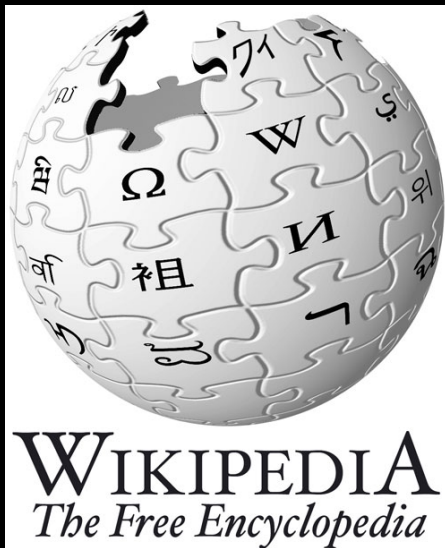


**YOU HAVE TO DISCONNECT TO
RECONNECT**

Bringing together different approaches



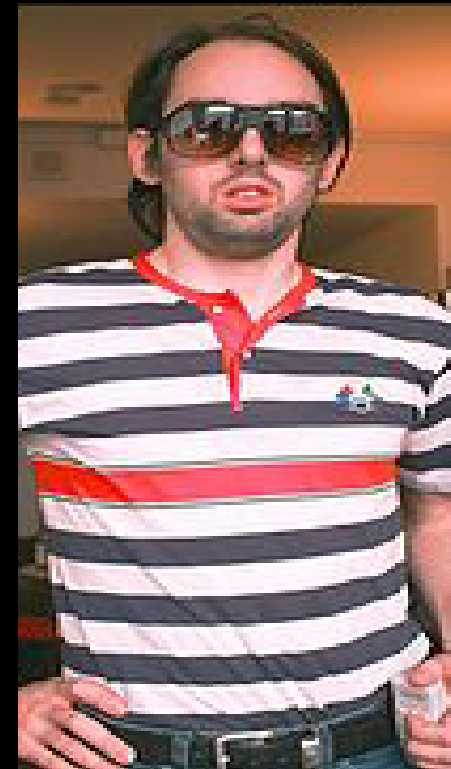
Sousveillance



Sousveillance (pronounced /suˈveɪləns/ soo-VAY-ləns, French pronunciation: [suvɛʒãs]) and **inverse surveillance** are terms coined by Steve Mann to describe the recording of an activity from the perspective of a participant in the activity, typically by way of small portable or wearable recording devices that often stream continuous live video to the Internet.

Sousveillance

The recording of an activity from the perspective of a participant in the activity.



Sousveillance

*Recruitment by professional
recruiters*



*Respondent given own blogging
interface & flip cam*



*Each day, we give respondents new
things to write about & probe on
previous day's responses*



*Typical duration is 3-5 days but
sometimes longer*

Sousveillance

Uses:

- Usability & product testing
- Brand consumption diaries
- Media diaries
- Event diaries
- Attitudes towards brands, advertising, sponsorship, products, life
- Lifestyle research

Sousveillance

“ well my best friend is obviously one of Ur closest friend but my best friend were not really that close anymore because I'm on tag and I have to be at my house for a certain time that's kind of stopping me from chill with my best friend anymore but if I need him for anything you can think off he would be their quicker then you can say. ”

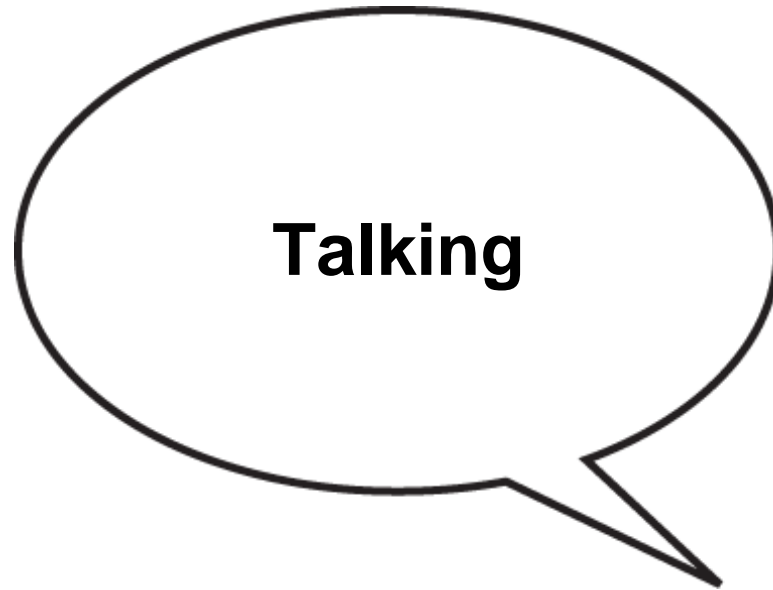
Sousveillance

“ I have been checking my ex-boyfriend’s email account for 3 years, and no one knows. ”

Sandboxing



What should we focus on?



Talking

#1

To consumers

#2

To experts

#3

To stakeholders

To consumers

Non-linear surveys



To consumers

Intelligent probing

Respondent: I guess it's kind of a cozy, cushy tone, which makes it all the more weird. And yeah, the [cuddly animal] is cute, but let's face it, he doesn't use the product. I'm just not sure that toilet paper really needs puppies or bears or anything else to sell it.

Question: Ok, now let's go a step further ... focus in again on this idea, and the person who created it ... based on your feelings about this idea, what do you think this person would be like? In other words, if this idea were a person, what kind of person would they be? I realize this is kind of an odd question, but work with me for a few minutes ... think about what they'd be like ... is it a male or a female? What are their interests and hobbies? What's their sense of humor like? What are their values - what's most important to this person? Really paint me a picture of this person and what he or she is like.

Respondent: This is that woman in line in the grocery store, who's wearing her slippers, a Winnie-the-Pooh sweatshirt and jeans pulled up to her navel. She's blonde, though obviously not through any natural act, and she wears too much make-up. She's got more jewelry on one hand than I have in my entire jewelry box and she's bathed in her perfume, sending the rest of us into coughing fits. She enjoys shopping, writing on her blog about puppy training and her favorite color is clear. She probably spells her name with an 'i' if it should have a 'y' or a 'y' if it should have an 'i'.

Question: What name would you give him/her?

Respondent: Cyndi.

Question: Suppose you knew this person ... what person or people in your life does Cyndi remind you of? What's your relationship like? Tell me about a memorable time you spent with this person - has anything like what happens in the information ever happened to you? Feel free to share as much detail as you'd like, I really want to understand how this person fits into your life.

Respondent: Okay, so the silly twit is in line in front of me in the grocery store. She has a gazillion coupons, which I don't mind, but she's haggling with the clerk over the 10 cents that canned corn is *supposed* to be on sale, but isn't. She has last week's circular, but doesn't know it, and now she's demanding to see the manager. I have three items and just want to go home. I hate Cyndi.

Question: You hate Cyndi, why do you say that?

Respondent: Because she's a twit. She's the self-centered type who put lotion on their hiney because a cuddly animal told her to.

To consumers

Don't always ask the obvious...

To experts



Embracing 'outside' expertise:

- For better understanding of the issues
- For stronger insights




Neuroscientists

Semioticians

Academics

Planners

To stakeholders



A word cloud of data-related terms on a black background. The terms are arranged in various orientations and sizes. The most prominent terms are 'data-overload' (large, yellow-green, horizontal), 'story-telling-versus-reportage' (large, orange, horizontal), 'collection-of-data' (large, grey, vertical on the left), 'communication' (medium, yellow-green, horizontal), 'actionable' (medium, orange, horizontal), and 'key-insights' (medium, grey, vertical). Other smaller terms include 'story-telling' and 'reportage'.

collection-of-data
communication
key-insights
actionable
story-telling-versus-reportage
data-overload

To stakeholders

It means moving from a torrent...



...to a drip approach.

And connecting stakeholders with their consumers to get faster answers.

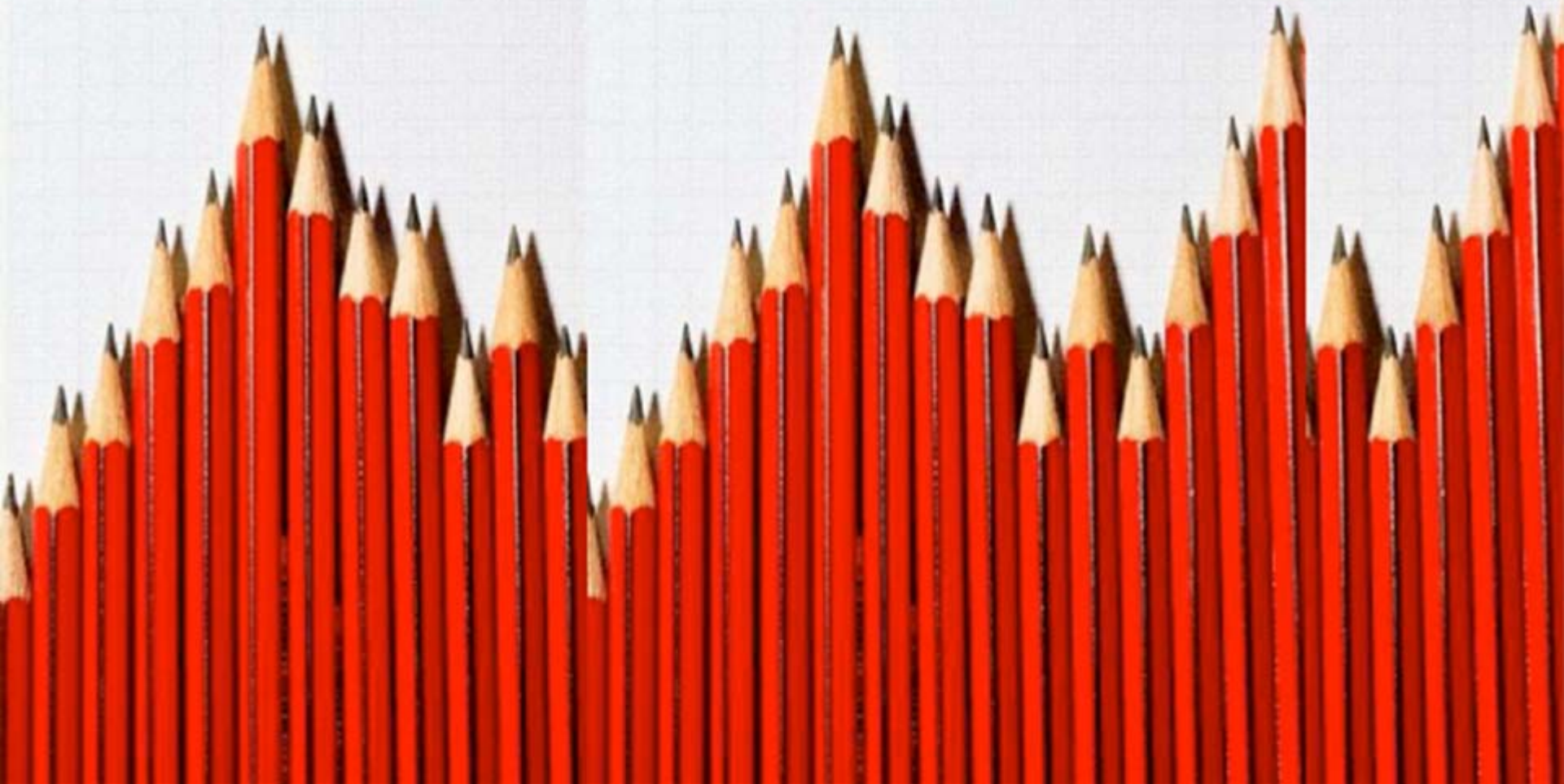


Storytelling – evolution isn't just about collecting the data
– it's about decoding and identifying the part that is worth using.



Storytelling

- Shift expectations of market research
- As part of the story, deliver ideas, feelings...as well as the data
- Do work that gets talked about



- **Crowdsourcing** – also known as expert-sourcing and open innovation
- Invite a community at large to provide input or work
- Product development, logo design, fund-raising and sales-lead generation



How does this work with a “real life” research study



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