

# Nutshell



An ISA Publication

Volume 2, July - September 2015



## Consumer Insights

A deep dive into the minds of the consumer

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## *From the Chairman's desk*

Dear Member,

As businesses have grown and evolved over the years, the challenges faced by marketers have multiplied exponentially. Marketers are now well aware that we can no longer try to give consumers "any colour they want, so long as it's black," as Henry Ford said. Companies now realize that they need to offer a wide variety of products and services to appeal to an ever-changing customer base. Adding to the complexity is the new global economy where consumers can virtually come from any part of the world that has an Internet connection.

It has therefore become imperative to go beyond conventional marketing methodology and move into an area where one can understand the consumer better. Consumer Insight & Research is that intelligence (tool) which involves getting into the consumer's mind and his lifestyle to find out why he/she makes a certain purchase and to project what could occur in the future, based on the elements around his/her purchase function. As the saying goes, from clear insights to actionable and accurate foresight!

This issue of Nutshell attempts to understand this Consumer Insights better and put into perspective its relevance in the overall marketing strategy. I would appreciate your comments and feedback, which can be sent on: [isa.ed@vsnl.net](mailto:isa.ed@vsnl.net).



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Chairman

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# Consumer Insight

A deep dive into the minds of the consumer

*Bharat Rajamani, Ernst & Young*

“At the heart of an effective creative philosophy is the belief that nothing is so powerful as an insight into human nature, what compulsions drive a man, what instincts dominate his action, even though his language so often camouflages what really motivates him”-Bill Bernbach

## Understanding the term :

Traditional companies divided the selling function into three major verticals: Research, Marketing and Sales. This segmentation was useful in earlier societies because of the relative simplicity of the demography and marketing channels. However, with the breakout of the new marketing environment with components including HD television, cable and high speed internet, the ensuing complexity has led companies to move beyond traditional market research, to delve in to the minds of the consumer. While market research depends more on compiling reams of data and looking for generalities, trends or correlations, consumer insight research involves getting into the consumer's mind and his lifestyle to find out why he/she makes a certain purchase and to project what could occur in the future, based on the elements around his/her purchase function.

By definition, consumer insight is the intersection between the interests of the consumer and features of the brand. Its main purpose is to understand why the consumer cares for the brand as well as their underlying mindsets, moods, motivation, desires and aspirations that trigger their attitude and actions.

Simply put, an insight is a previously



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unobserved truth about human emotions or behaviour which can be leveraged to build a brand. While consumer knowledge deals with consumer decisions, and consumer lifestyle, consumer insights delve much deeper and are often carved into the consumers' society, his beliefs, socio-political system and what not.

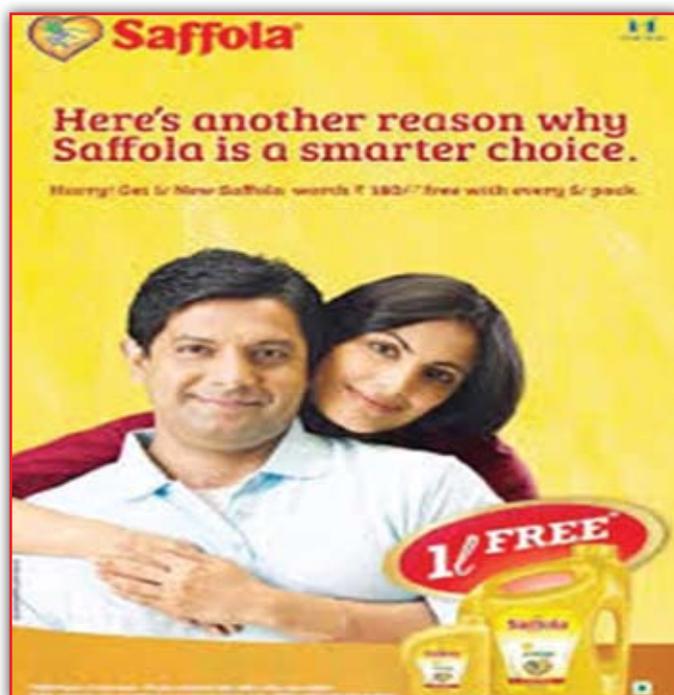
Thus, a powerful insight reveals an unmet need, is explanatory and not descriptive and often creates a reason for the brand to play a role in the consumers' life by increasing the engagement levels.

Unlike traditional market research that depended more on customer surveys and focus groups, consumer insights may involve, (apart from the traditional information gathering, thoughtful analyses involving other aspects including amongst others), psychology, ethnography, anthropology etc. to arrive at a deeper cultural understanding of individual or group buying behaviour.

**Insights can be classified into four broad categories :**

**Consumer Insights :**

The needs of a consumer are shaped up by various emotions that the consumer experiences. Touching upon these emotions



help the marketer understand the true need of the consumer. Consider an example; a wife wants to be reassured that she takes good care of her husband's health. Here, fear for her family's health drives her to look for a product that will resolve her problem. Saffola heart talks to such consumers. It first tells the wife that the husband's health is at high-risk and what could be the consequences if he continues in the same path. Then it asks her to switch to a better lifestyle by changing her cooking oil, assuring her that cooking in Saffola will keep her family healthy. The brand plays with fear as an emotion to get across the message to its consumers. In other words, the brand makes the consumer realise a latent need and fulfils the need gap hence realised.

**Cultural Insight :**

Society plays a bigger role in the way a person's needs are shaped up. Our culture affects our decisions sub-consciously. The choices we make, the way we perceive a situation all depend on the way our society has shaped us up. Certain cultures encourage impulsiveness while



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some appreciate a traditional thought-through behaviour. Consider an example; we Indians share sweets with special ones while celebrating occasions. It has become a traditional practice and we practice it effortlessly every single time. Cadbury launched the Celebrations range to share chocolates with special ones on special occasions around Diwali. A chocolate brand found its way into the households of traditional Indians.



### Product Insight :

Products have attributes that the consumers



relate to. It could be aspiration, freshness, confidence, celebrity association etc. If consumers feel that bright and clean clothes add confidence to a person's personality. Rin talks to confident women who feel their clothes have a major role to play in enhancing their personality.



### Brand Insight :

Each brand uniquely communicates its message to the user. And each brand is remembered differently in the minds of the consumer. Creating that place for the brand in the minds of the consumer is the brand insight. Educating the consumer is a way of passing on the brand message subtly. Unique way of relishing the taste of a biscuit enhances the reward of the first bite. Cadbury Oreo asks the consumer to 'twist-lick-dunk in milk' and to enjoy the taste. Here the consumer is taught in 3 simple steps how to relish their favourite biscuit. Twist-lick-dunk could have been followed by the consumer even before the brand communicated it. However, now it has got associated with the brand Oreo.



### What today's consumers want :

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then making them aware of the problem and providing the solution in the form of the brand is the key challenge. Hence, today's businesses must gather consumer insights to strategize and implement effective consumer marketing strategies.

Today's modern age consumer has easy access to information and thus is more aware of the brand's offerings. The consumer is able to connect better with the brand when the brand responds to the consumer's needs effortlessly. Consumer insight provides the understanding that leads to marketing on a more direct or personal level by taking into account the various behavioural differences across its target audience such as cultural, geographic, ethnic, operational differences. The insight, over a period of time, also helps the business build products / services that are more suited to customer requirements.

### Insights help us identify communication touch points :

Brands communicate to their customers through various mediums. The medium becomes effective if the customer has/will have a need of the product and also if the message is communicated in the medium in which the customer has undivided attention to.

### Types of touch-points :

**Media - TV, Print, Radio, Digital, Outdoor, OOH etc.**

Knowing which media does the consumer spend more time in and targeting efficiently in that medium is the goal of the marketer. For example, Honda Mobilio's TG spends a lot of time on the internet, it would be a great medium



to launch their new communication on YouTube and increase talk ability through social media. Another point to note here is that Mobilio also addressed the issue of space constraints that joint families face while travelling in a car together, which again is a consumer insight.

### Non-Media Word-of-mouth, Expert recommendations, point-of-sale touch points etc.

These are the mediums of communication on which the marketer does not have much control over, however these are considered as the more trusted mediums from the point of view of the consumer. A friend recommending a beauty cream brand, a dentist recommending a toothpaste brand, a shopkeeper recommending a brand of washing powder tend to influence the consumer deeply and their purchase decisions are impacted by such an influence. For example,



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women would trust the opinions of their female friends or sisters when it comes to choosing a shampoo brand rather than trusting an ad. Dove shampoo chose this as a communication and asked women to recommend Dove shampoo to their friends/sisters.



Another way of communicating the brand USP is not be paid or owned media but through earned media. Any media garnered by the brand through the power of content can be called earned media. In this space, the brand successfully generates media space and uses the same to transfer its message to the consumer.

## How to measure campaign effectiveness

### - Selecting the right mix :

Once a brand understands a consumer insight and the need gap that it wishes to fulfil, the next step is to communicate the same to the consumers. Often marketers choose the marketing mix that is in sync with the brand and its positioning; and this is where most marketers go wrong. A brand's marketing mix should not be suited towards the brand needs, but towards the needs, preferences and lifestyle of the consumer. Hence, the marketing mix has to be consumer centric rather than brand or product centric. Selecting the right marketing mix will ensure that the message communicated is not only received by the consumer but also understood by the consumer/influencer set.

Simply put, an ideal marketing mix should consist of elements that are a part of the consumers' life. If most of your consumer set commutes every morning to work, the brand

can choose to advertise on radio. If the brand wants to build engagement around a new product, contests, sampling events can be a part of the marketing mix. If the brand has improved its features or solved a customer issue, the Point of Sale media has to be capitalized on. All the above examples lead to a simple question- Is there a marketing mix that can be applied to all categories, or at least a marketing mix that caters to a specific category. The answer unfortunately is more complicated than the question.

As each brand progresses in its lifecycle, its role in the life of consumer also changes. Hence the brands in the same category cannot adhere to a simple marketing mix. The situation further complicates itself for brands targeting same TG but operating in different categories.

Does this mean the brands have to reinvent the wheel every time there is a need for a new campaign? Fortunately for marketers, this is not the case. While the brands need to understand consumers insight every time, there are some standard principles the brands can adhere to which can help them decide the correct marketing mix.



a. Media Vehicle reach - Does the media vehicle reach enough of the consumer set, and at the right time. There are parts of our country where despite TV having a reach, is not a viable option due to infrastructure issues. The problem is even worse with digital, where the content may take so long to load that the consumer might lose interest.

b. Role of media vehicle in consumers' life - How separable are my consumers with the chosen media. Does it form a routine of their life or its existence passive in the life of consumer?

c. Competition - Too much or too little. Should I be present in the media which is most cluttered with my competitors - most of which have a larger advertising budget? Or should I choose a medium where my competitors are not present, but my consumers are?

While such principles are mostly common to all categories, there are definitely larger factors that define a brand's marketing mix.

Another area where most marketers are suffering is to measure the effectiveness or efficiency of the marketing mix. The ever changing metrics of the game are keeping most marketers on their toes. As advertising becomes a more outsourced function, where specialised partners play a key role, gauging efficiency becomes a key ask of the marketing function. While traditionally marketers have struggled with gauging ROI of marketing investments, now it is possible to not only evaluate effectiveness of the marketing activity after the activity but to also gauge the efficiency of the activity even before it has hit the floors. This makes for very interesting times to be in the world of marketing.



### Consumer Insights and the moment-of-truth marketing :

Another key area for marketers is the moment of truth marketing. It is a popular belief that

consumers usually take seconds to make up their mind about a product, which is almost the same time they take to notice a new product. While traditionally, the marketers relied on the product packaging and word of mouth at the point of purchase, a new segment for this first moment of truth marketing has opened up in the last 4-5 years. A lot of this has to be credited to the newer/modern facilities of retail-where multiple brands operating in multiple categories are vying for the consumer's attention. Hence a lot depends on what transpires at the actual point of purchase.

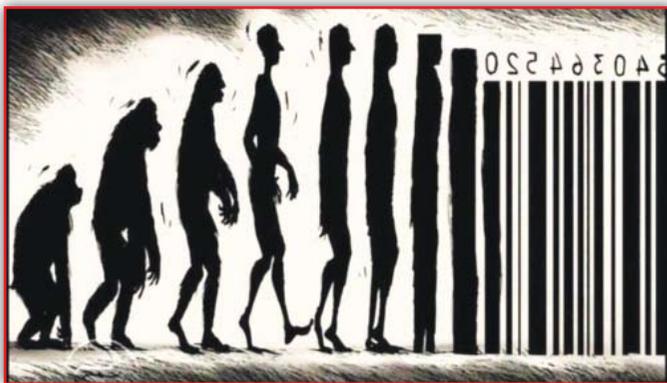


As is commonly believed and is to certain extent correct, if there are a lot of decisions at a place, there are insights to be mined. While consumer insights might play differently when compared to mass media, its importance at the point of purchase is obviously much more immediate.

Over the years, brands have cleverly started using this piece as a place to mine insights. It is not uncommon today to catch brand watchers quietly observing the consumers in the key departmental stores of the city. It is also now a standard practice to include demonstrations and samples at the point of sale. Earlier brands used to distribute free samples to shoppers to initiate trials. These days, it's a common practice to provide demonstrations not only to solve or remove any consumer query or hesitation, but also to capture the consumers' first response to the change that is provided by the demonstration.

Another area where consumer insight has

played a crucial role is the product placement at the point of purchase. It is now commonly accepted that the products that are placed at the shopper eye level are most likely to be noticed and put in the cart. Brands also cleverly use the display space to communicate the brand USP. It is also not uncommon for brands to put clever use to the product and its place of display. For example, few years back, a health drink manufacturer for kids made it mandatory for their products to be put on top shelf. While it took the risk of escaping the eye level, the clever marketer was subtly pushing the promise of "Growth" amongst its target audience.



Another clever example of the same strategy was when a well-known pain removing ointment used the bottom shelf to display its products. As the shopper bent to pick the product, they would understand the problems of back pain, and quickly a brand assistant offered his help, thereby creating a positioning in the consumers' mind about the benefit of the brand.

It is not just the FMCG industry that employs consumer insights at the point of purchase. While automobiles, consumer goods, luxury goods may not be bought on impulse, the marketers ensure that they make full use of consumer insight at the point of purchase.

If we talk about the automobiles, most of the manufacturers have stringent brand identity which is uniform all over the country. Hence, if a consumer visits two showrooms even in different states, there will be elements of brand identity which are common between the two. This helps the consumer picture the brand in a

complete fashion and the brand is also able to provide the complete experience of the brand with different elements catering to the sense of touch, smell and color. Apple is also an example of the same, with most consumers loving the ambience and the set-up of the showroom. As a brand, it stands for simplicity and innovation, and the same is reflected in each and every point of purchase.

### Observing a trend in consumer insights in online/mobile shopping vs traditional retail :

With digital media playing a key role, consumer insights have gone to a whole new level. The reason for the same is vast amount of knowledge digital media gains about the consumers without the consumer being aware of the same. It is now possible to completely define a consumers' personality based on his usage of the social/online space. While the young and dynamic have moved on cashless payments and mobile shopping, the generation above has taken up digital in a big way. As the retail industry is set for an overhaul - with live trials and hassle free process taking the industry by a storm, it is interesting to note how traditional retail has prepared its product offering.

Online retailers like Myntra and Amazon realized that Indian customers are heavily dependent on trials and would want to understand the fine print before making a purchase. Hence their communication was centred around trials, hassle free ordering and a simpler return process. Another area where Indian consumers were reluctant was making online payments. To counter this, the brands came with cash on delivery where the consumer would pay after the products were delivered. In fact, the changed mind-set of the Indian consumer regarding online payments can be gauged from the fact that over the last one year there have been numerous start-ups in the third party payment vendors.

Key retailers like Flipkart have entirely shutdown their website and are now operating through the 'mobile only' app. Such is the level of their understanding of the consumer insight

that they have changed their business model to suit its consumers. There is no proof more resounding than this to showcase how a brand changes its business function based purely on consumer insight.



### Cultivating Insights :

Traditional product design and marketing were push strategies where companies designed products based on perceived “needs” of consumer which are unmet and built marketing strategies around the products based on market research which would validate the product concept. The basic premise was that left to his own, “a consumer can react but not innovate”. This led to ambiguity in the process since the consumer’s reaction was not known till the product was ready, and by the time the feedback was available, it would become expensive to incorporate the response as the product design would have been frozen.

However, this premise is being overturned by companies that increasingly realize that if the consumer is made a part of the design process itself, his insights can be used effectively to jump-start the product design process, thereby removing the aforementioned ambiguity.

A typical data driven consumer research, which is still the norm in most companies, uses methods including focus groups, surveys and other interpersonal methods, is used to validate the company’s idea and not to stretch the boundary and ask the consumer, “if you had the choice, what would you rather have?”

Similarly, qualitative research focuses on the consumer’s reactions, but doesn’t explore what

he doesn’t say i.e. the latent needs. Also, the standardization of such techniques mean that they are more and more the methods to avoid negative fallout from the consumer than to bring out a “psychological connect”, thereby providing little or no advantage over the competitor. Such methods are designed to avoid failures but not to feed innovation.

On the contrary, participatory ideation from the consumer can help drive newer and previously unexplored insights into his needs, which in itself may become a moat to the product and reduce competitive assaults.

The major advantage of such a process would be that it would provide valuable insights into unarticulated consumer issues, motivations and aspiration. Even if the ideas are impractical, if probed imaginatively, they can lead to concepts which can be valuable inputs to the communication strategy for the brand.



Consumer insight development today is both an art and a science, which requires a combination of both left brain (the traditional objective methods) and right brained (subjective and innovative methods) thinking. Some of the new techniques through which modern corporations are involving consumer insights into product design include idea competitions, mining of social media, ethnographic studies etc... Where the idea is to take a deep dive into the creative consumers’ thinking process, understand his emotions and create products, services or communication strategies that the consumer can strongly connect with at a sub-conscious level.



There have been proven instances of such collaborations leading to successful harnessing of the consumer's creativity and seamlessly blending it into the product design and brand creation. There are some limitations to this process in that one requires a consumer who is really passionate and willing to delve into his creativity to help the process. To overcome this, the corporations are going out of the way to engage with the consumer by providing various compensation structures to involve the consumers more fruitfully.

- ITC which is setting up its first customer interaction centre in Bangalore for its personal care division. Spread over an area of 10,000 square feet, the space is equipped with a skin and hair evaluation clinic where consumers are invited to come and experience products in their development phase.
- The Godrej Hair Care Institute in Mumbai spread over 10,000 square feet and designed like a salon has been set up to invite consumers to test to-be-launched products. The Institute allows rapid prototyping and experimentation. Godrej also has a Design Lab within their campus where designers work closely with consumers while creating product and packaging design.
- French cosmetic major L'Oreal has a research and innovation centre in Mumbai, to develop products locally. The centre is equipped with 'model bathrooms' where consumers are invited to test out products while observers take note of particular usage habits.
- The Indian specific innovation Garnier Fructis Shampoo+Oil, launched in 2010 was a direct outcome of a visit to a consumer home in Kolkata where a young girl revealed that

she realised the importance of oiling her hair as practiced by her mother, but never found the time to do it.

- BMW posted a toolkit on its website that lets customers develop ideas in telematics and in-car online services.
- Lego allows programmers from outside the company to access to the code that controls its Mindstorm toy robot, leading to an increased range of activities the robot can perform, in ways the company never imagined.



### Shifting approach, same old methods :

While consumer insight articulation seeks to do away the old processes of interacting with consumers to seek their feedback, very often it is not possible to radically change these processes overnight, given that a lot of investment in terms of money, energy and time has been pumped into refining the existing structures. It may be more palatable for companies to modify the existing market research structures by thinking differently about ways to manage the qualitative consumer methods they already use, such as focus groups, interviews and panels. The primary step in this shift in mind set is to separate the consumer interactions into an exploratory thinking (ideation) stage and a conciliatory stage. These two stages have different purposes and outcomes, and call for different techniques.

The exploratory stage is used to gain new insights and generate answers to the ambiguity is probing and flexible, and is used for gaining fresh consumer insights and generating ideas

about the basic attitudes that the consumer would subconsciously affix on the underlying product/service and the process is often probing and flexible in nature. In the later conciliatory stage these concepts and ideas are validated and refined – this is standard procedure for many companies.



The first stage is already being utilized by some companies to a limited extent by asking consumers relatively straightforward questions and then having discussions on the same. For example, such lines of inquiry might include: “What do you like most about online shopping? What would make it better? What’s the worst thing about the way online shopping websites are designed? How would you redesign them?”

While using qualitative market research methods such as focus groups, such inquiries are often used merely to break the ice and serve as a brief warm-up exercise at the start of a session dedicated to concept validation. However, there is a significant opportunity to diverge much more effectively than this. Thus, in order to effectively implement the exploratory stage in conventional forums, it is imperative that the process is strategically divided into the two distinct stages, as otherwise the exploratory stage tends to get cluttered when followed by the more concrete and procedural conciliatory stage.

Rather than random selection of the participants to such methods, it will be effective if the participants are energetic, creative and articulate about the subject matter and can contribute

passionately in a brainstorming session. It is also imperative to use ingenious, powerful interaction techniques and simulations to enable consumers to think imaginatively.

Today, the field of consumer behaviour management has developed a wide range of such exploratory techniques (from simple, direct questioning and brainstorming to more subtle, experimental activities designed to understand the thought processes of the participants).

As mentioned earlier, it may make more sense for companies to gently start the process of exploratory inquiry with the consumer, rather than employing radically different techniques. The method of inquiry should be designed in line with the company’s desire to cultivate the consumer insight for a deeper level of understanding and inspiration.



It must also be mentioned here that such techniques may not bear any results in the beginning and may require repeated iterations before the line of questioning can be fine-tuned. Moreover, sufficient expertise would need to be built up in the system to separate the chaff from the wheat, as not all ideas that are developed would represent characteristic insights of the target consumer segment.

**Some examples of more experimental techniques in a facilitated, open focus group setting are as follows :**

- Consumers in the front room share their issues, concerns and product ideas with an artist who captures them in real time. The artist also works with the consumers to create mind maps,

scenarios, collages and timelines.

- Consumers talk face-to-face about their issues, frustrations and ideas with a software engineer, a retailer, or the head of product design.



- Consumers' emotions are elicited by a stand-up comedian in a "Talk Show" format, using the power of humor, improvisation and personal storytelling to draw out experiences and feelings about choosing a mobile service.
- Consumers debate in a moderated discussion set up on the advantages and disadvantages of competing brands or different versions.

Another setting involves setting up design workshops at the company location (Like Godrej, ITC etc... in the examples above). Consumers work alongside representatives from technology, design, marketing, R&D or manufacturing to create ideas while motion cameras capture the emotions that arise from the different iterations

### **Ethnographic research :**

Ethnography is the branch of anthropology that involves trying to understand how people live their lives. It's the systematic study of people and cultures, designed to study and explore cultural phenomena where the researcher observes society from the point of view of the subject of the study. The practice involves observing target users in real-world settings rather than in an artificial environment of labs or focus groups. By observing consumers' behavior and through understanding their motivations, aspirations and unarticulated issues companies

can create highly relevant products, solutions and experiences.

The method relies on techniques such as observation, video diaries, photographs, contextual interviews and analyses of artefacts such as devices, tools or paper forms that might be used as part of a person's job. Often, several methodologies are combined. For example, some "self-reporting" ethnography methods can work well together with traditional focus groups – participants agree to do an assignment prior to attending the focus group, such as completing a self-observation workbook or taking photographs of objects that are important in their lives.

The approach is more valuable at the beginning of the exercise when there is a need to understand real end user needs or to understand the constraints of using the product or service by the target segment. It provides a more holistic and nuanced view of what is actually going on in the consumer's own cultural context.



Intel Corporation has amongst the most well developed ethnographic research division. The division has moved on from focusing on product level answers to strategic and long term plans of the company such as "Will Television and PC technology converge?" Are baby boomers returning their PCs and TV habits as they age, or are they comfortable shifting to new media? Will smartphones take over most of the functions of PCs" etc...

Microsoft, Motorola and Intel have trained anthropologists and social scientists on staff. At Motorola, ethnographers found that Chinese businessmen working in rural areas with no telephone service had developed an elaborate system of using pagers to send coded messages.



## ABOUT THE AUTHOR



### ***Bharat Rajamani***

Director & Solution Champion – Marketing & Advertising Risk Services (MARS) across Asia, South East Asia, Middle East & Africa

Bharat has more than 18 years of experience serving in EY & over 15 years in specializing in MARS reviews covering :

- Marketing spend optimization reviews,
- Agency contract compliance reviews,
- Agency performance reviews,
- Planning & strategy reviews,
- Assistance in agency selection
- Creative production reviews
- Promotion reviews
- Digital reviews

His key MARS clients span across categories :

**FMCG/ FMCD** : Hindustan Lever, L'Oreal(India, Korea, Thailand), Reckitt & Benckiser (India & Thailand), Samsung, LG Electronics, Coke (India & Turkey), Cadburys, J&J, GSK, Titan, Tata AoR, Nokia (India, Singapore, Malaysia, Thailand, Cambodia, Hong Kong,

**Telecom** : Vodafone, Airtel, Idea, MTNL, SriLankan Telecom / Mobitel, Maxis Telecom / Aircel (India & Malaysia),

**Automobile** : Maruti, Jaguar (China),

**Financial Services** : Max New York, Bharti AXA, ICICI Bank, Kotak Bank

**Ecommerce** : OLX, Flipkart, Quikr

**Government** : Bhartiya Janta Party (BJP).

Bharat has :

- Assisted AC Nielsen in validating the controls implemented by them for conducting the National Readership Surveys on behalf of the National Readership Survey Council. He also worked on projects for leading broadcasters across India & US.
- Led projects with BJP for Lok Sabha & all Vidhan Sabha Elections held in 2014 (i.e. Maharashtra, Haryana, J&K, Jharkhand and Delhi elections)

He actively participates on Industry Thought Leadership initiatives conducted by Indian Society of Advertisers on Media Audits, Return on Marketing Investments & Digitization.

He is also a visiting faculty for Marketing in SIES College of Management Studies

Bharat is a Management Graduate with specialization in Marketing from Symbiosis & holds an Accounting Technician Certificate from Institute of Chartered Accountants of India

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Up to 6%\* p.a. for your family



Balance to be maintained as a family in any one account or spread across accounts



Dedicated Relationship Manager for your family^

SMS FAMILY to 5676788

\*Earn up to 6% interest p.a. on your Savings Account balance over ₹1 Lakh and 5% p.a. on balances up to ₹1 Lakh on Resident Accounts only.

^Subject to maintenance of Average Monthly Balance.

# THE JOURNEY RETURNS.

12TH DECEMBER, 2015.



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