



Personal Characteristics That Matter to Marketers

Any leader of a market research program needs to ask two strategic questions during the design phase of every project:

1. What if I were personally responsible for the business outcomes my research programs support?
2. Would that change how I conduct the research?

If the answer to the second question is “yes,” then you might seriously consider making some of those changes. To borrow from Steven Covey, “Begin with the end in mind.” It is a great way to ensure you start out on the right track.

This is not always easy, and it is tempting to rely on research designs that use existing frameworks or templates. For example, studies on consumer attitudes or behaviors commonly use demographic profiling to identify significant differences between groups. After identifying those differences, the research objectives are accomplished. However, are the marketing objectives satisfied?

Standard demographic profiling may reveal important differences between groups, but it does *not* inform marketers how to communicate directly with those consumers. There is a lot of diversity within demographic segments in America. As the population continues to grow and diversify it becomes ever more difficult to identify homogeneous consumer segments based on characteristics like age, income, gender, race, or ethnicity.

Good market research needs to identify the human characteristic(s) that enable communications with the target consumer group, using relevant messages. That key piece of information, the “theme” or “trigger” that gets the consumer’s attention and holds it long enough to deliver the relevant message, is perhaps the most important information market research can deliver.

Here is an example from two recent LIMRA studies. One study, *The Purchase Funnel*, examines life insurance

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shoppers and buyers. Another study, *Financial Needs of Unpaid Family Caregivers*, examines how caregiver financial needs differ from the typical consumer.

We completed both studies on time and on budget, two key criteria for “success.” They delivered on their respective research objectives. Both sets of reports are popular with the membership, and received positive feedback. In these respects, the two projects are equally successful.

Yet, I learned a lot from subsequent conversations on these projects. Discussions about *The Purchase Funnel* center on how members are applying information from the reports directly to their business operations — a very gratifying response.

However, the tone of conversations on the *Caregiver* reports differs. In every conversation about the caregiver research — consistently and without prompting — someone volunteers information on their own caregiving experiences. That same dynamic does not occur during

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the *Purchase Funnel* discussions. Yet, far more people have shopped for life insurance than have been unpaid family caregivers. So why do people want to share their experiences on one of these topics but not the other?

In short, it is due to an underlying emotional connection. I am a former unpaid family caregiver myself, so I understand the strong emotional bond with those experiences. Even so, I am surprised at how compelled people are to speak about these experiences, and how much information and emotion pours out during these discussions.

Even outside of meetings, people pull me aside to talk about the caregiver reports they read. However, they do not want to talk about the business applications or

the research methods, they want to talk about how the research resonates with them personally. This is the consumer connection that every marketer looks for. As a former caregiver, I empathize with the other caregivers. As a market research professional, I think, “Wow!” We have identified a truly meaningful personal characteristic.

Caregiving is a great example of a theme that gets the attention of the relevant consumer audience, and holds it long enough to deliver a relevant marketing message. That type of information is perhaps the most valuable learning that market research can deliver. 

¹ Covey, Stephen, *The 7 Habits of Highly Effective People*, 2004.

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