Market research has changed Have you?

Ray Poynter
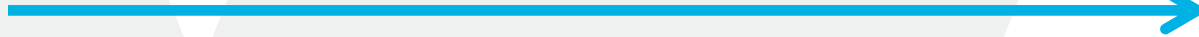
MRSS Asia Research Conference, 7 August, 2014, Singapore

Outline

1. The context has changed

2. Key tools

3. Research skills

4. Big Picture of New MR

Brands

1974 →→→→→ 2014

Local

Global

Brands ≈ lines

Line Extensions
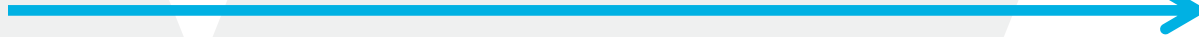
Product-based differentiation

Image-based differentiation

Weak retailers

Strong retailers

Advertising/Marketing

1974 ⟶ 2014

TV and Press		TV/Web/Social
Free hand		Increased scrutiny
Product-based differentiation		Image-based differentiation
Broadcast	Narrowcast	Two-way/Social

facebook

Search

Starbucks
Food/Beverages

Wall

Share: **Post** **Phot**

Wall
Locations
Info
Friend activity (1+)

Write something...

Ashley Momalop

37,130,519 Likes
230K Talking About

You Tube

Starbucks Vote Commercial

terrystorch   Subscribe   85 videos

A FREE CUP OF
COFFEE

0:37

0:42 / 1:01   360p

my
STARBUCKS IDEA

Customers

1974 ──────────────→ **2014**

Growing wealth   **Wealth plateauing**

Naïve   **Sophisticated**

Bottom of Maslow's   **Mid-to-high**
pyramid of needs   **Maslow needs**

Narrow choice   **Wide choice**

Passive   **Reactive**   **Collaborative**

MADMEN

Gap

LEGO 12+ 21100
しんかい 6500

Research
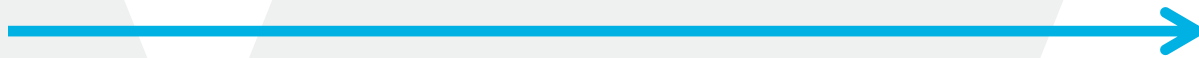
1974 ⟶ **2014**

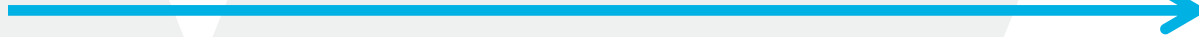|		
Face-to-Face	**CATI**	**Online**
U&A and Segmentation	**Ad tracking & Cust Sat**	**Ethnography & Social Media**
Focus groups	**Online Focus Groups**	**MROC**
Random sample	**Access Panels**	**Insight Communities**

Paradigms

1974 ———————————————————→ **2014**

Direct questions	**Indirect questions**
Random Prob. sampling	**Panels**
Research Instrument	**Engagement**
Adult -> child (TA)	**Discussions**

New markets

1974 —————————————▶ 2014

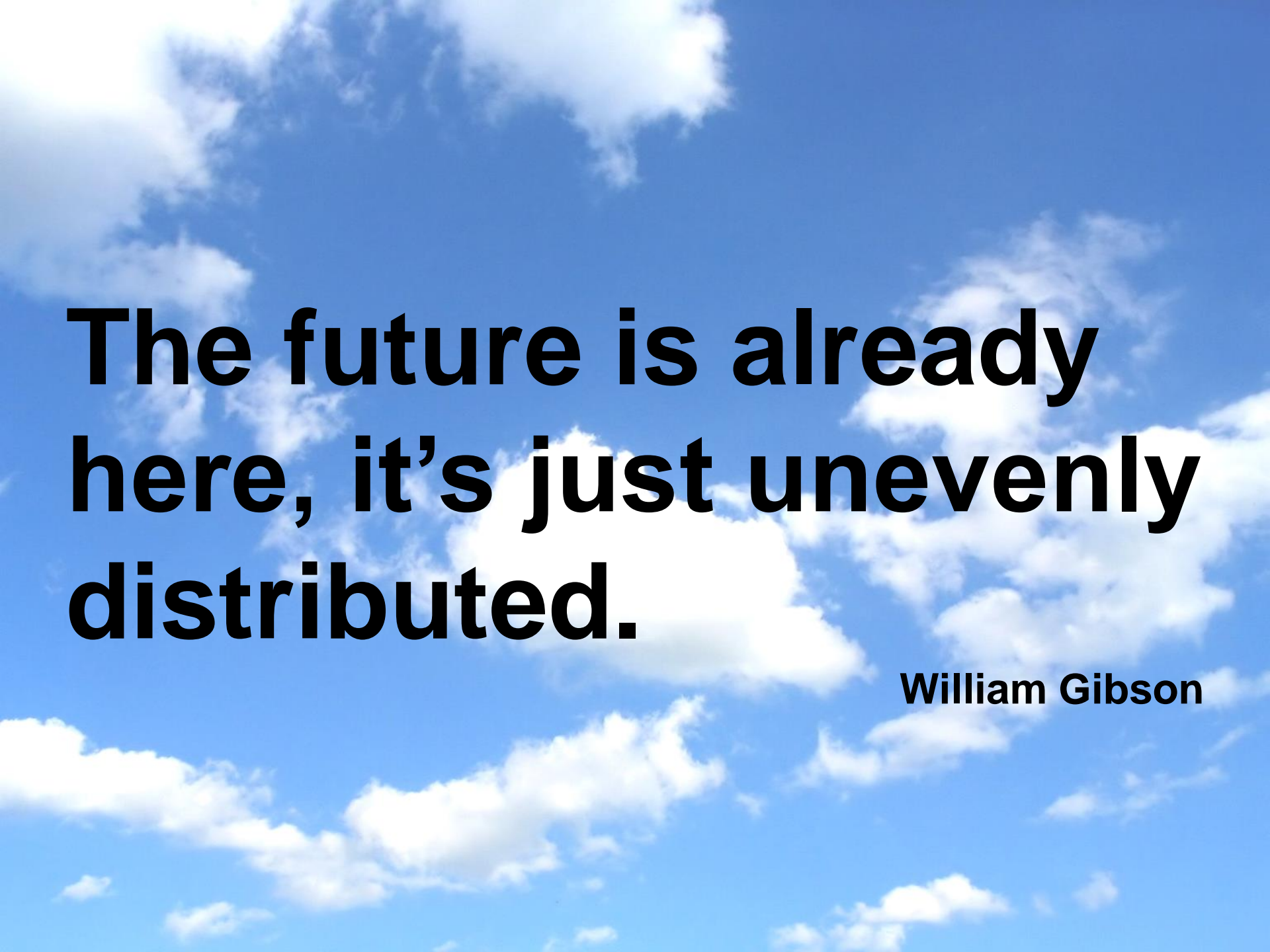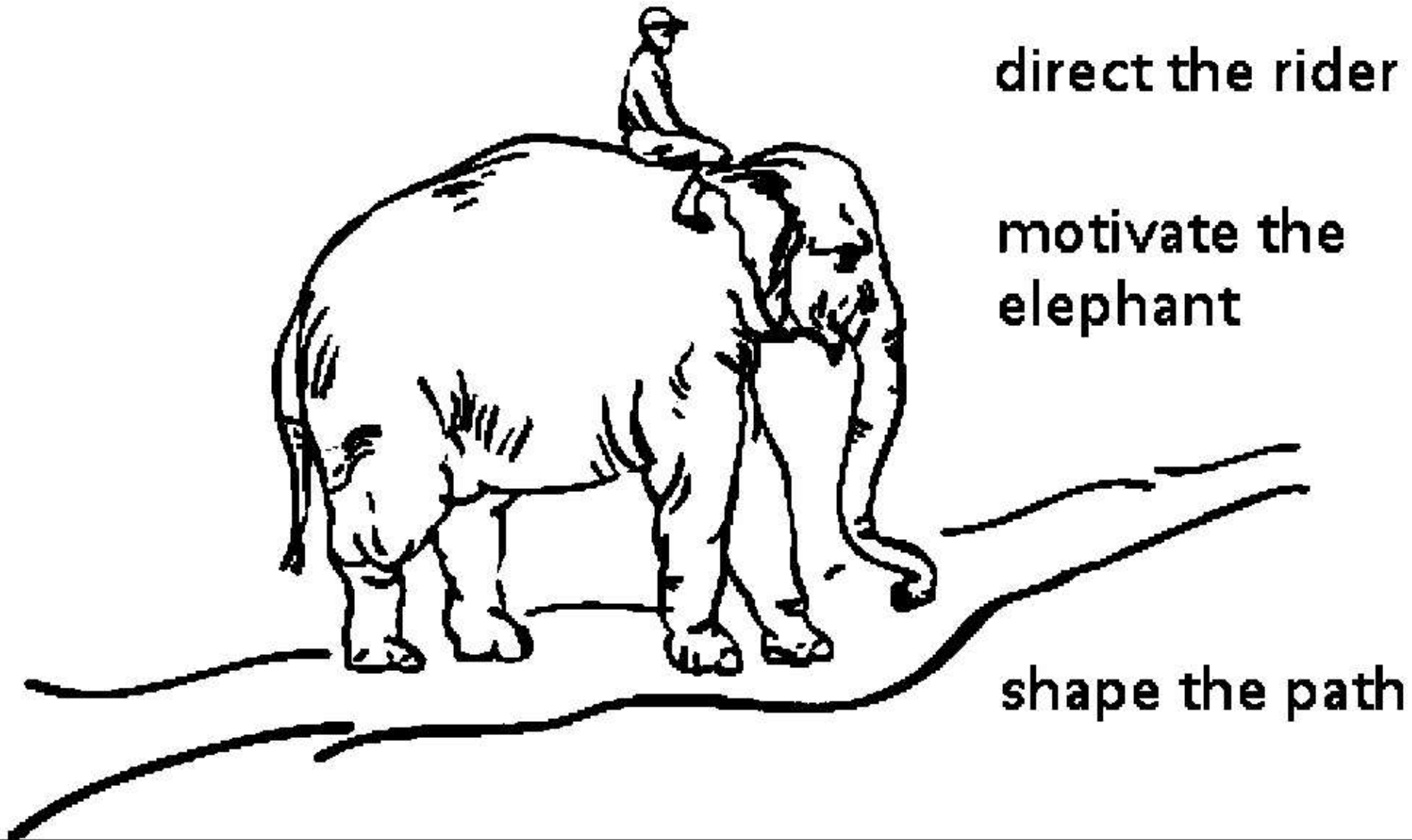|	
No phones	Mobile phones
Rich and poor	Growing middle-class
Limited travel	International travel
Local focus	International focus
Limited MR	Fastest growing regions

Key
Tools

The future is already here, it's just unevenly distributed.

William Gibson

We think much less than we think we think

For sale
$1.10

Elephant and Rider

direct the rider

motivate the elephant

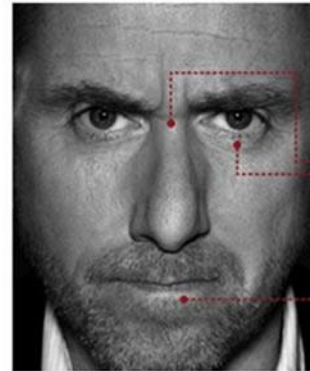shape the path

From Chip and Dan Heath

Facial Coding

sadness
1. drooping upper eyelids
2. losing focus in eyes
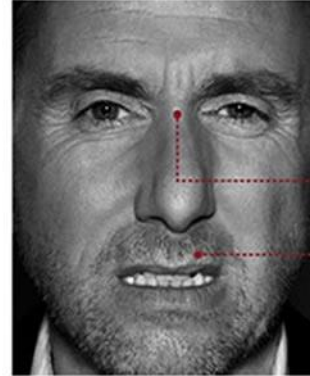3. slight pulling down of lip corners

anger
1. eyebrows down and together
2. eyes glare
3. narrowing of the lips

contempt
1. lip corner tightened and raised on only one side of face

disgust
1. nose wrinkling
2. upper lip raised

surprise
Lasts for only one second:
1. eyebrows raised
2. eyes widened
3. mouth open

fear
1. eyebrows raised and pulled together
2. raised upper eyelids
3. tensed lower eyelids
4. lips slightly stretched horizontally back to ears

Which Colour is it WRITTEN in?

GReedn

Tricky isn't it

Big Data

the signal and the noise

why so many predictions fail—but some don't

nate silver

Big Data

The New York Times Magazine — February 19, 2012

How your shopping habits reveal even the most personal information. By Charles Duhigg

Business Unplugged™

This blog features Carol entrepreneurship, as wel of contributors.

Big Data: Google Thinks That I'm a Dude and Target Thinks That I'm Pregnant

By: Carol Roth | 1 Comment

In the era of Big Data, companies are making a fortune out of selling information to other companies. However, what are those companies really paying for? Is it worth it and what does it do to customer relationships?

I don't mind getting information for stuff that I want, but when I am barraged with things that are clearly not relevant, sometimes I get mad. Case and point, the other day I received in the mail this "newborn nourishing" kit from Similac.

Internet Explorer vs Murder Rate

Source: Gizmodo

Correlation Annual Chocolate Consumption & Nobel Prizes per 10 Million of Population
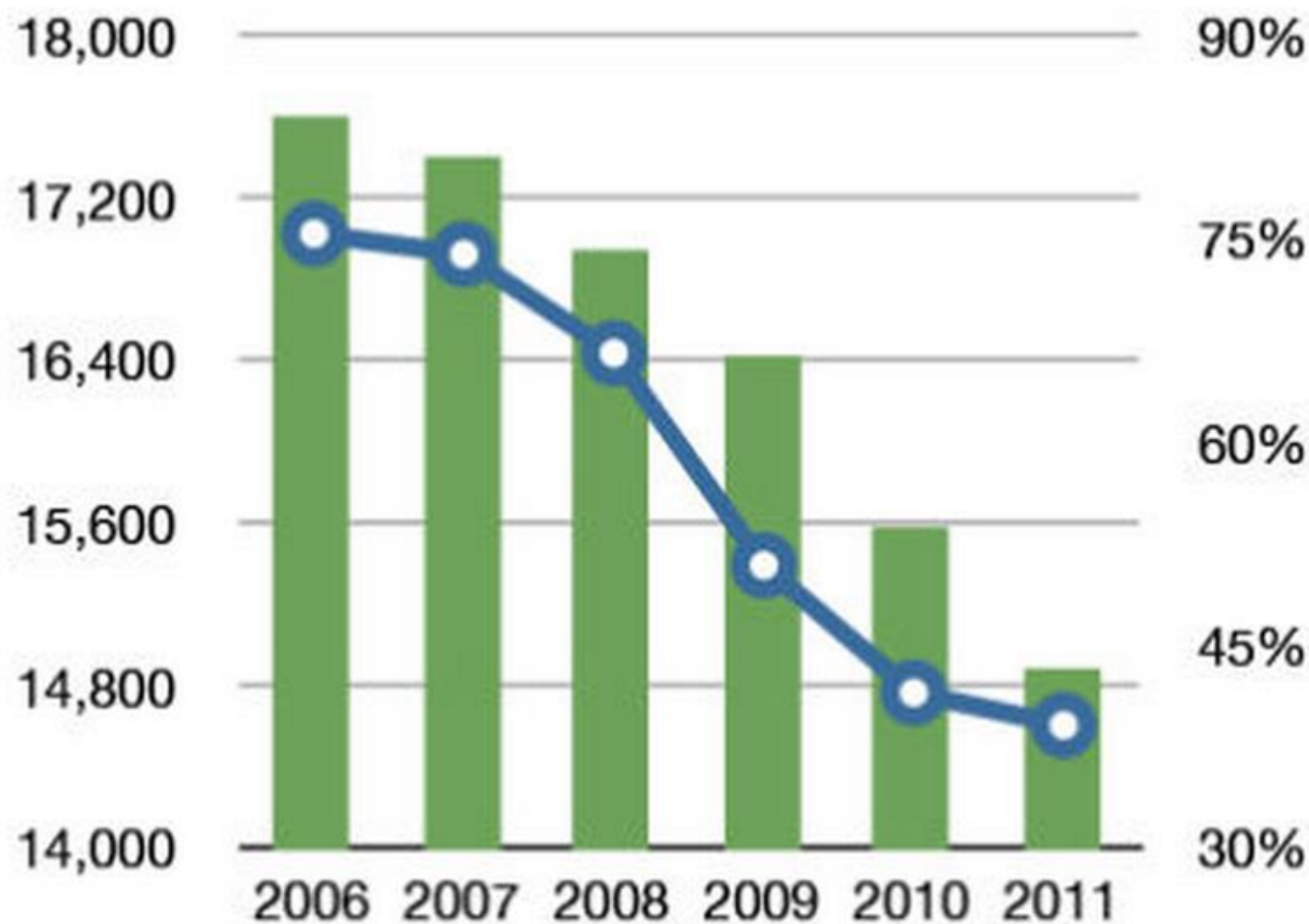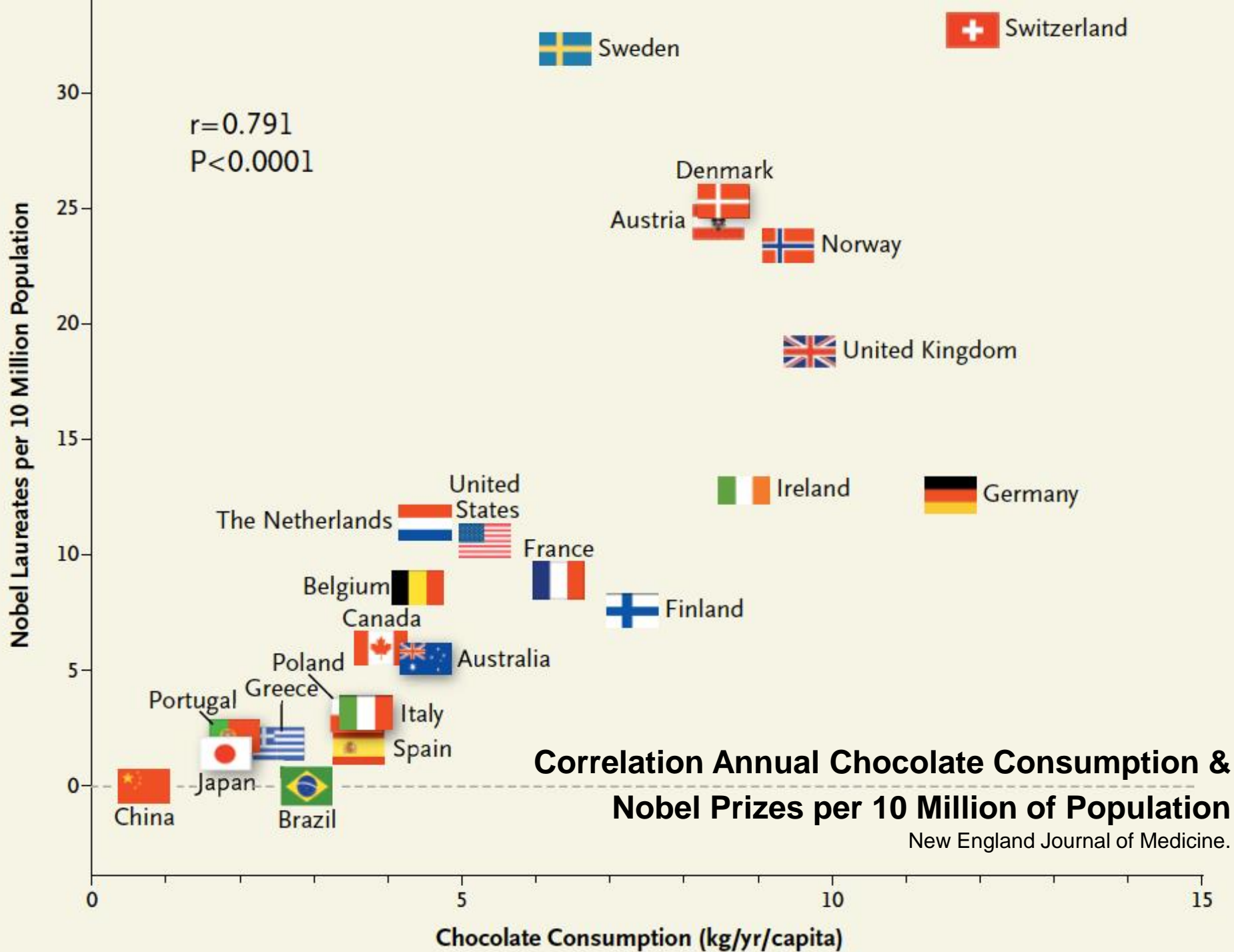
New England Journal of Medicine.

Mobile

Global ICT developments, 2001-2014

Per 100 inhabitants

- Mobile-cellular telephone subscriptions
- Individuals using the Internet
- Fixed-telephone subscriptions
- Active mobile-broadband subscriptions
- Fixed (wired)-broadband subscriptions

95.5
40.4
32.0
15.8
9.8

2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014*
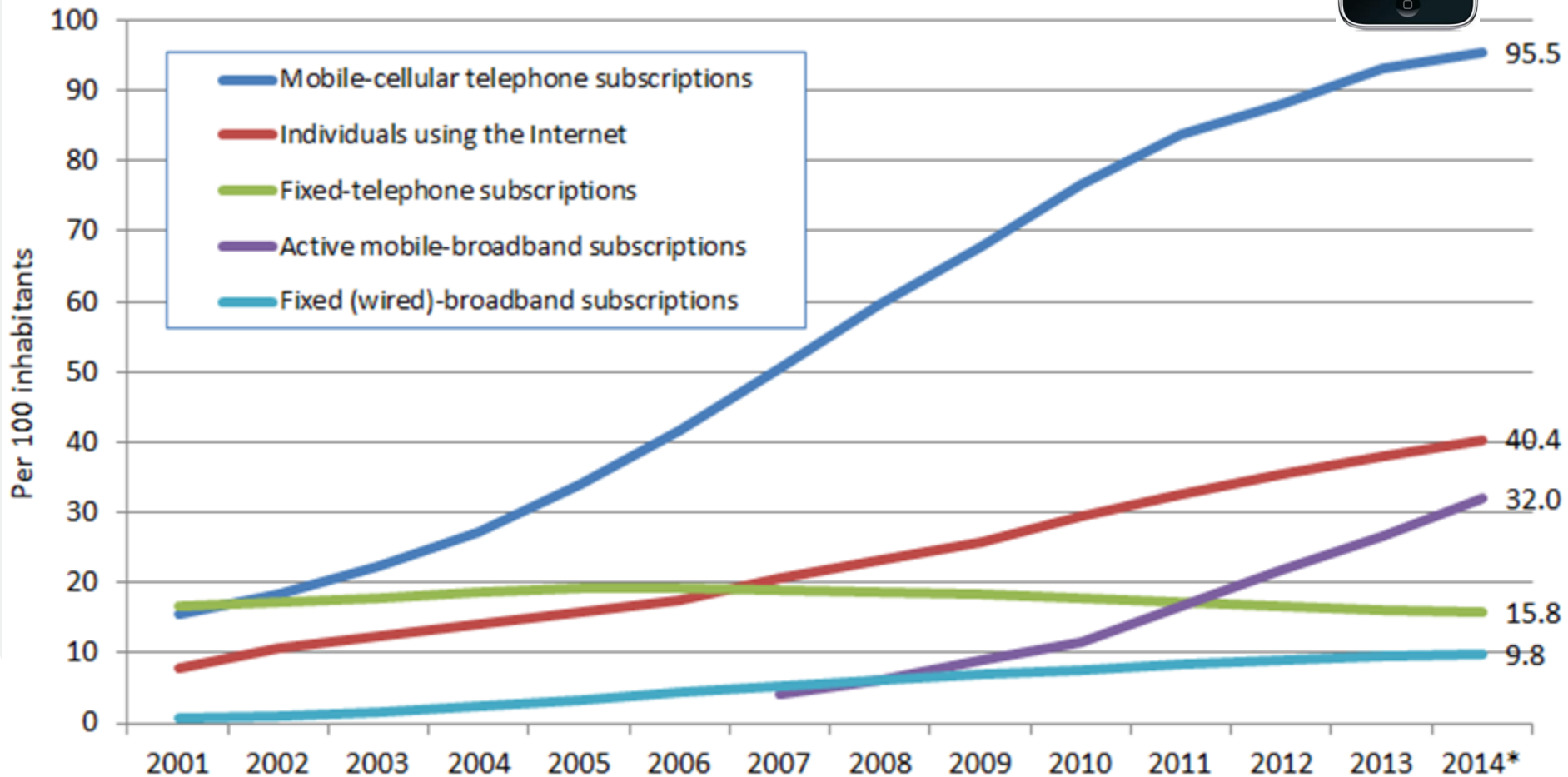
Note: * Estimate
Source: ITU World Telecommunication/ICT Indicators database

Phones per 100 is NOT penetration.
Some people have more than 1 phone.

Available from next month ☺
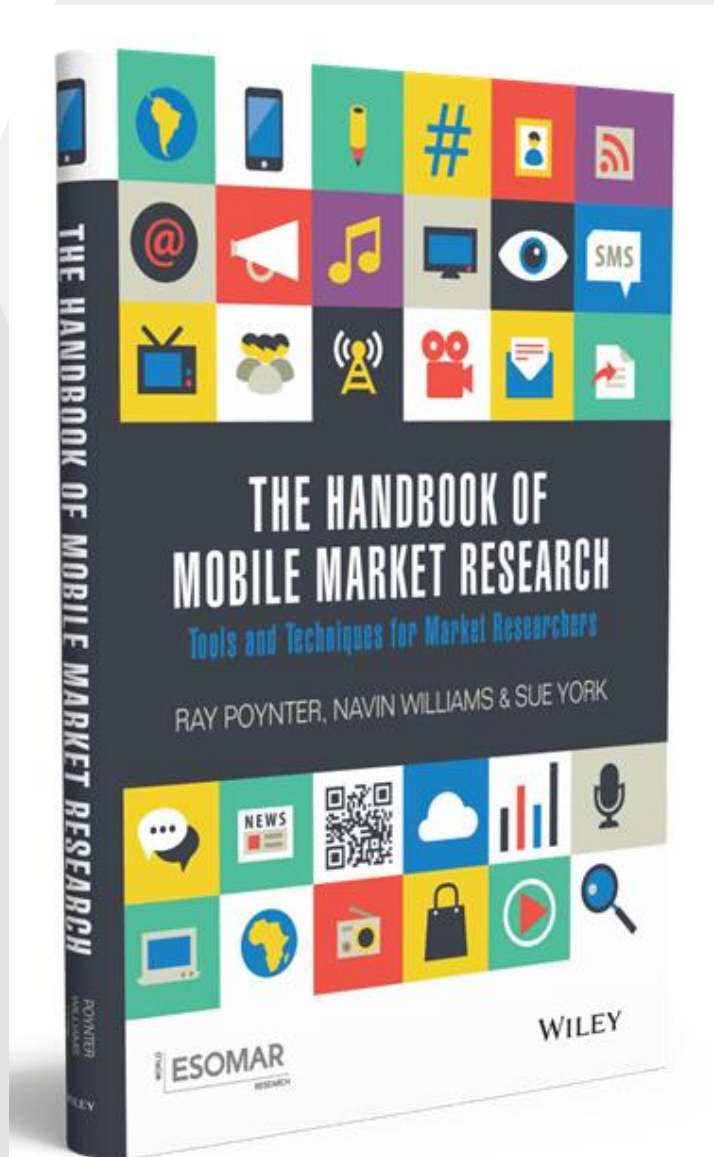
Trends in Mobile

Growing share of current modes of research

Ubiquity

24/7

Smartphone

Internet enabled

App running

Multiple sensors

Linked to other data

Participative
Passive
In the moment
Location based
Push

Mobile is more than surveys

Web messaging

WhatsApp

Faster than Facebook

Active users, m
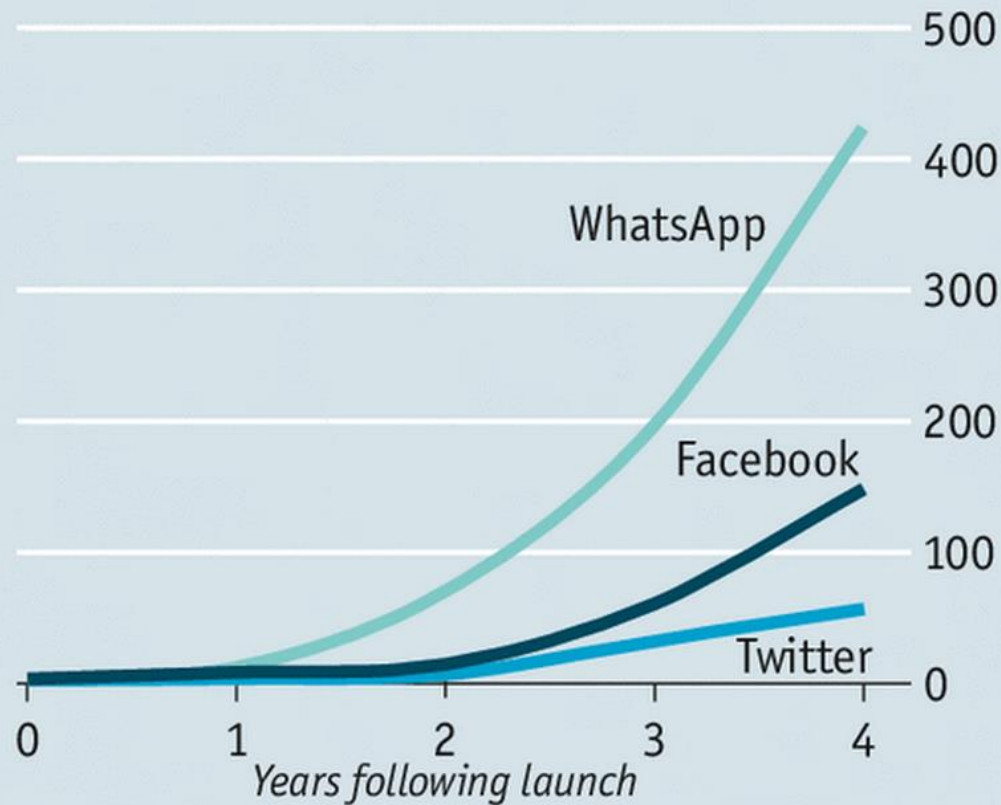
Source: comScore, Facebook, WhatsApp

February 2014

What do these have in common?

- Algorithmic Approaches
- Augmented Reality
- Big data
- Biometrics
- Choice modelling
- Consulting
- Discourse analysis
- Discussions
- Engagement
- Gamification
- Geofencing
- Insight Communities

- Mobile Surveys
- MROCs
- Nano/Micro surveys
- Neuroscience
- Non-probability sampling
- Passive data collection
- Programmatic marketing
- Sentiment analysis
- Smartphone Ethnography
- Social Media Research
- Text analysis
- Visualisation Techniques

File   Home   Insert   Design   Transitions   Animations   Slide Show   Review   View   Add-Ins

Paste   New Slide   Layout   Reset   Section

Clipboard   Slides

B I U S abc AV Aa A

Font

Shapes   Arrange   Quick Styles

Shape Fill   Shape Outline   Shape Effects

Drawing

Find   Replace   Select

Editing

1

New Skills for a New Era
Ray Poynter
Director, Vision Critical University

IIeX Atlanta, 2014

2

3

What do these have in common?

- Algorithmic Approaches
- Augmented Reality
- Big data
- Biometrics
- Choice modelling
- Consulting
- Discourse analysis
- Discussions
- Engagement
- Gamification
- Geofencing
- Insight Communities

- Mobile Surveys
- MROCs
- Nano/Micro surveys
- Neuroscience
- Non-probability sampling
- Passive data collection
- Programmatic marketing
- Sentiment analysis
- Smartphone Ethnography
- Social Media Research
- Text analysis
- Visualisation Techniques

VISIONCRITICAL

4

Internet Explorer vs Murder Rate

◇ Murders in US   ▓ Internet Explorer Market Share

5

Correlation Annual Chocolate Consumption & Nobel Prizes per 10 Million of Population

6

7

8

Data
Prior
Posterior

9

10

BABEL FISH

DIGESTIVE NERVE CHORD
TELEPATHIC EXCRETOR   BRAIN
ENERGY A...   GAS BLADD...
OLFACTORY BULB

EXTENDABLE NERVE SIGNAL SENSOR
GILL RAKERS   LIVER   DIGESTION
HEART   CONSCIOUS FREQUENCY SENSOR

THE BABEL FISH IS SMALL, YELLOW, L...
AND PROBABLY THE ODDEST THING IN...

11

12

1. Collaboration
2. Causality
3. BS & opportunity detector
4. Bayesian approaches
5. Triangulation
6. Translator
7. Illuminator

Slide Sorter   "Vision Critical template (Standard) 2013"   English (U.K.)   87%

Connecting the dots

BABEL FISH

DIGESTIVE NERVE CHORD

BRAIN

ENERGY AB...

GAS BLADD...

TELEPATHIC EXCRETOR

OLFACTORY BULB

EXTENDABLE
NERVE SIGNAL
SENSOR

LIVER

DIGESTION

CONSCIOUS
FREQUENCY SENSOR

GILL RAKERS

HEART
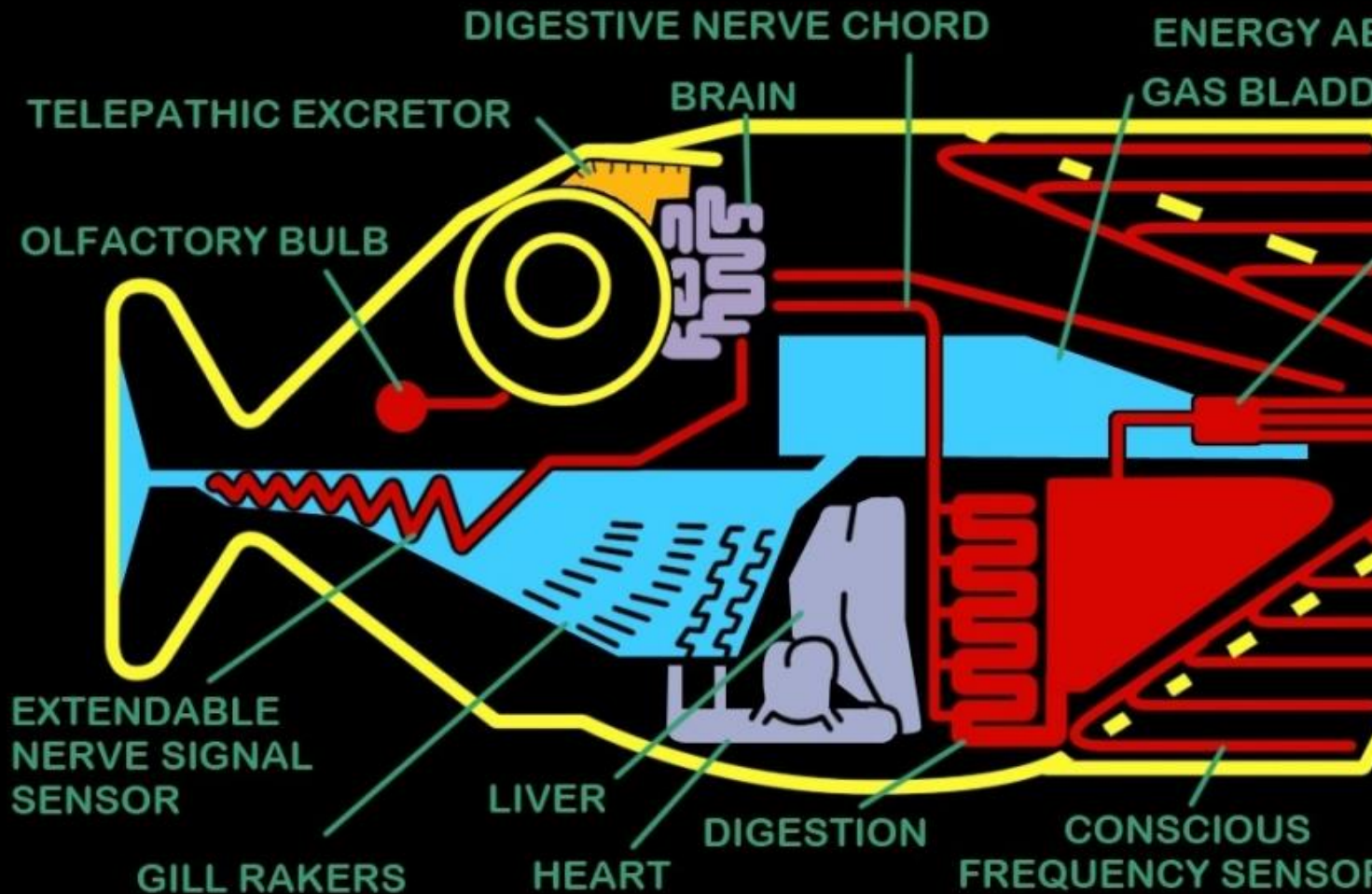
THE BABEL FISH IS SMALL, YELLOW, L...
AND PROBABLY THE ODDEST THING IN...

Big Picture of New MR

Big Data & Social Media

Neuroscience, BE, Biometrics, Gamification

People can't tell us all we need through surveys & focus groups

Memory System 1 Emotions

Communities

In the moment & Passive
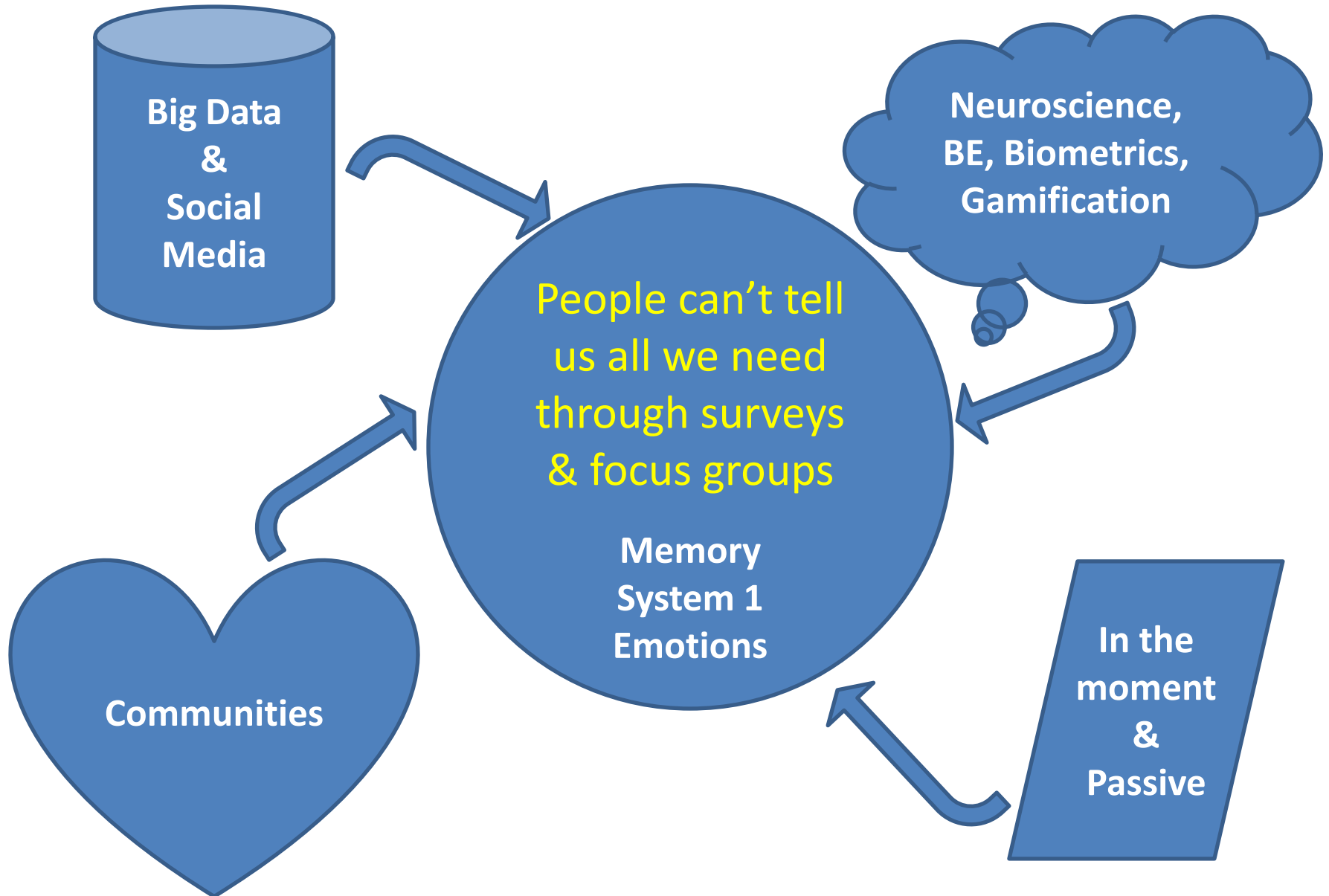
Thank you!

If you would like further information?

You can try any of the following:

- Email me via ray.poynter@thefutureplace.com
- Follow me on Twitter, see https://twitter.com/raypoynter
- Connect on LinkedIn via http://uk.linkedin.com/in/raypoynter/
- Check out NewMR at http://newmr.org/