**Date:** 30 January 2023

# Solving Claimed vs Actual

# A QUEST FOR TRUTH

The researcher's quest

is a search for truth.

The truth about…

**customers**
**products**
**markets**
**behaviours**

tells us where treasure is to be found.

# BUT WHAT IS TRUTH?



"**alétheia** in classical Greek denotes truth in contrast to mere appearance...

...truth in Greek writers is timeless, raised above the temporal and material world"

Raul Corazzon, *Theory and History of Ontology*
https://www.ontology.co/aletheia.htm

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# The founding discoveries of behavioural science:

1. People behave irrationally
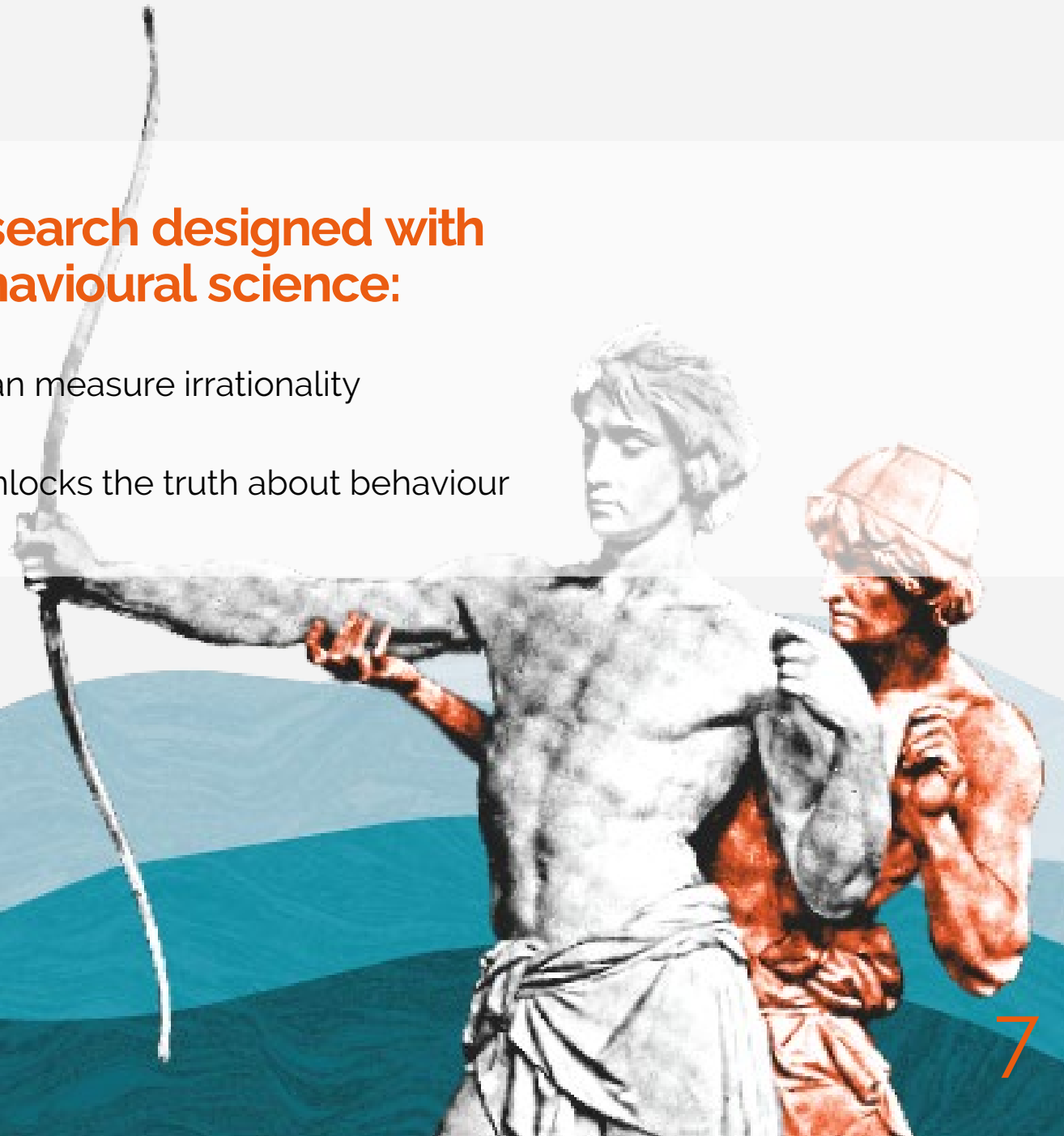
2. They can't describe their own behaviour

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## The founding discoveries of behavioural science:

1. People behave irrationally

2. They can't describe their own behaviour

## Research designed with behavioural science:

1. Can measure irrationality

2. Unlocks the truth about behaviour

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# ANSWERING THE QUESTIONS

1. Segmentation

2. U & A Research

3. Depth Interviews

4. Concept Testing

5. Communications and Message Testing

6. Brand Tracking

7. Conjoint Analysis

8. Shelf and Pack Test

9. UX and CX Research

10. Focus Groups

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# SEGMENTATION

**WHO ARE OUR CUSTOMERS?**

Traditional Approach:

Respondents mostly have good intentions, but they also have powerful intuitive biases. They flatter themselves, claiming more regular, interesting or moral behaviour than is really the case.

When something is easy to remember or imagine, people exaggerate its frequency and likelihood. They overestimate how often they use your brand. They want to feel like a good person – so they report unrealistic levels of behaviours like recycling and healthy eating.

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# SEGMENTATION

Behavioural Approach:

- Implicit measures (such as implicit reaction time or IRT) to tap directly into emotions and unconscious responses
- Gamification to build a heuristic segmentation
- Include multiple measures  - conscious, unconscious and behavioural
- Narrative qual layer to enrich the segments
- Understand the common stories shared by each segment

Which of these is more important to you when looking for a new job?

Salary

Flexible working hours

F

J

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# U & A RESEARCH

**WHAT ARE THE CONSUMER'S
BEHAVIOURS IN OUR CATEGORY?**

Traditional Approach:

Too many potential business objectives – new brands, new products, additional market segments, insight into potential advertising campaigns. Without a clear business question to focus on, the survey will never get the insights you need.

In the end there are so many permutations that the survey takes 35 minutes. Respondents are exhausted. They can't accurately remember behaviours and thoughts during their recent purchases in the category anyway.

# U & A RESEARCH

## WHAT ARE THE CONSUMER'S BEHAVIOURS IN OUR CATEGORY?

Behavioural Approach:

- Gamification adds a new level of engagement to the survey to keep respondents
- Randomize and apportion questions and tasks across respondents
- Use behavioural questions:
  - impactful and evocative
  - bring back accurate memories
  - storytelling in the survey
- Encourage respondents to share personal stories from the category and what it means to them



Your score was 1 out of 5.

| Question | Answer | Correct |
|---|---|---|
| What information is in the document? | Details of the cover chosen for the policy, details of the premium and excesses that apply | ✓ |
| What is one of the points you were told to do in the document? | Sign the document and send it back | ✗ |
| Which sections of the policy are insured? | It doesn't say which are insured | ✗ |
| Is there an excess for property damage? | The property damage excess is £250 | ✗ |
| What is the benefit payable for death under this policy? | £5,000 total | ✗ |

Press next to proceed

next

# DEPTH INTERVIEWS

Traditional Approach:

- Considered to be expensive
- Long discussion guides and techniques that inhibit conversation
- Neutral tones, nothing personal revealed and 'objective'. Stripping every morsel of personality and rapport from the conversation.
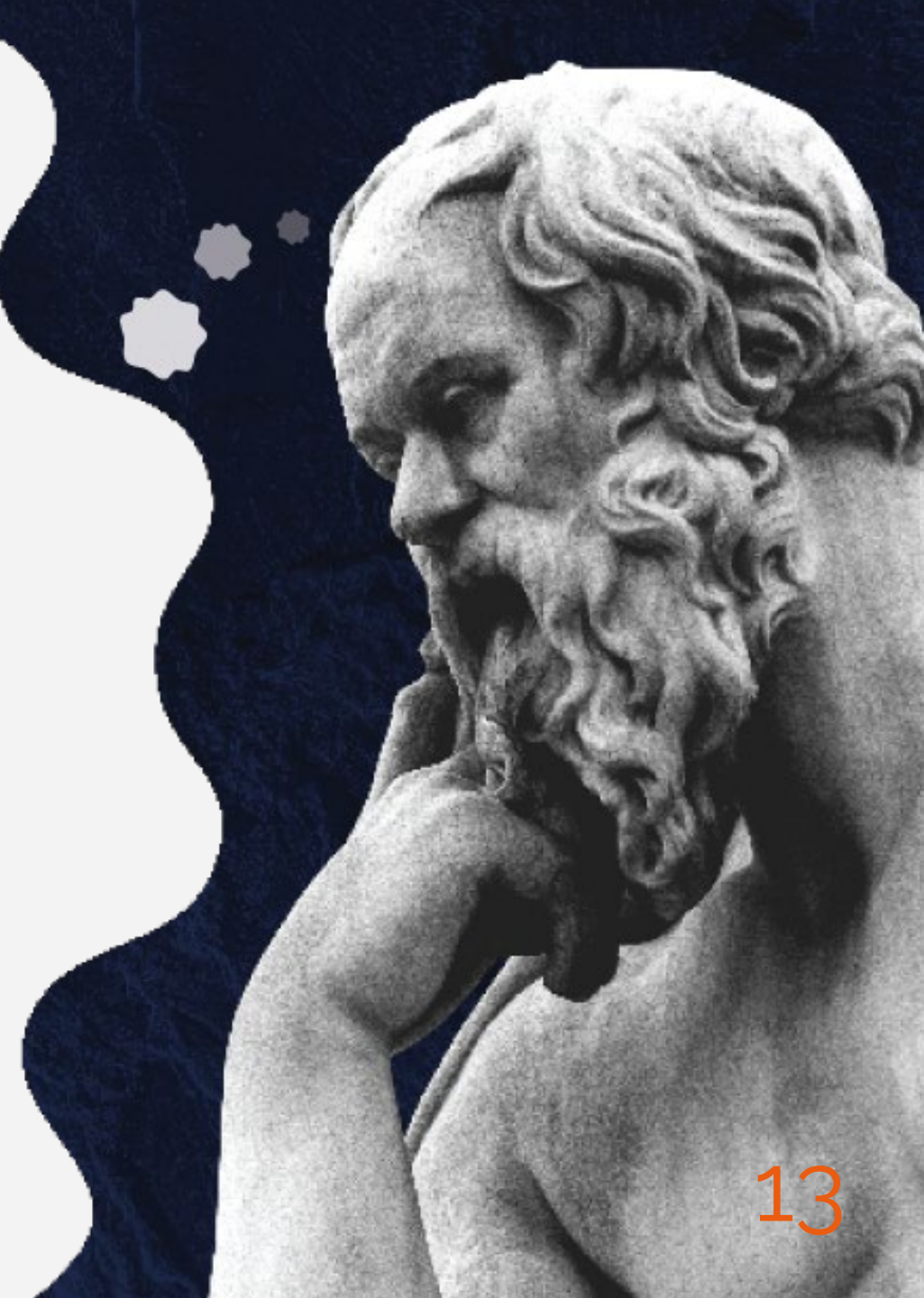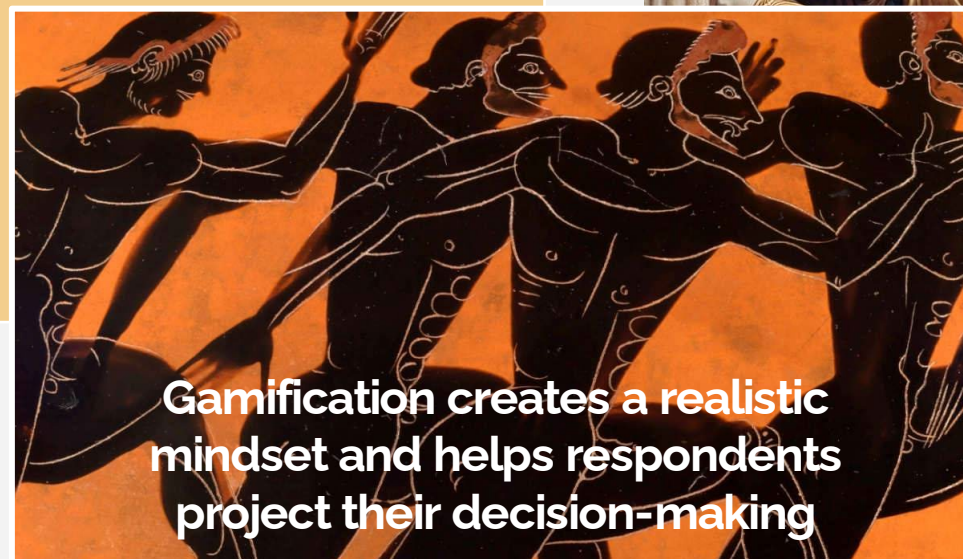
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# DEPTH INTERVIEWS

## HOW CAN WE UNDERSTAND CUSTOMERS' DEEPER THOUGHTS ABOUT THIS SUBJECT?

Behavioural Approach:

- A narrative story telling approach to moderating, sharing stories, can help respondents open up and share their own

- Conversational and empathetic techniques help respondents open up

**Gamification creates a realistic mindset and helps respondents project their decision-making**

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# CONCEPT TESTING

**WILL THIS PRODUCT IDEA SELL?**

Traditional Approach:

- Likelihood to purchase studies are devoid of context. Purchasing is a function of mindset, advertising, need state and the alternative options available.
- Shoppers are not really thinking in terms of "credibility" or "originality" when they buy things, and translating that onto a rating scale
- New ideas aren't predictable
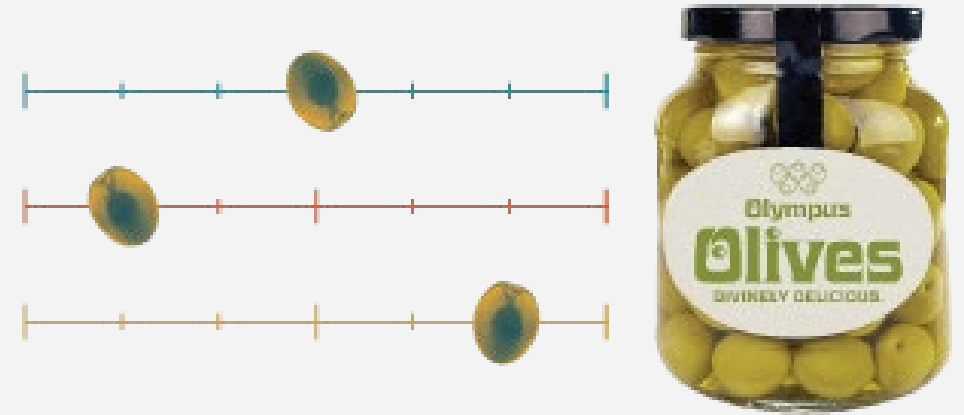
# CONCEPT TESTING

**WILL THIS PRODUCT IDEA SELL?**



Behavioural Approach:

A concept test is a context test

- Include competitor products alongside yours

- Use narrative data collection to understand what the concept evokes for the respondent

- Measure **emotional** and **biometric** response to a concept

# COMMS AND MESSAGE TESTING

**WILL THIS MARKETING CAMPAIGN WORK?**

Traditional Approach:

Traditional message tests give high scores to rational, comprehensive and "clever" language at the expense of the emotional and memorable lines that more often drive real behaviour.

Respondents evaluate with System 2, but in real life they're using System 1 and System 3.



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# COMMS AND MESSAGE TESTING

**WILL THIS MARKETING CAMPAIGN WORK?**

### You chose *Premium*. What does that mean to you?

| | | | | |
|---|---|---|---|---|
| Fresh | Cold | Delicious | Sweet | Water |
| Cravendale | Waitrose | With tea | Long-life | Sour |
| Premium | Every day | Warm | Fridge | Juice |
| Cereal | Love | Cool down | Energy | Vitamins |
| Skimmed | White | Müller | Calcium | Creamy |

Behavioural Approach:

Randomized control trials. Respondents are divided into separate groups, with each group seeing a different message, and then their behaviour is recorded. They also complete a word association task, to uncover the hidden stories and meanings that the message triggers for them.

- Discover which message has real impact
- Word associations tell you (and Athena) why
- Reveal emotional associations and unconscious beliefs

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# BRAND TRACKING

**WHAT DO PEOPLE THINK OR FEEL ABOUT OUR BRAND?**

Traditional Approach:

Tracker tells you whether the brand score has gone up or down. But not **why**, or **how to improve** it. Provoking debates among stakeholders that can never be resolved.
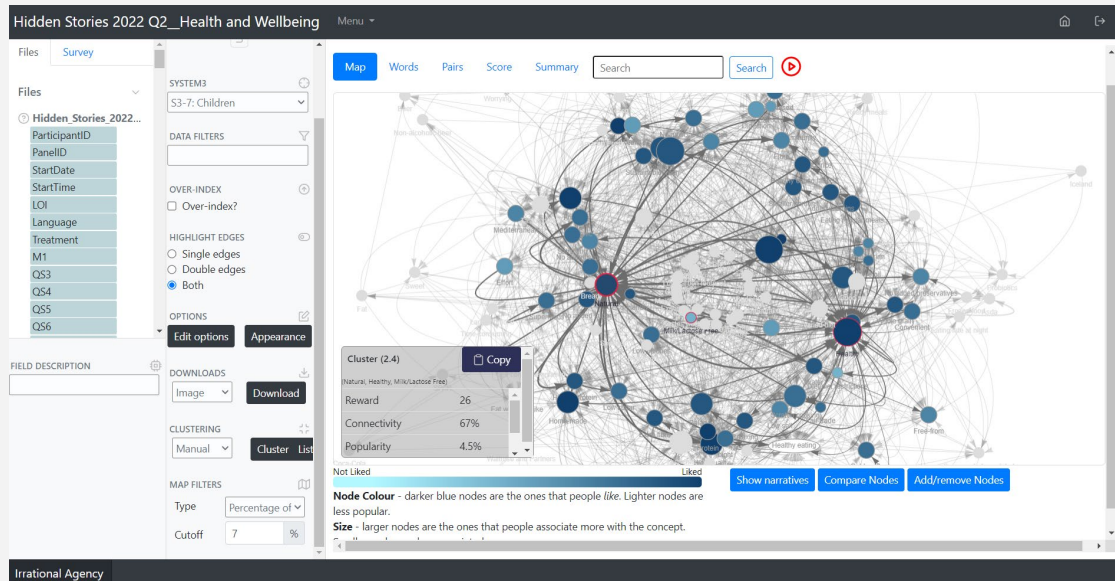
There is also a distance between the outputs of the brand tracker and consumer actions. Trackers capture claimed attitudes, not true behaviour.

A brand score could go up even when sales go down.



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# BRAND TRACKING

## WHAT DO PEOPLE THINK OR FEEL ABOUT OUR BRAND?



Behavioural Approach:

Capture brand narratives and choices. The narratives provide deeper, more predictive insight while still offering a simple score that can be compared between waves.

Each response to the tracker captures a story about the brand as well as a numerical score.

- Text analysis and word associations
- Find the deeper meaning behind the ratings
- What's driving quarterly changes in the score?

By recording choices in a simulated shopping environment, you can get a more accurate picture of consideration and purchase likelihood.

# CONJOINT AND PRICE TESTING

**WHAT FEATURES SHOULD BE INCLUDED
IN THIS PRODUCT?**

Traditional Approach:

Respondents over-rationalise their answers. They put too much weight on functional features and too little on the emotional message. And Loki hides from them the importance of context and range architecture.

Respondents aren't spending their own money, so they may be tempted to pick the expensive fully-featured option, as this helps them avoid making painful mental tradeoffs. On the other hand, they want to be strategic and influence you to sell your product cheaper, so they may claim to buy cheap.

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# CONJOINT AND PRICE TESTING

**WHAT FEATURES SHOULD BE INCLUDED
IN THIS PRODUCT?**



Behavioural Approach:

Redesign conjoint using behavioural science – adding:

- Time pressure
- Budget limits
- Bonus prize incentives based on the choices respondents make
- Psychological heuristics
- Simulated shopping journey and shelf visuals

Behavioural conjoint produces more accurate and more complete results than traditional, and gives you evidence that you and your stakeholders can believe in.

# SHELF AND PACK TESTS

Traditional Approach:

Participants often report the best pack to be the one they prefer aesthetically – often the one with **subtle, nuanced designs** that have no **standout** on shelf.
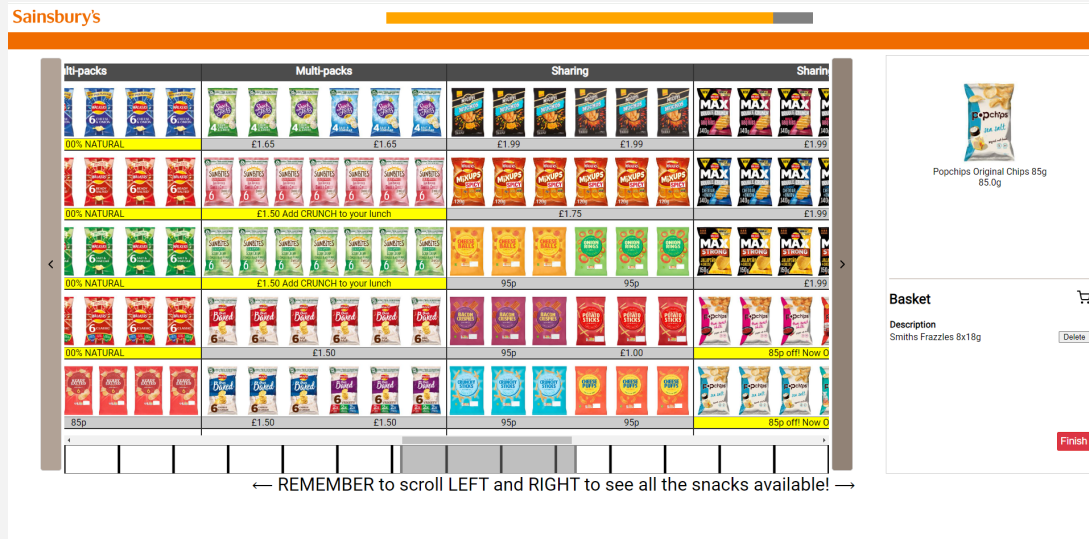
Participants say what they like about the pack, they select features in the design – but they don't know what really makes a difference to performance.

It's whatever they rationalize as being a logical decision factor: nutritional information, or clever-sounding claims.



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# SHELF AND PACK TESTS

**WHAT SHOULD BE ON OUR PACKAGING**



Behavioural Approach:

**Eye tracking technology** combined with **nonconscious audio** stimulus let you follow which part of the pack the respondent is looking at, identify words and phrases that evoke emotions and prompt them to look at certain things, and design a pack that perfectly fits the customer's mindset.

The pack is presented on a realistic shelf as part of a full customer journey – simulating the whole shopping mindset and all of the touchpoints before and after the shelf itself. Immersing the respondent in this context allows the whole decision to be imagined, researched and tested.

# UX AND CX RESEARCH

**WHAT'S THE BEST WAY FOR CUSTOMERS TO INTERACT WITH US?**

Traditional Approach:

Only the people who feel strongest about the product have bothered to complete the survey. Website designers create surveys that look great, but often are not a great research experience.

Net Promoter Score based on a 10-point recommendation scale flattened out into three groups of Promoters, Detractors and Passives, is convenient but not an effective way of making strategic decisions.

# UX AND CX RESEARCH

## WHAT'S THE BEST WAY FOR CUSTOMERS TO INTERACT WITH US?
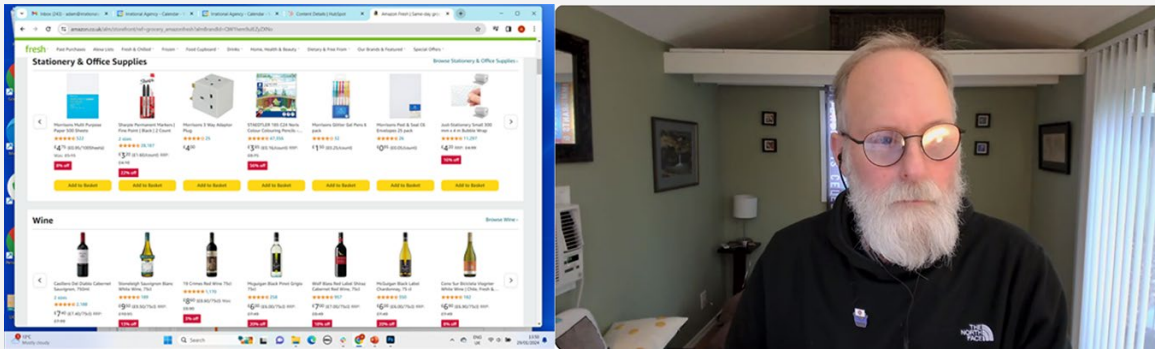


Behavioural Approach:

- **Random sampling** to get a real cross-section of customers – lovers, haters and the vast majority in between
- **Immersive research** to recreate the context of usage, of both product and website, with intensive customer listening to help customers open up verbally about their experiences
- **Monadic nudge testing,** trialing new psychological design tweaks to the product and website, and measuring the real changes in customer behaviour that result
- **Redesigned satisfaction survey** including System 1 and System 3 word associations, getting to the non-conscious truth about how customers feel

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# FOCUS GROUPS

**WHAT DO PEOPLE THINK COLLECTIVELY ABOUT AN IDEA**

Traditional Approach:

Focus groups can be a battle of wills with individual personalities of those in the group dominating or shrinking from the discussion.

Many people don't want to talk about sensitive or difficult topics in front of strangers. This inhibits conversation in the group, and can even stop people signing up in the first place.

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# FOCUS GROUPS

**WHAT DO PEOPLE THINK COLLECTIVELY ABOUT AN IDEA**

Behavioural Approach:

• Starting respondents out on a creative exercise, or a structured task helps ensure everyone has space to open up and give their view.

• Roleplaying and projecting into a new personality allows everyone to be more honest, suspend their caution about having the right opinion, and represent the views of people outside the room.

• Re-run implicit tests and choice exercises from earlier research within the room, while talking respondents through the decision process that replicates their shopping behaviour can help you cut through the arguments for and against the product or category.

# Summary

**Segmentation**

Implicit reaction, gamification, and narrative techniques remove biases and provide a more valuable segment

**U&A Research**

Gamification and storytelling components break down barriers for recollection

# Summary

**Depth Interviews**

Conversational and empathetic techniques help respondents open up

**Concept Testing**

Concept testing is context testing!

# Summary

**Communications and Message Testing**

Narrative techniques uncover the messages that have real impact and emotional associations it connects with

**Brand Tracking**

Narratives provide deeper, more predictive insight while still offering a simple score that can be compared between waves

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# Summary

**Conjoint Analysis**

Behavioural conjoint, a simulated shopper journey, and shelf visuals provide more accurate and complete data

**Shelf and Pack Test**

Eye tracking and immersive shelf tests simulates the shopper mindset

# Summary

## Focus Groups

Creative, structured tasks, narrative roleplaying controls group dynamics,

## UX and CX Research

Immersive, nudge and system 1 and 3 word associations get to the non-conscious truth

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Who will win the battle of the Say-Do Gap?

It depends whose army
you choose to join.

Join the
irrational
army