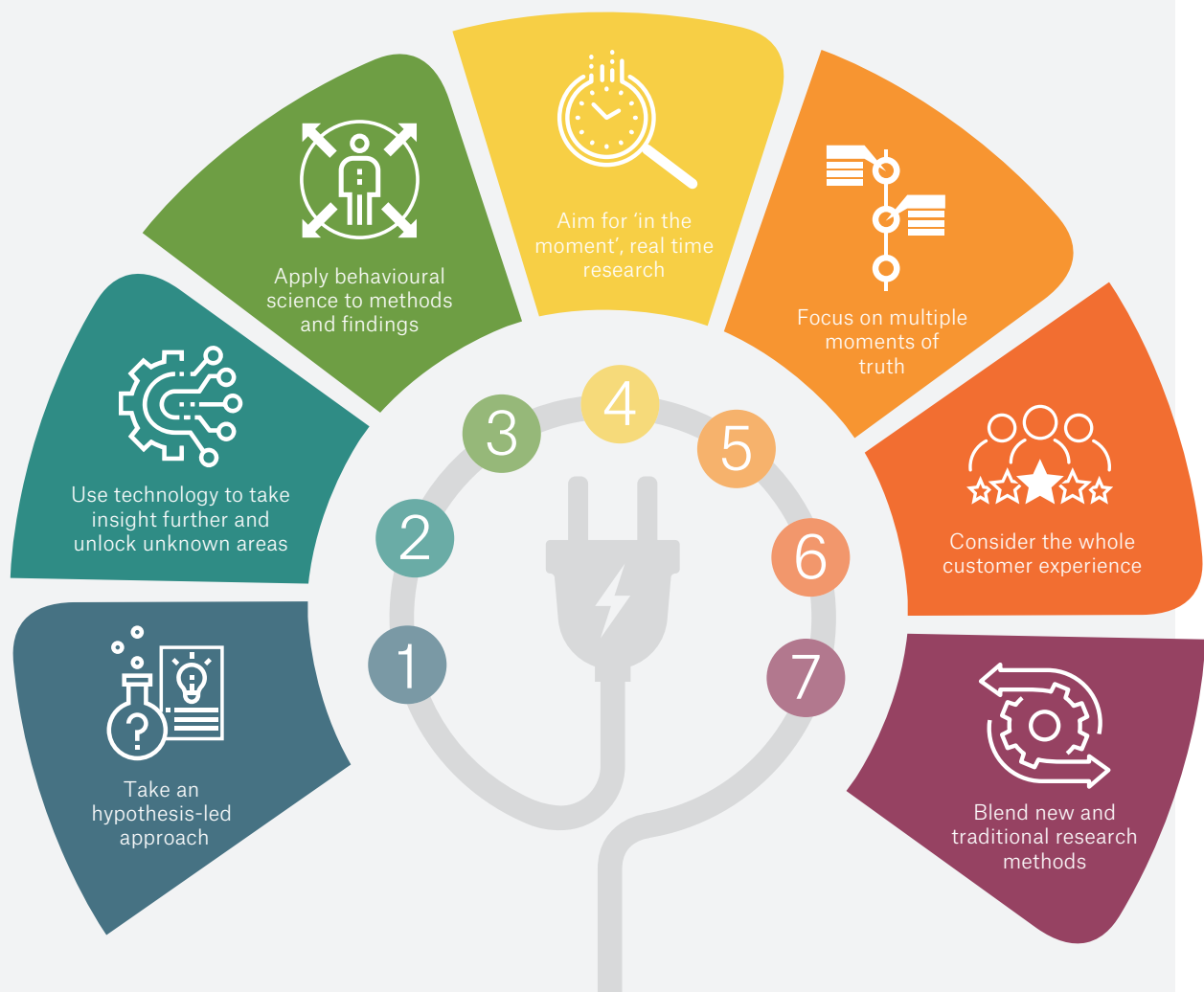


# In focus

Seven ways to supercharge research and get closer to consumer truth



There has never been greater need for consumer insight. And it has never been so hard to discover what consumers really think. This paradox is driving changes in the way research is conducted, so we can get closer to consumer truth. Increasingly, it involves understanding behaviour – considering what people do, as well as listening to what they say.

Our Head of Consumer Science, Emma Gubisch, says fundamentally ‘consumers are just people like us with all our contradictions and inconsistencies’. In this paper, she considers how to get to know them better.



Consumer insight has always been fundamental to product development and marketing. Understanding what people want, when they want it and their perception of existing products is vital. It means goods can evolve for ongoing relevance, effectiveness and enjoyment. However, in the digital age, market research often falls short.

With the rise of social media, consumer empowerment has reached new heights. One person’s opinion can quickly elicit an avalanche of comments from others, which can have a huge influence on a company’s reputation, for better or for worse.

Then there’s the issue of digital disruption. Many sectors are being shaken up by the arrival of new businesses that are more in-tune with what consumers want.

Each of these scenarios can quickly damage brand equity and market share. Tackling their cause - generally rooted in poor consumer insight - is a more effective strategy than trying to stem the symptoms. So, how can brands ensure consumer research is fit for purpose in the digital economy?

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## Progressive consumer research for the digital age

Back in the 1940s and 50s when commercial market research first took off, the received wisdom was 'ask people a question and they will tell you what they think'. However, our understanding of human psychology has progressed since then. People are complex beings and their answers don't necessarily reflect how they actually behave.

This challenge is compounded by the volatile nature of consumer expectations today. When we polled delegates from a range of industries and academia at the Pangborn Sensory Science Conference<sup>1</sup>, 73% said they find it difficult to keep track of changing consumer priorities. Yet the pace of change is not likely to abate: uncertainty and disruption are the new normal, and the only way for brands to ride this is through dynamic consumer understanding.

Getting to grips with the intangible and elusive nature of consumer truth demands modern research methods which draw on the best traditional techniques and the most relevant new technologies. Overlaying the nuances of consumers' actual behaviours with the opinions they express and their sensory experience of the world offers an effective route to success. It's about listening to what people say, looking at what they do and making intelligent inferences.

**Here are seven ways to refine your consumer insight so that it does all three.**

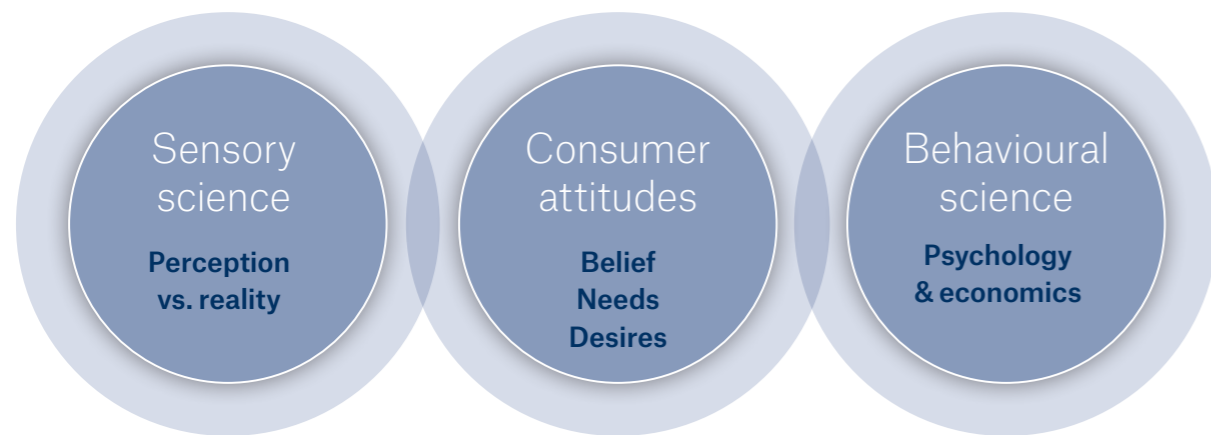


Figure 1: Sensory science, consumer insight & behavioural economics get us closer to consumer truth

## 1 Take an hypothesis-led approach

Faced with the frustration of harnessing evolving customer demands, it's easy to get swept along with the latest research methods and technologies which promise wonderful things.

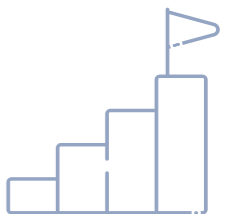
It's true that there are many exciting new ways to engage consumers, elicit their opinions and track their behaviour. However, it's all too easy to blow the research budget revealing interesting findings that don't translate into actionable insights. Any research initiative should have a robust, business-focused foundation with a clear rationale and objectives.

Whether you're adapting an existing product or developing a new one, changing the recipe of a biscuit or launching an innovative personal care device, one factor is critical to success: start off by defining what you need to know.

A good way to achieve this is by hypothesising likely consumer responses to your product launch or adjustments. It helps pinpoint what the research needs to deliver, and the type of research you might need. You may decide upon a phased approach, conducting qualitative focus groups which inform quantitative research. Or there may be value in harnessing the objective insights of an expert sensory panel ahead of large-scale consumer testing of product prototypes.

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By taking the time to set objectives at the outset, you increase the likelihood of choosing the most appropriate research strategy and methods to meet your specific business needs.





## 2 Use technology to take insight further and unlock unknown areas

Technological advances unlock exciting and unique ways to find out what consumers think and do. This is fracturing and splintering the traditional world of market research. New layers of insight can be revealed by listening to or observing people in real life settings rather than the artificial environment of a research centre.

Technological advances are disrupting the traditional world of market research.



Many consumer insight start-ups are coming onto the scene, with innovative ways to elicit, track and analyse consumer opinion and behaviour. This new generation doesn't abide by traditional boundaries, such as those separating consumer research and sensory science. They take a more holistic and cohesive stance in the quest for consumer truth.

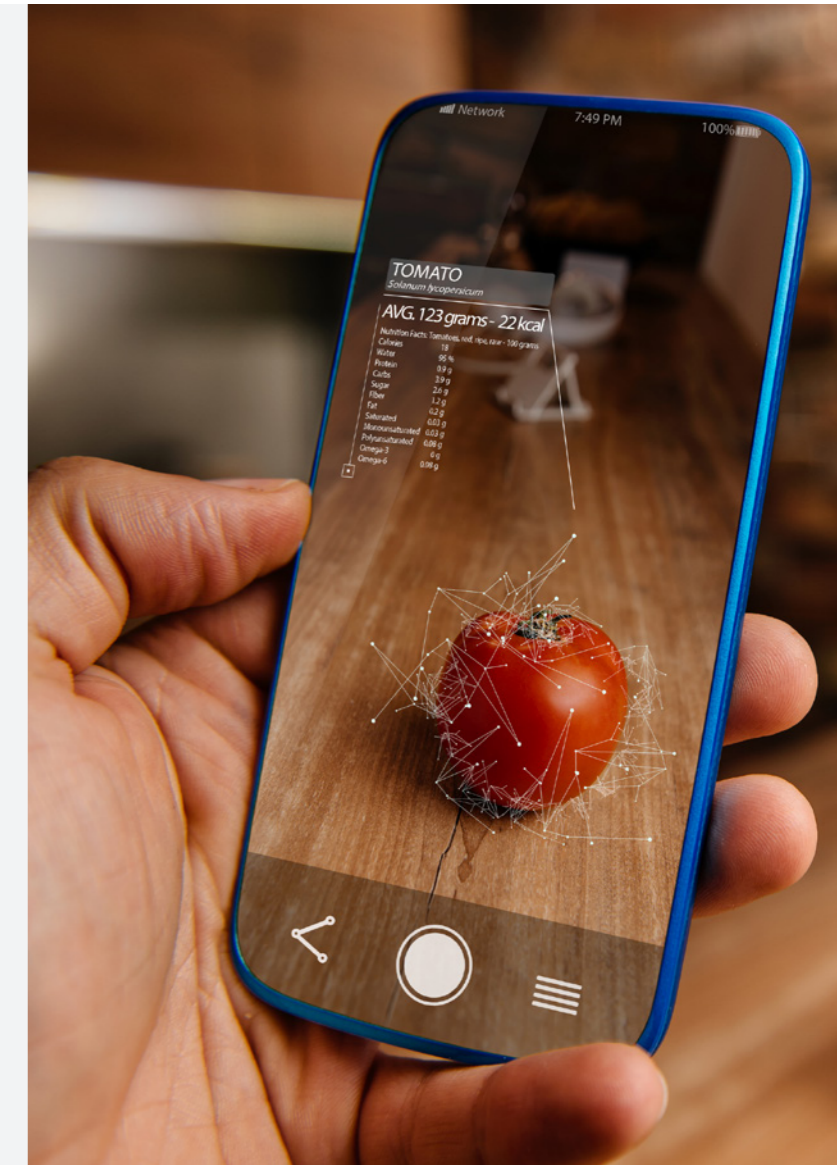
At the Pangborn Conference, 74% of our delegates believed that 'measuring human behaviour' is a key opportunity linked to the use of technology in sensory and consumer science. It's easy to see why. Technology infiltrates areas of human experience which have historically been hard to reach or measure.

This helps us build a more accurate picture of human experience via real time, in the moment data. We can reach people through their smartphones as they are living their lives. Or we can ask permission to track their behaviour. For instance, an individual might struggle to remember how long it takes to dry their hair, but a device can record this much more accurately.

### The technology toolkit

Modern technologies enable us to:

- Discover beliefs or concerns people don't acknowledge to themselves or their peers (e.g. using analysis platforms such as Google Trends)
- Assess how people present themselves to others on social media and the narratives they craft (e.g. using social media listening)
- Put people in settings which don't yet exist or are difficult/expensive to reach (e.g. using virtual reality)
- Blend what isn't there with what is (e.g. using augmented reality)
- Track things which are hard for consumers to measure accurately (e.g. using sensors to measure heart rate)
- Create large datasets of online behaviour (e.g. through website tracking data)
- Predict which emerging trends will become mainstream (e.g. tracking influencers, and applying predictive methods)



### 3 Apply behavioural science to methods and findings

As we acknowledged earlier, human behaviour is inherently complex. It can often be hard for us to understand our own actions and needs, let alone those of other people.

Psychology and behavioural science show that people don't always say what they think. Context has a bearing on this, we might say something in one situation, then contradict it in another. Much of the time this is unconscious, and we're unaware of our own inconsistencies. We are often creatures of the moment, sometimes doing things on autopilot, living by rules of thumb to speed up decision-making. We are fundamentally flawed and susceptible to influence from peers and social networks.

All of this makes consumers hard to pin down, which is why research needs to extend to people's behaviours as well as their perceptions and what they say.

Current psychological theory indicates that we are influenced by two cognitive systems, (detailed in Fig 2). Traditional research methods tend to rely on System 2, which is characterised by the reflective brain, whereas people often exist in the System 1 mode. Human behaviour is a manifestation of the interplay between these two systems.

System 1	System 2
Fast	Slow
Intuitive	Thoughtful
Automatic	Reflective
Uncontrolled	Controlled
Effortless	Effortful

Figure 2: Two cognitive systems influence human behaviour

It's important to remember this when assessing research findings to extrapolate consumer truth. Understanding the dynamics and patterns of human behaviour makes it easier to predict how consumers will respond to new innovations and products.

### 4 Aim for 'in the moment', real time research

For findings to be truly meaningful, research methods need to get as close to real life as possible. Of our Pangborn Conference respondents, 74% believed 'immersion in consumer experience' is a prime opportunity for new technologies.

Sensory science has been making waves in this field with its use of techniques like virtual reality (VR). We know from our own research with a lemonade product that 'liking' was higher in a VR setting involving a beach than it was in a standard hall test. What's more, in some experiments using VR conditions vs standard hall tests, people were less likely to differentiate between small product differences in the VR scenario.

This is all very interesting and it certainly adds value. But much of the time we're simply applying new technologies to old techniques. It's time to take a more radical stance. We need to think about what technology can enable us to do, instead of using it to do what we have always done.

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Recording people's behaviours and experiences in real time takes us closer to that elusive consumer truth.

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So, rather than mimicking real life with VR, we should aim to record experiences and natural behaviours in people's own lives, in real time. It's an opportunity to fully embrace ethnography, understanding how people interact in their natural environment instead of in a lab-style context. This requires deeper engagement with the complexity of human behaviour, and it certainly brings new challenges. But ultimately, it enables us to take a big step closer to that elusive consumer truth.

## 5 Focus on multiple moments of truth

Qualitative research can shed new light on consumer behaviour. However, to capture a more complete 360-degree view, it needs to extend beyond the single moment.

In practice, this might involve tracking activity both during purchase and product use or consumption. You could also explore how consumers feel when they no longer have the product. Building a multi-dimensional picture of a product and its impact on consumers provides high-value insights which can enrich business decision-making.



A further advantage of multipoint, real time monitoring is that you can observe or track actual behaviours, rather than relying on imperfect recollections or claims after the event. Even so, the findings may be contradictory. We know from sensory research that our senses can't always be trusted. Human experience and perception is varied, beautiful, fluctuating and inherently flawed. So, consumer truth isn't a fixed point or a definitive outcome of research. Rather, it's a continuum that is open to interpretation, a journey that changes course over time.

All of this can seem frustrating if your goal is to pin down a single game-changing insight. But once you stop chasing unicorns, you can focus on leveraging multiple insights to drive adaptive product development.

## 6 Consider the whole customer experience

Breaking free from the static test hall environment empowers research to understand the consumer experience in its entirety. As well as enabling multiple moments of truth to be monitored, it allows sensory science, traditional research methods and new technologies to come together. The result is a more complete, nuanced view of how customers experience products.

That's not to say that test halls and traditional focus groups have no place in modern consumer research. Many valuable insights can be gained from sitting down and talking to people. The secret is to augment and interrogate the insights gathered, rather than taking them at face value.

This is where breaking down siloes, such as those between traditional consumer research and sensory science, can deliver maximum benefits. Converging multiple disciplines lets us get a better handle on the dynamic nature of consumer

experience. So, sensory data can be overlaid with information about what people say, how they perceive the world and what motivates them. Enriching this with real time, real world behavioural analysis takes consumer understanding to a whole new level.

It's important to remember that people don't experience products in a vacuum. Multiple factors influence the way we feel when choosing and using or consuming products. Figure 3 visualises this, juxtaposing the visceral (sensory) with the more reflective (emotional) aspects of experience. Understanding this complex interplay empowers product development, giving teams a better chance of maximising consumer enjoyment, loyalty and advocacy.

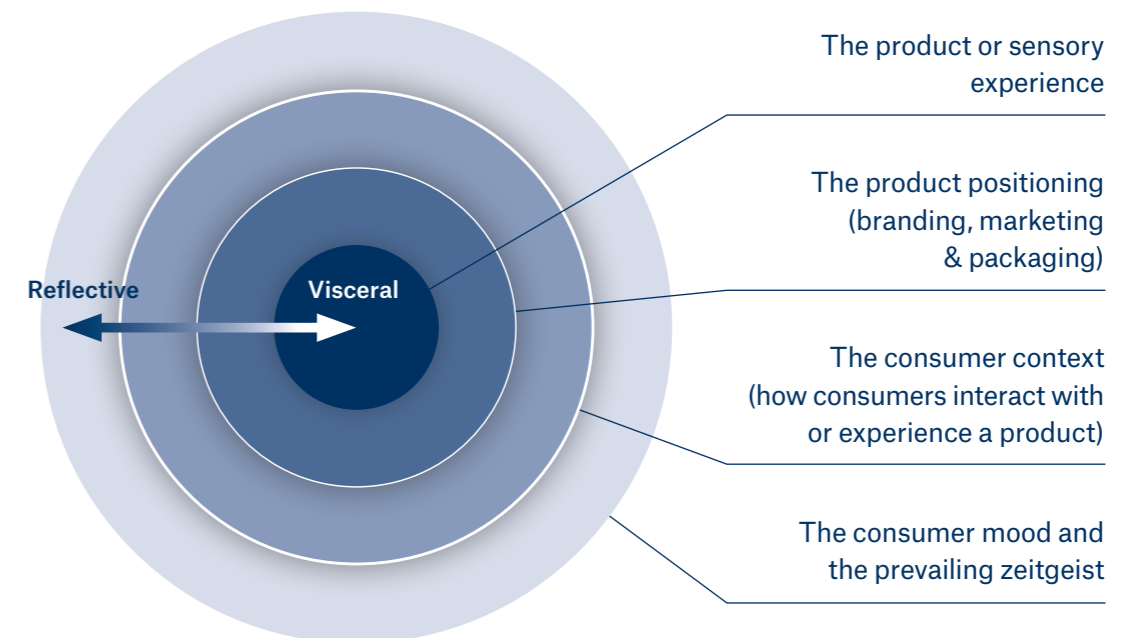


Figure 3: It's important to consider the whole product ecosystem



## 7 Blend new and traditional research methods

Many consumer insight start-ups champion vigorous new approaches. They can reach people in different places, at different times, tapping into of the moment behaviours and emotions.



What's more, they can gather and analyse this data faster than anyone would have thought possible ten years ago.

However, while social media, online tools and smartphone apps have made consumers easier to reach, their behaviours and choices can be harder to interpret. The upshot can be that when it comes to meaningful, actionable insights, there is a tendency to over-promise and under-deliver.

This is not meant to undermine the value these players bring to the table. It's just that novel research needs to learn from, or run alongside, proven methods that have been honed over decades of use.

One solution is to evolve, extend and reinvent traditional methods – such as sensory science, focus groups and quantitative surveys – with digital technologies. Interpreting and rationalising the resultant findings through the lens of behavioural science can reveal consumer truth.

To do this properly, you need to start out by clearly defining the challenge you're trying to overcome. Which takes us full circle to the earlier point about setting objectives. It's about hypothesising what you need to know, and finding the best way to achieve that. We need to harness the rigour of the old and the vigour of the new.

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## Cross-disciplinary integration shines a light on consumer truth

In an age where people expect products to meet their personal needs and preferences, but organisations still need to operate at scale, consumer insight is a critical asset.

Traditional assumptions about segmenting consumers according to demographics, geographies and socio-economic factors are being turned on their head. Instead we need to discover new ways to define groups of people according to behaviours and preferences, while acknowledging that these will be influenced by external factors and trends.

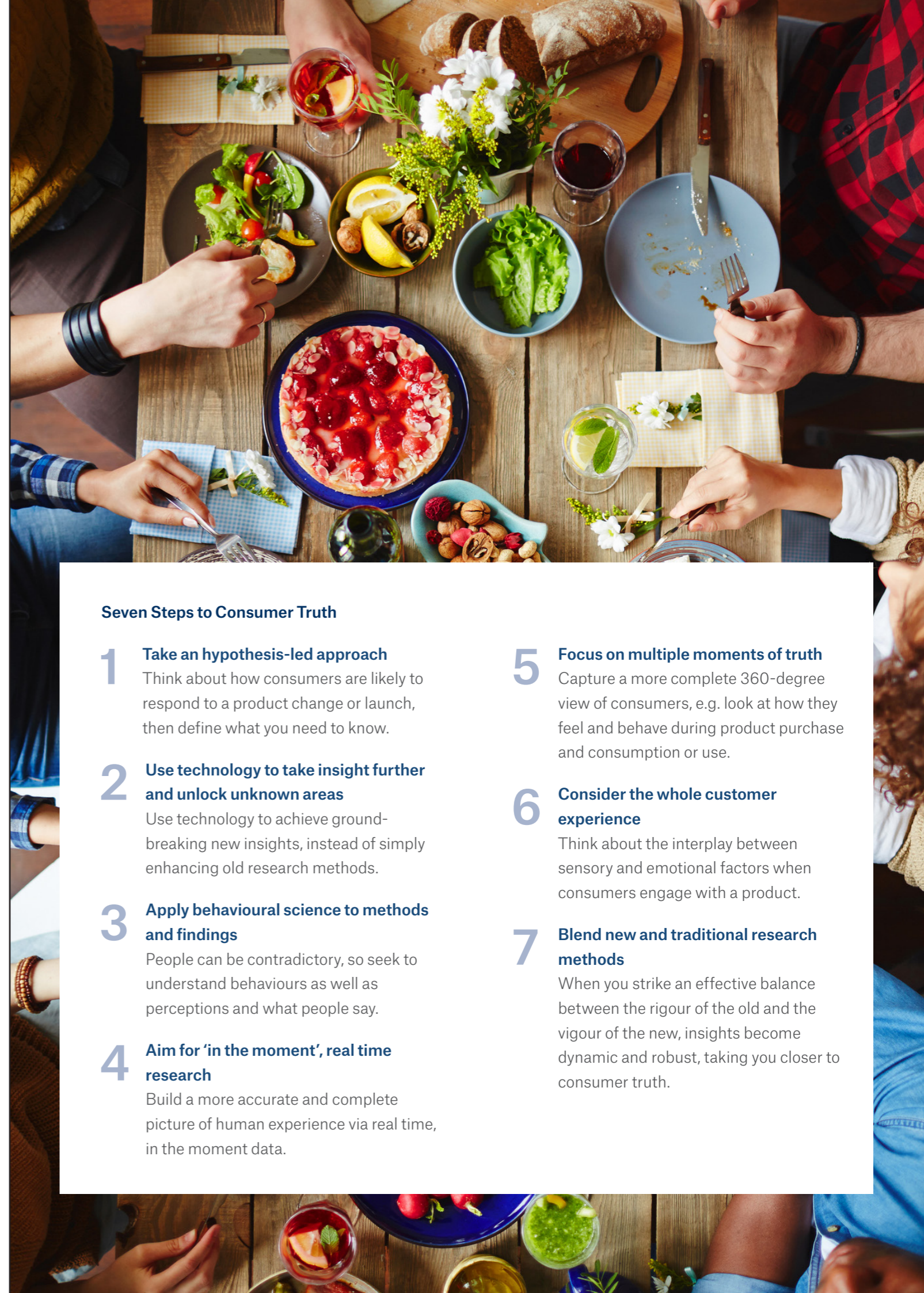
This approach empowers brands to develop adaptive products which appeal to intelligently defined consumer segments. So, the food and beverage sector might categorise consumers in terms of those who use food for fuel and those who love cooking or have a deep interest in nutrition.

Dynamic consumer insight also enables brands to identify trends which are likely to go from niche to mainstream. Emerging superfoods are a case in point. An independent coffee shop in Soho might start adding turmeric to beverages. Then, as consumers catch on to the perceived benefits, it gets picked up by high-end restaurants, then high street coffee chains and larger retailers.

Consumer truth can be capricious. But it doesn't have to be unattainable. The secret is a collaborative, cross-disciplinary approach, which draws on new technologies, proven methods and human psychology. Brands that approach this responsibly and get the balance right can build meaningful relationships with consumers, despite their messy, complex and nuanced ways.

### Footnote

1. Pangborn Sensory Science Conference, 31 July 2019, c.90 attendees from a range of industries and academia polled at our workshop *The battle for consumer truth: how consumer and sensory research is facing disruption*.



### Seven Steps to Consumer Truth

- 1 Take an hypothesis-led approach**  
Think about how consumers are likely to respond to a product change or launch, then define what you need to know.
- 2 Use technology to take insight further and unlock unknown areas**  
Use technology to achieve ground-breaking new insights, instead of simply enhancing old research methods.
- 3 Apply behavioural science to methods and findings**  
People can be contradictory, so seek to understand behaviours as well as perceptions and what people say.
- 4 Aim for 'in the moment', real time research**  
Build a more accurate and complete picture of human experience via real time, in the moment data.
- 5 Focus on multiple moments of truth**  
Capture a more complete 360-degree view of consumers, e.g. look at how they feel and behave during product purchase and consumption or use.
- 6 Consider the whole customer experience**  
Think about the interplay between sensory and emotional factors when consumers engage with a product.
- 7 Blend new and traditional research methods**  
When you strike an effective balance between the rigour of the old and the vigour of the new, insights become dynamic and robust, taking you closer to consumer truth.



### About Leatherhead Food Research ▾

Leatherhead Food Research provides expertise and support to the global food and drink sector with practical solutions that cover all stages of a product's life cycle from consumer insight, ingredient innovation and sensory testing to food safety consultancy and global regulatory advice. Leatherhead operates a membership program which represents a who's who of the global food and drinks industry. Supporting all members and clients, large or small, Leatherhead provides consultancy and advice, as well as training, market news, published reports and bespoke projects. Alongside the member support and project work, our world-renowned experts deliver cutting-edge research in areas that drive long term commercial benefit for the food and drink industry. Leatherhead Food Research is a trading name of Leatherhead Research Ltd, a Science Group Company.

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