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IPSOS VIEWS

How Technology Can Fuel
Behavioral Research
– and Enrich Your Insights

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Our clients are riding a wave of disruption that shows no signs of receding. Virtually every industry is seeing dramatic transformation. Mobility has become electrified, autonomous, shared, and connected. Fintech must invest in voice interfaces, digital assistants, and blockchain technology. Even the basic soft drink is reinventing itself to deliver personalization, naturalness, and functional benefits.

Disruptions such as these drive fundamental changes in human behavior and attitudes. Think about Venmo, a digital wallet that lets you make and share payments with friends and displays your transactions on a friend-shared app. Venmo resulted in a behavioral change in how friends split expenses, such as a restaurant bill, as well as attitudinal changes about finances: people now expect to be able to instantly and digitally exchange money with friends and no longer have any reluctance to exposing their financial transactions to other people.

It is more critical than ever to understand these changing consumer behaviors and attitudes. To this end, marketers turn to Usage and Attitude (U&A) studies. The U&A is an indispensable tool for understanding consumer behaviors, attitudes, motivations, and profiles and uncovering why people behave the way they do. The information gleaned from U&A studies helps marketers to form brand strategies, optimize their portfolios, fill their innovation pipelines, target acquisitions, and, in general, grow their businesses.

Unfortunately, traditional U&As can be weak at capturing today's disrupted behaviors and attitudes and, as a result, may fail to identify new growth opportunities.

The traditional U&A must evolve

With their lengthy and sometimes tedious survey formats, traditional U&As are out of touch with today's digitally connected, visually-obsessed, and time-deprived consumer. If people have shortened the phrase "thank you" to "ty" when texting and express themselves through images instead of words on Instagram, how much longer can we expect them to answer a 40-minute survey or take the time to write down details in an open-ended question? (This is why, a few years ago, we deconstructed our U&A approach to feature shorter, iterative modules, multiple data sources and faster, hypothesis-driven insights[1].)

Moreover, traditional U&As are based on *recall*, which is not as optimal as capturing real-time, real-life behavior. It's like driving backwards while looking through your rearview mirror. When the road is straight, you will get to your destination – but when the road is curvy, it is more difficult to drive because you can't see all the twists and turns or, in other words, disruptions. Moreover, when you depend on the rearview mirror, you may miss the scenery along the way: respondent recall often lacks the richness and emotion that respondents have to offer.

[1] Read about Ipsos' deconstructed U&A approach in our paper *Incremental vs. Monumental Decision-Making*

Fortunately, technologies now exist that enable more comprehensive and contextual ways of conducting research and, in essence, allow us to follow the new rules of the road:

1. Capture **real behaviors and actions**, on top of stated responses.

2. Uncover consumers' **System 1** reactions, not only their System 2 thinking.

3. Connect with consumers **in-the-moment**, not just through recall.

How technology can fuel behavioral U&A research

New technologies have made it easier to capture consumers' real behaviors and fast, intuitive System 1 thinking. These technologies lessen the burden for respondents by reducing or eliminating survey questions and, at the same time, provide marketers with behavior-based information. Specifically, today's technologies can help marketers follow the "new rules of the road".

To determine the potential of new technologies for delivering more behavior-based insights, we conducted a pilot U&A study that integrated these new digitalized approaches.

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1. Capture real behaviors and actions, on top of stated responses

- Offline moments and profiles through GPS sensor apps (which can be integrated with online activity timelines).

- Online behaviors and digital activity through passive monitoring (which helps build consumer profiles and digital journeys).

2. Uncover consumers' System 1 reactions, not only their System 2 thinking

- System 1 brand and category perspectives via short, in-the-moment mobile surveys (which can include metaphor elicitation to aid spontaneous expressions regarding needs and motivations or brand associations).

3. Connect with consumers in-the-moment, not just through recall

- Contextual insights via images and videos captured on mobile phones and tablets.

- Natural trends and brand perspectives through unfiltered, organic conversations derived from social data (and analyzed through deep artificial intelligence-powered text analytics).

Designing a behavioral U&A that is more real and less recall

Our behavioral U&A pilot study focused on automotive mobility, which is quickly moving from traditional mobility (e.g., car ownership and public transportation) to on-demand, autonomous mobility (e.g., app-based ride hailing and autonomous vehicles).

We set out to understand this transforming world of mobility through the integration of different data sources, with the goal of having consumers show us what they are doing (behavior-based research) in addition to telling us what they are doing (recall-based research). We developed a behavioral U&A research framework as illustrated in *Figure 1*, essentially integrating a limited number of survey questions with techno-driven behavioral elements available through Ipsos on a single-source platform.

Passive Monitoring
Online behaviors/
digital activity to build
consumer profiles and
digital journeys

Mobile Survey
System 1 thinking (e.g., via
metaphor elicitation)

Video/Image Capture
Contextual insights

GPS Sensors
Offline moments and
profiles (which can
be integrated with
online activities)

Social Intelligence
Natural trends/brand
perspectives from
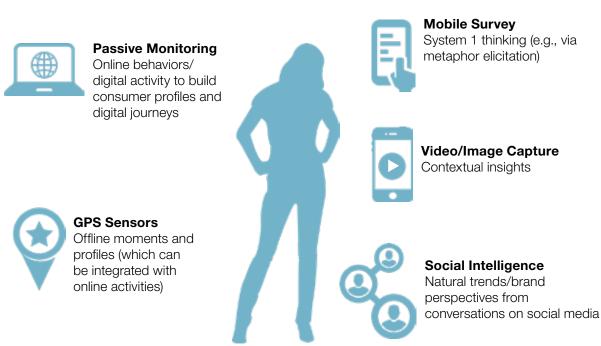conversations on social media

Figure 1

What we learned about automotive mobility from the Behavioral U&A

Each component of our behavioral U&A contributed a unique set of learnings. The detailed learnings follow.

GPS Sensors

We constructed 254 offline behavior profiles based on the GPS sensor data that captured exactly how people travel – with a level of precision that would not be possible through respondent recall.

Based on GPS data, we can calculate the amount of time people spend at home, at work, or on the move. We can also detect that a person is driving a car based on distance and speed measurements, and deduce that a person who is using their phone while driving may be a distracted driver and a person who changes lanes or speeds frequently may be a risky driver.

Behaviorial Offline Profiles

	Brand A User	Brand B User
Early Bird	19%	16%
Night Owl	**19%**	10%
Workaholic	**24%**	8%
Work Traveler	10%	10%

Figure 2
Source: GPS Tracking

Key Learnings

- People are on the move, spending over a third of their day in transit.
- Looking at app-based ride hailing companies, Brand A users are more likely to be 'workaholics' and 'night owls' than Brand B users. (See *Figure 2*)
- Among those driving, over 25% have risky driving habits. (See *Figure 3*)

SAFE DRIVERS

Anticipative driver	39%
Efficient driver	31%
Legal driver	19%

RISKY DRIVERS

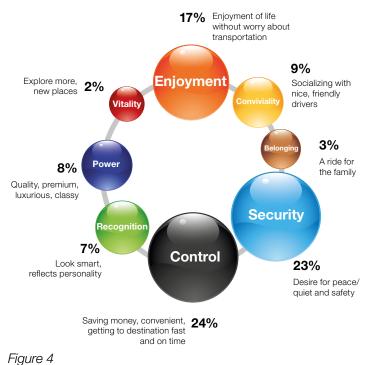| Distracted driver	12%
Aggressive driver	9%
Illegal driver	7%

Figure 3
Source: GPS Tracking

Mobile Survey for System 1 Processing

We conducted a short mobile survey to capture System 1 brand and category perspectives as they relate to app-based ride hailing. Our mobile survey used only four questions and provided the same insights – if not richer insights – than some 40-minute surveys. Key to the mobile survey was the metaphor elicitation component, whereby we used visual metaphors to capture consumer motivations in a more granular and more intuitive way. Because visuals are a stronger way to communicate than words, using them as metaphors in a survey helps respondents better express their emotional meanings.

Key Learnings

- App-based ride hailing is already a leading mode of transport, with greater past month penetration than traditional taxis, buses, or trains.

- Based on our Censydiam framework, people use app-based ride hailing for the control/security it provides (save money, convenient, get to destination fast and on time, safety) and/or for fun (freedom to enjoy life without worrying about transportation). (See *Figure 4*)

- Brand A has a strong, positive brand mental network (i.e., unique set of memories, emotions, experiences, images, symbols, etc.) that references its brand assets. (*See Figure 5*) The positive associations with Brand A are more about functional benefits and less about emotional. The associations are highly connected, which contributes to a strong salience of the brand. It should be noted that these interconnections cannot be uncovered with traditional attribute-led research.

17% Enjoyment of life without worry about transportation

2% Explore more, new places

9% Socializing with nice, friendly drivers

3% A ride for the family

8% Quality, premium, luxurious, classy

7% Look smart, reflects personality

23% Desire for peace/quiet and safety

24% Saving money, convenient, getting to destination fast and on time

"FUN" FOCUSED
Combining those motivated by enjoyment, exploration, and recognition.

"CONTROL/SECURITY" FOCUSED
Combining those motivated by a sense of control, security, and family

Figure 4
Source: Mobile Survey (Visual Metaphors Elicitation)
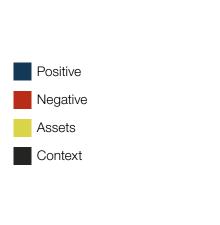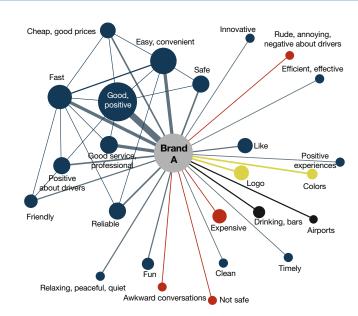

Positive

Negative

Assets

Context

Figure 5
Source: Mobile Survey (Brand Mental Network)

Passive Monitoring

With passive monitoring, respondents agree to have a cookie placed on their device which tells us the types of information they search for, or engage with, digitally. By leveraging this technology, we were able to follow consumers in-the-moment and build 1,641 consumer profiles based on real behaviors instead of recall.

Key Learnings

- Brand A users are more professional and innovative whereas Brand B users are focused on hobbies and lifestyle. (See *Figure 6*.)

Brand A User	
Brand A users are more likely to engage online than Brand B users in these areas	
Professional	**Innovative**
Real estate	Cloud computing
Architecture	Entrepreneur

Brand B User		
Brand B users are more likely to engage online than Brand A users in these areas		
Commerce	**Hobbies**	**Health**
Beauty products	Arts and crafts	Pregnancy
Car brands	Baseball	Energy
Utility vehicles	**Finance**	Doctor
Weapons	Savings	Psychotherapy
Furniture	Loans	Philosophy
	Participative economy	Relaxation therapy

Figure 6
Source: Passive Monitoring

Video Capture

We captured 68 videos on the topic of autonomous vehicles.

Below is an extract from a video response we received. The full quote is nearly 300 words and showcases a richness and emotional depth that we would never obtain from a written open end.

"So, I definitely see the future of travel as being automated. **I don't know if I would feel entirely safe***, but* **I could see myself in the future being completely fine with that. And I would love to not have to drive or own a car, it's a pain in the butt to own a car***, I did live in New York* **for a couple of years and did not have a car, and it was brilliant, I loved it.** *I think probably in five years that half of the cars on the road are going to be driverless, and* **that's insane to think about***. So yeah,* **that's some cool stuff to look forward to."**

Key Learnings

- Consumers are generally open to autonomous vehicles (AVs) in the future once the technology is tested and proven.

- In particular, consumers feel AVs can make the roads safer. This would be a very strong benefit of AVs, given that 25% of drivers have risky habits, according to our GPS Sensors learnings.

Social Intelligence

We collected social data focused on autonomous vehicle trends and analyzed it through AI-powered text analytics.
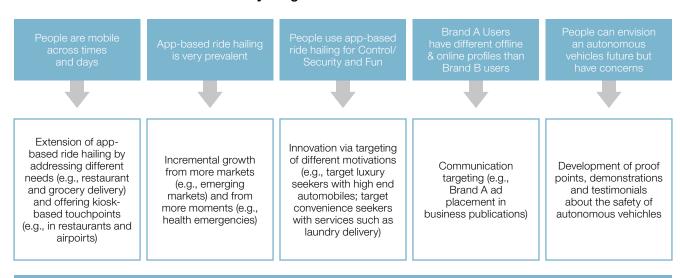
Key Learnings

- Consumers recognize long-term safety benefits of AVs but express immediate concerns on the technical execution.

- Consumers are interested in how laws will evolve and who will be held liable in an accident.

- Consumers believe AVs will save them time and money once they become commonplace.

Business Impact of Automotive Mobility Behavioral U&A

By monitoring actual behaviors, we were able to paint a fully accurate picture of people's activities, both offline and online, as they relate to automotive mobility. Moreover, we used System 1 techniques, such as visual metaphor elicitation, to capture a truer reflection of how they feel about this disruptive category, as well as groundbreaking brands. Based on our learnings, we were able to identify potential business opportunities for marketers involved in the automotive mobility category, as summarized in *Figure 7*. While our pilot focused on automotive mobility, the technologies described could be applied to business issues in a vast array of sectors – from consumer packaged goods to financial services to healthcare and beyond.

Key insights from behaviorial U&A

People are mobile across times and days	App-based ride hailing is very prevalent	People use app-based ride hailing for Control/ Security and Fun	Brand A Users have different offline & online profiles than Brand B users	People can envision an autonomous vehicles future but have concerns
Extension of app-based ride hailing by addressing different needs (e.g., restaurant and grocery delivery) and offering kiosk-based touchpoints (e.g., in restaurants and airpoirts)	Incremental growth from more markets (e.g., emerging markets) and from more moments (e.g., health emergencies)	Innovation via targeting of different motivations (e.g., target luxury seekers with high end automobiles; target convenience seekers with services such as laundry delivery)	Communication targeting (e.g., Brand A ad placement in business publications)	Development of proof points, demonstrations and testimonials about the safety of autonomous vehichles

BUSINESS OPPORTUNITIES

Figure 7

The traditional U&A needs to be disrupted

To help understand consumers' behaviors and attitudes in today's disrupted markets, we need to capture **real behaviors and actions**, uncover consumers' **System 1** reactions and connect with consumers **in-the-moment**. In short, it is time to disrupt the traditional U&A by incorporating more behavioral insights.

Fortunately, today's technologies are allowing us to capture behavioral insights in ways that are fast, easy and efficient – and we encourage all marketers to start taking advantage of these new methodologies. At the same time, we cannot remain satisfied with what is available to us now – we must continue to challenge ourselves to develop even more sophisticated ways to capture real behaviors, real emotions and real insights so that we can develop brands that are relevant to tomorrow's consumers.

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