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MARKET RESEARCH

SUPPLEMENT

2011

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A SIGNIFICANT ROLE

MARKET RESEARCH IS PLAYING an increasingly significant role in how brands - whether a service or a product - approach their markets. Research can also determine what mediums to use to communicate with these markets. With social media, digital and mobile communication increasing at a rapid pace, the marketers also need to follow the consumer and track what is being said about their brands.

For the first time, a forecast was released for the South African media and entertainment market when PriceWaterhouseCoopers (PwC) presented the first South African entertainment and media outlook: 2010-2014 (*the Outlook*), last year. PwC has released a global Outlook for years, and some regions such as Australia, have their own *Outlook*. Having a South African *Outlook* is important because of some of the unique aspects of the South African media and entertainment sector. We have a wonderfully diverse society, but while this adds to the colour of our nation; it makes it a complex market to operate in.

The report states: '*Outlook* combines deep knowledge of the local market with a truly global perspective and is a powerful tool for understanding critical business issues.'

It talks about challenges facing the sector that include: 'restructuring, talent management, changing revenue models, intellectual property and rights management, compliance and managing capital spend.'

Media owners, marketers and brands will have to understand their markets and consumers if they are to survive. A report such as *Outlook* is therefore an invaluable tool - as is market research conducted by the various research houses in the country. Just tracking what consumers of your brand are saying on Facebook is not enough. Brands need to know as much as possible - and more - as the consumer dictates in this space at an increasingly rapid rate.

The *AdVantage* Market Research supplement is only a small glimpse into the services that market research institutions can offer marketers and media owners. These institutions can provide a wealth of knowledge - which marketers and media owners that already use their services - will tell you.

The value of good, objective market research has never been more important than now.

Danette Breitenbach, Market Research Supplement Editor

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QUALITY AND TRAINING top SAMRA's 2011 agenda

As the demand for quality marketing research by accredited researchers continues to grow, training and quality assurance will be the main thrust of the Southern African Marketing Research Association's (SAMRA) activities in 2011, says chairperson Elsa Thirion-Venter

Elsa Thirion-Venter, chairperson of the Southern African Marketing Research Association

"**TRAINING, QUALITY ASSURANCE** and the accreditation of researchers to promote and maintain professional standards will take centre stage. We consider quality and high industry standards so important, that SAMRA will host a seminar at the beginning of the second semester where quality-related issues in the industry – ranging from the impact and importance of ISO certification to specific methodologies and the quality of field work – will be thoroughly examined," Thirion-Venter stresses.

Steadily gaining momentum after years of groundwork to determine a viable accreditation model for South Arica, SAMRA'S accreditation drive has, to date, yielded some 15 SAMRA accredited researchers (SARs), with more applications in the pipeline. "Obviously our objective is to motivate as many researchers as possible to reach SAR-level and become accredited so that the entire industry will, in the long run, benefit from the drive."

Thirion-Venter believes the fact that clients and research users are starting to demand the services of accredited researchers will also ensure that accreditation is taken far more seriously. "Accreditation is the only yardstick to validate a superior level of research knowledge and experience. Moreover, it will also ensure that excellent standards are maintained and strict adherence to the industry codes."

"The marketing research industry, like several other industries, is experiencing a skills shortage, particularly at middle level. "Often younger people who enter the industry exit too soon so that they are lost to middle and top levels. The challenge is to position marketing research as a career of choice which will motivate candidates to remain in the industry and, despite initial growing pains, continue building fulfilling careers," stresses Thirion-Venter.

Hence, the strong focus on presentations by industry and SAMRA stalwarts at relevant departments of tertiary institutions to promote marketing research as an interesting and stimulating career choice.

In an attempt to motivate and encourage younger researchers, 'bright young minds' have, for the first time this year, been invited to submit synopses for papers at this year's annual SAMRA conference. Two synopses from budding young researchers have been accepted.

Engaging research users to join SAMRA and share in the benefits of belonging to a professional research body, to become actively involved in SAMRA activities and the enhancement and promotion of professionalism in the industry, will also be a focus.

"While there are a number of research users who are actively involved in SAMRA, we would like more research users' involvement. Ongoing interaction with the Services Seta also remains an important objective in order to promote closer co-operation and involvement," she says.

Greater interaction and co-operation between the various research disciplines are also paramount to provide insight in and learn from the different disciplines, thus also facilitating the growing need for multi-tasking, reckons Thirion-Venter. SAMRA does not work in isolation, but sees itself as part of the broader marketing industry, the organisation will also continue to strengthen ties and co-operation with other sister associations and industry partners.

Looming large this year is the possible impact of the imminent introduction of a number of Acts and Bills on marketing research operations as well as on the SAMRA Code of Conduct. "We need advice to timeously prepare ourselves for the implications of, for example, the Electronic Communication Act, the Consumer Protection Act, including the principle of consumer privacy, and the Protection of Personal Information Bill," concludes Thirion-Venter.

ELSA THIRION-VENTER
Elsa is currently the national chairperson of SAMRA. She held various positions in SAMRA for the past eight years. She's been involved in research for the past 25 years, both as a user and supplier of research. She is currently a director of MarkData (Pty) Ltd.

Predicting the FUTURE

Last year PriceWaterhouseCoopers (PwC) released the first *South African entertainment and media outlook: 2010-2014 (the Outlook)*, which contains forecasts and analyses focusing on 12 major entertainment and media segments. *Danette Breitenbach* asked Vicki Myburgh, partner, PwC, what it took to compile *the Outlook*

Vicki Myburgh, Southern African leader, Entertainment and Media practice, PwC

Q: What was the motivation to produce the Outlook locally?

A: PwC has produced the Global Entertainment and Media Outlook for 11 years now and we felt that there was a need in SA for more in-depth research and analysis on this specific market as, in many ways, it is quite unique.

Q: How did PwC go about setting up this massive research study?

A: The study is established in PwC (as mentioned above) with the *Global Outlook* – more recently, various regions have also produced a local version. The methodology and approach that is used leverages off the global research, but this was then narrowed down to focus on SA. The primary research is performed by Wilkofsky, Gruen, Associates Inc., a provider of global research and analysis of the media, entertainment and telecommunications industries. They also perform the research for the *Global Outlook*.

Q: What methodologies were used?

A: Firstly, historical information is obtained principally from confidential and proprietary sources. Where third party sources are consulted and their information is used directly – from such sources such as government agencies, trade associations – the sources are explicitly cited.

Second comes forecast information. Recent trends in industry performance are analysed and the factors underlying those trends are identified. The factors considered are economic, demographic, technological, institutional, behavioural, competitive and other drivers that may affect each of the entertainment and media markets.

Models are then developed to quantify the impact of each trend on industry spending. A forecast scenario for each causative factor is then created, and the contribution of each factor on a prospective basis is identified.

These proprietary mathematical models and analytic algorithms are used in the process to provide an initial array of prospective values. Our professional expertise and institutional knowledge are then applied to review and adjust those values if required. The entire process is then examined for internal consistency and transparency vis-à-vis prevailing industry wisdom.

Q: Why is the *Outlook* important?

A: Over the next five years digital technologies will progressively increase their impact across all segments of entertainment and media as digital transformation continues to expand and escalate. An uncertain economic background has done nothing to slow the pace of change, which has been far quicker than predicted 12 months ago.

Consumers are embracing new media experiences with staggering speed. The advancing digital transformation is driving audience fragmentation to a level not previously seen. However, the current wave of change is of a different magnitude from previous ones both in its speed and its simultaneous impact across all segments.

Marcel Fenez, Global Leader, Entertainment & Media practice, PwC said: "Some companies perceive the continuing fragmentation of the market as a threat... but it should be seized upon as an opportunity."

Outlook is a thought piece that looks at the trends we are expecting to see developing, challenges that companies are facing and certain factors companies will need to embrace to operate successfully in this rapidly changing environment.

Q: Forecasting key trends are risky business... or not?

A: *Outlook* seeks to analyse the trends we are expecting to see over the next five years as well as the factors expected to shape the industry. Forecasts are by their nature never precise and we are definitely not attempting to predict accurate numbers. The *Outlook* will be updated annually for the next five years and our forecasts will be updated as more information becomes available and as new trends emerge.

VICKY MYBURGH
Southern African leader, Entertainment and Media practice
Vicki has been with PwC for 17 years. She is a partner in the Assurance Practice and has been the Southern African leader for PwC's Entertainment and Media practice for the last two years. She spent a few years in London in the late 1990's working for the PwC practice there. Vicki has worked with many local and international media companies throughout her career and manages large cross border assurance engagements. She has contributed to many thought leadership publications.

Why we must safeguard our JOINT INDUSTRY RESEARCH

Sometimes, people ask me why we go to all this effort to produce joint industry media audience research. It's expensive. It's complex. It involves knocking on doors and drumming up funding. And, it's a political minefield that can often see decision-making dragging on for longer than usual. Yet, we've been doing it in South Africa for almost 40 years, and some countries have been doing it even longer

BY PAUL HAUPT, SAARF CEO

THIS IS BECAUSE THERE are a number of compelling reasons for carrying out joint industry research such as the AMPS, RAMS and TAMS surveys, which the South African Advertising Research Foundation (SAARF) conducts.

First, if the goal is to create an industry-wide research currency that can be used to underpin the buying and selling of media space and time, and which will provide information for target marketing and media selection, you need to be able to trust that currency.

The only way you can do this is if the research on which the entire industry is basing its rate cards and buying decisions is run by a joint industry committee so that it is independent, unbiased and cannot be influenced by any one media owner.

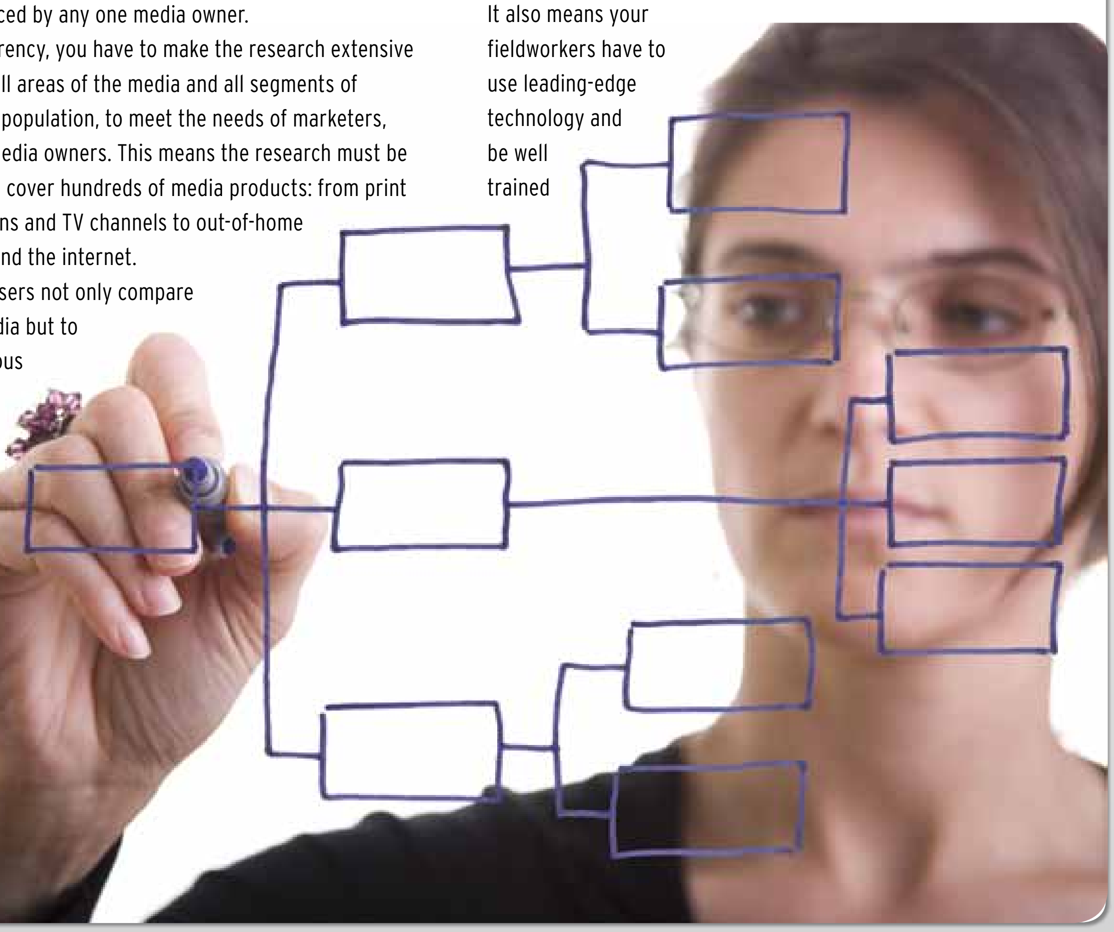
To create such a currency, you have to make the research extensive enough to cover all areas of the media and all segments of the South African population, to meet the needs of marketers, advertisers and media owners. This means the research must be national and must cover hundreds of media products: from print titles, radio stations and TV channels to out-of-home formats, cinema and the internet.

Such research lets users not only compare brands within media but to compare the various types of media as a whole to others. The only way to decide whether print, TV, radio or any other medium will deliver your target market better than another, is if you can compare them, and you cannot compare proprietary research done by different industry players using different samples and methodologies.

Yet, a national, all-media-encompassing survey would be too costly for any one media owner to conduct alone.

And then, as the basis of a financial currency, this research would need to deliver reliable, credible and accurate results. It would therefore need to be done to very high standards, which entails large samples that are selected using random probability sampling to ensure the results accurately represent the total population.

It also means your fieldworkers have to use leading-edge technology and be well trained



and experienced to ensure the raw data is above reproach.

Yes, while this makes joint industry research more expensive to conduct than proprietary research, more difficult to manage and sometimes slower, it is definitely worth not only preserving, but also strengthening.

Since it is carried out by an objective third party, joint industry research is unbiased. It is also in the public domain. One of the biggest advantages flowing from freely available data is that you can see comparable data for your competition, which in some instances could be of even more use than looking at your own results.

Joint industry research is more extensive and of a higher quality than could be afforded by any one player. When one industry body conducts it, as is the case in South Africa, Germany and Belgium, stakeholders can reap the benefits of synergies and cost savings, which would otherwise be lost.

Of course, joint industry research is not the panacea and cannot cater for all stakeholder needs. SAARF has always encouraged stakeholders to do complementary research where needed. The SAARF products – AMPS, RAMS and TAMS – are designed to give you a picture of what is happening in the market. With these research tools, you can see what has happened to media, products, brands and consumer behaviour over time. The 'why' behind these changes however, is not SAARF's domain. To fill specific gaps in their knowledge, individual stakeholders should conduct their own qualitative research.

As a body that represents the interests of three large stakeholder groups – the media, advertising and marketing industries – SAARF's research must benefit the whole. At times, we're accused of asking the wrong questions, or producing results, which seem 'wrong' to one player, but AMPS, RAMS and TAMS serve the greater good. SAARF does not decide this 'greater good' but is guided by its stakeholders.

'THE ONLY WAY TO DECIDE WHETHER PRINT, TV, RADIO OR ANY OTHER MEDIUM WILL DELIVER YOUR TARGET MARKET BETTER THAN ANOTHER, IS IF YOU CAN COMPARE THEM'

People from each industry sector, such as print, TV, radio and outdoor, sit on specialised tripartite committees to safeguard and advance the interests of their own sectors. An overarching committee then ensures that no one sector's interests are met to the detriment of any other. This consultative process is sometimes a complicated and time-consuming one but the results are worth it, as it is important to have buy-in from all stakeholders to ensure full support of the industry currency.

Lastly, funding or the lack thereof, will always be a complicating factor. Once all the committees have met and the stakeholders have spoken, the money must be found. This is never an easy job, yet the South African industry has one of the best track records in the world when it comes to consistent funding of currency research.

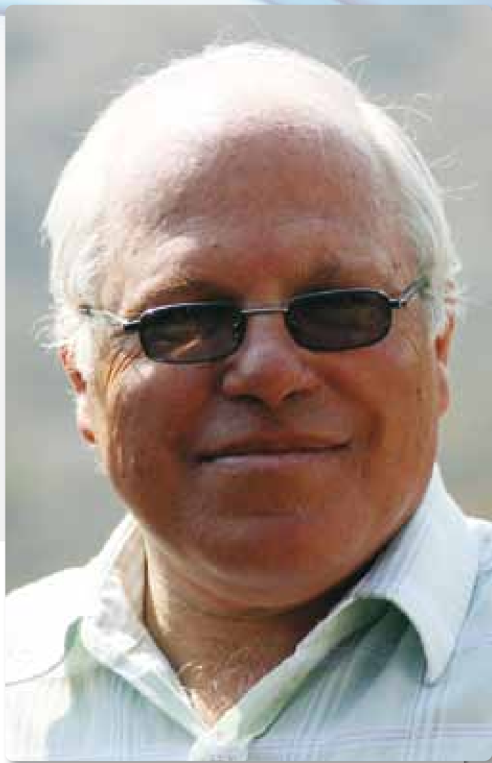
With the industry currently relooking the funding model, it is important for those involved in this debate to look at the bigger picture and ensure that this vital function, which enables the orderly trading of media space and time, gets sufficient funding to meet the increasing needs of a dynamic and changing industry. ‹

DR PAUL HAUPT
Paul is the CEO of the South African Advertising Research Foundation (SAARF), a position he has held since July 1998. He holds a PhD in Experimental Nuclear Physics from the University of Stellenbosch

What are we MISSING?

There can be little doubt that the media and marketing world is heavily focused on digital and where this is taking us all. That is as it should be – digital is the Brave New World of this decade

BY NEIL HIGGS, SENIOR ADVISER, TNS RESEARCH SURVEYS



Neil Higgs, head of Innovation and media at TNS Research Surveys

COUPLED WITH THIS AND especially critical in Africa, is the Other Brave New World of Mobile. Marry these together, and in the next couple of years we will have a New Order in communication between brands, people and researchers.

TNS's Emerging Market experts say that this will all be in place by 2014 – probably even sooner – leading to a revolution in how people perceive and interact with their own version of the world. This will change how people make buying decisions and how they react to marketing communications. It will also change dramatically how the research world gets feedback from people, let alone how they trawl the Web to tap into the conversations people are having that might affect their clients' brands and activities.

It is good and right that much energy needs to be expended – is being expended – on these new media and new channels. It is good that they are extensively discussed and debated. They will change how we think about how we interact with people, do research and interpret findings.

But does all of this change the essence of humanity? It certainly changes the 'how' of the way things might be done as the decade progresses. It certainly challenges our mechanisms and abilities to interpret the huge range of information flowing in. But do these new trends deserve the capital-letter status and hype they are receiving at the moment? Are they not just about the How? Are we beginning to lose sight of the Why? Is the human condition really actually changing?

Were the same conversations not being had when the Telephone arrived? When Radio arrived? When Television arrived?

All these things changed what we had to do and how we had to do it. They made us think about the nature of people – and we adopted a model of how advertising and communication works that was fundamentally wrong. Yes, it may have been a fair approximation in the first couple of years of each of these innovations, but people soon take these innovations as read and revert to type.

The last 10 years have led to a literal revolution in our understanding of how people use their brains to absorb and store information, how they use 'fast and furious heuristics' to make buying decisions and how they take the outcomes to drive future decisions. These processes turn out to have been with us for thousands of years – they are part of our evolution. In fact, as the pace of modern society becomes even more frenetic, these ancient survival mechanisms kick in even more.

In a recent presentation from TNS's Head of Consumer on the Bottom of the Pyramid, Sebastien Janini, a point he kept making was that we need to understand these people and their lives, their motivations, desires, how they view their world, their cultures and worldviews. They are one of the Next Big Things in his view, with huge potential for new opportunities.

If one takes these last two elements together, is this not still the essence of what marketers must do – understand the people? Does this not mean that, whilst the 'How?' might change (and this is a huge story in itself, to be sure), we still need to ensure we get the 'Why?' – the human condition.

So, by all means, let us play with excitement and enthusiasm in the Digital and Mobile (sorry, digital and mobile) space. Let us debate and discuss and write papers and experiment and have fun and learn. But let us also not forget that we are dealing with People, who actually evolve much more slowly than the world(s) they build around them. There are fundamental advances to be made in understanding people, how they live (to be sure) and what drives them to manage their lives in certain ways: their worldviews, their cultural filters, their morés, what is in their heads and how it got there.

In the excitement of new media, research cannot afford to forget the basic raw material they deal with: human beings.

NEIL HIGGS
Neil has been in research for 36 years and at TNS for 25 years. His roles are technical innovation, troubleshooting and public/media relations. He has presented 12 papers at the annual SAMRA convention (winning eight awards) and has presented overseas to The Institute of Statisticians, the Market Research Society in the UK, and the US Academy of Marketing Science. He has been published in *The Statistician* and *The Journal of Social Indicators* and was an invited speaker at the 57th Session of the International Statistical Institute, 2009. He is also an aeroplane nut.

IT'S A NGUNI, not a Guernsey!

There can be little doubt that the media and marketing world is heavily focused on digital and where this is taking us all. That is as it should be – digital is the Brave New World of this decade

BY MATTHEW GLOGAUER, DEPUTY MD AND CLAIRE SPEIRS, RESEARCH CONSULTANT, KLA

IT'S WONDERFUL BEING PART of an highly networked, interconnected, wireless, and completely plugged in global network - iPads, iPhone4s, BB PlayBooks, Twitter, 4G, blogs and vlogs, video messaging and all the rest! Except, while some of us may have the luxury of embracing technological innovation, how relevant is all of this to the 84.6% of South Africans, who are not connected?

Our conundrum – reconciling the fact that while, technology is the future it has wedged a great divide between us 'plugged in' South Africans and the broader market.

Globalisation is undeniably a force of progress, but it's also a somewhat 'mindless' beast – one we tend to allow ourselves to be led by, like a bull with a ring through its nose. We often get so caught up in the desire to stay at the forefront, that we don't apply enough critical thinking to the choices we make.

Let's posit that this is driven by thirds. One third by the apparent advantages of the thing we're choosing, one third by a human (animal) attraction to bright colours and flashing lights, and one third by an age-old self-doubt that the things we do in 'Deepest Darkest' are not as good as the stuff that comes from across the oceans.

We're not for a moment saying that we shouldn't pay attention to international trends. We strongly advocate listening to and monitoring what's happening at the 'bleeding edge'. We NEED to be aware of the latest and greatest.

With global companies implementing global practices, mandated processes from 'Head Office' or 'Global', there is a greater risk of not thinking through why we're doing things, and what we're doing. This can massively undermine the value of your spend. In the world of market research we're in ongoing danger of weakening the links to the reasons we are asking the questions, thereby further increasing the chance of not applying the critical thinking and individual attention which (ideally) each market research initiative should receive. Cookie cutters, (be they from the USA, France or Oman), only make cookies that match their own mould.

The point of all of the above is that, as marketers, our brands deserve a level of focus that reflects the time, effort, and money spent on them. Our consumers deserve products that deliver against brand promises and meet their needs in their real lives. The least we can do in this vein is to think what this part of the world needs and who can do it best.

So, while it's great to be linked in to the greater world network, we are South African – we have 11 languages accompanied by 11 cultures and most of us don't wear socks and slops. Understand your consumer in his/her context… choose a supplier who will link your results and insights to your larger strategy; a supplier who knows about the memes of the moment, but can tell you which are more relevant to you and yours – integrating, rather than imposing, global thinking. And beware of being led by the nose by people whose thinking and expertise is not proudly South African.

Claire Speirs, research consultant, KLA

Matthew Glogauer, deputy MD

SAMRA CONFERENCE promises to be insightful

Members and delegates to the 2011 conference of the Southern African Marketing Research Association (SAMRA), can look forward to an insightful three days of learning, knowledge sharing and networking, says conference chair Kim Larsen.
The event will take place 2 - 3 June this year at the Riverside Lifestyle Resort on the banks of the Vaal River near Vanderbijlpark

THE CONFERENCE WILL BRING together some 150-200 researchers, research users and marketers from all over southern Africa and abroad, with the objective of developing and advancing marketing research in the region by showcasing developments and discussing topical issues and new trends in the industry.

After an initial gruelling judging process under the chairmanship of TNS Research Surveys innovation and development director and industry stalwart Neil Higgs, 22 research papers and three keynote addresses have been selected for the conference. The total number of presentations currently stands at 25, but this may change.

TOPICS ADDRESSED IN THE KEYNOTES INCLUDE:

- **How doing good builds strong brands:** Being seen to do good is a powerful means to build a strong brand provided the brand first fulfils people's basic needs. If environmental and societal responsibility is to add value to a brand being seen to do good is as important as doing good.

- **Neuro-bullshitting:** The term neuro-marketing was only coined in 2002/3. Already the term neuro-bullshitting is freely used on many serious websites. Unfortunately, much of what is published by suppliers and the media is neuro-bullshitting.

- **Professionalising the marketing research industry** and why there is confusion within the marketing sector.

CONFERENCE PAPERS WILL ADDRESS THE FOLLOWING (SUBJECT TO CHANGE):

- **Attribute importance in customer/staff satisfaction surveys – A statistical approach:** Which method is the most accurate (and acceptable) method to calculate and report importance rankings of attribute statements?

- **Digital vs Analog: Aren't we still just humans?:** Are online consumers that different to their offline counterparts? Should we be marketing to them differently? Is 'digital' just another channel or media, for which the traditional models should work?

- **Mobile Research: iFuture or iFlop?:** How feasible is mobile research in South Africa and other developing markets? What is the effect of mobile research on research design, data quality and insights?

- **Lies, damned lies, and 'proofiness':** Do we care enough about potemkin, disestimation, fruit-packing, casuistry and randumdness? - To what extent is Joe Blog misled and lied to by market research findings being published without clear guidelines and rules from our industry Code of Conduct?

- **Touch, pause, engage:** Utilising mobile devices for qualitative consumer insights – How are mobile devices currently used internationally to conduct qualitative research? When is the mobile approach most appropriate? What is the future of mobile research in South Africa?

- **Will the heART of market research survive in a deadline driven industry?:** Why did market research project due dates become deadlines? What will happen if the word 'deadline' is replaced with the word 'due date'?

- **Market Simulation:** Offering a glimpse of the future – Can we accurately predict market share and what variables are likely to perturb markets in a dynamic environment.

- **Care and the cloud:** Care, carefulness and the era of cloudification – How careful is marketing research in adopting information technology innovations? While marketing research embraces these technologies, it is worth asking if the adoption is careful and caring – for the environment, respondent, researcher and workplace.

- **The science of attention and memory:** What Neuro-economics has to say about the high- or low-information processing debate – How do our brains decide what to focus on and what to remember? Understanding basic brain processes helps tailor more effective communications and improve business success and has huge implications for any marketer.

- **From quantum physics to quantum marketing research practice – a monistic view:** Has a new era dawned for marketing research practice (or not)? The paradigm shift as put forward by the monistic philosophy calls for a different engagement of marketing research practice.

- **MXed methodology: Using MXit to research SA youth** – How to research a representative sample of the SA population using a digital methodology, hence saving trees?

- **The role of brands in the social networking space:** Savvy marketers and brand managers have spied the opportunity to use the new social networking platforms to connect with consumers, with varying degrees of success. But what do consumers think about brands entering this social space?

- **"TRI-the-love-ANGLE":** Wellness model to map the world at the dawn of… – How well is the world when viewed through the lens of the SPD-Wellness Triangle model?

- **Rediscovering and rethinking the foundations and key developmental events in the market research industry and the implications of how market research is conducted and managed today:** What are the founding principles governing the industry until now and what are the core competencies that should be non-negotiable to contribute to the understanding of how the industry will remain relevant. How it will define itself, differentiate itself and contribute positively to the growing demands placed on it?

- **Do we care that social media may be killing the survey star?** Can social media stand alone as a source of customer information or is there still a strong case for online/community research?

- **The Game of Research: Utilising game mechanics and behavioural economics to improve online data collection:** How can game mechanics be employed to create sustained engagement and valuable contributions from online communities?

Kim Larsen, SAMRA conference chair

- **Engaging the unfaithful:** What are the elements of successful employee engagement? How can companies retain talented employees and build profitable businesses?

- **Applying adaptive conjoint analysis in the development of optimal pricing strategies:** How can Adaptive Conjoint Analysis be used to obtain insight into customers' price perception and price driven behaviour with regards to banking products? The specific aim is to create a tool that can be used in developing optimal pricing strategies that is market orientated and based on customers' preferences.

- **Mobile & digital technology & the application of needs-based research in sub-Saharan Africa:** What are the needs and motivations of mobile phone users on the continent? Based on the understanding how can appropriate technology be delivered in a way that is relevant to people on the continent? How can life-changing services like mobile banking be introduced effectively in markets where they are most needed?

- **Customers who care:** Best practice in segmenting ecologically conscious customers – This paper aims to examine the dynamic nature of ecologically conscious customers and assess the different segmentation alternatives to arrive at usable insights.

- **Third world sustainability:** Saving the rhino vs. better education – Against the backdrop of global trends which continue to align with green philosophies and the environment, the research will aid in gaining a comprehensive understanding of what constitutes organisational sustainability within the South African context according to corporate leaders, and how has this changed over the past few years.

- **Engaging Employee Research:** Providing an ear for the employer and a voice for the employee. How can employee research be improved to provide a more engaging research environment to gather research insights?

KIM LARSEN
Kim Larsen is a business manager at TNS Research Surveys and 2011 SAMRA conference chair. She has worked in research for over 10 years across a number categories and key clients

The puzzle of the BRAIN AND THE

One of the keynote speakers at the 2011 SAMRA conference, Erik du Plessis, Millward Brown (SA) non-executive chairman, well-known researcher and accomplished author of The Advertising Mind (2005), will shed some light on his new book *The Branded Mind – what neuroscience really tells us about the puzzle of the brain and the brand* (2011)

IN THIS INTERVIEW with Dr G P Sudhakar, professional in marketing and corporate communications, brand management in Bangalore, India, Du Plessis provides a sneak preview of his new book.

Sudhakar: What are emotions and what are feelings?

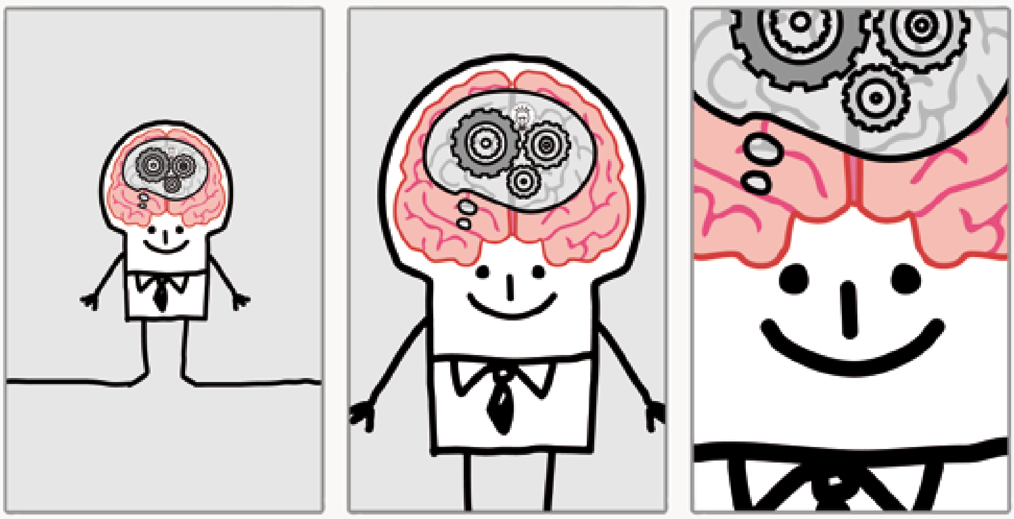
Du Plessis: Aha, this is where there are some new insights in my book. People often use these terms in inappropriate ways. Or, let me clarify, people tend to use the terms correctly, but scientists over-define the words and confuse themselves. The word 'feelings' is a collective noun for things like emotions, moods, culture, personality, homeostasis (which refers to the state of the body), etc. Each of these has a specific survival function. Emotions are reactions to our environment. In other words, this is how we monitor the environment for threats or opportunities for pleasure. Emotions happen in the amygdale – part of the primitive brain – and serve to make the consciousness aware of something in the environment, that is, an emotion forces our attention toward something in the environment.

Emotions occur fast because we need to react. Homeostatic feelings monitor the state of the body: hunger, thirst, temperature, etc. This works mainly through hormones and tend to be slower in their build-up. Moods are feelings that monitor the state of our brain itself. The brain cannot be excited for too long, or relaxed all the time. Moods tend to be slower in their build-up. Personality and culture are the 'feeling' things that tend to last the longest – much longer than emotions, moods or homeostatic feelings. One of Prof Damasio's big insights is that emotions are a feeling that plays off against the background of our other feelings. Depending on the state of our background feelings, we will experience different emotions. Before a meal, when we're hungry, food will give a positive emotion of anticipated pleasure. After a big meal, food could give us a negative emotion of revulsion.

Sudhakar: In simple terms and according to the latest findings, what is emotional, rational and functional in terms of our response to brands?

Du Plessis: According to the paradigm introduced by Damasio, we should not view emotion as something that stands in contrast to rationality. It's not a case that emotions lead us to being irrational. Instead, Damasio's insight is that emotions cause us to be rational. In his words: when we lack the capacity to experience emotions, we become non-rational. If one views this in terms of the brain structures, then sight (as an example) starts with neurons being recruited in the back of the brain, the process moves through the middle brain (limbic system) where emotions occur and ends in the frontal areas (where rational consideration resides). This, of course, is a vast over-simplification. Thus, emotions become an input to rationality. We know how we feel about something at the same time as we become aware of it. This allows us to think about what we should do about it.

It has become fashionable for some authors and creatives to claim



BRAND

Erik du Plessis, Millward Brown (SA) non-executive chairman

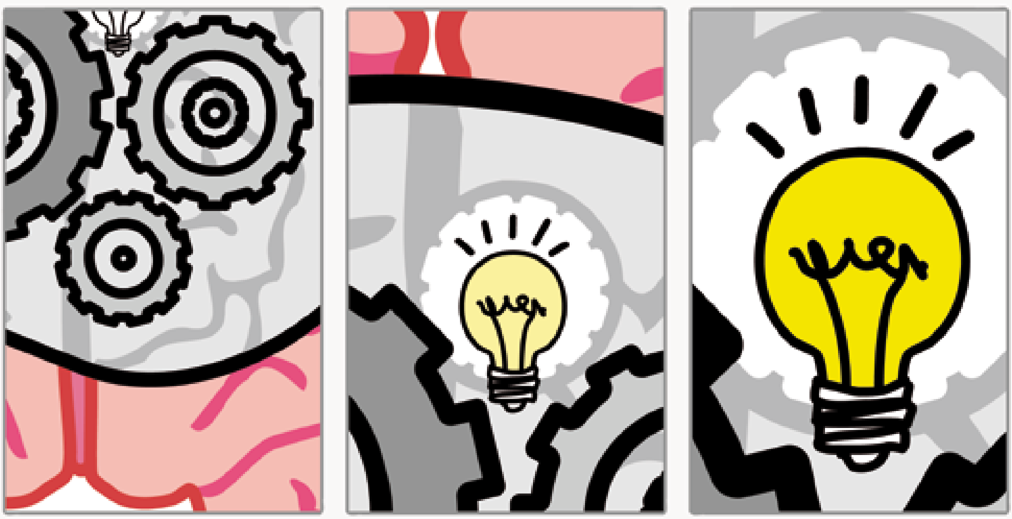
that 'neuroscience has proven that our decisions are emotional and not rational'. This is simply not true. Advertisers and researchers are often caught in a debate about emotional appeal vs. rational appeal. This often is simplified to 'making ads about the feelings the brand create' vs. 'making ads about the brands, functionality'. Even worse, this is sometimes reduced to simply a debate about an advertisement that is merely potentially entertaining. People rationally want to optimise their feelings. To do this they consider how they feel (or will feel at some point in the future) and the expected change in how they will feel after using the brand. If the functionalities of the brand are not going to produce the desired increase in 'feeling good', then a so-called emotional appeal will be useless. If the functionality of the brand will produce this improvement in how they will feel, then it is rational for them to choose the brand. Millward Brown's tracking database shows statistically significant empirical evidence that for a new brand telling people about its functionality works best, for a known brand reminding people about the feelings they will experience works best, and that mostly it is best to do both.

Sudhakar: It's becoming difficult to differentiate with many targeting the same segment with similar messages. You have suggested a brand new approach to segmentation. What kind of segments do you see in the future? Will demographics not be important in the new segmentation approach?

Du Plessis: I am not sure that I suggested a 'new approach' to segmentation. I suppose it depends on what type of segmentation people tried to apply before. I argue that you should not be one-dimensional in the way you try to segment the market. In other words, you should not only be using demographics, or only use psychographics, or only use need-states, or any pre-packaged segmentation. In SA there are cars that are mainly bought by younger people (demographic), cars that are mainly bought by women (demographic), mainly bought be wealthy people (demographic), mainly bought by adventurous people (personality type and possibly mood), mainly bought by status conscious people (personality), mainly bought by people that are outdoor types (personality and culture), etc. I'm suggesting that when market segmentation studies are done, these should use as many differentiators as possible to identify segments that could co-exist or even be across segments.

Suhakar: We are all now exposed to the concept of EEG measures being used for neuromarketing research – how does this fit in with what you say?

Du Plessis: The term 'neuromarketing' was coined in 2002, so the discipline is very new. EEG measurements – using electrodes on the brain scalp – are cheap and therefore have become the measure mostly used when we talk about neuromarketing. EEG measures immediate changes in the brain's electric activity – i.e. it does not measure slow changes in the brain, like hunger, thirst, personality, and culture. Emotions are quick reactions in the brain to the environment, so this is really all that EEG can measure. However, the feeling of emotion plays of against the background feelings: how hungry/thirsty/warm I am, my mood, my personality and my culture. Most EEG studies ignore these background feelings currently. This is one very good reason why one should be sceptical of studies that only use EEG measures. EEG measures can only aid in interpreting research findings based on questions and answers from the respondents. <



ERIK DU PLESSIS

Erik is non-executive chairman of Millward Brown. In 2005, his probing book, *The Advertised Mind: Groundbreaking Insights into How Our Brains Respond to Advertising*, brought him international recognition This year sees the launch of his new book, *The Branded Mind – What Neuroscience Really tells us about the puzzle of the Brain and the Brand*, which, again, has led to a number of international invitations to speak about his latest work.

ONLINE MARKETING
– surveys and beyond

Online research is the dominant data collection mode in the major research markets today, a status achieved over a very short period. Despite this global ascendancy, the adoption of online research has varied greatly in terms of country and region

Henk Pretorius is a co-founder of Columinate, an online marketing research company that specialises in online research approaches

IT IS ALSO ONE OF THE MOST dynamic and rapidly changing areas of market research with a diversity of innovations that might come as a surprise to those who still equate online research with surveys. But, while surveys are still a dominant part of all research conducted online, numerous other methods have also gained ground in recent years. This article gives a brief overview of the current online research landscape.

On a methodological level, online research approaches include both quantitative approaches (those types of research that aim to quantify perceptions, attitudes and opinions and analyse them through statistical analysis) and qualitative research approaches (types of research that aim to provide a broad, in-depth exploration on an issue, by generating themes from open-ended data sources).

Innovations in online research techniques in the last five years seem to have been mostly in qualitative research. Ironically, this form of research was once thought not to be a good fit for the Internet, but the current plethora of online qualitative techniques strongly challenges that position.

Below is a summary of some of the most prominent of these online qualitative techniques:

- **Online Focus Groups:** The online equivalent of face-to-face Focus Groups, participants and moderators interact for a few hours by using bespoke chat and discussion software.
- **Bulletin Board Groups:** Typically take place over a longer period than Online Focus Groups (several days), with potentially more participants. Most appropriate when respondents need to give considered responses and/or cannot all be convened in a shorter period of time (e.g. for a two-hour focus group).
- **Online Insight Communities:** A technique that best reveals the adoption of social media in market research. These communities

RESEARCH

are private online sites created and maintained specifically for research, with social network and research features, where hundreds to thousands of invited participants regularly spend time engaging in research activities over a period ranging from a few weeks to years.

These communities (also called MROCs – Market Research Online Communities) create environments where consumers feel they are interacting on a social network, while researchers are able to gather systematic feedback through research functions. The longest and most involved of all online qualitative methodologies and functionalities may include: discussions, blogs, surveys and polls, chat, profile pages, photo galleries, brainstorming areas etc.

- **Blogs as research tools:** There are two ways that researchers can use blogs in research: either as a platform where recruited participants are asked to express their feelings over a set period of time, or existing blogs can be used as sources of insight that can be mined for topics of interest to a research project.

Other cutting-edge online tools include netnography, crowd-sourcing, prediction markets, micro-blogging research and gaming surveys. New tools are being fashioned almost continuously, with developments on the Internet egging on the research innovators. In this regard, the influence of social media has been particularly evident in research inventions in recent years.

Astute researchers will never claim that one methodology works in all instances; rather, it is a case of each having its unique utility. This is as true of market research in general as it is of online research in particular.

ADDRESSING DIFFERENT GOALS

Different forms of online research have evolved to address different research goals and the collection of tools available means that a wider variety of research objectives can be met online than ever before. Some of the popular areas of application seem to be concept/product testing, customer satisfaction, advertising/brand tracking, usage and attitude studies, employee studies, website and online marketing evaluation, copy and design testing, business-to-business studies and numerous bespoke studies.

Marketers and researchers have recognised that online research can be successfully integrated with other forms of research, along with its ability to be a valuable standalone method. A quick online survey or online focus groups could guide the design of a bigger face-to-face or telephonic project.

Online research can also augment traditional research by providing access to hard-to-reach segments (upper LSMs, business-to-business, professionals) that prefer participating in research on their own terms. Integrating online research as a component in traditional research studies could offer the benefits of online research (lower cost, speed, access to difficult-to-recruit demographics) with the larger reach afforded by traditional methods. The online research community has also been responsive to concerns about the quality of online research, addressing issues such as sample representativeness, security of online materials and respondent honesty.

RESEARCH IN SA

South Africa's online research landscape is growing in leaps and bounds. Being latecomers to the scene has meant that we have benefited from learning from international mistakes, applying guidance from players in more mature markets who have been in this game for over 10 years.

In the past decade, online research has evolved from a small area of research to being the dominant data collection mode in the major world markets. The majority of innovations in research are occurring online, changing the very nature of market research. Add the rise of broadband Internet access; the increase in reputable companies offering online research services and the future looks bright for online research globally and locally.

HENK PRETORIUS
A co-founder of Columinate, an online marketing research company that specialises in online research approaches. He holds a Master's degree in Research Psychology and is a Research Psychologist (Independent Practice) registered with the HPCSA (Health Professions Council of South Africa). He has presented papers at national conferences and published papers in popular marketing magazines and industry journals and has appeared as a guest on radio discussing online research in South Africa. In 2009 he won both Best First Time Speaker and Best Overall Paper at the SAMRA Conference. Pretorius is also a guest lecturer on online research methods at North West University.

DIGITAL: TV's ugly stepsister?

What comes to mind when you think about 'digital' and how do you measure this effectively? For some Stone Age techno consumers, it is easy to believe that this only refers to that catchy little flashing ad in the corner of your designated home page

THE CONCEPT OF digital comprises of many fragments (from on line banner ads, to rich media content, on line gaming, mobi sites, mobile gaming and much, much more). Marketers know that digital is important (it just has to be, right?), but struggle to quantify the value of this. But, just how important are digital consumers to brands?

STRONGER RELATIONSHIPS

Millward Brown findings from the WPP BrandZ database (the largest repository of brand knowledge in the world) highlights that digital consumers have stronger relationships with brands than non-digital consumers. Digital consumers are defined as people who have bought from or searched for information about an individual category online. The report shows that digital consumers generally have strong relationships with more brands. In addition, some individual brands are disproportionately more appealing to digital consumers, highlighting the importance of understanding these differences within categories.

The research found that this difference among digital consumers was strongest for airline brand relationships, where digital consumers had nearly twice as strong brand relationships as their offline counterparts. Other key categories where digital consumers had stronger relationships than non-digital consumers included IT hardware and software (48% stronger), credit cards (33% stronger) and fragrances (29% stronger).

TRANSMITTERS

Another key finding is that digital consumers are more than twice as likely to be 'transmitters' – knowledgeable category consumers who influence others with their opinions. Digital consumers are likely to be slightly younger and more affluent, on average; compared to non-digital consumers and they place a higher value on creativity, excitement and having fun!

This is a global phenomenon, since digital consumers have stronger relationships in all 24 countries examined by the report; Japan and Taiwan (36% stronger) have the highest average digital relationship differences. As expected, countries with higher web penetration tend to exhibit stronger brand relationships among digital consumers. However, while Canada has a far higher web penetration than India, both have similar average relationship differences – suggesting the relatively small number of digital consumers in India is particularly important to brand owners.

TRACKING DIGITAL CAMPAIGNS

Now that we know how important digital consumers are, how do we track our digital campaigns more effectively? In any conventional media tracking study, marketers are often distraught at the fact that media awareness for 'above the line media' far surpasses awareness garnered from digital advertising.

The Millward Brown global tracking database, which comprises of more than 10 000 brands globally, shows that the norm for digital as a source of advertising awareness is less than 1% in South Africa, whilst the norm for TV is 16%. One might be forgiven for thinking that the internet norm is higher in more developed markets like the US, for example, the norm for digital it is only 3%, whilst TV is 13%.

So, TV is the star of the media world, with the internet her ugly step sister, or so it would seem.

In order to understand why the norms for internet awareness are so small, we need to take a step back and look at how most companies track media effectiveness. Usually, a question is asked along the lines of 'have you seen any advertising for brand X recently'. If a respondent answers yes, then a follow up question 'where have you seen that advertising' is asked. Whilst there is nothing wrong with asking ad awareness, the limitations of this question need to be understood.

Millward Brown has many learning's, which highlight media channels with the highest reach potential are likely to garner the most response. Added to this, TV normally dominates ad recall due to the fact that this rich, audiovisual experience often overshadows other media channels, and even in synergistic 360 media campaigns, consumers default to answering TV.

So then, perhaps there is nothing wrong with the internet, or all other digital platforms? Perhaps the problem lies in how we as marketers and researchers measure the contribution of digital – but how else would you measure all channels together?

TRACK THE WHOLE JOURNEY

It is crucial to find a holistic way to measure across all campaigns if you want to understand which of your many offline and online media investments has the most impact on desired brand outcomes – such as improving image perceptions, increasing brand loyalty and ultimately generating sales – or to understand how different media work together in synergy to impact these measures. Finding a common way to compare the output from different media is not easy, but it is possible.

MAXIMISE MARKETING INVESTMENT

By comparing the contributions of all the different media encountered along the consumer journey to purchase on an 'apples for apples' basis, you can gain a better understanding of which media combinations are contributing most to the desired brand response. This can help to guide future media budgets and ensure that the return on marketing investment is maximised. In the current economic climate, it is unlikely there are any marketers who do not want to maximise their spend, or better understand which activities make the most impact on what really matters for their brand.

And a lot can be learnt from the results. For example, the overall return from digital media may be greater per dollar spent than other media. However, a proportion of this may be due to it working in synergy with TV activity designed to help drive traffic to the web site. This level of understanding is important to ensure that planning recommendations take into account that some media may work better in conjunction with others and that looking at pure overall return per dollar online is only part of the story.

Monique Leech, account manager, Millward Brown

CROSS-MEDIA ANALYSIS

A cross-media analysis could help show the real benefits of having digital in the media mix – in particular, proving the value of including digital to those who have, until now, been nervous about spending money in new areas. If you can justify the spend on digital versus other media competing for the same pot of money and show how it fits into the overall marketing mix, it will make it easier to decide to include it in future.

In conducting a cross-media analysis, a few things need to be taken into consideration. For example, it is important to measure before and during a campaign to ensure that you take into account how people felt about the brand before being exposed to the media. Otherwise, there is a risk of wrongly attributing a media effect (e.g. a significant increase in consideration) to a group who were heavily exposed to the media, when in fact, they already had high levels of consideration and that is precisely why they were targeted more heavily by the campaign.

MEASUREMENT

It is also important to consider how the media exposure is being measured. Of course, in the digital space, the most accurate way to measure exposure to media is to use cookies. For other media, there are different methods, some using recognition and some using media consumption questions. Although recognition can have its advantages, the use of media consumption questions tends to provide the most impartial and complete estimate of media exposure. It is not subject to misattribution in the way that recognition is. Further, recognition is really measuring the impact on people who have already remembered the copy (likely due to power of the creative) so it is more of a measure of remembered effect than actual media exposure in terms of opportunity to see.

CONCLUSION

The benefits of using cross-media campaigns to build brands are clear. But, many marketers are a long way from both understanding the synergies that they provide and using them to hone the efficiency of their media investments. Measuring digital campaign effectiveness need no longer be done in isolation from other media. The true value of digital campaigns lies in understanding the contribution they make to other media and the contribution that other media make to the overall digital strategy. <

MONIQUE LEECH
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International affiliation: Synovate
Area of expertise: Mainstream market across financial services, telecoms and packaged goods sectors. Our practices encompass customer experience, product testing and brand and communications.
Unique selling point: the most local global research company
Company profile: African Response is a full-service market research agency providing qualitative and quantitative research. We have the flexibility to conduct research anywhere in country with a regional springboard into the rest of Africa. We are renowned for generating local consumer and market insights to help grow brands and businesses in South Africa. Our exceptional ability to understand and interpret the needs of the South African mainstream market, coupled with our association with Synovate [one of the big 4 custom research firms globally], makes African Response the most local global research company in South Africa
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Ask Africa

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Date established: 1995
Area of expertise: Customised research.
Unique selling point: Simplifies research to shape futures (Respected and relevant field force capabilities; rigorous data quality control processes; latest innovations in software and project management systems; advanced statistical and analytical capabilities and highly qualified and passionate research teams).
Company profile: Ask Afrika is a proudly South African market research company with an international flare that guarantees local relevance and globally benchmarked expertise. Ask Afrika's Orange Index has benchmarked local service excellence for the past eleven years. The Ask Afrika Trust Barometer uncovers the most trusted and admired companies and leaders in South Africa and Ask Afrika prides in owning TGI South Africa, part of an international network of harmonized market and media research surveys, present in over 60 countries around the world. Since its inception in 1995, Ask Afrika has been committed to being an equal employer as well as an entrepreneurial company that visibly seeks ways to contribute to the upliftment of its communities. Ask Afrika is a strategic research partner that applies active intellect and connectivity to customise solutions and provide credible results and consulting services to its wide range of blue chip clients. Ask Afrika simplifies research to shape your future.

Bateleur/Khaya

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Date established: December 1993
International affiliation: ESOMAR
Company profile: For over twenty years Bateleur has partnered blue chip companies in developing and delivering winning brand strategies for their markets.
Our underlying philosophy is that great strategies are rooted in a deep understanding of consumers' needs, their perceptions about brands and how these drive their behaviour. Your brand's relevancy to consumers, coupled with its competitive superiority lies at the heart of a winning brand strategy.
At Bateleur we have developed a host of unique, tried and test research tools designed to understand consumers needs, perceptions and behaviours in ways unattainable by run of mill research methods. These unique insights lead to a crystal clear understanding of your Brand Topography™ and Critical Brand Dimensions™. This understanding, coupled with the experience of Bateleur's senior partners, is the secret to creating winning brand strategies.

KLA

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Area of expertise: Market research
Company profile: KLA is a premier, full-service African market research company, focused on strategic Client delivery and partnership, offering added value and insightful market intelligence. Having started off with a focus on qualitative expertise, KLA has continued to evolve over the past 20 years, and has grown from being one of SA's leading qualitative market research agencies, into a skilled African practitioner in both the qualitative and quantitative arenas. KLA also partners top companies with brand health tracking, staff evaluations and mystery shopping initiatives.KLA's latest infrastructure investment enables us to operate in the internet-based and mobile-based market research environment, with a focus on Online Panel development, Ad hoc Online,Quant, and Online Qual. KLA's uniqueness lies in our ability to bring fresh-thinking and Client-oriented approaches to every new challenge. KLA is affiliated with and is a full member of Esomar. KLA has a partnership with Women's Development Bank Investment Holdings (WDBIH), allowing KLA to achieve a strong LEVEL 3 BEE scorecard.

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Areas of expertise: Brand and Communications Research - Tracking, Brand Equity, Pre and Post Testing, Neuroscience Insights, Digital and Social Media Evaluation, Cross Media Analysis, ROI Modelling and our qualitative boutique, Firefly.
Unique selling point: Unrivalled understanding and expertise of clients' brands. We have a learning culture; deriving knowledge from every project we do to build experience, insight and understanding about what drives consumer loyalty towards brands and how communication of all kinds affects that loyalty.
Company profile: Millward Brown is a leading global research based consultancy that provides a full range of qualitative and quantitative solutions. We help guide business decision making to ensure that the marketing investments that companies make have the greatest financial payback. Our expertise spans from communications assessment and media evaluation, to brand performance monitoring, and marketing accountability. Today, we continue to push the boundaries of marketing research and brand consulting. Powered by insight, innovative thinking, and a rich heritage, we focus on providing actionable solutions to address key business issues.

Synovate

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Area of expertise: Customer Experience, Advertising and Communication, Brand Equity, Consumer Understanding, Mystery Shopping and Product Testing
Unique selling point: Research reinvented
Company profile: Synovate has offices in Bryanston, Rivonia, Cape Town, PE, and Durban and is the market research arm of Aegis Group plc. It generates insights to help clients drive competitive brand, product and customer experience strategies. A truly borderless company with offices in over 60 countries, our approach combines best in class global research capabilities with personalised service, local knowledge and the flexibility to create teams and processes that meet clients' specific requirements. At Synovate, our clients sit at the top of our organisational chart, driving us to continually develop more innovative research solutions that predict actual business outcomes. In South Africa, Synovate has been a preferred supplier of market research to leading blue chip companies in South Africa since 1989. We offer the highest levels of market research expertise and exceptional human and technological resource and our data collection capabilities are unsurpassed in the South African market. Synovate South Africa is ISO 20252 and ISO 9001: 2000 certified and BEE compliant.

TGI

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Date established: 2003
International affiliation: A global company
Area of expertise: Syndicated research.
Unique selling point: Enables superior consumer trend profiling (Large scale single source consumer survey measuring demographics, media consumption, media attitudes, lifestyle, 450+ products used, 8000+ brands used, and psychographics)
Company profile: TGI is an international network of harmonised market and media research surveys, present in over 60 countries around the world. TGI offers an extensive and flexible range of solutions to meet your marketing needs.
TGI has been in South Africa since 2003 and its central purpose is to describe the characteristics of consumer target groups and recommend effective strategies that enable communication with these audiences. Its large scale, single source consumer survey is recognised as a market leader for yielding strategic market information on consumers' demography, attitudes, media consumption and usage of products & brands. TGI seeks to provide excellence in commercial interpretation, bringing research alive throughout the client organisation to influence better decisions.

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