

# Who is shaping your brand's future?

How a better understanding of the people shaping your market can improve brand growth. By **Peter Kneale**, TNS Europe

**T**HE WRITERS OF the US Declaration of Independence thought it 'self-evident' that all men are created equal. Looking at the evidence quickly leads you to a different conclusion. Huge differences exist between individuals on all sorts of dimensions - sex, age, shape and size, personality, intelligence, skills, beliefs, attitudes and, of course, habits and behaviours.

Freedom of expression is an equally democratic concept. Happily, much of the modern world celebrates diversity of view and the right for all opinions to be heard. Indeed in the market research community it is a mantra that 'it is your opinion that counts; there are no right or wrong answers'. Commitment to equality also demands that samples be representative, with everyone given an equal chance to air their views irrespective of age, gender, education or anything else that might differentiate them.

Philosophically this is an attractive set of principles, and it certainly helps us to explain the world around us as it is today. But it does not necessarily help us see how the world might change in future.

The problem is, not all opinions are created equal. The opinions of some people have a disproportionately big influence on the way other people think and behave, while other people have little or no impact. As such, an undemocratic focus on the key influencers, both in your market research and marketing activity,

can help you keep your brand one step ahead of the competition.

## New ideas on influence

What does it mean to be an influential person? A practical definition might be that you have a disproportionately large impact on future attitudes, habits and purchases.

What are the key dimensions of this influence? Historically, the search for leading or influential consumers has focused on a few dimensions that have been treated independently of one another. More recent ideas on the true nature of influence show that it is the bundling of several of these aspects into one person - the Future Shaper - that gives somebody real influence.

## Curiosity

The classic early adopter is interested in new ideas, new ways of doing things, new products and services. Diffusion theory holds that new ideas, products or trends start with innovators, are taken up by early adopters and then eventually the rest of the population joins the party.

While in practice it is not too hard to identify and sell to the early adopters, it quickly became clear that diffusion through to the mass market could not be guaranteed. As Geoffrey Moore argued in *Crossing the Chasm*, the problem with this model is that there is no mechanism for the innovation or trend to diffuse from the leaders to the followers. Innovators

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and early adopters try new things for their own sake - they want the thrill of the new and then they move on (see Figure i),

## Advocacy

So what else is needed? Well one important mechanism for diffusion is advocacy, or word of mouth.

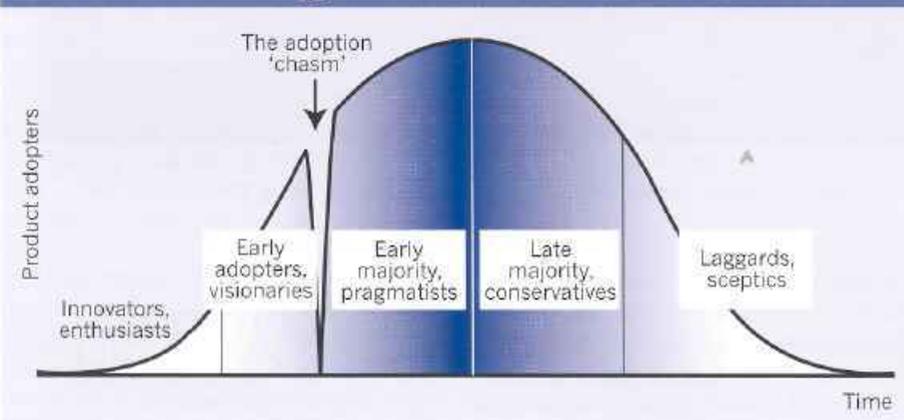
Malcolm Gladwell's *The Tipping Point* outlined three archetypes of highly effective advocates:

1. *The Connector*. The more people you know and are in touch with, the bigger your potential sphere of influence. We might all be within 6 degrees of separation, but that is only because most of us know one or two incredibly well-connected people.
2. *The Maven* is extremely knowledgeable and authoritative about a specific subject and prepared to share their views to help others. His or her opinions are treated with great respect.
3. *The Salesman* uses persuasion and force of personality to win people around to his or her point of view.

Gladwell's book used highly engaging examples to illustrate these three elements. For example, Paul Revere's ride through Massachusetts to rouse the militias against the British army was successful because he combined elements of the Connector and the Maven. It is not realistic to build a marketing strategy around gaining the support of one or two such heroic figures, but what we can do is use the Connector, Maven and Salesman

FIGURE 1

## From innovators to laggards



concepts to build a model of advocacy that, in conjunction with early adopters, helps us find a more everyday definition of a truly future-influential consumer.

**Category focus**

The Maven concept is thought-provoking for another reason. No one has this kind of passionate interest, and consequently influence over others, in every category. You wouldn't ask a car fanatic where to get the best organic vegetables. It seems like a statement of the obvious, but traditional models of future influence have often just looked for people who are influential in general. Or have used leading consumers in trendy categories like mobile phones to get ideas for more mundane markets.

Such approaches are ineffective. In reality, most of us are future shapers in some areas of our lives, but hardly anybody will be future-influential in everything they do or say.

**The rise of the New Consumer**

If you find somebody in your category who has elements of an early adopter and is a persuasive advocate, you are well on your way to finding a really future-influential person. But this is still not enough.

In recent years, key 'mega-trends' in consumer opinion have started to make a big impression on more or less every product category in more or less every country. These trends do not manifest themselves in the same way everywhere and they have not reached a similar stage in every country, but the direction of change is the same.

The trends are as follows:

- ^ Authenticity. Growing desire for authenticity and integrity in what you buy and from whom.
- > Individuality. Increasing need for customisation to reflect your specific needs.
- > Social responsibility. Rising awareness of social responsibility and the need to make ethical choices.
- ^ Time poverty. Real or perceived feeling that time is more precious and scarce than money.

New Consumers are those people who are most conscious of these trends, and who demand that brands and companies

provide new solutions to address these issues. In the UK the rise of food provenance issues, the success of the oft-referenced Innocent (smoothies) and the tension between the convenience of Tesco and resentment of its ubiquity can all be understood in relation to these trends.

**So who are the Future Shapers?**

The truly future-influential person - what TNS calls a Future Shaper - is a powerful combination of:

- > early adopter
- > persuasive connector
- ^ New Consumer.

Crucially, future-influence is category specific - you need to look for the future shapers of *your* market

**The FutureView research tool**

Based on these insights on the nature of future influence, TNS embarked on a programme of research and development, to find a process for identifying future shapers. Between 2002 and 2005 some 20,000 interviews were conducted across a range of product categories. The end result was a research tool that reliably



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identified people who were driving change and growth within a market.

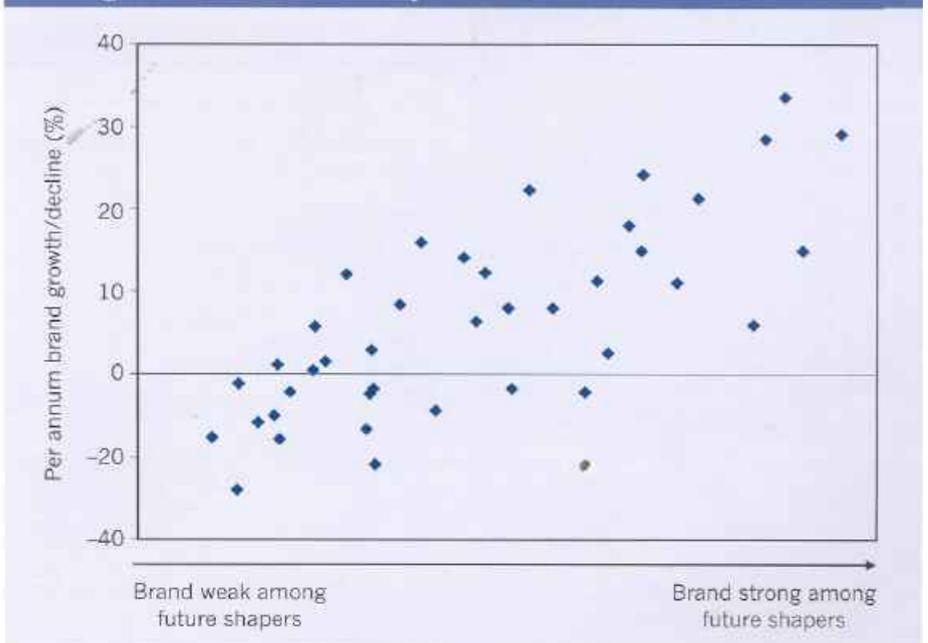
**Using FutureView**

FutureView does not simply identify the future shapers; it allocates each consumer to one of five groups across the FutureView model, as follows:

- > Future Shapers: the leading consumers in the market.
- > Future Makers: more future-influential than the average consumer.

FIGURE 2

**Brand growth and Future Shapers**



> • Today Consumers: the middle of the market.

^ Yesterday Consumers: less future-influential than average.

\* Yesteryear consumers: the least future-influential consumers in the market

By looking at the attitudes and behaviours of Future Shapers, compared to the

less future-influential consumers, we have found a clear pattern - attitudes and behaviours that are particularly prevalent among Future Shapers have a very high probability of growing in the near future as they diffuse into the rest of the market.

The most striking manifestation of this tendency is when looking at brand

growth. Across 40 brands in eight fmcg categories, we found that those brands that were favoured by Future Shapers had a much stronger probability of growing in the following two years than did brands that were being bought by Yesterday and Yesteryear Consumers (see Figure 2).

This finding becomes still more significant when compared to the result when only a single dimension of future influence - for example, early adoption - is considered. While the correlation between brand growth and strength among future shapers is a very high 0.77 (where 1.00 is a perfect correlation), the equivalent correlation for early adoption is just 0.24.

Simply put, FutureView is a reliable guide to future growth opportunities in your market.

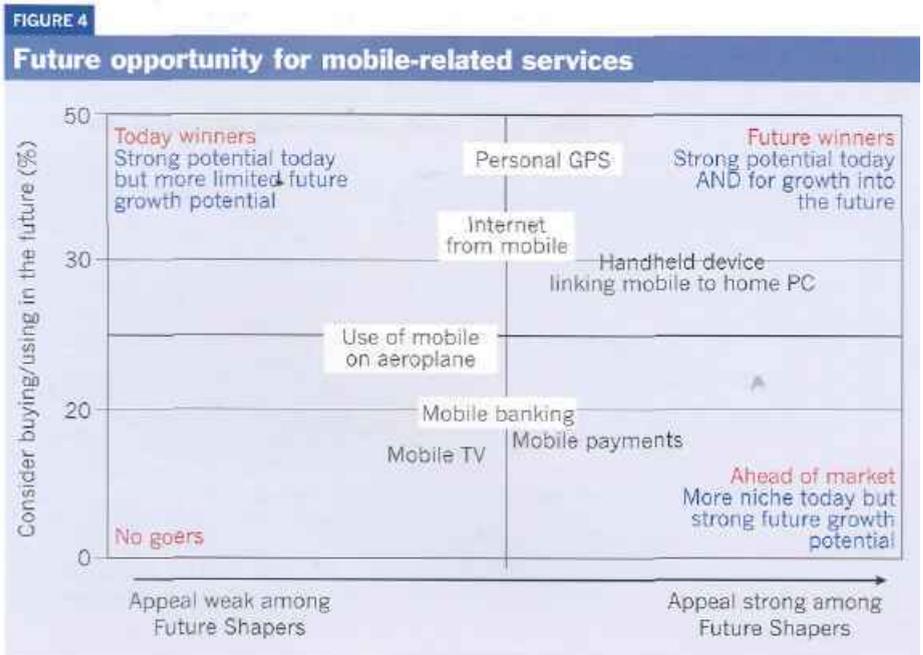
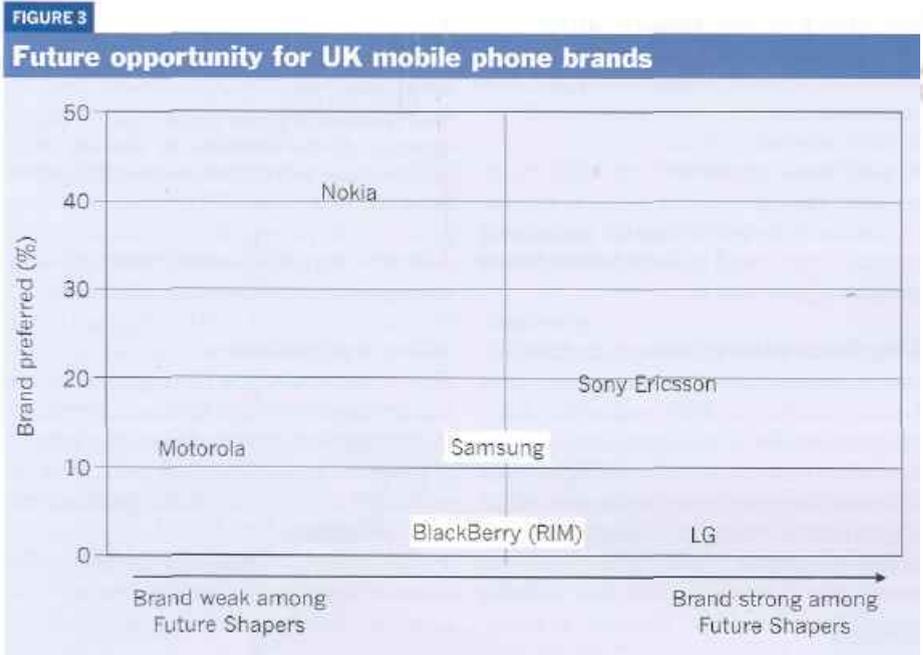
**FutureView applications**

FutureView as a research tool is very simple. Since we know that Future Shapers are the most future-influential consumers, we look at their needs, their attitudes, their habits and their purchasing, and compare them to those of less influential people. Where the differences are most striking, we have a foresight - an insight into what might change in the near future.

**Planning ahead with FutureView**

A few examples, based on a survey conducted by TNS Technology in June 2007. First we can look at brand usage. We already know that brands used or desired by future shapers are well placed for future growth. So Figure 3 indicates that Sony Ericsson is particularly well placed for continued growth in the UK mobile phone market, whereas Motorola is still struggling to find the next big thing to replace the RAZR. LG, while small overall, has a strong franchise among Future Shapers and may be one to watch.

Since we can also ask consumers what their needs are in the category and what services they might be interested in acquiring, we can then start to see how brands can improve their offer to





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the future-influential consumers and so improve their future prospects (see Figure 4). On this basis, technology to link your mobile phone to your home PC appears to be strongly desired both now and into the future. Of more concern to the industry is the relatively weak potential of mobile TV, a technology often seen as a 'killer app' to help sell 3G. Fortunately, mobile internet might plug that gap.

#### **New product development with Future View**

Future Shapers are both knowledgeable about their fields of expertise and are interested in new ideas. As such, it is no surprise that they are particularly receptive to new product ideas that are

genuinely offering something different into the market.

Too often these radical innovations are shot down in research by mainstream consumers, either in focus groups or in quantitative concept screening. By paying particular attention to the opinions of Future Shapers, it is possible to identify and prioritise these precious 'disruptive innovations', while kicking out the me-too ideas that simply involve selling new variations on existing products.

#### **FutureView provides actionable outcomes**

So Future View can help to check the future potential of your brand but, more importantly, can provide foresights so you can

improve your chances of growth. Since it was introduced\*in 2006 it has been used to:

- > help develop and launch soft drinks based on New Consumer trends
- \* create mould-breaking ideas in the mobile phone category
- ^ spot trends 'topping out' in the UK alcoholic drinks market
- \*• anticipate a switch to new product formats in the personal care market
- > show the value of a magazine's readership
- ^- change the way companies evaluate new product ideas.

For the companies involved, an undemocratic focus on the real Future Shapers is paying off.

 More on opinion leaders at [WARC.com](http://WARC.com)

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