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EVERY MOVE YOU MAKE]

All over the world there are teams of people videotaping other people doing their laundry, making breakfast, playing with their kids and taking a shower. They're not voyeurs; they're ethnographers, helping businesses deliver what consumers really, really want.

Jo Bowman reports

It's easy to spot the flaws in traditional market research. Ask most people if they buy sugary cereal for their kids and of course they say they don't. They eat their greens, only watch documentaries on television, and exercise daily.

Reality, of course, is often very different, and for businesses looking to serve customers in what they really do, it often takes a kind of research that goes beyond asking questions.

So, businesses are increasingly looking to ethnography – a social science technique used for decades by anthropologists but only really recently being exploited by the corporate world – to see how and why people really do what they do. In essence, ethnography is watching people do what they normally do, where and when they normally do it. Danish toy company Lego is a big fan of ethnographic research. "If you want to know how a lion hunts, don't go to the zoo, go to the jungle," says Flemming Ostergaard, its director of global innovation and marketing.

Microsoft is among the many companies now taking ethnographers into the consumer jungle. Its researchers have watched people in their homes setting up their new computers, to try to simplify the process for future customers. The difference between ordinary people's experience of a new computer, and the experience of the slightly geeky

volunteers who used to help Microsoft test things like this, is vast.

Toyota has been on drive-alongs with motorists to see how they drive, and how they use different features in their cars. Procter & Gamble famously came up with the idea for the Swiffer mop range when it realised, through ethnography – watching people clean their floors, that

is – that householders were spending more time cleaning their mop than they were spending cleaning their floor.

Ethnography isn't just about catching out liars in surveys. Asking questions does rely on people's honesty, but also in their ability to accurately recall what they do, and being aware of what they do and all the reasons why. Joan Vinyets, ▀



who runs the ethnography-focused agency A Piece of Pie, in Barcelona, says ethnography “provides information that people are not able to articulate ... and so many times people are not conscious about the things that they do”.

At market intelligence consultancy, The Nielsen Company, Crystal Nathan, the Sydney-based head of qualitative research, says there’s been a huge upswing in client demand for ethnography in the past few years, even though it’s been available for over a decade. It now accounts for between 40% and 60% of all the qualitative research that Nielsen does. The appeal, Nathan says, is in showing how consumers decide on one brand versus another, something now being used by finance companies, white goods makers and healthcare brands. Nathan’s ethnography projects have even included a study of sex workers on the job.

Siamack Salari, whose global company, EverydayLives, counts Coca-Cola, British American Tobacco, Kellogg’s, MasterCard, Samsung and Merck among its clients, says ethnography gives clients “a reality check”. He adds: “You see how people decide whether to go to McDonald’s or Starbucks? What does that instant look like? You find things you didn’t know you didn’t know.”

Some companies use ethnography to explore a new group of consumers they know little about. Others use it to inspire new product ideas, modify product designs, reassess packaging and pricing, and inform their marketing strategy. Ethnography shows not just what people buy and how they use it, but also the way they find new uses for things they buy, and how they improvise when they don’t have a single product that does the job they want. Research by Intel into the lives of older people showed how their fear of falling over affected so much of what they did. Chairs positioned by the bed, just in case, for instance, were something they wouldn’t have thought to mention because they weren’t always conscious of having made adjustments. Ethnographers, however, could see it.

At Philips, the Arcitec electric razor was developed to tackle frustrations identified in ethnographic studies of men shaving: styling and getting the bottom of the neck right were a common problem. Federico Trovato, vice president of consumer market intelligence at Philips’ consumer lifestyle division, says the company has used ethnography for a year or two. Philips has also used it



“You can read a lot from a report, but it’s not the same as being there”

Marta Tantos Aranda design manager at Lego’s Conceptlab,

to see how people use their AV equipment – how it fits into their homes and their lives – and water purifiers, a new range for the company. “When you answer rationally to questions about water, you find out that X% of people say they filter,” Trovato says. “But you see the level of care they take, or their frustration with it. It really colours what we get with quantitative research.”

At Lego’s product innovation centre, Conceptlab, design manager Marta Tantos Aranda, says that while the company already has a mass of research on children and families, ethnography provides a new depth of understanding. “From the design process, the more you understand the person you’re designing for, and the more empathy you feel, the easier it is to design the right experiences for them. You can read a lot from a report, but it’s not the same as being there.” Watching families helped Lego understand how boys created hierarchical structures in their play, and spot the difference between parents’ perception of the time allowed watching TV and playing video games, and the much bigger, actual role screens play in children’s lives.

Ethnographic research usually involves spending between half a day and three days in a household, with the researcher present rather than relying on video. At EverydayLives, Salari selects portions of footage and then goes back to those involved and asks them to narrate the film, describing what they were doing and why. The time-consuming nature of ethnography means it’s expensive when compared to more traditional data collection methods, such as an online survey, and sample sizes are small. Video diaries are often used to keep costs down.

The presence of the ethnographer can affect the way people behave in the home, Salari concedes, but he insists that this does not negate the value of watching. “Clients say ‘won’t they just show you the things they want you to see?’. Yes, sometimes they will, and you come to understand why. You have to identify moments when you might have had an effect, and there’s a big difference between acting natural and being natural. Being natural happens after about half a day. I’ve filmed plenty of rows and fights. I just leave the camera running and walk out.”

Vinyets says initial nerves fade quickly, and with the right person doing the research, most people relax after about 10 minutes. “After that, they don’t care, if you create the right climate to make people feel comfortable. Of course, when you ask people things they can lie, but if it’s a conversation spanning three or four hours, you can see they’re doing the opposite of what they tell you they do.”

Ethnographers usually don’t tell the people being watched who the client is, or even what kind of product or service is involved, to minimise any bias in behaviour, though they are told afterwards. Nathan says recruitment of willing subjects is surprisingly easy. “It’s amazing how curious people are; they like to be involved in a project like this.” Salari even had people willing to shower for the cameras several years ago. His client, a shower company, said: “If you can’t film them in the shower naked having a proper, real shower, don’t do it.”

“Privacy and ethnography are not the easiest of fits,” Salari admits. “By definition, a film will be made which will be shown to other people. We obviously have disclaimers, releases and privacy statements which must be signed off by respondents, but nothing can substitute a detailed chat with respondents to explain why we are conducting the study ... and who will see the footage.” EverydayLives also destroys tapes after two years.

Users of ethnography say one of its greatest strengths is not actually in discovering something new, but in illustrating and bringing to life something they already know is the case. Convincing a CEO to commit to a new product line, or to scrap a multimillion-dollar ad campaign that’s ready to roll, often takes more than a PowerPoint presentation. “This really brings the consumer from the bedroom to the boardroom,” says Nathan. “It puts the zing back into research.” ■