

TOO MUCH REALITY?

THE PERILS OF EASY ACCESS TO HEARTS, MINDS AND BEDROOMS

Anjali Puri • Sangeeta Gupta

INTRODUCTION

Year: 2010

Event: Annual brand planning workshop

Scene: Team of brand custodians including research agency, advertising agency and brand management watching video footage from an ethnographic project among teens. The teenagers have been asked to film highlights of their lives for a week, and they have been startlingly enthusiastic. We get glimpses of banter and leg pulling, fantasy-laden bedrooms, swearing and smoking, classroom defiance and disruption, “wild” partying, rock band practice sessions. The team watches in voyeuristic glee, marveling that they have been allowed access into such private recesses of consumer lives. This is so much more fun than the average research presentation.

Until someone in the room asks: So what’s the learning here? How is this different from the way we were in college?

LETTING IT ALL HANG OUT

Research, particularly qualitative research, is increasingly about celebrating an immersion in real lives and real people. For the last 15 years, our battle cry has been centered on moving out of the contrived contexts of focus groups and into real contexts and natural environments. And we seem to have achieved that quite emphatically. A random scan of proposals written by our team last year showed that 38 out of 50 had an element of ethnographic or observation-based data collection built into them. All the qualitative presentations we have been part of in the last three months have had video footage showcasing consumer realities in some form. And any self-respecting market researcher is excited by the open access to real lives and spontaneous conversations made possible by social media. The last decade, after all, has been about letting it all hang out. Spurred on by a heady cocktail of YouTube, Facebook, and Blogspot, inspired to recklessness by reality shows and armed with webcams and camera phones, consumers are reveling in living on the internet ... and adapting to the thinning lines between the private and the public.

And we seem hungry for more, with client briefs demanding, and newer tools promising, even greater “consumer intimacy” (a term that seems to be on the agenda of a great many industry conferences). Worse, there seems to be a clamour for more granularity and texture in narrowly defined fields of vision – for example, a need to know the nuances of how consumers in rural India use their refrigerators and the problems they face ... while ignoring the looming truth of no electricity, which is the far more pressing starting point of innovation.

CONSUMERS ‘UNCUT’

We also find a huge growth in the client demand for direct experience of raw, ‘uncut’ consumer data – video footage increasingly takes center-stage in our debriefs, not as an illustration of an argument but as a key deliverable. The explosion of social media has also led to the new-found thrill of interacting with consumers directly – providing access to another version of ‘authentic, unfiltered reality’.

One example of this phenomenon is the profusion of online ethnography services emerging in large agencies and boutiques alike. The extract below is from one such service (and we would like to stress that its use as an example here is not intended as a critique of this service in particular, but as a comment on the trend in the industry).

XYZ uses the power of video and the convenience of the internet to redefine qualitative market research. ... get candid, truthful video answers from your most important consumers. XYZ ... provides intuitive tools for researchers to analyze, notate and download raw video, and analysts enjoy a seamless workflow for organizing playlists and creating dynamic Video Reports.

Another example is the following extract from an article by Edward Boches titled “Do we still need the one-way mirror when we have Twitter?”

“Compare (... focus group data) to what we, as marketers, can get on Twitter: 24/7 access to what real customers are thinking, feeling, saying and wishing for. We can listen, ask questions, seek advice, and solicit reactions... ”

And a reader response to this

“...And now, with Twitter Search -- you can get information that's real and raw -- yielding much better insights than anything you'll ever find in a focus group”.

THE LURE OF REALITY

There are some important reasons why uncut reality seems to be taking centre-stage in our industry today. Discussions with clients and researchers point to three themes driving the reality bandwagon. It is worth briefly examining these.

1. *The need for engagement:* Fragmented attention spans are a truism that we live with. As users as well as providers of research we recognize the phenomenon of information overload, and what Linda Stone calls ‘*continuous partial attention*’ – a state created by our networked lives where we flit from one activity to another, being partially immersed in all but not sufficiently attentive to any. It is harder to engage our attention, and this is as true of us as clients as it is of us as human beings. As researchers, we all recognize the need to make our debriefs far more engaging than before – *and slivers of reality in the form of video and consumer voices add impact and drama* to what used to be much drier presentations.

“In our media-rich culture, the convention most people are used to for persuasion about contested issues and the reporting of human experience is not print. Our clients don't read anthropology journals, they often don't even read the editorial page – they watch TV”. (Gavin Johnson; Video, Ethnography and the Corporate Environment)

2. *The appeal of the story:* What we react to in ‘uncut reality’ are basic human stories. Stories have the ability to draw us in, to hold us at an emotional level – there is something fundamentally seductive about them that appeals to us at a universal and primal level.

“The narratives of the world are without number...the narrative is present at all times, in all places, in all societies; the history of the narrative begins with the history of mankind; there does not exist, and never has existed, a people without narratives.” (Barthes, 1996)

Such stories contain the magnetism of ‘gossip’ in them, fascination for which is hardwired into us (McAndrew, 2008). This innate enthrallment with ordinary details of the lives of others is what drives us to watch reality TV, soaps, YouTube ... and avidly follow the lives and times of near strangers on Facebook, Twitter and Blogspot. *It is the same magnetism that drives users of research to look for and enjoy ‘raw’ data rather than a more processed account ... the verbatims and pictures and video footage that a piece of research produces are able to generate far more resonance and identification and create the feeling of understanding an issue first-hand.*

3. *The need for novelty:* There is huge pressure on researchers today to produce ‘new insights’, and we find that novelty is often easier to produce at a superficial, anecdotal level than at a deeper level of analysis. Video footage of small-town Indian teenagers engaging in leg-pulling and banter with the opposite sex on the terraces of their homes, away from adult eyes, seems interesting to the upmarket, metro-centric user of research; but the underlying need that drives this – teenagers’ desire for their own space within the outwardly ‘protected’ confines of the home – seems like a cultural truth they knew all along. In over-researched categories or segments where a lot is already known (but not always acted on), the cry for newness is often hard to meet at a ‘fundamental needs’ level but there continues to be enough novelty in the details of individual lives.

THE TRAPS OF REALITY

So where is the problem? Shouldn't market research at its best be about enabling better understanding of consumer lives and realities? Of course it should. There is no debate that we have made great strides in the last few years with respect to the quality of data that we can now access, and the version of "reality" that we now place before clients. We also have no argument with the tremendous value of using video to illustrate our stories and the engagement it adds to our presentations.

But we believe that the preoccupation with studying and showcasing the gritty texture of real lives, and particularly the way in which video and other forms of "reality" are being used, is cause for concern because:

1. It leads to excessive data orientation.
2. It disregards the importance of the researcher's 'frames' and the value of the subjective, interpretive view.
3. And finally, at a broader level, it keeps us rooted in the present reality, whereas the consumer is increasingly rooted in possibilities.

Let's look at each of these briefly:

1. Data orientation

Qualitative research has made a transition from being the "voice of the consumer" to being a solutions-provider, with consumer data being one of the inputs to arriving at the solution. However, today, the excitement about experiencing consumer lives in all their textured detail seems to have taken us back into a data-dominated mode – we are celebrating the video as we once celebrated the verbatim. Some of our own proposals showcasing digital tools have been guilty of claims like "*300 photos, 40 videos and 500 texts of life-as-it-happens ... all in a week!*"

We're certainly becoming much better storytellers and making more impactful presentations. The problem, however, is that a data-oriented mindset has led to a *preoccupation with the micro-story*. The stories we are telling are of the nature of *anecdotes* – we have a flood of interesting, personally and emotionally revealing snippets of particular people in particular situations. Unfortunately what we are often left with as a result is the impact and drama of individual stories, but not a sufficient analysis of multiple stories to create meaning or a larger construct. *We are stopping at a collection of anecdotes, where what we need to aim for are stories of the nature of legends*. Anecdotes fuel involvement and engage the heart – but they keep us focused on micro-realities. Legends engage the mind and fuel wisdom – they open doors to macro-possibilities.

2. Objective vs. 'framed' reality

The preoccupation with 'consumer realities' also has implicit in it the *seductive notion of an objective reality* out there – one that we have managed to capture on camera or field notes. Ethnographic data is particularly subject to such an illusion, given that our intuitive wisdom typically directs us to rely on our senses ("seeing is believing"). It is important to remind ourselves that what we witness will always be a version of reality, a subjective interpretation framed either by our own filters or framed for our benefit by the researcher. *It is this framing that gives value to the data*, although in the seduction of being witness to 'actual reality' it is easy to forget the existence of the frame.

Good qualitative research involves an *imaginative framing of reality*, made possible by a researcher who has seen possibilities in the data that are not apparent to the ordinary view. Good qualitative research is neither about presenting reality as it is, nor about distorting it – it is about the *ability to zoom in on the facet of reality that enables the mind to leap*. Some good examples are provided in this wonderful talk by Paul Bennett of IDEO¹⁾ where he demonstrates the value of living the experience in generating inspiring design solutions. One of the 'realities' discussed in the video is that of lying in the hospital bed all day – but the reality of patient experience that is presented to us (boredom, de-humanization) has been framed compellingly to lead us to the solutions that he subsequently presents. It is not 'objective' reality, or a reality that everyone would see.

3. The tight vs. the panoramic frame: From reality to possibility

Lives are transforming at a rapid pace and many of the breakthrough innovations of our era have come from the realm of imagination and possibility – not necessarily by working bottom-up from existing consumer needs and realities. We are concerned that focusing excessively on micro-reality – striving to dig deeper, to get more intimate – *may keep us from opportunities that come from looking at the big picture*. There are two reasons why focusing on the bigger picture is worthwhile:

- a) Technology has changed us in unthought-of ways, and started to create an expectation of dramatic change, several times over, in a single lifetime. Consumers have become more receptive to and less suspicious of dramatic innovation.

The life-changing impact of recent technologies – which many had not foreseen a “need” for – has resulted in optimism, a belief in transformation and an impatience with the boring constraints of life as it is. Youth living in small town China feel emotionally centered in Shanghai and are often willing to take a pay cut to move to the big city. Illiterate farmers in remote villages in India find themselves connected on the internet. Base of Pyramid consumers living on less than \$2 a day, barely managing to feed their families, think a mobile phone is a worthwhile investment.

- b) Secondly, as the world turns its attention on emerging markets, we are, at the macro level, dealing with remarkably different cultures – but many of the human needs at an individual level remain intuitively similar, and knowledge of the macro culture and socio-economic environment is a more useful input to finding a solution, rather than an up-close, dig-deeper analysis. For example, we are increasingly doing a lot of work with the Base of the Pyramid consumer – a consumer who is socio-culturally and economically very different from the mainstream consumer even in emerging markets. What we find is that the big opportunities for marketers lie in addressing the larger, more obvious needs – infrastructure challenges, affordability issues, nutrition deficiencies, etc. Where research needs to help is in prioritization – in helping to understand which markets and segments to target, and what spending priorities are likely to be. We will elaborate on this point via an example in the last section.

We thus believe we need to zoom out from tight close-ups to more wide-angled views; to look beyond micro-realities to a larger socio-economic whole. While both – the close up and the panoramic view – are necessary and serve different purposes, we are doing far too much of the former and not nearly enough of the latter. The latter still tends to be the domain of consultants, and is something we still seem to fight shy of.

RE-ORIENTING OUR ROLE

We believe that qualitative researchers are doing themselves a disservice by focusing excessively on their role as providers of consumer reality. “Reality” (in the way it is currently defined and sought) is going to be increasingly cheap and plentiful in today’s technology-enabled, data-surplus world. In an environment where there is increasing celebration of direct access to consumer voices on the internet, researchers cannot simply be intermediaries between consumers and marketers. *To remain relevant we must re-orient our roles* around the more sophisticated skills that we have the potential to bring to the table, but are not doing enough of. This section presents some thoughts that address the three issues we’ve discussed above:

- Getting beyond data and anecdotal stories, and reclaiming our role as meaning-makers;
- Asserting the subjectivity and skills involved in framing reality in ways that inspire the imagination, and cultivating these skills actively;
- Zooming out and using the macro view effectively.

1. Reclaiming meaning-creation

This is not a new idea – much of what we want to say on this topic is simply drawn from revisiting the traditions of analysis and meaning creation in qualitative research and ethnography. To pinpoint the gap that we are noticing in present-day analyses, we’ve discussed a three-level analysis framework based loosely on grounded theory principles. A typical qualitative or ethnographic exercise should ideally consist of:

- A. *Observation* – the gathering of facts, the creation of thick descriptions of events without interpretative overlay.
- B. Three levels of analysis:
 1. *Interrogation*: This is the first, basic level of analysis that involves questioning and scanning the data to find patterns, identify recurring themes that suggest answers to the central question.
 2. *Bridging*: This is about embedding the patterns in a larger environmental context – in other knowledge about the “field” under study (which might range from something as wide as a socio-economic or cultural context to as specific as a retail environment).

What we observe target consumers do and say within the boundaries of a research project is a small part of the whole picture. The socio-cultural environment that we are a part of has a large role to play in shaping our needs and our lives, and much of this exists at an implicit, taken-for-granted level. In our analysis we tend to put far too much emphasis on the stated and the observed parts of individual motivations and behavior, and not enough on the unsaid, unseen and intangible contextual fabric that might seem out of focus but may actually add the most meaning to what we are observing. ‘Bridging’ is simply about the understanding that everything occurs within a context and that it is important to overlay this context on data to complete the picture.

The intangibles that build contextual knowledge often don’t surface directly as primary data – either because they are so obvious and taken-for-granted that they are not articulated, or because they are macro realities that cannot be seen ‘on the ground’ and need an aerial view to spot. They therefore need to be extracted from other

knowledge and sources of information - either tacit, intuitive knowledge, or formal knowledge from other research, or a read of the media environment, social trends and popular culture. The examples that follow will help illustrate what we mean by contextual knowledge of this kind.

3. *Extrapolation*: Extrapolation refers to the development of enduring theoretical constructs – extracting elements of the learning that are transferrable to other similar contexts, and become part of a body of knowledge about “how things work” in a specific set of circumstances. This adds to the cumulative knowledge on a category or segment, and heightens the impact of a useful insight by ensuring it “lives” beyond a project and is leveraged in multiple future contexts.

Although it may not seem to be an immediately necessary level of analysis from the perspective of an individual piece of research, we believe that discipline with respect to this stage has two important benefits:

- a. It provides another round of challenging and sharpening our thinking, forcing us to focus on the truly enduring learnings and implications from the research;
- b. It creates a *habit of continuity* in our thinking and ways of working with clients – leading to genuine partnerships and consultative relationships.

Coming back to the meaning-gap in present-day analyses, it is worth first pointing out that we have actually done well as an industry at the observation level – thanks to technology, our descriptions of the ‘field’ are much richer than before; and our increasing recognition of the respondent as co-creator generates a more authentic ‘emic’ perspective compared to what we would achieve in the slice-of-life observations that commercial market research usually uses as data.

With respect to the three levels of meaning-creation, however, we often find qualitative research stopping at level one (i.e. interrogation or finding patterns in observed data). This is not necessarily a level lacking in usefulness or solutions for the client problem, but it can be a less holistic understanding leading to a less than optimal situation. We’ve attempted to illustrate this below with a couple of examples.

The first is an example of retail ethnography, which we’ve described in detail to explain what we mean by these three levels, and to illustrate the outcomes at each level of analysis. The second is an attempt to layer this thinking onto the youth research that guides communication insights for the Pepsi brand. This is not an outcome of a single study, but a review of how analyzing various pieces of work at ‘level 1’ kept us from achieving the breakthrough that we have managed this year. The level 2 analysis illustrates why the current communication is working so well, and is useful to examine since it provides pointers for the brand communication going forward.

EXAMPLE 1: OVERCOMING A TRADITIONAL TRADE CHALLENGE

One of the big challenges that LRBs (Liquid Refreshment Beverages) face in the traditional trade channels in India is maintaining visi-cooler purity (i.e. not stocking other products or brands), and getting retailer compliance with the company-prescribed planograms. Marketers usually provide a visi-cooler to the retailer free of cost, with the understanding that it will be used to stock their brands; the expectation is that the retailer will:

- a) stock the visi-cooler in accordance with a prescribed planogram (a predefined mix of company brands and SKUs displayed in a specific way); and
- b) not stock any competitor brands or other products in the visi-cooler.

The research was designed to understand barriers to compliance with the visi-cooler agreement, and find ways to enhance compliance. To provide some context, the visi-cooler was restocked once a week by the company service reps, who were also responsible for ascertaining compliance when they came to restock. The research design consisted of in-store observations before, during and after re-stocking along with interviews with the retailers.

Level 1: Interrogation: Some of the key themes from the observed data were:

1. Most retailers had a mix of products other than Pepsico brands in the visi-cooler. Typically these were dairy products and chocolates; occasionally they were competitive brands of cold beverages. Each visit by the service rep involved removing other products from the cooler.
2. The stocking process was a long and cumbersome one and tended to be a hindrance to business in the store. The stores were typically short on space, and visi-cooler was designed in a way that opening the door to re-stock often took up space and blocked movement. The retailer was thus keen to get the service rep out of the way quickly, and let him stock the visi-cooler in the desired way. However, once the service rep was out of the store, other products were put back in.

3. The planogram itself was complex; restocking involved taking out all existing bottles from the cooler so that the new stock (which wasn't chilled) could be put at the back, and then the cold bottles put back in. The retailer was thus unlikely to follow the planogram when re-stocking the cooler himself.

If you imagined videos of what was going on in these stores, you would see a very compelling picture of bulky visi-coolers blocking up space in highly cluttered stores, a wide door that opened outwards sealing off all remaining space every time it was left open, chaos in an already chaotic environment as cold bottles were taken out and placed on any available surface, while new bottles were placed at the back. You would see the retailer shrugging as the dairy products were removed from the cooler, anxious to see the service rep leave the store so that he could get on with his business. You would see a resigned service rep leaving the store with the knowledge that his careful re-arrangement would not last for long.

Going by the above patterns, the following solutions suggested themselves had we left it at this level:

1. Simplifying the planogram.
2. Redesigning the cooler so that it was easier to restock without having to remove existing bottles. Also redesigning the door to take up less space when opened.
3. Incentivizing the retailer to not stock other products in it by announcing prizes for compliance based on random checks.

Level 2: Bridging: An understanding of the traditional trade environment and the retailer's priorities adds another layer to the above analysis.

1. The visi-cooler agreement is typically drawn up by the marketer under the assumption that providing a free visi-cooler to the retailer deserves a quid pro quo in terms of compliance with planogram requirements and maintaining cooler purity. However, the retailer's perspective of the issue is quite different. For him, the space in the store is at a premium; the stores are tiny and every available inch needs to be utilized productively, by stocking products that are high margin and have high turnover. He tends to see his decision to accept a visi-cooler as space that he is renting out to the marketer; he also believes that since he is providing the space, and is paying for the running costs of the cooler, he is free to stock the cooler as he pleases.
2. Floor space – which the visi-cooler requires – is especially at a premium compared to shelf, counter-top or air space since the floor is where he stores staples. The staples, for a large section of traditional trade stores, form the heart of the business. So giving up floor space to a visi-cooler again 'entitles' the retailer to do as he pleases with it.
3. The other categories central to the business are everyday purchase categories like milk, yogurt, bread, eggs. In terms of contribution to his business, therefore, LRBs fall far below dairy products – particularly milk and yogurt which get his regular customers into his store on a daily basis. Therefore, to not stock dairy products in a cooler which is taking up space in his store is ludicrous to him – no amount of incentives can change this behavior, since to change it would be in conflict with one of the fundamental drivers of his business.

Understanding the larger context helped bring about the recognition that it was important to collaborate with the retailer and help him rather than fight him when it came to stocking dairy products. This led to a visi-cooler design that had a 'hidden' compartment for dairy products, meeting the retailer's need while keeping the visible sections of the cooler 'pure'. It also triggered thinking on design innovations that could offer flexibility with respect to occupying floor space (e.g. a visi-cooler on wheels which could be moved around).

Level 3: Extrapolation: Finally, we need to extract from any piece of strategic work the enduring constructs about 'how things work' – the learning that can be applied to other similar contexts. In this example, for marketers grappling with the traditional trade environment, it is essential to recognize the importance of:

- a) Identifying and not getting into a direct conflict with categories that are high margin and high turnover for the retailer (in this case bread, eggs, dairy products);
- b) The high premium placed on anything that can help the retailer manage floor space within the store.

EXAMPLE 2: STRIKING THE RIGHT EMOTIONAL CHORD WITH YOUTH

Much of the research we do for the Pepsi brand is focused on understanding youth – Pepsi is a brand about being young at heart and needs to stay in synch with what it means to be young. Historically, Pepsi in India has been known for its provocative advertising and stance against convention. In the last few years, however, the communication has not had the same emotional resonance with youth.

A brief example of the youth insight that drove the last campaign vs. the current one illustrates the difference we have been discussing about levels of analysis.

A series of 'level 1' analyses (*interrogation*) of data on youth needs in India told us that youth in India are increasingly confident and spunky, they revel in pushing boundaries, and that 'beating the system' – outwitting adults and other figures of authority to get their own way – is a highly aspirational quality. Pepsi advertising in the last few years has revolved around this theme of outwitting figures of authority, combined with the dominant youth trend of that period. For example, the 2010 advertising had gaming as a theme, based on the observation that gaming was becoming hugely popular in the country. While appealing enough, much of this has been low-impact compared with the once-iconic status that the brand's advertising had.

A level 2 (*bridging*) analysis of the issues directs our attention towards the larger change in status that youth are experiencing in Indian society. India has traditionally been a system that has revered age – but it seems to have finally relinquished control to the young. There is also a parallel socio-cultural evolution in the country as a whole – a greater confidence when interacting with the rest of the world, greater optimism and belief in oneself, a greater awareness of India's growing importance in the new world order. So what we have now is a generation of young people who believe their time has come, living in a country that believes its time has come. While themes like 'outsmarting authority' or 'beating the system' are not off the mark, they are symptoms of a much more far-reaching belief that it is possible to change the system itself. The latest Pepsi campaign ("Change the game") reflects this insight, and has been among the most successful campaigns for the brand in recent years with track data showing significant upswings in brand salience as well as bonding post the campaign.

Stretching the analysis to level 3 (and laying the ground for *extrapolation* to future brand communication) yields the learning that youth aspirations (or the country's aspirations) are no longer focused on beating 'the other' – they are focused on celebrating their own inventiveness, their own capacity to push boundaries and surprise themselves in the process. Continuing to focus on youth vs. 'the other', drawing literally from their lives, leads to a much narrower interpretation of youth spunk and audacity and keeps us from a deeper and more resonant insight.

2. Inspiring the imagination: Cultivating the serendipitous frame

Much creative development and design research requires ethnographic inputs that frame reality in unexpected and intriguing ways – perspectives that spark recognition and empathy as well as surprise. There are many exceptional examples of qualitative work that has inspired creativity – work where the researcher's frames make an obvious difference, showing the audience a fresh angle and revealing a 'reality' overlooked earlier (such as in the IDEO example in an earlier section of this paper). However, this is far too often a capricious outcome of individual talent combined with luck, and harder to pin down into a process. Given the parallels this has with the creative process, we thought it would be useful to seek inspiration from the creative world on how to make this a more accessible and consistently applied skill. We've had a few conversations with and reviewed writings of creative people in ad agencies, writers and filmmakers to understand how and what they look for in the reality around them to fuel the creative process.

Most creative people believe that insights and ideas cannot be chased – they surface spontaneously at unexpected times.

"Ideas choose us. It's not in my hands to go find the best ideas. I can only be a worthy medium, the wire rather than the electricity" (Prasoon Joshi, Chairman, McCann Erickson India; as quoted in The Economic Times, May 2011)

"You need to wait for insights to come to you ... like you can't catch a butterfly if you chase it, you have to wait for it to sit on you" (Josy Paul, Chairman, BBDO India in a one-on-one interview)

However, two consistent themes emerged from these conversations that seem to be worth emulating to heighten our sensitivity to creative possibilities:

1. Immersion or sponging

Immersion is a much abused term in the research context, but there is no better term for describing an alertness to the environment, curiosity about events and people, and sponging in of life-as-it-happens. To quote Prasoon Joshi again, *"you need to be a student of life to succeed in advertising"*. Immersion of this kind makes for more finely tuned antennae and a greater receptivity to ideas and insights when they do come along. It also results in a mental warehouse of ideas and fresh perspectives on everyday issues – a warehouse to draw from when the need arises.

This is something we do understand as an industry – we go out of our way to recruit people with diverse talents and backgrounds, people with interests and passions beyond their jobs, because we believe it makes them more open and

receptive – better “students of life”. Most good researchers (particularly qualitative researchers) are keen observers of life, and use their observations to cultivate a “point of view” or “frames” that they bring to the research process.

The truth remains, however, that receptivity and curiosity of this kind are often as rare and precious as creativity itself, and do not come naturally to everyone. Experience sometimes takes the place of natural curiosity, and can result in the development of a point of view by virtue of having worked in a specific kind of environment for some time. This results in a situation where clients trust and value the subjective “frames” of some researchers more than others – either by virtue of their industry experience or their individual qualities.

While making the point that these are qualities worth cultivating, we also have the more practical suggestion that *agencies should invest in creating knowledge and points of view* on the themes that marketers are commonly interested in. This would mean self-funded “research on life” – without a set agenda, other than to gather interesting observations on consumer segments, issues and categories that are considered important to clients. We call these Life Labs, and are currently creating such bodies of knowledge on the Emerging Middle Class, the Base of the Pyramid, and Cultural Archetypes.

At present, the development of a ‘point of view’ seems to be left to chance – it is an outcome of individual qualities or randomly accumulated tacit knowledge from client-funded work that we happen to work on. Making this a more formal process can help develop a consistent set of frames that an agency brings to the table.

2. Anticipation

On 2nd April 2011 India won the cricket world cup, and much was written about the expression on captain MS Dhoni’s face as he hit the winning boundary. Several ‘lucky’ photographers captured that wonderful expression, but were they really so lucky? It was the last over of the final, and anything that Dhoni did at that moment would have been worth recording on camera – it was a moment with high potential for drama, and all photographers probably had their cameras trained on his face, hoping to capture something!

Spotting something unusual, intriguing or captivating (what we call ‘drama’) is often a matter of looking for it. This is partly an outcome of the receptivity described above but is also about being conscious of situations and contexts that have the potential for drama. Anticipating drama is something creative people do well, and is a skill researchers would do well to cultivate.

Apart from a point of view cultivated through immersion, anticipating drama comes from:

- Focusing on archetypal themes – for example in the ethnographic work that we do among teens for Pepsico, the “drama” is often in situations involving romance (texting under the radar while sitting with parents, using a visit to the temple to meet a date), parent-child differences (the misunderstood hero stalking off to his room), defying authority and breaking rules, peer-group initiation rituals (pranks and dares at youth hang-outs);
- Knowing the frictions or stress points in the context or segment under study, and focusing on situations where those frictions are heightened.
 - For example, in an ethnographic study on breakfast opportunities, one common source of friction that we were conscious of was the lack of time to eat a complete breakfast before leaving for work or school. A common refrain we heard from mothers was that there was no time to eat an elaborate breakfast like cereal – which was mystifying, since cereal is as instant a breakfast as possible. Focusing our attention on the time that the child is leaving for school, and looking at management of time in this context gave us the insight that the breakfast is a stand-up affair. The child has a glass of milk in one hand and perhaps a couple of biscuits in the other. He is often standing at the door, school bag on his back, gulping down his milk. In this situation, a bowl of breakfast cereal that he would have to sit down for does indeed seem elaborate!
 - Another example of focusing on stress points is from research among youth, where we know that social acceptance, particularly in a new group, is an area of anxiety. Watching teens in situations where they need to integrate with a new group is therefore potentially a high-drama situation. In one piece of work among teens, we watched college freshers interact with their new social group on their first day at college – making new friends, dealing with ragging, etc. One category-relevant insight here was that food and beverages were often used as appeasement or as social lubricants – e.g. as something to diffuse a potentially awkward ‘ragging’ situation.

Learning to anticipate drama is learning to court serendipity – you still don’t know what you’ll find, but you start to look in the right places and know that you’ll find something! Emotional insights in particular are something that anticipation helps tune sharply into.

3. Zooming out: Using the macro view effectively

We made the point earlier that a big picture view of the socio-cultural, political and economic environment can often be a more useful input to strategy than an up-close and personal view of consumer lives. Analysis of media and popular culture, secondary data reviews, analysis of the political environment and government policies, etc. are tools we don't rely on enough to paint the big picture. Recent innovation work that Pepsico has been doing with BoP consumers illustrates the relative usefulness of the macro view vs. primary consumer work in driving strategy.

Project 'Asha' (meaning 'hope') is an initiative borne out of Pepsico's vision to contribute to better health in emerging economies by addressing under-nutrition among BoP consumers. The vision is to do this via a sustainable business model that leverages the local community and resources.

The initiative started with an open agenda, to look for innovation opportunities that would make a significant impact and would be a viable business proposition. The boundaries placed on the initiative at the start were simply that it had to be a product that could be offered at a Rs.2 (4 cents) price point, had to have great taste and zero compromise on nutrition. To briefly summarize the stages in the project and the decisions at each stage:

- Data from the National Family Health Survey (NFHS) indicated that iron deficiency among women was a burning issue, especially since it affected not just them but also their offspring – and therefore carried forward into the next generation. Fifty-five percent of Indian women were iron deficient at a national level, and the deficiency among children was as high as 70%. A decision was thus taken to target child-bearing women and adolescent girls, since this is where the impact could be most wide-ranging.
- The NFHS data also indicated that the problem was far more acute in the state of Andhra Pradesh. The decision to focus on this state initially was supported by other macroeconomic statistics, analysis of the retail environment and rural infrastructure. This state had the seventh highest per capita income in India, a dense network of roads, 60% electrification and fifth highest FDI approvals. It also had the highest NGO presence and highest self-help-group presence in the country, which would contribute towards market access.
- Primary work (consisting of immersions in rural communities) added knowledge on the role of women in decision making, the needs and aspirations to target to open them up to this concept, the eating habits of girls and women and therefore the possible contexts or formats that an iron-supplement product would work in.
- It is interesting to note, in retrospect, that there were few elements in the primary 'needs assessment' work that were surprising or different from what we might have intuitively expected. For example:
 - Women and adolescent girls had very little decision-making or spending power, and it was important to include men in the communication – which is a reflection of gender roles across society.
 - Two meals a day were the norm, and there was very high reliance on staples for belly-fill (snacking was rare) ... which would be expected from low income consumers anywhere in the world.
 - Nutrition meant belly fill and energy to work (more energy to work resulting in greater income) ...a reflection, again, of BoP consumer realities. The need for economic gains is an overriding driver among BoP consumers, and is one of the strongest influences on spending priorities – whether we are talking about food or mobile phones!
- Where the primary work did add new knowledge was in helping to arrive at the right format to deliver the iron. We went in with a variety of products and formats, ranging from biscuits, extruded snacks, traditional snacks, meal additives and beverages – and based on familiarity, taste, fit with and likelihood of integration into current eating habits, zeroed in on biscuits and extruded snacks as the most workable options. The biscuit format has just been test-launched in Andhra Pradesh.

We've used the example of BoP consumers deliberately since this is a segment that is socio-economically and culturally very distant from us as marketers and researchers, and therefore the need to "understand their realities" is really stark. However, as we do more work with BoP consumers, we find that there is sufficient homogeneity within the segment to extrapolate knowledge. The issues of income, disempowerment and deprivation so far outweigh other issues, that these have much greater influence in driving decisions than other micro-realities. Also, while there are stark and high-impact differences from the mainstream consumer, there are incredible similarities within the segment ... even between disparate BoP communities across Asia and Africa. And beyond the surface differences, fundamental human needs remain the same.

The point is not that we don't need to witness their reality first-hand via the up-close views that ethnography or immersions allow, but rather that we need to rethink what we are using such research for. For example, we find that the need that most often drives ethnographic research among BoP communities is the importance of bridging the cultural distance, getting familiar, getting 'first-hand experience'. There is no debate that this sort of familiarity is important in itself, since it guides intuition and helps create the right frames to interpret other data. If we acknowledge this, we can build into

our research designs much briefer “immersions” that generate familiarity, but are not necessarily ‘dig deep’ initiatives intended to surface unique needs and opportunities (think back to the refrigerator example at the beginning of this paper – do we really need ethnography to help redesign a refrigerator’s shape and shelves when we know that innovations that circumvent unreliable electric supply will probably be the big opportunity?). We need to think more carefully about when a microscopic analysis will result in new opportunities, vs. *when we need to take a leap based on the macroscopic view*. The BoP segment, at present, is an example of the latter.

FINAL WORDS

This paper challenges the prevailing celebration of technology-enabled access to “raw” consumer realities. While we acknowledge the many benefits that video-ethnography and social media bring to us (emotional engagement, richness and texture, more impactful storytelling) we believe that they have also led to a focus on the anecdotal story, on data rather than analysis, and on micro-reality at the cost of the macro view.

It is also a trend that will lead to questions on the relevance of our industry if we continue on this path. In this technology-enabled environment, researchers cannot simply be intermediaries between consumers and marketers. To remain relevant we must be confident interpreters of reality, not merely cameras.

In part, this is about resisting the temptation to slip back into data-mode (no matter how engaging data is starting to look), and reasserting our role as meaning-creators and reality-framers. Beyond this, it is also about learning to work more confidently with the macro view. “Getting more intimate” with existing realities is not always the best path to spotting big consumer opportunities, particularly with consumers increasingly accustomed to and welcoming of life-transforming innovations – being able to use the panoramic view to take a leap is essential if we are to stay ahead of this consumer.

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FOOTNOTE

1. http://www.ted.com/talks/paul_bennett_finds_design_in_the_details.htm

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THE AUTHORS

Anjali Puri is Regional Director, Qualitative Research, TNS Asia Pacific, India.

Sangeeta Gupta is Director, Consumer Strategy & Insights, PepsiCo India.