

# On the Right Track

Next Generation  
Usage and Attitude  
Surveys



Consumers' behaviour is often difficult to predict, and usage and attitude (U&A) surveys at times come up against their limits. **Gabriele Stöckl**, **Orhan Kocyigit** and **Frank Drewes** present a new approach – a combination of classical U&A and permission-based online tracking.

**J**ohnson & Johnson produces one of the most popular mouthwash products in the US, called Listerine. Its antiseptic characteristics are advertised as “Kills germs that cause bad breath” – so at first glance it is a conventional mouthrinse product with a specific benefit.

A second glance and some quick internet research reveal a surprisingly broad range of applications. General practitioners recommend it as a supporting remedy for a sore throat, or to be more precise for bacterial infections of the throat. Affected people discuss Listerine as a home remedy for skin blemishes and experiment with different variants and colours (no final conclusions in yet). The US consumer forum *mommysavers.com* lists 22 unique uses for Listerine ranging from the suppression of kitchen trash odours (“Soak a paper towel in Listerine and put it at the bottom of your trash can”) to the more adventurous treatment of lice (“Soak your hair in Listerine and cover it with a shower cap for two hours.”).

## Understanding Consumers' Needs

Listerine successfully expanded into overseas markets, not only on the strength of its product, but also by understanding and accommodating varying consumer needs in different countries. European consumers, for example, “want their mouthwash to solve more com-

plicated problems than just bad breath. The biggest problem is if you don't understand consumer needs," says Alison Lewis, Chief Marketing Officer for Johnson & Johnson. "If you don't do that well, you don't win." (New York Times, September 12, 2014).

Insights in consumer needs are typically the domain of market research. Large-scale "usage and attitude" (U&A) projects attempt to collect all consumer perceptions and assumptions within a product category, to provide a valid base for critical business decisions for at least two years.

This said, however, U&A projects tend to be complex, expensive and generally highly demanding both for researchers and participating consumers. Researchers have to collect the informational demands of internal stakeholders, ranging from Research and Development (R&D) to Marketing, translate them into research objectives, operationalise them in consumers' terms and integrate them into a cohesive research design. Frequently, researchers have to make compromises resulting in surveys which are perceived by participants either as long, thematically incoherent, and/or worded in incomprehensible terms.

## Complexity as a Challenge

Another challenge in conducting U&A projects is the inherent complexity of the objective. Consumer behaviour and attitudes can seem unpredictable to researchers and consumers. First-time buyers of mouthwash products in developing markets may be interested in improving their breath, caring for their oral health, disinfecting sores or putting it to a not-yet formulated 23<sup>rd</sup> unique use. Research sticking too closely to (implicit) beliefs about a product category runs the risk of missing important insights or trends. Observational research approaches can offer a more open and unbiased access to consumer behaviour. Unfortunately, they were difficult to implement outside controlled settings and on a large scale until fairly recently. That changed with the advent of online tracking data sources.

## Online Tracking Data Sources

Online tracking data sources can be basically differentiated by a) the depth versus breadth of the tracked online behaviour, b) its level of privacy versus publicness and c) the availability of a communication channel between researchers and tracked consumers. Social media monitoring, for example, tracks public content (deep) on social networking sites (narrow) without the (immediate) opportunity to ask posting, replying or reading consumers any questions. Providers of clickstream data like Jump Shot monitor any website accesses (broad) but typically not the content (flat), again all without the possibility to communicate with participants.

Another option is permission- and cookie-based tracking of specific online content, typically advertising, in an online access panel.

This technique is offered by a number of market research agencies and it provides the opportunity to enrich the tracking data with surveys and background information about the participants. This kind of online tracking is naturally narrow and flat in our terminology, but highly efficient in testing online ad effectiveness under certain conditions.

A comparatively recently developed fourth option is a permission-based, clickstream-like tracking of website accesses in online access panels. This fourth approach provides insights into the online behaviour (which websites are retrieved when and how long in which succession?) which can be matched and merged with panel core data and survey results on an individual level. In other words, it provides an unprecedented opportunity to combine large-scale observations of actual online consumer behaviour with more conventional U&A survey approaches.

## Extended Approach: U&A 2.0

The inclusion of permission-based online tracking in classical U&A approaches offers a number of research opportunities which can lift the potential insights to a new level. The tracking supports both PC and mobile devices and records full URL for every online activity. Depending on the organisation of a website, full URL can contain information about searches on the website, website subcategories and topics, visited product sites in online shops and much more. This data source in connection with a well-developed list of relevant terms and topics and a powerful string-parsing tool allows unbiased insights into the way consumers approach a product category online. Potential objectives are the identification and description of:

- visited manufacturer, brand and product websites within the interesting category
- category-relevant Google searches and visited research results
- online purchases of products in the interesting category
- visited consumer forums and discussion threads

As already mentioned, these tracking objectives can be qualified by and/or augmented with any survey-based information, for example online behaviour by brand preference, product usage, attitudes towards category and so on.

## Genuine Innovation

The combination of digital tracking with consumption diaries provides another kind of insight by identifying online activities before, in and after consumption occasions. Potential objectives of this approach are:

- description of consumption occasions in terms of online behaviour
- identification and targeting of websites, online content and/or behaviour which are associated with the consumption

Again, consumption-related online activities can be analysed in connection with any other survey-based information.

Summarising the 2.0 promise in the U&A 2.0 proposition, market research does not have to rely solely on stated usage behaviour and attitudes any more. Permission-based online tracking allows large-scale observation of consumer behaviour in a natural environment that can be combined with any other data collection method including diaries and conventional surveys. Permission-based online tracking addresses completely new objectives which elevates it from a mere improvement to a genuine innovation.

### A Pilot Project

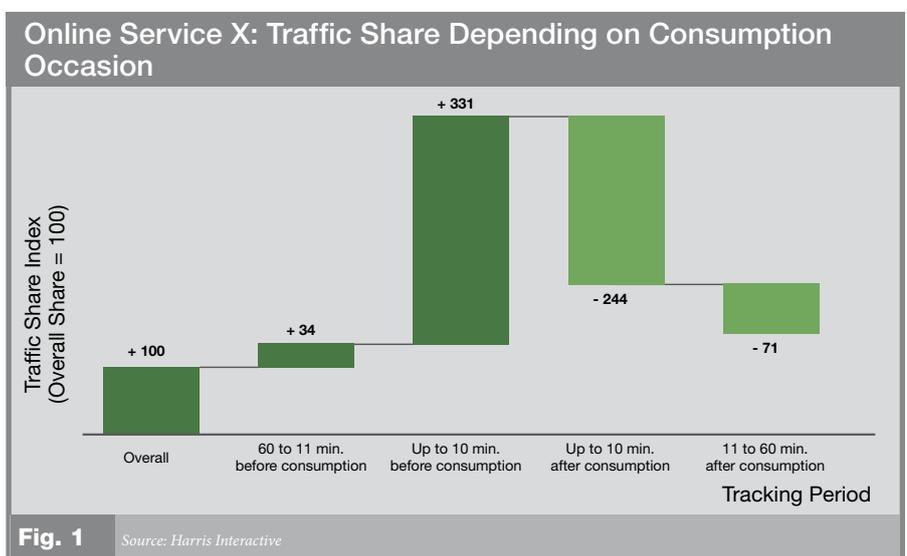
Harris Interactive conducted a U&A 2.0 project on behalf of one of the globally leading FMCG manufacturers in one of the Big Five European markets in 2018. The relevant category is characterised by high consumption and purchase frequencies (several per day and week respectively). The core of the project was a mobile-based consumption diary survey that lasted seven days. Approximately 1,000 participants recorded 50,000 consumption situations in total. Each consumed product and the situation in which it was consumed was exhaustively described. Additionally, half of the respondents also participated in the permission-based tracking of online activities. Consumption and online tracking were accompanied by more conventional U&A surveys.

### First Findings

A first general insight was that a large proportion of online activities seemed to be independent from the consumption within the relevant category. Popular online services like Google, Amazon, Facebook and WhatsApp on mobile phones are powerful attractors and were retrieved more or less at any time and in any situation.

Regarding spontaneous category-related online activities, “health” – compared to “environment” – was the more important one of the assumed trend topics. Both topics were outshone by more mundane activities like online purchases, research of recipes and category-related kitchen appliances. Browsing category-related web content in consumption situations was the exception.

The most challenging part in the project design was the synchronisation between automatically recorded time stamps for online activities and self-reported consumption times. The validity of the latter exceeded by far the expectations as exemplified by a certain online service (fig. 1) with a very narrow, category-related field of application: usage of this service peaked ten minutes before a consumption incidence. Another proof was provided by findings like a peak in social networking one hour before socially characterised consumption situations. Both examples highlight the potential of the online tracking in the identification of important online touchpoints.



## A Powerful Tool

Understanding consumer needs remains important for FMCG manufacturers both in developed and emerging markets. Conventional U&A surveys seem to encounter their limit not only in terms of feasibility but also in terms of the insights they can generate. A multitude of internal stakeholders on the one hand and complex, to some extent unpredictable, consumer behaviour on the other hand, require open and unbiased research tools. Permission-based online tracking provides a truly innovative tool that collects observational data on a large time and sample scale. It provides insights into characteristics of consumption situations and category-related online consumer activities ranging from research to actual purchases – so if there is a 23<sup>rd</sup> unique use for Listerine out there, permission-based tracking will find it. ■

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