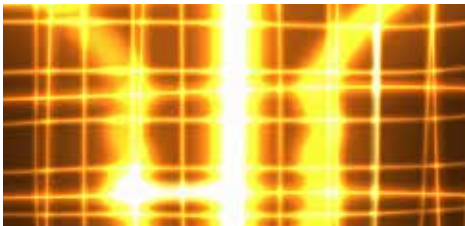


# Eureka's of Market Research



Success stories illustrating  
the impact of research on  
business, public policy and  
society





Eureka's of  
Market Research

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# Foreword



Finn Raben  
Director General,  
ESOMAR

The ‘Eureka’s of Market Research’ has been designed to give those within the sector a new platform to share and showcase the good work and tangible outcomes of market research to the wider world.

At ESOMAR, it has always been our mission statement to promote and elevate market research, and it’s given us great joy to look through the numerous case studies sent in from agencies and companies that really demonstrate the value of research to our sector.

Within this booklet, we have highlighted 16 case studies of the 50 plus we received, to give you a taster of what you can find in the full online report.

Finn Raben  
Director General. ESOMAR





## Introduction

The Eureka's of Market Research is designed to highlight the scientific and rigorous nature of market research. It also aims to demonstrate the inherent creativity and adaptability of any research project, the concrete and practical impact that market research has on people's lives, in the way it shapes business decisions, consumer products, or institutions, and that market research is indispensable to improving many aspects of everyday life.

People and policymakers widely acknowledge that due to its methodological strength and versatility, market research is an essential added value to our society, as demonstrated in this report. Market research has a long-standing tradition of effective self-regulation which provides appropriate safeguards for the rights and freedoms of the individual. It will always provide relevant, reliable, and aggregated data sets, leading to better decision-making, targeted and cost-effective public policy, and economic development leading to faster growth and more jobs.





## Business trends and digital economy

Market research, with its adaptable and innovative methodologies and techniques, has always been at the core of strategic business decisions. Boosting innovation, redefining branding strategies, positioning on the market, assessing investments and launching of new products, are just a few examples of the valuable contribution market research brings to business.

Fashion and retail

# How Luxottica redefined its brand strategy to target millennials

By Luxottica, the international leader in eyewear, owner of brands such as Ray-Ban.



## Why?

### Reach a new consumer group

Luxottica decided to focus on Millennials, the generation born between 1980 and the mid-2000s, to shape and inform its vision for the future, due to their purchasing power.



## How?

### Quantitative survey and ethnographic interviews

Luxottica conducted the research in 7 countries: USA, Brazil, France, Italy, Turkey, India and China, using a number of complementary research methods, in order to provide a 360° vision on the subject group. A quantitative research survey was used with 10,500 respondents, including millennials, but also Generation X and Baby Boomers. Alongside this, ethnographic interviews were carried out, including digital diaries to screen-out respondent shop-alongs, and accompanied eye-exam visits. The objective: to go in-depth into Millennials' feelings and motivations, shopping habits and attitudes towards eyewear.

## So what?

### Understanding of consumer motivation and shopper journey: redefining of brand strategy

The results demonstrated how Millennials think about brands and their own appearance. It showed the development from seeing prescription glasses as a hindrance, to seeing them as part of their visual identity and an accessory. The results redefined Luxottica's brand strategy, resulting in the creation of a more holistic and personalised experience. The research also inspired the creation of a follow-up online platform, the Ray-Ban Envisionner Community, made up of 'cool hunters' from 10 mega-cities who spot new trends and give quick feedback on new ideas. More than anything else, this research has highlighted the status, and importance, of Millennials as a new segment of consumers who expect more proximity and openness from the brands, and demand interaction and engaging experiences when purchasing.

Online Pricing

# How L'TUR increased its website's conversion rate by 70% through market research

By Vocatus, a market research agency specialised in pricing and marketing.



## Why?

### Test out the idea behind the travel price comparison

The low cost/last minute travel company L'TUR had developed a price-comparison engine for its own internal purposes, in order to assess the prices offered by its competitors and adjust its pricing strategy accordingly. L'TUR needed to undertake a cost/benefit analysis for the introduction of their new tool, and understand how people would react to this new offering and how it would impact both the direct booking effect and the indirect image effect of the brand.

## How?

### Behavioural Economics

The findings of behavioural economics were the basis for this project. The first step uncovered that L'TUR has five different types of clients: Bargain Hunters, Risk Avoiders, Price Accepters, Indifferent Buyers and Loyal Buyers. These five types have different motives behind their search and booking behaviour. The research used various tests to examine the effectiveness of the travel price comparison tool on the different client types. This allowed the study to make a valid prediction about whether the tool would work in practice.



## So what?

### Increased website's conversion rate

Research revealed that clients leave the L'TUR website and see what the competition have to offer. Hence the idea of the "travel price comparison tool" by displaying competitors' prices directly on L'TUR's website. L'TUR took away the client's need to carry out his own search. A somewhat paradoxical and risky idea that resulted in the website's conversion rate increasing by an incredible 70%. After this research project, the travel price comparison tool has been successfully integrated into the L'TUR website.



Return on investments and research

# How Nielsen proved the return on investment of market research

By Nielsen, a leading worldwide market research company.



## Why?

### Exploring the potential of consumer research in optimising the success of new products

In the Consumer Packaged Goods industry, sales growth is often sluggish. This makes innovation and the introduction of new products all the more critical for brands. Given this context, Nielsen wanted to define the relationship between research spend and innovation revenue, in order to understand the role of consumer insights driving innovation revenue.

## How?

### Evolutionary optimisation research methodology

The researchers decided to look at the technique of evolutionary optimisation. This uses an algorithm to test millions of different concept alternatives, or different combinations of the ideas generated in the initial phase by the product development team, with consumers, who select which option they prefer most. The algorithm evolves learning from previous choices.

Across 20 randomly selected new product initiatives, Nielsen compared the average BASES forecasted revenue for concepts, versus those developed using alternate methods. To calculate forecasted revenue, Nielsen assumed a consistent level of marketing support and distribution for each brand, based on category averages.



## So what?

### Consumer insight remains a very important step in the innovation process

The concepts identified through evolutionary optimisation yielded \$13 million more in forecasted revenue than concepts that were chosen using other techniques. This represents a 38% improvement by evolutionary optimisation over other methods of concept identification. On average, optimisation improved an initiative's probability of success by 65% and was four times more likely to identify an innovation ready for market than alternative research methods.

Instead of reducing insights spending, companies should be identifying areas where spending is having the most direct revenue impact and doubling down. By investing in algorithm-based technologies, marketers can test hundreds, or millions, of concept alternatives at once with consumers, in order to identify the best idea to produce products and services that will be successful on the market.

Attracting customers

# How 7-Eleven increased sales of its ‘food on the go’ range

By Bergent, an Australian market research agency.



## Why?

### Positioning on the market and new opportunities for business

7-Eleven, a global chain of convenience stores, was very interested in growing its Foodservice, or fresh ‘Food on the Go’ (FoTG) category, and achieve sustainable profit growth in this domain. They asked Bergent to investigate the needs, perceptions and experiences of people shopping for ‘Food on the Go’ at 7-Eleven, in order to gain insight into how to move forward.

## How?

### A four-stage shopper-focused qualitative and quantitative methodology

In the first stage, Bergent conducted an audit to ensure existing knowledge and research results about the FotG sector and the client were equally shared between Bergent and 7-Eleven. The second phase of the research was qualitative, and focused on shopping expeditions and emotional association tasks with study participants about factors that drive consideration and perceptions. The third stage aimed to quantify the findings from the qualitative leg of the research project, a national online survey of 1079 FotG shoppers answered questions on rational and emotional factors that drive consideration and perceptions of FotG retailers, different products, in-store themes and in-store experience. Finally, Bergent and 7-Eleven conducted an implementation workshop, to ensure smooth and optimal implementation of the findings.



## So what?

### Increased sales, profit and brand’s image

Results from the research were surprising. Shoppers saw 7-Eleven as providing real FotG, and did think that the snacks and packaged food they offered were tasty; many admitted they ate them as meals. Shoppers’ awareness of the ‘real food’ available at 7-Eleven was low. Store visits were a pleasant surprise to many. They felt the range, taste and price of sandwiches and other traditional FotG offers were high quality. By keeping the focus on the shopper, Bergent identified opportunities to boost FotG performance against 7-Eleven’s research and business objectives; changes suggested by the research led to an increase of 32.3% in the profits of the Foodservice category and an increase of 25.5% in Foodservice sales. The changes also had a positive impact on the brand: ‘Active Brand Consideration’ for Food on the Go went from 44% in June 2014 to 59% in December 2014, up to an all-time high of 63% in January 2015.

## Public Sector and Policy-making

Research has always been the cornerstone of informed decisions with its capacity to provide valuable insights and data, and to separate what is important to politicians and policymakers for the wealth of their constituencies.

Violence against women and children

# How market research contributed to a ‘new way of thinking’ about violence against women and their children

By TNS, a leading worldwide market research company.



Australian Government

## Why?

### How to address violence before it occurs

Violence against women is the number one cause of death and disability in Australian women aged 15-44. In 2015, the community's focus on violence against women intensified, following high profile cases and media attention. The Government needed to respond not only to the shocking statistics, but also to the community's growing demand to address them. An integrated communications strategy, the likes of which had not been implemented in Australia previously, was needed.



## How?

### Quantitative and qualitative techniques

Extensive national and international evidence on the topic already existed, but new insights to guide a communications strategy were needed. To achieve this, the methodology captured the full spectrum of predictable (but, necessary and important insights) through to the unpredictable (new insights and foresights). The methodology blended both traditional and innovative techniques, and engaged corporate marketers from the outset. This included: traditional qualitative techniques (focus groups, family sessions, affinity sessions), advanced projective techniques to facilitate deeper discussions, and explore the unconscious, innovative and technology enabled research techniques including online discussion forums, extended Super Groups which brought together young people, parents and influencers who were innovative thinkers, and workshops with leading corporate marketers.

## So what?

### Unprecedented impact and new campaign strategy

The formative research provided the evidence base for the campaign strategy. It was considered so ground-breaking, that it was released publicly by the Australian Prime Minister. This launch generated over 500 articles mentioning the research. It started a 'new conversation', and way of thinking about violence against women in Australia. The campaign has recorded unprecedented impact against the strategy already with: online views of the TVC have reached 30 million, in a country of 23 million people. Brand reinforcement, many brands and corporates have strongly supported the messaging which has significantly extended the reach. For example, a single post generated >5m views. Sparked a community conversation, with people recognising and reconciling their role. Early tracking data suggests people are initiating conversations offline (family/friends) and online (>750k reactions/shares/comments). Social media engagement has been exceptionally high, a single Facebook post had over 10.4 million views and 14,000 comments.



## Consumers labelling

# How market research helped the EU assess the effects of food labels on consumers in the EU

By Nielsen, a leading worldwide market research company.



## Why?

### Understand the quantity, accuracy and effects of food labels in the EU

The European Commission guidelines concerning the labeling of food packages and agricultural food products and the directive of unfair commercial practices, establish a number of objectives and specific measures to ensure that food labels provide consumers with transparent and reliable information. EU legislators needed to know to what extent food manufacturers follow and apply the guidelines and directives, but also how consumers actually perceive food labeling schemes, and to what extent these labels affect their purchase decisions.

## How?

### Quantitative and qualitative techniques

The researchers started out with a websweep, and put together a database listing all the food labeling schemes in the EU member states, assessing whether these schemes were following the Commissions' guidelines. An online consumer survey was conducted among EU countries to assess consumer awareness and perceptions of food labelling schemes, the survey also included a behavioural experiment. Furthermore, a virtual online shopping exercise involved shoppers visiting online grocery shops to check the food labelling schemes that were included on certain products. In the end, a web listening exercise gathered comments and conversations from consumers taking place online.



## So what?

### Key drivers for compliance and non-compliance and how to improve food labeling

The study found large variations in the way schemes were managed, and identified what factors and preoccupations motivate compliance or, on the contrary, discourage it: Key drivers for compliance: increasing transparency and minimising consumer confusion; Key obstacles for compliance: lack of awareness, administrative burden, cost of compliance. The study suggested ways to improve food labeling schemes by raising awareness of the guidelines, improving transparency, enabling and promoting the participation of small scale producers, differentiating if the scheme is public or private and whether it is certified or self-declared, and provided methods to minimise the administrative burdens and costs for producers and scheme operators in complying with the guidelines. The study also revealed a number of regional differences between EU15 and EU12 countries; EU12 countries, the last to join the EU, are less skeptical toward food labelling schemes than EU15 respondents.

## Governance

# How market research helped the French government increase online tax submission

By the French government and BVA, a French research agency.



## Why?

### Government E-service offering to citizens

The French government wanted to increase the number of people submitting online tax returns. Their aim was to simplify citizens' access to public services and increase the number of e-services to save time, paper and government resources.

## How?

### Behavioural economics ethnography

Together with research agency BVA, the French government used behaviour economics ethnography (the study of how people make decisions), to review three key factors of behaviour influence: personal mind-set, physical context and social environment. In addition, they used 'Nudgelab', a one-day co-working session which included clients and some lead users, to discover insights into the user journey. Each idea was evaluated and ordered in priority, with the top ones being pre-tested before they were rolled-out.



## So what?

### Increase citizens awareness

The research showed that the lack of awareness about online tax returns was due to paper tax returns being presented as the default, identifying this as a key issue in increasing citizen usage of the platform. As a result, a renovate communication campaign was launched to present online as the new default. This study helped save 400 tonnes of paper and led to a 10% increase in online tax returns, compared with the previous year.

## Opinion research

# How is opinion research used in Canadian public policy?

By MRIA, the Marketing Research and Intelligence Association, a Canadian not-for-profit association.



## Why?

### Improve the collection and use of public opinion research

MRIA wanted to understand how data and information emanating from the market intelligence sector, and especially opinion research, was being used in Canadian policy-making. They were especially interested in the ways that this usage could be improved, either by improving the quality of the information available to policymakers, or the way it was being used.

## How?

### In-depth interviews

MRIA interviewed the so-called “thought leaders”, experts from various fields with close knowledge of the Canadian government, to gather their views on market and opinion research and the way it is commissioned and used by the government. 39 in-depth interviews were conducted. The participants included current and former senior federal public servants, current and former politicians, including federal elected officials and senators, current and former political strategists and staff, public opinion research coordinators and evaluation personnel, members of academia, representatives of think tanks, non-governmental organisations and national associations, members of the media and international experts in public opinion research.



## So what?

### Understanding the relation between research and policy-making

Five types of empirical information were identified as very important in governance by the interviewees: demographic data, government databases information, socio-economic statistics, expert analysis, and public opinion data. Public Opinion Research specifically was unanimously identified as an important mechanism of governance, and as a practice that reflects a healthy and democratic society, as it keeps the government informed about and attuned to the attitudes, opinions, beliefs, values and concerns of the people affected by national policies.

The study gave insights into the general attitudes and opinions towards research in Canadian policy-making amongst people closely associated with that field; it is an important indicator both for people in the research industry as well as, more widely, for Canadian citizens looking to understand how national policies are being devised.

## Non-Profit and NGOs

Market research is not only about helping business. Every day, all around the world, market research methodologies and techniques are successfully helping NGOs and non-profit organisations to address societal challenges. Assessing and evaluating the impact and understanding target groups, are only few examples of how market research can help NGOs and non-profit organisations to improve the world we are living in.



## Human trafficking

# How My choices Foundation used market research to help prevent trafficking of girls for sexual exploitation

Operation Red Alert is the anti-trafficking initiative of My Choices Foundation commissioned to Final Mile consulting.



## Why?

### Understanding how to address men's behavior to buy and sell girls

The primary objective of this research was to develop ways to effectively prevent buying and selling of girls in the human trafficking trade. Operation Red Alert commissioned Final Mile to understand the compulsions of male behaviour leading to the selling/sending and purchasing of girls in the human trafficking trade, in order to develop effective messaging and ways that can be used to address such behaviour and prevent girls from being sold into forced commercial sexual exploitation.

## How?

### Tailored research technique

Final Mile used a proprietary research technique called EthnoLab™, which involved a game that simulates the real-world context of the participants in order to solicit real world reactions and behaviours. The game was the medium through which context, emotions, and mental models that influence the behaviour of at-risk families and urban clientele were studied. The game was developed in digital form and a remote response system was used to collect the participants' responses. Audio instructions and narration were used without the inclusion of any text, in order to accommodate the literacy and comprehension levels of target groups. The game was followed by a hot state interview session, which was designed to elicit emotions felt by the participants and to gather perceptions in relation to trafficking and purchasing sex.



## So what?

### Understanding of key stakeholder behaviour: redefining the approach to human trafficking prevention.

The results showed that both the decision to sell/send a girl into trafficking and to buy a girl are guided by emotional, financial and social frameworks of the men. Crucially, the results pointed to non-malicious behaviour by men that is motivated by a desire to abide by the expectations of these frameworks. The results redefined Operation Red Alert's approach to developing messaging to speak to men and boys in at-risk areas. Crucially the results pointed to the benefits of engaging men and boys with positive messaging framing, highlighting the benefits of protecting and educating girls and encouraging affection and protection for girls. Inducing fear among fathers selling their daughters, and shame among young men (potential purchasers of sex) was identified as a harmful approach, likely to be ignored by men and boys and deter them from engaging with the issue. Operation Red Alert has used the results as the basis for its grassroots prevention work in at-risk villages across rural India and the Red Alert Helpline, which is India's first national, anti-sex trafficking helpline. This research has the potential to change the national response of NGO and Government responses to trafficking alike. The results not only inform methods to change behaviour that sits at the root of the problem, but also the development of tools for public education and engagement.

## Human rights and advocacy

# How worldwide attitudes to LGBTI people were gathered through a global market research study

By RIWI, a global market intelligence company for the International Lesbian, Gay, Bisexual, Trans and Intersex Association ILGA.



## Why?

### Legitimising tools for advocacy

For the first time in history, internet technology development allows the gathering of data on attitudes towards LGBTI people and issues in every country and territory in the world including a selection of countries that are most hostile from religious tradition and that criminalise same-sex sexual activity with jail or death. This data is vital in legitimising tools for advocacy, planning and funding of sexual orientation and gender identity movements, they move LGBTI discussions away from the anecdotal to the actual, facilitating actions based on credible evidence.

## How?

### Quantitative methodology and surveys

The first-ever global study of its kind was conducted on how diverse populations around the world feel about LGBTI people. The project surveyed over 96,000 respondents across 65 countries who gave their opinions on Homophobia and Transphobia.



## So what?

### Insights for future advocacy activities

34% of respondents say that their opinion on LGBTI people has become more favourable in the last 5 years. 67% of respondents think that human rights should be applied to everyone, regardless of sexual orientation. 43% of respondents from the African continent believe that being a sexual minority, transgender or intersex person should be illegal. 68% of respondents answered that they would be very or somewhat upset if their child said they were in love with someone of same gender. 36% of respondents in Asia, 34% in Latin America, and 21% in the Middle East, North Africa and Eastern Europe support marriage equality. 41% of respondents from the Middle East and North Africa agree that companies should be allowed to fire LGBTI employees on the grounds of their sexuality or gender expression. While the findings demonstrate that attitudes towards the LGBTI community are slowly becoming more favourable, the study also reveals that acceptance and equal rights are far from a reality in numerous countries around the world. In this way, RIWI's data from this study informed global attitudinal baselines that the whole LGBTI activist and development community can reference in their work.

## Food security

# How market research helped the world food programme identify food security indicator data in the Democratic Republic of Congo

By GeoPoll, a leading mobile surveying platform with a database of over 200 million users.



## Why?

### Alternative methods for collecting data in war zones

In 2013, the World Food Programme (WFP) was faced with a challenge when conflict broke out in the North Kivu region of the Democratic Republic of Congo. They needed updated food security indicator data (information based on affordability, availability, and quality of food across a set of 113 countries), but could not collect it via traditional methods. This led them to develop a new way to collect food security data together with GeoPoll.

## How?

### Mobile survey

The WFP previously carried out work analysing food security in North Kivu through face-to-face interviews in 2011 and 2012, but in early 2013 conflict in the region dramatically altered the food security situation. WFP chose to partner with GeoPoll to send out mobile surveys as GeoPoll has a large database of mobile subscribers in the DRC, and is able to send messages that are free for respondents. The two organisations worked together to adapt two food security modules for the mobile phone, and sent surveys by SMS in July, August, and September of 2013 reaching 2,000 responses.



## So what?

### Costs and time savings

Results showed that demographically, mobile surveys and face-to-face surveys were in line, with a distribution of 69.6% male and 30.4% female for mobile, and 65.2% male to 34.8% female in face-to-face surveys. Mobile results from the Food Consumption Score (FCS) module were consistent over all three months, with an average of 76.5% of respondents having an “acceptable” FCS score, and 8.1% having a “severe” score. While there were some differences in the data, mobile surveys accurately demonstrated food security trends and identified the populations most vulnerable to severe food insecurity. There were also significant cost and time differences: costs were \$5 per survey for mobile surveys and \$22 per survey for face-to-face. Mobile surveys took 2 weeks for collection of 2,000 responses, whereas face-to-face surveys took 6 weeks for 2,700 responses, and the mobile survey timeframe has been further reduced in subsequent projects.

## Foundation and social investments

# How social research helped a non-profit organisation measure the social return on investment of its activities

By FLUPP, the Lucia and Pelerson Penido Foundation.



## Why?

### Assessing SROI

After four years of operation, FLUPP Foundation was keen to demonstrate its value as a non-profit organisation and to establish the effectiveness of its VIM project (education in very early childhood) with the aim of applying this model to other municipalities. The objective was to identify Social Return on Investment (SROI) evaluation as the most efficient way to present strong evidence of VIM's impact.

## How?

### Focus group and surveys

The evaluation focused on Roseira, one of four municipalities that host VIM. The process of quantifying the social benefits of the charities' efforts in financial terms involves: Identifying all of the stakeholders, or people who had been affected and had changed as a result of the programme, and predicting the effect of the programme on them. Identifying measurable indicators of the changes such as indicators of the children's cognitive development and sociability. Collecting the data associated with these indicators through focus groups and surveys, which are also used in order to give a voice to all of the stakeholders. Assigning financial value to the programme outcomes, by using market values of paid-for services that achieve similar results to VIM's activities. Calculating the total value of the benefits VIM has created in Roseira.



## So what?

### Data-based evidence for social investment

The SROI evaluation indicated that for every R\$1 of investment in VIM, R\$4.08 of social value was being created. In other words, VIM was more than quadrupling the value invested. FLUPP now have clear, data-based evidence that VIM is achieving its aim in having a significant, positive impact on young children's development. IDIS' SROI services have affirmed the relevance of FLUPP and given the foundation a strong case for continuing its valuable work into the future.

Furthermore, these numbers give a strong case and argument to FLUPP to bring to donors, volunteers, as well as local governments for the continuation and expansion of its efforts.





## Serving customers

Even if you don't notice it, market research is everywhere. Whether you are taking the train, flying away on holiday or using your car for a family trip, your everyday experiences are shaped and tailored for your comfort by market research studies.

## Transport and Governance

# How a rail company used market research to improve travellers' experience on-board its trains

By Deutsche Bahn, Germany's national rail company, and Ipsos, a leading worldwide market research company.



## Why?

### Understand the needs of passengers and customers

Deutsche Bhan used Ipsos to help evaluate the comfort, tidiness, safety and communications on their trains, to better understand the needs of passengers and optimise their service for them.

## How?

### Focus groups and ethnographic interviews

A combination of focus groups and ethnographic interviews were used. Ipsos wanted to create a real life setting to get spontaneous and authentic feedback in order to gain deeper insights. They used a train carriage as a location for the study and used role-play for various scenarios, such as a real life train attendees, actors posing as drunken hooligans and the presence of an untidy environment often found on trains.

In parallel, passengers of Deutsche Bhan were encouraged to use the 'streetspotr' mobile app to collect pictures inside the trains and to share their experience on the app. This was then used as discussion points for the ethnographic interviews.



## So what?

### New passenger policies and trains design

The unconventional methodologies and on-site interviews lead to a much higher level of engagement and much richer feedback from participants than had previously been observed in such studies. Deutsche Bhan gained unprecedented insight into overall travel experience of their customers, and were able to incorporate this knowledge into updating their employee-training and passenger policies.

Furthermore, elements of its train design were tweaked according to respondents' feedback, with the inclusion, for example, of armrests between seats. Deutsche Bhan travelers now benefit from a more comfortable and improved train journey.



## Improving store experience

# How market research using virtual reality contributed to optimising shopper-oriented in-store actions

By Stratégir, a consumer and shopper researcher company.



**SAMSUNG**

## Why?

### Meeting shoppers experience

To assess strengths and weaknesses of new store organisation, Samsung sought shopper feedback by conducting research using virtual shelf layouts or in-store interviews. Samsung wanted to implement a new type of research using 360° virtual immersion to convey space dimension without a complicated set up, and so, Stratégir worked on the development of a new tool to implement the survey.

## How?

### Virtual visits and interviews

Samsung and Stratégir joined forces to develop an innovative method to interview shoppers of the Samsung Experience Store and expose them virtually to the current store layout and organisation, as realistically as possible. An exploratory sequential research design was set up to compare 3 types of visits. Firstly, accompanied interviews in the physical Samsung Experience Store. Secondly, exposure to a virtual visit to the Samsung Experience Store projected at life size. Thirdly, exposure to a virtual visit to the Samsung Experience Store at 360° immersion with Gear VR. Each participant conducted all 3 visits (in a rotated order). 22 90-minute interviews were carried out among potential buyers of smartphone and non-rejecters of the Samsung brand.



## So what?

### Optimised shop experience and re-organisation of store

Key takeaways for Samsung regarding the evaluation of the store were available at the end of the research. On one side, shoppers felt good in a store that invites them to navigate due to a high tech atmosphere which is calm and pleasant, a reasonable number of products and communications, and a well organised store. On the other side, the store was perceived too bright and masculine, the prices not very visible and equipment and accessories of the same device in the same area. The study helped Samsung to highlight different areas of optimisation in order to create a warmer store environment, with the less bright/white colours and clearer pricing.

## Travelers experience

# How United Airlines used market research in the development, optimisation, and launch of its new international business class offering

By TNS, a global leading market research company.



## Why?

### Reinvent and elevate Business Class experience

To maintain competitiveness and build long-term loyalty and market share with business class travelers, along with an effective internal rollout, United Airlines needed a deeper understanding of both customer and employee perceptions and needs across the International business class journey.

## How?

### Qualitative and quantitative techniques

United partnered with TNS to conduct “overnight flight simulations” at the Boeing Dreamliner gallery, focus groups were conducted with business class travelers (post-simulation) and flight attendants. Stakeholder interviews (including the CEO, CFO, CMO) and a Discover workshop facilitated by TNS informed a multi-method qualitative project (online mobile deep dives + in-person focus groups) to explore all other aspects of the business class journey (completed in the US, China, and UK). After quantitative testing with 650 business travelers, United selected four bundles for further development. TNS facilitated a Strategy workshop with United, where bundles were brought to life from lounge to landing. Flight simulations on the ground and a second phase of in-air research via a chartered flight to Hawaii, evaluated and optimised the bundles. TNS observed and interviewed travelers throughout (including pre-/post-flight surveys), and travel diaries and GoPro “confessional booths” gave participants the opportunity to share their feedback. Finally, TNS and United organised focus group to explore naming options for the new business class experience.



## So what?

### Optimisation and execution of a new business class

This research provided critical direction for the strategic generation, optimisation and execution of a new business class that Polaris will launch on 1<sup>st</sup> December 2016. United used key customer and employee insights to create a custom-designed business class seat. Then, United leveraged the emotive opportunity areas uncovered by TNS to develop 12 positioning bundles to enhance business class ‘from lounge to landing.’ Furthermore, United took prioritised ideas and created detailed flight plans and product specifications for each bundle. Based on customer and employee feedback, United moved forward with the sleep offering and they addressed all critical optimisation opportunities prior to launch.



## Car design

# How market research measured how people really feel about different car models

By Toyota and Haystack, a market research agency.



## Why?

### Testing the way customers react to cars design

Together with research agency Haystack, Toyota conducted a methodological study to find out whether it was possible to close the gap between development teams and customer feedback at the beginning of the product development process. They wanted to gain a better understanding of the way in which customers experience a car's interior and exterior features by measuring their biometric reactions.

## How?

### Quantitative and qualitative research with neuroscience

The research was done in two phase, the first phase was conducted in Poland with 40 participants - respondents were exposed to computer-generated images of three car models already on the Polish market. In the second phase, conducted in Belgium with 8 respondents, the researchers measured the impact of materials in a real car setting. Haystack deployed a number of neuro-research tools such as eye-tracking, electro-encephalogram and Galavanic Skins Response to measure the reaction to different stimuli. In both stages, a number of statistical methods were used in order to control for other factors and stimuli.



## So what?

### Neuroscience as an added value for car production

The results of the biometric measurements were extracted in the form of a motion spectrum, which allowed the researchers to detect, millisecond by millisecond, what people were looking at and what reactions were triggered in the brain. The study highlighted a number of broad truths in regards to how car design emotionally impacts consumers. Specific exterior and interior car features can evoke negative or positive reactions, without affecting the overall liking of the car, but overall evaluation is not the only metric that matters. Each individual element has to be emotionally engaging for long-term success, even small details or ornaments can evoke strong emotional reactions. On the basis of these methodology tests, Toyota added neuro-research as a tool in its official manual for product and concept tests. There was a consensus that this method can help optimise the car development process, resulting in producing better cars all in the end.

The entire report containing all the stories ESOMAR received from the market research industry can be found on the ESOMAR website.

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