

The end of consumer surveys?

Jack Neff

P&G, Unilever join ARF in effort to move beyond question-and-answer

After issuing dire warnings about the future of consumer surveys, the two biggest advertisers and buyers of market research in the world-Procter & Gamble and Unilever-are linking with the Advertising Research Foundation for an industry effort to embrace online chatter and other naturally occurring feedback like never before.

"Without transforming our capabilities into approaches that are more in touch with the lifestyles of the consumers we seek to understand, the consumer-research industry as we know it today will be on life support by 2012," Kim Dedeker, VP-external capability leadership, global consumer and market knowledge at P&G, said in a statement provided by the ARF.

To tackle the issue, the ARF will hold two industry summits in the coming six weeks to support new ways of listening to consumers that don't involve the traditional question-and-answer format. "Our consumers have been sending us messages for years that they're not interested in the traditional survey process," said Ms. Dedeker, who declined to elaborate, saving her thoughts for an Oct. 29 keynote at an Industry Leader Forum to be hosted by the ARF in New York.

"I don't know if we are going to have a choice but to move away from survey research," said Donna Goldfarb, VP-consumer and market insights for Unilever Americas, who will headline a Sept. 22 workshop ARF is hosting in New York. "We continue to torture consumers with boring and antiquated search methods," she said. "What's holding us back is history and norms. But I work in a business where I think most of the senior leadership is still very frustrated with the tools that we are using."

To be sure, both companies continue to do plenty of surveys tracking brand-equity metrics for hundreds of brands daily. Ms. Dedeker noted in 2006 her company alone spent \$200 million on 600 research vendors.

Yet their statements signal a shift in paradigms, and most likely budgets, away from surveys and toward mining insights from blogs, social networks, consumer comments to websites and more, said Joel Rubinson, chief research officer of the ARF.

The initiative grew out of a July meeting on how better to listen to and track opinions consumers already are sharing spontaneously, Mr. Rubinson said. "Within about an hour, this session really became transformational," he said. "Researchers were starting to sound like planners."

COMING AROUND

Pete Blackshaw, exec VP-digital strategic services for Nielsen Online, who faced industry skepticism for years after founding his original business, PlanetFeedback, in 2000 to mine consumer opinion online, called it the "most inspirational meeting I've ever been to," and said that industry giants appear to be coming around.

Mr. Rubinson said he believes the "listening" initiative will be the ARF's most important ever, one that could help research shed its uncool image and move researchers beyond today's primary role as gatekeepers toward idea generators.

"You can't ask people what they want, because what they say and what they do are two different things," said Artie Bulgrin, senior VP-research and sales for ESPN, another backer of the ARF effort. "We can actually improve our [initiative's] success rate if we just listen a bit more ... on a passive basis."

Though many, including Ms. Dedeker, have expressed doubts in the past about how well bloggers or participants in social networks represent the broader population, Mr. Rubinson said it's clear that digital chatter can have useful statistical properties.

For example, he's noticed a trend line in Nielsen Online's Blogpulse, in which John McCain closed a months-long gap and overtook Barack Obama in recent blog mentions, exactly as tracking polls showed the same trend in the presidential election.

Clearly, however, traditional survey researchers won't go away quickly or without a fight. WPP Group's Millward Brown-which uses surveys to track advertising effectiveness for the likes of Unilever and Kimberly-Clark Corp.-is participating in the ARF initiative, but it's not exactly conceding the irrelevance of surveys.

"We see [mining consumer insights online] as a way to add lots of nuance and color and answers to questions you didn't think to ask," said Eileen Campbell, CEO of Millward Brown, noting that the firm has its own Precis unit for that. "But ... it's highly unlikely you're going to be able to quantify who's seeing your advertising in any meaningful way by simply listening in on the web."

Big issues that interest almost everyone-such as presidential elections-generate statistically useful web chatter, she said, but household-product brands usually don't. "I'm a big reader of blogs and visitor to sites like TripAdvisor," Ms. Campbell said. "I have to be righteously ticked off in order to post."

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