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Interview

mit GfK-CEO
Matthias Hartmann

Special

Information und
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Schwerpunkt

Von der Idee bis ins Regal

Markt- und Meinungsforschungsinstitute aus der ganzen Welt haben sich zum Netzwerk WIN zusammengeschlossen. *planung & analyse* hatte die Gelegenheit mit den Vertretern aus Deutschland, Brasilien und Australien exklusiv die Produktmarktforschung der Zukunft zu diskutieren. Wie für ein internationales Netzwerk naheliegend, ist die gemeinsame Sprache Englisch, deshalb dieses Interview hier in der Originalsprache.

Innovation Research for the Future



Laure Castelnau ist Executive Director des brasilianischen Institutes IBOPE Inteligência und dort zuständig für Marketing in Lateinamerika.

planung & analyse: *When it comes to innovation research, how has the role of market research agencies changed in recent years?*

Laure: Until about ten years ago, most of the money spent on market research was focused on studies looking at the past and present behaviour of consumers, such as usage & attitude studies. The search for future trends and innovation tracks has become more frequent in the last ten years. As such, the demands on research companies began to change and they had to invest in and develop innovative techniques. Many techniques have emerged to allow ideation and co-creation, mostly qualitative. And many disciplines were merged into innovation research: design thinking, some anthropology techniques and semiotics are just a few examples. The role of research companies ceas-

sed to be merely descriptive and became more creative, consultative and trend-focused. In parallel, many advertising or branding agencies and also many "boutiques" appeared on the market, calling themselves experts in innovation. And, more recently, online agencies and even Google have started to play an important role in innovation studies. What we see most often today is the realisation of many online innovation studies via online communities, crowdsourcing and gamification. Additionally, the search for future trends and innovation tracks is increasingly turning towards big data and data mining studies. At the same time, researchers have been unable to defend themselves and they failed to incorporate this segment into market research. So "innovation" currently has different types of providers generating overlaps, positioning is confused and so on.

Peter: It's useful to answer this question from the perspective of companies, consumers and research firms. In general terms, we see three major company trends in innovation processes in Australia: companies are now searching for "fewer, bigger, better" rather than the more tactical line extensions. Global companies are centralising the research functions associated with innovation and bringing them in-house. Retailers are rapidly growing their Private Labels ranges and are now becoming active in innovation. Interestingly, we find that consumers have noted a reduction in the amount of innovation from companies, and they are now taking more personal responsibility for the creation of excitement and variety in the products they use. We see this strongly evidenced by the increased interest in craft-based products and the success of Masterchef-style cooking shows on television. Research companies like us are noticing an increasing demand for strategic research and a reduced demand for research further down the innovation funnel. As companies have shifted towards the "fewer, bigger, better" strategy, we have found that there has been an increase in more strategic needs-based research at the beginning of the process and a heavier emphasis on volumetric estimation during and at the end of the process. With companies investing more in fewer initiatives, there is a growing requirement to reduce risk through the use of consumer research.

Heiner: I remember controversial debates about the role of market research in the development of new products. Market research agencies used to have an image of killing creativity and of promising ideas rather than stimulating innovation. The role of research was limited to delivering data and insights. Things like concept and product testing, pricing studies and conjoint analysis are still relevant pillars of innovation research, but in recent years agencies and clients have come to understand that innovation research goes beyond reducing risk. Instead, a significant part of the job nowadays is to inspire, provoke and

emotionally influence decision-makers with research findings.

“Thinking outside the box”, “pushing boundaries” and “leaving well-trodden paths” are catchphrases of creativity and ideation. However, many companies still don’t think of market research when they need inspiration and strategic support to shape their future. Why do you believe market research agencies are ideally placed for these creative and strategic tasks?

Heiner: We have the know-how and the infrastructure to deliver solid data for innovation decisions. We are also familiar with research methods such as ethnography, for going beyond what can be objectively seen and heard in order to find relevant insights and hidden needs. So the starting position of research agencies is pretty good. No doubt, though, leading a creative process requires additional skills and puts the researcher in a different role. Most of our clients welcome this as they know that market research and creative tasks go very well together.

Laure: As an industry, we are not regarded as ideally placed because many agencies are still too attached to the old techniques. In fact, we fight a lot to be recognised as “creative and innovative”. In Brazil, we were among the first research agencies to set up a range of ideation tools. They include ideation workshops, online co-creation, collaborative and non-collaborative methods and verbal and non-verbal methodologies. It shows that lateral thinking and market research cross-fertilise and lead to fascinating solutions.

Peter: Ideation is a valuable complement to research. Experience has consistently shown that creative techniques are a great way to gain insights. Participants work intuitively, making intriguing new connections and associations, and thus also revealing their hidden

wishes and motives. Every creative idea also provides inspiring insights into the desires of the consumer.

Where do you currently see the most challenging areas of market research in the field of innovation?

Laure: Considering that everybody copies everything very quickly nowadays, the first challenge is to create a regular and continuous innovation process to allow clients to differentiate their brands. In addition, the challenge is to create techniques that are capable of representing the future behaviour of consumers and, at the same time, speak their current language and attract and encourage people to participate. The set of techniques used in the last ten years for innovation is not valid any more. They still depend a lot on verbal speech. It’s necessary to develop a new set of techniques and tools

combining the verbal and non-verbal, offline and online. Hard technicality has no place any more; we have to replace it with flexibility, intuitiveness and experimentation.

Heiner: Given the changing role of the researcher, agencies must look for and foster new talents. Storytelling, leadership and creativity are critical skills when it comes to helping clients shape their business. Finding these talents and engaging them in multidisciplinary teams with experts from other fields is a big challenge for both clients and agencies.

Peter: There are challenges at every stage of the innovation process. Perhaps the most challenging stages are at the beginning when it is necessary to identify the consumer need and determine the size of the opportunity. There is a requirement for the researcher to be the objective partner at times when the client might be overcautious or overenthusiastic. At the beginning of the process, consumers are not always able to articulate their needs or be clear about the features of a product or service. The skill of the researcher is often required to help close the gap between consumer need and product delivery.

Let’s be more specific. How do you help your clients identify hidden needs and white space opportunities?

Peter: We could speak at great length about the identification of white space opportunities. However, the principles we use are the creation of perceptual maps which are more like street directories than segmentation models. In these perceptual maps, we utilise spa-



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Marktforscher aus aller Welt

WIN ist eine internationale Kooperation in der Marktforschung. Sie besteht aus 77 unabhängigen Markt- und Meinungsforschungsinstituten. Aus jedem Land ist nur ein Unternehmen vertreten. Der Gesamtumsatz der Mitglieder beträgt über 500 Millionen Euro. Dies deckt 95 Prozent des Weltmarkt-Volumens für Markt-

forschung ab, heißt es bei WIN. Die Mitglieds-Institute verfügen über profunde Kenntnisse der Methoden und Techniken des eigenen Landes. Sie arbeiten regelmäßig zusammen, sei es um gemeinsame Studien herauszubringen oder um Wissen und neueste Forschungsergebnisse auszutauschen.



tial mapping to map needs at various levels against the positioning of available brands and products. The white spaces are found in the gaps where there is a sufficient volume of needs but a lack of products. The techniques commence with motivational qualitative research and progress to quantitative techniques involving marketing science.

Heiner: Identifying white spaces is a critical and demanding process. It's like looking for something that doesn't exist yet but will ideally become the starting point for successful innovation. Our role in this process differs client by client. Increasingly, clients want us to facilitate their internal discussions. In cross-functional teams we reframe the topic. That means we analyse and combine research findings, trends, consumer needs and values, expert knowledge and inspiring innovations from other categories. My experience is that this inspirational change of perspective is extremely helpful in identifying new opportunities for innovation.

How do you integrate intelligence on market trends and consumer values, needs and behaviour into the innovation process?

Peter: We find that our best approach is to retain the "objective observer" role in the process. However, there is a strong requirement for the researcher to probe consumers for an expression of their needs and to translate consumer language into meaningful product definitions. We find it extremely helpful for the researcher to be aware of market trends as well as broader social change. We run a long-term monitoring process to assist our clients in determining whether a trend is likely to have a short lifespan or be more enduring. Successful innovation can be as much about the timing of delivery as about the quality of the product.

Laure: As researchers, we talk to and observe consumers every day. Our hands-on experience from various industries of consumer behaviour and drivers, as well as trends, always allows us to provide inspirational input. However, we have to scrutinise the specific drivers and meaningful trends for every project. Once we have gathered and filtered the meaningful information for the client, we conduct a workshop to identify the business opportunities behind it.

Heiner: Market trends and needs are also incredibly helpful for giving ideation sessions a dynamic shift in perspective. We use micro-trends or personas with typical behavioural patterns in the creative process to get the creative juices flowing again.



Peter Kenny ist bei dem australischen Institut Colmar Brunton Managing Director Asia Pacific und Vorstandsmitglied von WIN.

You mentioned ideation. To what extent can you guarantee your client will ultimately come up with creative and relevant ideas?

Peter: A creative process always entails the possibility of failure. However, generating ideas becomes much more predictable and efficient if it is approached in a structured manner, rather than as an intellectual game. Ideation is a systematic process with a clear focus.

Heiner: I completely agree. You have to focus your search for ideas within clearly defined search spaces but leave enough room for lateral thinking. You can develop much more specific solutions this way. Preparation is another key to a successful ideas workshop. Each person needs to have enough time to get to grips with the subject. We give our creative thinkers time to let the issue really sink in. We start to set specific tasks days before the ideas workshop begins. It's important for participants to have really engaged with the issue and for lots of exciting ideas to begin to germinate. The ideas then come to fruition in the actual workshop.

Laure: In the end, it all comes down to the people who ideate. We think very carefully about who should be in the team. The ideal group consists of volunteers who are highly motivated and enjoy tackling challenges. It's vital to have a diverse mix of impulsive people, analytical thinkers, optimisers, realists and visionaries. Before the ideas workshop takes place, it's necessary to think about how to deal with the different personality types. Who can be integrated most effectively where, and when? Who needs to be kept in check on specific points?

How have social media and mobile technology found their way into your innovation tool box?

Laure: The mutual benefit in innovation requires organisations to engage with consumers and consumers to engage with organisations. Whilst there have been many effective mechanisms for engagement between consumers and organisations in the creation of innovation, the more recent developments in web-based technologies have increased the opportunities for engagement. It's now possible to listen to social media to identify needs sooner, and new tools are emerging for reaching smaller niches with specific needs.

Peter: As researchers, we find the closer we can get to the point of purchase and the point of consumption, the clearer the understanding of purchase decision drivers and of emotional and rational consumption benefits becomes. Mobile technology is a wonderful new tool for researchers to obtain words and pictures at these critical points in time.

Heiner: We use mobile research along the entire innovation process. Let me give you two examples. Mobile ethnography delivers genuine insights into respondents' lives, their daily hassles and workarounds. These findings are ideally suited to identifying white spaces for innovation. On our ideation platform, participants frequently use smartphones to gather and share inspiring impressions and comments with others. Mobile technology also enables them to post spontaneous ideas every time something pops into their minds.

Let's take a look into the future. What's your vision of innovation research in 2020?

Laure: For innovation research along the entire process, I expect further integration: integration of techniques, professional disciplines and research methodologies. I also see increasing demand for more intuitive and implicit approaches. My desire would be to allow more time for immersion at the fuzzy front end in order to develop even more meaningful innovations.

Peter: 2020 is just five years away now. However, I believe that by the time it arrives organisations will be increasingly differentiated by the intellectual capital they have built up, or that they are capable of creating. Intellectual capital may eventually be assigned a balance sheet value that is tradeable. A critical outcome of this intellectual capital will be the capability to deliver profitable innovation ahead of competitors. In this "knowledge age" the role of innovation research will be to contribute to the intellectual capital owned by the company. It is likely that this type of research will be less about short-term tactical innovation (which is likely to be conducted in-house by the company) and more based on strategic market knowledge, which will require the input of specialist research agencies.

Heiner: For many clients, research agencies will remain tried-and-tested partners providing valuable data and insights by means of traditional market research. However, in 2020 I think we will regularly recruit multidisciplinary co-creation teams, we will spend more time engaging clients and consumers, we will have more pictures and videos to depict relevant insights and there will be more workshops led by researchers on how to innovate. We will see more storytelling and inspiring presentations, but also take ideas to the crash test stage very early on. So innovation research in 2020 will sometimes be a source of inspiration and sometimes a dragons' den.

► Die Interviewpartner

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Produktforschung für die Zukunft

Die Rolle der Marktforschungsagenturen hat sich stark verändert, darin sind sich die Marktforscher aus Deutschland, Brasilien und Australien einig. Das Image des Marktforschers als reiner Datenlieferant und Killer von innovativen Ideen gehört jedoch der Vergangenheit an, glaubt Heiner Junker von produkt + markt. In der Produktmarktforschung gehört es zu den Aufgaben der Agentur, Entscheidungsträger zu inspirieren, um Innovationen zu finden. In Brasilien müssen Agenturen allerdings um den Ruf, innovativ und kreativ zu sein, kämpfen, berichtet Laure Castelnau von IBOPE Inteligência. Marktforscher sehen sich genau wie die Hersteller gehetzt durch die Kultur der schnellen Kopien. Auch Einzelhändler sind innovativ für ihre Handelsmarken und ahnen jeden Trend schnell nach. Gefragt sind zunehmend kreative Techniken und Methoden, um versteckte Bedürfnisse des Konsumenten zu finden. Denn die Techniken der vergangenen zehn Jahre sind überholt, weiß Castelnau. Gefragt sind Flexibilität, Intuition und Experimente. Junker weist darauf hin, dass es dabei immer wichtiger wird, die richtigen Talente zu finden, die mit den Kreativ-Tools so umgehen können, dass sie den Kunden überzeugen.

Aber wie können Marktforscher ihren Kunden helfen, die verborgenen Bedürfnisse zu entdecken? Peter Kenny, Managing Director von Colmar Brunton aus Australien, arbeitet mit Wahrnehmungszuordnungen.

Für die Bedürfnisse werden räumliche Zuordnungen geschaffen, die dann mit den vorhandenen Marken und Produkten in Relation gesetzt werden. Junker ergänzt: „Wir analysieren und kombinieren Forschungsergebnisse, Trends, Bedürfnisse und Werte der Verbraucher mit Expertenwissen sowie Innovationen aus anderen Kategorien zu einer neuen Produktidee.“

Aber können Marktforscher den Kunden nicht nur kreative sondern auch relevante Ideen zusichern? Ein kreativer Prozess beinhaltet immer auch die Möglichkeit des Scheiterns, weiß Kenny. Ideation sollte ein systematischer Prozess mit einem klaren Fokus sein. Aber wichtig ist, auch genügend Platz für Querdenker zu haben, wirft Junker in die Debatte. Außerdem braucht ein solcher Innovationsprozess auch genügend Zeit.

Castelnau aus Brasilien beschreibt, wie wichtig die Zusammenstellung einer idealen Gruppe für den Prozess ist: „Es muss eine Mischung aus impulsiven Menschen, analytischen Denkern, Optimierern, Realisten und Visionären sein.“ Bei der Ideenfindung spielen auch soziale Medien und Mobile Research eine Rolle. Für das Jahr 2020 versprechen die drei Marktforscher mehr von all dem: Mehr Storytelling, mehr Co-Creation, mehr Workshops. Das „intellektuelle Kapital“ wird zum entscheidenden Erfolgsfaktor von Innovationen. Die Rolle der Marktforschung wird also wesentlich vielschichtiger: von der Inspirationsquelle bis zum Crashtest für Innovationen. p&a ◀

Heiner Junker ist Managing Partner der Agentur produkt + markt. Zudem ist er Vorstandsmitglied und Westeuropa-Koordinator von WIN. Junker ist spezialisiert auf Forschung und Beratung entlang der Innovation-Roadmap. Die Projekte umfassen die qualitative Forschung, kreative Ideenfindung, Konzeption und Produkttests. Junker entwickelt proprietäre Ideation-Techniken und Werkzeuge und berät Organisationen in diesem Bereich.

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Peter Kenny ist Managing Director Asia Pacific von Colmar Brunton, einem australischen Marktforschungsunternehmen in Sydney. Er ist zudem Vorstandsmitglied von WIN. Nach zehn Jahren Erfahrung mit der Entwicklung von Lebensmittelprodukten sowie sieben Jahren in verschiedenen Marketing-Positionen bei FMCG- und Einzelhandelsunternehmen wechselte Kenny in die Marktforschung. Er ist Gründungsdirektor von Colmar Brunton, eine der größten Marktforschungsagenturen in der Region. Er hat über 2000 Innovationen begleitet.

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