

Understanding Middle Eastern Consumers
through
Innovative Research Tools

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Saber Khan (MOO339670)

Institute for Work Based Learning
Middlesex University

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Abstract

The aim of this two-part DProf is to produce a portfolio of research approaches to:

- Understand how mainstream brands can effectively access and engage Middle East consumers across the Gulf Co-operation Council (GCC), comprising Bahrain, Oman, Qatar, Kuwait, Saudi Arabia, and United Arab Emirates
- Leverage mainstream luxury brands to access and engage Middle East Ultra-High Net Worth Individuals (UHNWI) across the GCC
- Develop a training programme for Brands on insights of Middle East consumers, including UHNWI
- Develop a website communication platform to act as a catalyst for enquiries.

In achieving the aim of the project, the objectives were to:

- Review literature in relation to 'hard-to-reach' communities in the emerging market context, in particular the Middle East
- Undertake a 600-strong face-to-face questionnaire survey of Middle East consumers across the six GCC nations
- Undertake six gender-split focus groups across the GCC
- Undertake a series of cognitive interviews with Middle East shoppers
- Critically review five research projects undertaken in the Middle East
- Carry out five in-depth interviews with brand influencers in the West and three practitioner influencers in the Middle East.

The tangible outcomes that arose from the project included:

- A portfolio of new communication approaches pertaining to reaching Middle East consumers that incorporates a cognitive interview product and a culturally pertinent luxury brand health model
- A refined 'Middle East Millionaire Panel' research product that appealed to Western brands.

A number of distinct questions were the focus of this study:

- How can cultural features associated with Middle East consumers' norms impact upon the suitability of research methodologies?
- What are the most appropriate qualitative and quantitative approaches that serve to maximise consumer engagement across research studies?
- What enhancements to research approaches can be developed to maximise consumer engagement by Middle East consumers?
- What will attract Western brands to take up the Middle East Millionaire Panel?
- How can the Panel and associated services be marketed in local and international markets?

Whilst the products represent innovations for engaging consumers across this segment, they also recognise that rigour, validity of analysis and statistical significance have to be reconciled with tools that articulate novel ways of clustering and configuring heterogeneous Middle East consumer tastes and preferences.

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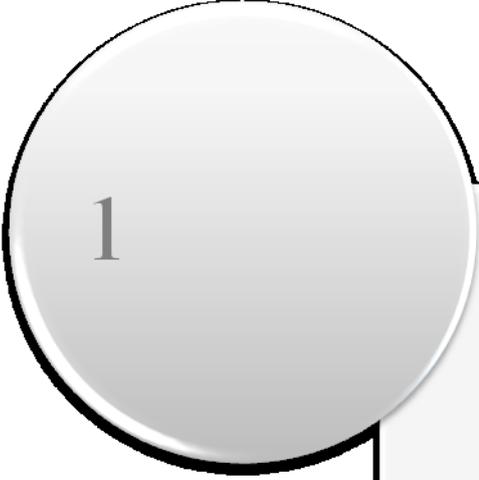
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Table of Abbreviations:

CAPI	Computer Aided Personal Interviewing
COCB	Company-Sponsored Online Co-Creation Brainstorming
CRM	Customer Relationship Management
GCC	Gulf Co-operation Council
HNW	High Net Worth
KNA	Kuwait National Airways
QPSMR	Qualitative Package for Social and Market Research
RFQ	Request for Quote
SAMA	Saudi Arabian Monetary Agency
SPSS	Statistical Package for Social Science
TVC	The value chain
UHNWI	Ultra-High Net Worth Individuals
BOQK	Bahrain, Oman, Qatar and Kuwait
D&G	Dolce and Gabana
DQ	Delta Qual
ESOMAR	European Market Research Standards
GDP	Gross Domestic Product
HNWI	High Net Worth Individual
KSA	Kingdom of Saudi Arabia
LVMH	Louis Vuitton Holdings
MEMP	Middle East Millionaire Panel
MENAP	Middle East North Africa and Pakistan
SAMEC	Service Access to Minority Ethnic Communities Charity
SAW	Arabic Attribution to the Holy Prophet Muhammed
STRC	Research Company commissioning study
UAE	United Arab Emirates



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Introduction -
The Contextual
Journey

1.1 Project Introduction, Background and Context

The motivation for undertaking this DProf research was, firstly, my exposure to the market, having held a senior research position in the Middle East region where I developed considerable insight and networks; secondly, my organisation's interest in emerging markets; and thirdly, because it represented an extension of my values, encapsulating a commitment to understanding and engaging hard-to-reach communities.

When I left the Middle East to return to England in 2009, I left with the contacts and support to develop a specialist brand engagement High Net Worth research product. At the same time my organisation was increasing its work across emerging markets, including the Middle East. This DProf project set out to produce a new insight research toolkit that benefits both brand name companies and HNWI's. It was envisaged that the research product(s) would be trademarked to reflect the niche and promoted at luxury fairs, conferences, and seminars so as to ensure that business practice was supported by actionable and rigorous data insight tools.

By virtue of being Director of Emerging Markets Insight Research at STRC World, I have the latitude to work with global brands using innovative methodologies, unrestricted by the 'off-the-shelf' approaches used by many research organisations.

This DProf programme arose from my background as a professional market researcher working for leading brands seeking to connect with the UK's ethnic minority populations, often termed as 'hard-to-reach'. Over the last 15 years, I have been at the cutting edge of work in the field of social and market research, with the above focus on working with

clients across various business sectors. A key feature of my research practice has been the development of research methods and management tools appropriate to the engagement of diverse ethnic communities across UK, Europe and emerging markets.

The conduct of research with communities often described as 'hard-to-reach' can be challenging and this was the thread that ran through my various RAL DProf submissions. Hard-to-reach groups present challenges such as a language barrier, a lack of trust in outsiders, sensitive subject matter or simply a small demographic, and much of my research career has been characterised by a thirst for developing research strategies to maximise the engagement of such communities. This is as much my own endeavour as that of clients, for many of my design skills arise directly from an initial Request for Quote (RFQ) from the client.

Given that I had previously critically reviewed the 'Ethnibus' research methodology and its application in previous RAL submissions, I was cognisant that my RAL claim for advanced developments in professional practice had to extend beyond 'tools' of research such as Ethnibus to achieve a more advanced perspective. Accordingly, underpinning my recent Level 8 claim for DPS 5120 was a focus on methodological innovations to engage difficult-to-reach groups across a range of markets. The focus of the Level 8 claim for advanced professional learning rests upon the development of research methodologies that serve to innovate and generate actionable insights for clients interested in engaging 'hard-to-reach' communities. The principal theme that runs through my professional practice is the need constantly to improve and innovate. This is reflected in the improvements to models, assumptions and strategies to optimise client engagement. This necessitated training over 152 experienced fieldworkers. My skills are not confined to quantitative

techniques, and include culturally relevant ethnographical techniques, cognitive qualitative techniques and semiotics, which I have applied across client projects to good effect. There is a need to be totally flexible, creative and innovative to come up with an insight generation research approach for the most varied of briefs in breadth, depth, and seriousness.

The following examples serve to illustrate the range and depths of research projects that I have dealt with in respect of winning the participation of ethnic communities:

- a) Engaging research with Black youth on a project relating to Black gun violence for the Metropolitan Police
- b) Developing research methodologies to win the participation of Muslims in UK for studies relating to terrorism, for the US Department of State
- c) Developing research approaches to engage ethnic minority women on the subject of breast cancer, as part of specific work for Breast Cancer Awareness Week
- d) Testing the take-up and reactions to new food products aimed at ethnic minority communities, which included leaving kilogram bags of flour with 500 Asian households
- e) Engaging Soninke speakers in France and Romanians in Spain to test mobile phone propositions for Orange

- f) Designing a study to determine the next referred waxwork model of a Bollywood superstar at Madame Tussauds

- g) Exploring the UK Chinese community's habits of saving and banking.

As explored in earlier RAL submissions, a natural curiosity combined with an entrepreneurial intuition created a robust marriage between myself as an insights researcher, and clients seeking to engage a £42 billion business UK opportunity across multidisciplinary sectors. Central to my unearthing of insights from niches has been a need to develop rapport. This is an absolute essential and comes before research participation with any community of interest. My experience of work in this field has reinforced the fact that, irrespective of how robust the research design is, the engagement of respondents themselves is ultimately the key indicator of success. This aspect of understanding ethnic respondents has been the subject of my research outputs on good practice, *Steps to Understanding* (1997) and *Today's Concerns and Bleak Tomorrows* (1997). The central message of these studies is that the prevalence of barriers to accessing public services is compounded by a lack of awareness of those services.

Having worked across a rich tapestry of ethnic diversity, I spent a period of two years heading qualitative research in the Middle East, leading the development of research business across a Region spanning 14 countries. That exposure and my current work act as the transferable catalyst for this DProf in the context of another distinctly hard-to-reach market—Middle East consumers.

The grounding for this study is the case for the efficacy of research methods and analytical approaches, exploring developments that harness social cognition; narrative tools as well as brand health. This is a two-part submission including the research innovations developed a result of this project, presented in Part 2. It takes the form of a portfolio of new methodological research approaches that would assist particularly STRC as a research organisation, but also any research agency interested in engaging Middle East general and High Net Worth (HNW) consumers. Specifically these are presented as innovative research methodology tools in the form of brand equity and a cognitive interviewing product. In addition is a unique panel for engaging ultra-high net worth Middle East millionaires. At the request of STRC the tools as products are in the form of a PowerPoint document, presented as evidence of achievement here using screenshots setting out the new communication approaches and the rationale for the composition of Middle East Millionaire Panel.

This critical review represents an integral element of this submission, and this document consists of the contextual and methodological information pertaining to the production of the above products. This will be presented as a detailed commentary giving the context of the product development, the associated literature and the application of research methodologies relating to Middle East consumers in general, and specifically millionaires.

The central focus is one of understanding and explaining in the context of Middle East consumer:

- How people make choices

- How consumers evaluate and make decisions about products and brands
- How people process information
- How people understand markets in the demand-driven conception.

Underlying the creation of these products has been the recognition that there are complex configurations of tastes that go beyond social demographic classifications, which form one of the main bulwarks of market research segmentation and the analysis of brand. The study sought to highlight and map these complex configurations of tastes and consumption sensibilities, and found no correlation between standard social demographic measures and Middle East consumer behaviour. The fact is that a Middle East consumer, whether from Saudi Arabia, Qatar, Kuwait, Bahrain, Oman or the United Arab Emirates, does not display homogeneity but heterogeneity, and exhibits complex realities. These are not related to social demographic measures such as income but to perceptions of tribal affinity, cultural norms and preferences grounded in a complex interplay of psychological, social, economic interactions with the functional attributes of a product or brand.

Whilst the products represent innovations for engaging consumers across this segment, they also reflect a recognition that the focus on rigour, validity of analysis and statistical significance has to be reconciled using tools that articulate novel ways of clustering and configuring consumer taste and preferences.

1.2 Perspective and Important Assumptions about the Researcher, the Research and Approach

The project contributed to my own professional development as an expert in the market, having worked in a senior position at regional level and developed insight tools as a practitioner. My recognition as a practitioner was enhanced by my deep, meaningful research outputs and dissemination of findings. The impact of the project to my organisation revolved around it becoming an agent of quality insight research and consultancy for brands wishing to connect with consumers across this globally significant market.

Throughout the process of testing and exploring assumptions during cognitive interviews, focus groups, depths, expert interviews and questionnaire stages, I believe my knowledge of the latest events in the Middle East consumer marketplace and luxury markets in particular was being updated. This allowed for the ongoing shaping of insights to be heightened, based upon a continuous practitioner dialogue with the literature.

My perspective was based on values emerging as a result of seeing superficial research being undertaken with ethnic communities and packaged as ‘serious’ research. Moreover, my perspective was about really trying to understand the very people being researched prior to undertaking the research—this meant putting in place culturally relevant resources. This value base inevitably meant that any methodology that I developed would be consciously culturally robust.

For example, my organisation has been shaped by my belief that face-to-face approaches secure the advantage of being able to clarify points, undertake interviews in person and through multilingual formats assist in developing rapport. Accordingly, although expensive compared with telephone and online, face-to-face contact is a key driver in maximising confidence to facilitate the participation of Middle East consumers. As enhancing confidence is a prime value, I rejected online and telephone approaches as these do not lend confidence to ethnic respondents; they like the certainty of seeing someone before them. Consequently, values serve to shape the methodology and associated research tools developed as part of this research.

Given that this was work-based research, I saw myself as a living, breathing shaper of the research with a direct interest in the outcome. Whilst this did not make me at the onset totally neutral and impartial, as a professional researcher I was charged with the development of a robust methodological framework against which respondents' insights would be generated within the security of ethical rights. These aspects are the cornerstones of my project.

Running through my project was the active and deliberate recognition of my own perspective and associated values that positioned me as a mere facilitator of any research exercise that empowered respondents to share their valuable contributions. It follows that understanding these valuable perspectives gave rise to the necessity to deliver research protocols that were transparent and based upon the highest ethical principles of confidentiality and informed disclosure.

My positioning surrounding the relationships between brands and consumers was rather more complex. Global brands have inculcated the minds of consumers and continue to do so. Emerging markets represent frontiers for global brands that need the minds of consumers to be 'colonised' through complex research usage and attitude, brand equity and new concept studies. Such is the complexity that naively to present the consumer as an untouched body against an independent brand, seeking to understand that consumer, is wholly misguided. I therefore considered it important to ensure that the client, respondent and researcher relationship was contextualised and understood across the stages from research design to research outcome, and a critical evaluative mechanism was ignited. In doing so, I assembled an armoury to nurture critical reflection that could subsequently challenge views that were held or taken as given, thereby presenting new knowledge through critical reflection as a practitioner in a robust context.

Accordingly, I accepted that I would be developing meanings across the process of research and thereby could not be an outsider, looking in. Rather than being objective, I would be inquisitive about the way influences and contacts led to deliberations and engagements that arose. This process of reflexivity proved to be integral to the study.

One such consideration was the nature of my work-based project. Whilst the central stakeholder was my organisation, other key stakeholders included funders, investors, clients, respondents, government agencies and ethical bodies.

As my work related to research carried out in Middle East nations I possessed demonstrable experience of the cultural, social and political environments and the entry

points of robust research. Dominant perspectives had to be respected and worked with, rather than ignored or, at worst, worked against.

Whilst I could explore cultural aspects in the countries in which I conducted research, I also needed to be mindful of my cultural make-up. I was a researcher whose values have been shaped by social, environment, personal and peer influences, and this in turn has shaped my world view of power, knowledge and systems. As a researcher I had developed methodologies that underpin those perspectives. For example, my own prejudices and perspectives would indirectly shape the project design and management; I believe that my organisation must contribute to addressing any inequalities that ethnic communities may experience in research settings, and this will mean that I need to build in resources that include same-language, same-gender interviewing and ask design questions that elicit full comprehension, that translate and defend the rights of ethnic respondents in the face of ‘demanding’ clients.

Conversely, I also recognise that ‘elites’ buying luxury products in the Middle East can be seen as exploiting a well-documented underclass. These perspectives derive from three realities—the reality of an ethnic researcher with Punjabi parents, my Sheffield life, which gives a constant re-evaluation of my standpoints, and my residence in the Middle East. The other related context is my employment in research organisations that seek a blanket approach to all communities, not actively recognising individual difference. This absence of recognition erects barriers that may inhibit the potential of ethnic respondents to participate in research exercises.

Therefore, I sought to be inclusive by investing in cultural relevant resources at every stage of the research process. In reality I was making judgements that determined my interpretation of the research world. This will always be with me and it was a healthy tension to reconcile. I saw myself as a practitioner–researcher who developed insights through research that were immediately actioned by me to inform research practice. The fact that I was a practitioner–researcher and an insider–researcher allowed me to manoeuvre around the perspectives that pervaded the research context described above. As an insider–researcher, I actively undertook research that impacted upon my organisational work as a change agent, developing and enhancing research models for prospective clients.

Similarly, as a practitioner–researcher I used my work as the context for developing knowledge and thinking that could be implemented in organisational practice. This duality was fluid and dynamic and, in combination, served to generate fresh thinking and reflective practices that were constantly evaluated along the research journey.

This thesis integrates methodological discussion through reflection, as the refinement of a process in its varied nuanced perspectives. This represents valuable insights into shaping the ultimate objective of developing innovative research methodologies pertinent to enabling brands to optimise the buy-in of Middle East consumers in general, and Middle East millionaires in particular.

However, there were also organisational dynamics that I had to address, such as cross-country roles—in some countries my field teams were semi-autonomous, whilst in others they were dependent on my ‘green lights’ and ‘instructions’. I saw myself as an interested participant and sought to be neither remote nor detached.

Whilst I had the benefit of insider knowledge, the extent varied from country to country. This presented interesting methodological perspectives and approaches in the context of being an actor–observer, by virtue of being an insider but also an observer. My methodology discussed the mechanisms in place to ensure that data and respondents were not compromised by these manifestations of roles. In critically evaluating my own professional researcher position at STRC I was conscious that there could indeed be tensions between my own level of responsibility to the respondent and the sense of responsibility I had for my client. There was an apparent contradiction and I accepted that neutrality might be the loser if I failed to accommodate these respective duties. I had consciously and explicitly to remind myself of this, and I embedded the integrity of the client business objectives within the research design so that my stance was subjected to internal checks and balances that had been formalised.

In explaining my world view of the research context, the work of Giddens provided a framework for a critical stance to the research designs and is elaborated in the next section.

This work-based project relates to key aspects of contextual knowledge and understanding pertaining to branding to emerging market consumers, luxury market understanding, Middle East demographics and culturally relevant research engagement. As one of my key research areas was to develop research tools for brands to penetrate the Middle East luxury market, it was highly apposite to explore the relationship between consumers and the choices they ‘make’ in relation to brands.

I have recently completed a Diploma in Strategy and Innovation at the Said Business School, University of Oxford. My thesis was on the subject of co-creation, that is, the

movement of brands to engage consumers directly in new product development. One element of the research was to examine the co-creation appetite of Middle East millionaires. Using ten in-depth interviews, some key findings pertinent to this DProf were that brands were not perceived to be communicating adequately with HNWIs from the Middle East and that co-creation opportunities may be missed (Khan, 2013). This experience served to reinforce further my active interest in developing research innovations to aid brands seeking to engage such specialist segments.

1.3 Review of Knowledge and Information

Understanding perceptions of consumer choice and articulating the rules that underpin the formulation and execution of choice are complex. The notion of choice is explored within a theoretical stance of structuration theory.

Structuration theory was the result of the work of Anthony Giddens. Giddens (1979) distinguishes between the *social system* (actual society) and *social structures* (the rules and resources which underpin reality). He seeks to link structural approaches, which focus on the way that structures exist apart from and above people and constrain their lives and activities, with action (or phenomenological) approaches, which stress free will and choice. His focus stems from the interaction of human agency and structure in order to explain the existence of institutional practices that are repeated through patterns of action.

He further argues that structure is comprised of rules and resources. Society prescribes the rules (procedures) that we follow in our daily lives. Resources are made up of economic goods and power. Allied to the above structural approaches are action approaches. By this, Giddens means that individuals make choices and act in certain ways so as to alter the structure. As Saare (1986) explains: Agents *'reconstruct structures during their experiences and actions within the social system, and reproduce them through their actions'*.

The important feature is that this process of agency can only occur within the constraints of structure. The two concepts are therefore interconnected, hence the notion of choice within a system of constraints. This duality forms the core of structuration theory.

Another central aspect to Giddens' work is the concept of '*locale*', which provides the setting for interactions between individual actors, organisations and structural processes to take place. Nonetheless, as Giddens reiterates, '*Structures must not be conceptualised as simply placing constraints upon human society, but as enabling*'.

In explaining the relationship between global brands with that of a consumer, any research project exploring the perspectives of choice preferences of consumers is in effect determined by wider structures that limit real choice, under the guise of choice. Any research that is designed has subconscious realities that influence the respondents' perspectives and choices are really seen as options against a heavily constrained environment.

This constrained environment at times makes statements that may appear somewhat to relegate local culture as relatively inferior, and to negatively influence the mind of impressionable consumers. Whilst in the Middle East I often saw global brand fast-food forecourts being visited by the wealthy local Emirate populace as a statement of being part of a positive emerging 'trend' that threatened to relegate local offerings to a residual level.

Virginia Valentine (2003) argues:

When consumers agree or disagree with a research proposition or 'like' or dislike an idea, they are signaling their acceptance or rejection of the underlying language.... What they are really responding to is the systems beneath....

In other words, the theoretical frame of structure and agency shows that real choice is constrained by a wider structural context that masks choice as ‘free will’.

Giddens continues, ‘the realm of human agency is bounded. Men produce society, but they do so as historically located actors and not under conditions of their own choosing’ (p. 160). Thus, what may appear to be individual free choices are in fact predetermined by the social structures in place around them.

The global research company, Nielsen, developed a buying behaviour exploratory model, DeltaQual™, that sought to explore the hidden, often habitual rules of shopping behaviour. Unlike DeltaQual, conventional qualitative research uses a process by which most brands are subject to the use of personification. Whilst using personification in projects, I noted interesting variations depending on ethnicity and in which market. Some cultures did not readily see brands in terms of personification and found such connections difficult or irrelevant (Khan, 2008). There are also some misgivings in the mainstream market research sector about the pertinence of brand personification (Aaker, 1999). Similarly, Romaniuk and Ehrenberg (2003), writing in a paper provocatively titled ‘Do Brands Lack Personalities’, argue:

while brand personalities may be useful as a creative device, they seem unlikely to help in getting consumers to think of the brand in buying situations or to build overall brand salience and sales.

The Nielsen DeltaQual approach suggests that researchers should ‘periscope’ out and recognise that the macro consumer has multiple needs at multiple levels, rather than

simplistic personify a brand. It follows that any subsequent research that I undertook had to relate culturally to the subconscious triggers for new markets such as the Middle East. Moisander and Valtonen (2006) make the case for a cultural approach to be integrated into the study of marketplace dynamics. Semiotics as a research approach focuses on cultures that influence the consumer to act or behave in a certain way, and central to its contribution is its emphasis on delving deep into the multi-layered messages within a consumer's subconscious. In essence, the focus is on the 'how' and not just on the 'what' the brand symbolises and communicates.

Alexander (2004) argues for a greater use of concept time codes that could explain cultural semiotics—*residual*, *dominant* and *emergent*. Virginia Valentine (1996) refers to how these time codes could manifest themselves as 'cultural paradigms', which are:

a consequence of the interaction of dynamic social forces: economic, technological, political, social, demographic all combining together to influence and in some ways re-shape the zeitgeist (the spirit of the age) and its expression through that society's own particular forms of 'popular culture.

In extending this rationale of appreciating 'dynamic social forces', I draw upon a series of projects that I undertook in Qatar, Saudi Arabia, UAE, Kuwait between 2007 and 2009 that involved intensive cultural analysis.

These issues touch upon the work in the sociology of culture, and the studies of complex tastes in cultural consumption. The French sociologist Pierre Bourdieu (1979) in his report, *La Distinction*, argues that it is society that defines 'taste' and, as such, class factions are

based not just on the possession of economic and social capital, but cultural capital. He argues that these aesthetics are perpetuated by classes positioning themselves within boundaries that keep them in their position. Referring to a scenario where a person experiences the art of another class, he observes that the person feels *'disgust, provoked by horror, or visceral intolerance (feeling sick) of the tastes of others'*.

Peterson and Kern (1996) argue that the prevalence of groups who could be expected to exhibit snobbishness have diminished over time and predictable patterns are far more difficult to discern, due to a combination of structural societal change, value changes, generational politics and status group politics. Looking at the arts market, they note: *'Rising levels of living, broader education, and presentation of the arts via the media have made elite aesthetic taste more accessible to wider segments of the population, devaluing arts as markers of exclusion'*.

What is significant is that people's own parameters of taste manifest themselves as social boundaries and, as Bruneau (2006) notes, *'our cultural choices often reflect on our social status'*.

In the context of the Middle East, Western approaches to categorisation may not be appropriate. At STRC the use of socio-economic class indicators such as social class, for instance grade 'A', representing professional class, are often meaningless. A Bedouin illiterate may well be the owner of multimillion dollar assets, which in a Western context would not be evident. The question arises whether the Western elite 'A' grade individual has predictable traits, for instance a high level of education, professional training, a

particular style of dress and a taste for highbrow life? Probably yes; and does the Bedouin display the same traits? Definitely no.

Tastes differ between cultures, and across the Middle East market the configurations are incredibly complex. From a research perspective, techniques to elicit insight must match the need to unravel the richness and complexity of tastes to capture the lived reality of the individual.

For example, dress is the same, attitudes towards religion and the tribe may be the same, and education may be the same—so where does taste become differentiated, and why and how? There is a need to capture the functional, social, economic and psychological dimensions of taste in a manner that is culturally inclusive and embodies the language of the individual.

This thesis makes the case for unpacking the complex and often myriad 'dynamic forces' that influence consumer behaviour. Standard industry-created demographic screeners simply use socio-economic classifications as their basis of analysis of what are often complex inter-relationships of tastes and consumption patterns. The rich tapestry of heterogeneity is simplified by conventions that seek to simplify communities and individuals for the purpose of data analysts into categories such 'as local socio-economic “A” male from the Gulf’.

Running through this DProf is a strong message that the formulations that contribute to the make-up of communities require unpacking. This is not only through convenient classifications that serve to prove that the study was scientifically designed and its

associated findings statistically valid, but more that that the histories and self-ascribed formulations of individuals are given the necessary recognition and not lost in the abyss of impersonal data.

The social realities that shape an experience give rise to explanation and, when presented and shaped by the individual, derive a value that can only be described as hugely powerful and relevant.

I argue that it is this 'significance', as opposed to the usage associated with the world of mathematics, that forms the basis of understanding such complex realities. This is not to dismiss the role of statistical significance; it certainly has a place in the work that I do, but it must also be recognised that social cognition, narration and the voice of experience has a role that can create revelations far more revealing than a table or chart.

1.4 Aims, Objectives and Outcomes

The aim of this thesis is to produce a portfolio of research approaches to:

- Understand how mainstream brands can effectively access and engage Middle East consumers across the Gulf Co-operation Council (GCC), comprising Bahrain, Oman, Qatar, Kuwait, Saudi Arabia, and United Arab Emirates
- Lever mainstream luxury brands to access and engage Middle East Ultra-High Net Worth (UHNWI) consumers across the GCC
- Develop a training programme for brands on insights into Middle East consumers including UHNWI
- Develop a digital communication platform to act as a catalyst for opportunities.

In achieving the aim of the project, the objectives were to:

- Review literature in relation to ‘hard-to-reach’ communities in the emerging market context, in particular the Middle East
- Undertake a 600-strong face-to-face questionnaire survey of Middle East consumers across the GCC

- Undertake six gender-split focus groups across the GCC
- Undertake a series of cognitive interviews with Middle East shoppers
- Critically review five research projects undertaken in the Middle East
- Carry out five in-depth interviews with brand influencers in the West and three practitioner influencers in the Middle East.

The tangible outcomes that were intended to arise from the project include:

- A portfolio of new communication approaches pertaining to reaching Middle East consumers that incorporates a cognitive interview product and a projection/enabling methodology
- A refined ‘Middle East Millionaire Panel’ research product that appeals to Western brands.

A number of distinct questions were the focus of this study:

- How can cultural features associated with Middle East consumers’ norms impact upon the suitability of research methodologies?

- What are the most appropriate qualitative and quantitative approaches that serve to maximise consumer engagement across research studies?
- What enhancements to research approaches can be developed to maximise consumer engagement of Middle East consumers?
- What will attract Western brands to take up the Middle East Millionaire Panel?
- How can the Panel and associated services be marketed in local and international markets?

It was anticipated that the findings that arose from addressing these specific questions, would be disseminated across multiple channels, including through ‘good practice’ publications, expert seminars, research outputs and case studies of practical research. Given the paucity of research in this area, I believe that this DProf is an original and distinct contribution to the body of knowledge for brands wishing coherently to penetrate hard-to-reach Middle East consumer markets. Chapter 2 extends this discussion by exploring the methodological context underpinning the development of research innovations pertinent to Middle East consumers. This includes a discussion about the significance of the Middle East consumer, supported by primary and qualitative research.

Chapter 3 draws upon this empirical and evaluative discussion in formulating an exploration of product innovation in research. The notion of innovation is discussed from a theoretical standpoint. Co-creation as an approach is explored as a means of emergent innovations that revolve around being close to the end consumer. A number of case studies

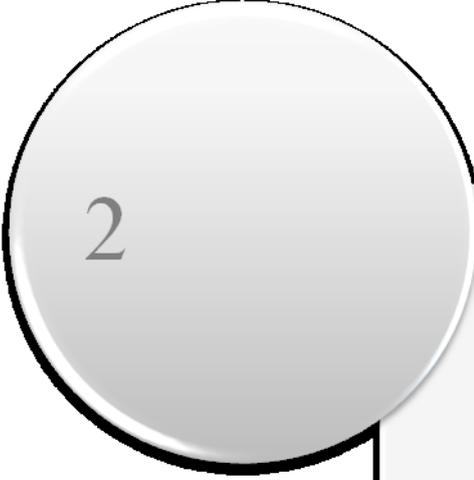
of projects undertaken across Gulf markets is also reviewed in the context of the value added by research methods and the potential for further innovations. Using the learning from this evaluation, this chapter goes on to explore cognitive interviewing approaches as a means of capturing the richness of the consumer narrative, before moving to a quantitative level where the development of brand equity is explored in the context of applying such approaches to the Middle East Millionaire Panel.

This feeds into the considerations underpinning the development of the STRC cognitive interviewing model, and the STRC Brand Equity Model presented in Chapter 4. This benefits from feedback from influencers from both the mainstream and the Middle East. The feedback gives authoritative direction in the revised formulations of the relevant models. The chapter also draws upon feedback from in-depth interviews with influencers pertaining to optimisation of the Middle East Millionaire Panel innovation.

The final chapter reflects on the professional journey underpinning the project and draws upon its contribution to wider understanding. There is a reassertion of the narrative to address the complex configurations of consumer heterogeneity across the Middle Eastern consumer dynamic.

Part 2 presents the evidence of achievement in the form of an embedded sequence of edited commercially sensitive slides requested by STRC, setting out the communication strategy for the Middle East Millionaire Panel, the cognitive tool, and the bespoke STRC Luxury MEMP brand health model. Together these represent to STRC an innovative development of consumer engagement research tools that capture the richness and diversity of the

heterogeneous Middle East consumer 'experience', beyond traditional research approaches.



2

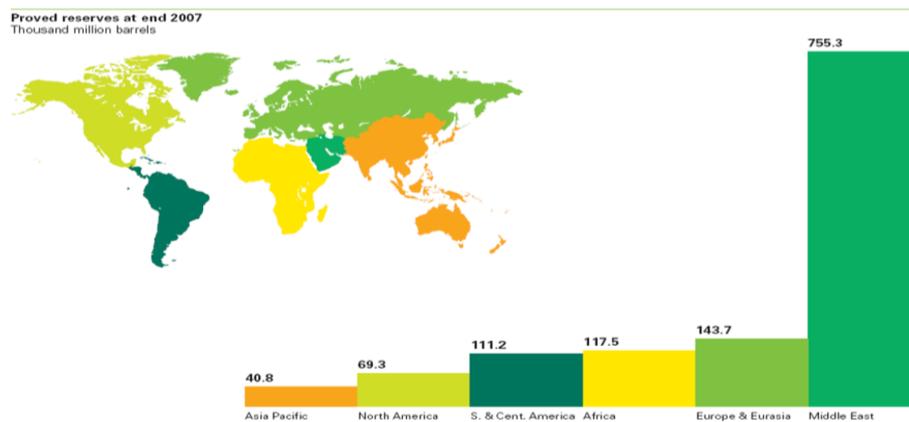


Understanding
the Middle
Eastern
Consumer

This chapter sets out the parameters of the research in terms of understanding Middle East consumers. The chapter discusses the emerging significance of the GCC for brands, especially at a luxury level. Primary research in the form of a survey of Middle East consumers and focus groups shall be drawn upon, as well as a review of studies undertaken across general and luxury segments.

2.1 The Gulf Market Context

This research is set in a region comprising United Arab Emirates, Kingdom of Saudi Arabia, Oman, Bahrain, Kuwait and Qatar. Although independent, collectively they operate as a strategic zone known as the GCC. As a region its wealth derives from the presence of huge oil and gas reserves, as illustrated below. The Middle East holds two-thirds of the global reserves of oil.



Source: DIFC (2014)

As a result it has the fastest-growing economies in the world, supplemented by a building and investment boom backed by decades of accrued petroleum and gas revenues. Some of the nations hold sovereign funds to build reserves in excess of several hundreds of billion dollars in the event of oil depletion. For example, the UAE's investment arm, in the form of the Abu Dhabi Investment Authority, retains over \$900 billion in assets. Given that this project is set in the Gulf, this section provides a short introductory context of the Region. I shall draw upon the Kingdom of Saudi Arabia and the United Arab Emirates in some detail, rather than writing about all the nations. These two represent the main economies in the region, and the religious and cultural contexts are similar. For example, all six nations feature hereditary leadership in the form of ruling clans, all of whom are religiously conservative in their Islamic ideology and represent significant wealth. With its small population of less than 2 million, Qatar is now the richest nation on earth with GDP in excess of 120,000 dollars a year.

Kingdom of Saudi Arabia



With a population of 26 million, the Kingdom of Saudi Arabia has been under the rule of the Saud family since 1932. The country has a constitution based upon Shariah Law as interpreted by the ruling Wahabi religious school: 'The Holy Quran is the country's constitution'. Saudis collectively respect and abide by Quranic laws sent by God, and Saudi laws emanate from the teachings of the Prophet Mohammed (SAW) (Nielsen presentation, 2007). This has implications for the whole of life's functions and interactions, including the manner in which products are consumed, sold, promoted and purchased, by whom and at what time.

Moreover, as the Holy Islamic cities of Mecca and Medina are based in the Kingdom, Saudi Arabia also sees itself as the centre of the Islamic world. The country is fast becoming urbanised, with 83 per cent of the population residing in 28 cities and towns with populations in excess of 100,000. The Kingdom is ruled by a Monarchy. An oath of allegiance known as the 'Biyahth' reinforces the rule of the Saud family. It controls oil and most of the larger firms, and is responsible for all infrastructure; public hospitals, clinics and social welfare; and media. It also regulates and administers the banking sector through the SAMA (Saudi Arabian Monetary Agency). In addition it is the direct employer of the imams of the mosques.

An Overview:

- This is an oil-based economy with strong government controls over major economic activities.
- Saudi Arabia has the largest reserves of petroleum in the world (26% of the proven total), ranks as the largest exporter of petroleum, and plays a leading role in OPEC.
- The petroleum sector accounts for roughly 75% of budget revenues, 40% of GDP, and 90% of export earnings. About 35% of GDP comes from the private sector.
- Roughly 4 million foreign workers play an important role in the Saudi economy, for example, in the oil and service sectors.
- The government in 1999 announced plans to begin privatising the electricity companies, which follows the ongoing privatisation of the telecommunications company.
- The government is expected to continue calling for private sector growth to lessen the Kingdom's dependence on oil and increase employment opportunities for the growing Saudi population. Oil production and revenues are increasing, and the government is spending heavily, particularly on investments in infrastructure, utilities, upstream gas, water, education, health, ports, rail, defence and oil refining
- King Abdullah's reforms have had a highly positive impact on the economy, opening up new markets such as finance and telecoms
- Oil/gas-related business is growing strongly
- Private-sector investment is taking over as a growth driver
- Five new economic cities are underway (industrial, residential, logistics, high-tech, education) and attracting private-sector investment.

Family life in Saudi Arabia

Across Saudi society the boundaries of family life are laid down strictly. The teachings of the Quran are taken literally as God's words, and the *Sunnah* (examples) teachings from his Prophet ensure a literal interpretation of all the verses of the Quran. The *Mutawwa* (religious police) ensure adherence and compliance. These include punctuality of prayers, male attendance of prayers, closure of shops during prayers, conformity in dressing, *abaya* and covered hair (for women), *thoub* or long pants and short hair (for men), no playing music aloud in the streets, and enforcement of the ban of alcohol outside foreign embassies and their compounds.

Yet, in the context of brands, at a consumption level individuality is highly sought-after, whether it be cars, handbags, homes, accessories or holidays. This includes being associated with the right brands.

Whilst there is strict gender segregation across most public domains, technology is opening communication. The internet is used by 41 per cent of the population and provides some anonymity, especially whilst connecting to the opposite gender.

Mobile phones ownership exceeds 90 per cent across the board, and gives the ability to connect with someone 'anywhere, anytime'. For women, shopping represents a complete outing. A leading social researcher from Saudi Arabia presented a paper at Nielsen research conference that I convened (Jandi, 2008). She summarised the situation: *'Social changes taking place on the ground. Stability and conservatism will remain watchwords and the royal family will maintain it. The culture is larger than the individual. Conformity is*

expected, individualism exists. All information is processed through a societal filter. The popular choice more than the niche. For women limited manoeuvrability out of the home is channelized (sic) into an almost obsessive self-indulgence’.

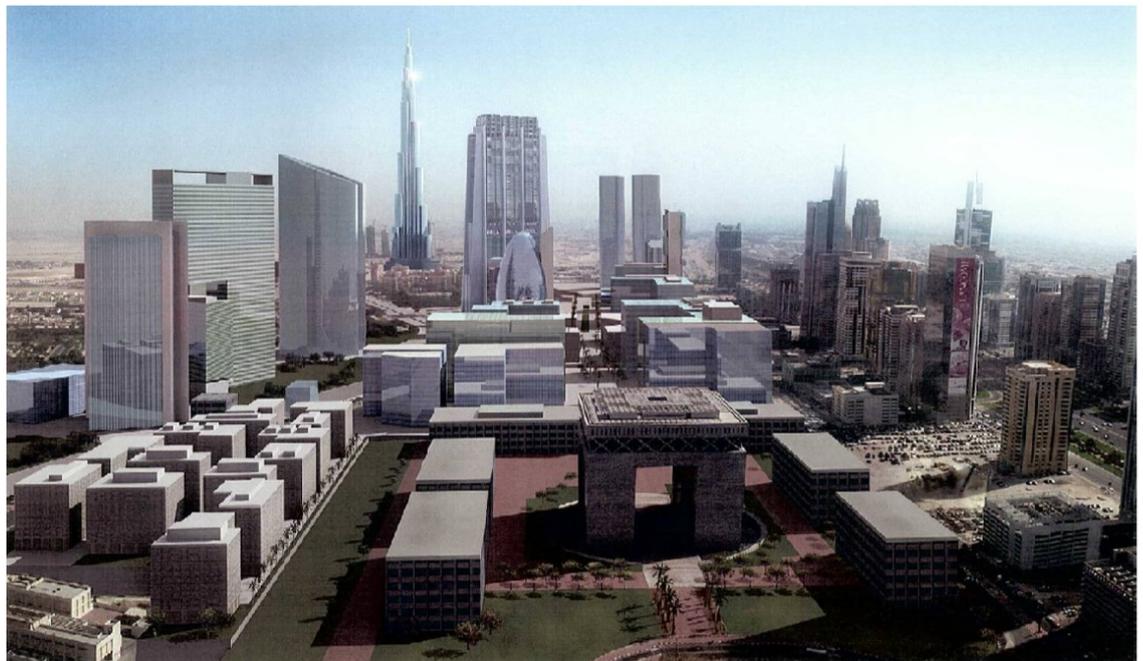
The United Arab Emirates

The United Arab Emirates was formed from tribally organised Arabian Peninsula sheikhdoms along the southern coast of the Persian Gulf and the northwestern coast of the Gulf of Oman. It comprises seven Emirates, Abu Dhabi being the largest and the Federal capital of the UAE. It is also the most populated with 34.3 per cent of the total population. It is the centre of government and business life in the UAE, and headquarters of the Emirate’s oil operating companies. Its wealth was responsible for saving Dubai from the recession of 2008, and sovereign funds were central to the rescue of Barclays Bank during the recession.

The Emirate of Dubai is the second most populated and is arguably the most prominent in terms of visibility. Hugely transformed over 20 years from arid desert with a handful of high-rise buildings, it is now one of the most visited destinations in the world, hosting some of the most largest and majestic modern architecture across the planet.



Photograph 1: Sheikh Zayed Road and surrounding area, 1990



Photograph 2: Sheikh Zayed Road and surrounding area, 2014

Despite rapid economic development in recent years, Dubai remains close to its heritage. Local Emiratees wear traditional robes and head-dress *kandora* and ladies dress in black robes with a hard covering, known as the *abaya*. Across some Emirate nations such as Sharjah alcohol consumption is not allowed.

The Presidency and Premiership of the United Arab Emirates is hereditary to the Al Nahyan tribe of Abu Dhabi and the Al Maktoum tribe of Dubai. The Supreme Council, made up of the rulers of the seven Emirates, also elects the Council of Ministers, whilst an appointed 40-member Federal National Council drawn from all the Emirates reviews proposed laws.

- An Overview:**
- The UAE has an open economy with a high per capita income and a sizable annual trade surplus.
 - Its wealth is based on oil and gas output (about 33% of GDP), and the fortunes of the economy fluctuate with the prices of those commodities.
 - Since 1973, the UAE has undergone a profound transformation from an impoverished region of small desert principalities to a modern state with a high standard of living.
 - At present levels of production, oil and gas reserves should last for over 100 years.
 - The government has increased spending on job creation and infrastructure expansion and is opening up its utilities to greater private-sector involvement.

Economy: **GDP:** purchasing power parity—\$60.5 billion

GDP: real growth rate: 3.6%

GDP: per capita: purchasing power parity—\$30,647

Inflation rate (consumer prices): 4%

Exports: \$34 billion

Exports: commodities: crude oil 45%, natural gas, re-exports, dried fish, dates

Exports: partners: Japan 30%, South Korea 10%, India 6%, Singapore 4.5%,
Oman 3%, Iran

Imports: \$27.5 billion

Imports: commodities: machinery and transport equipment, chemicals, food

Imports: partners: US 10%, Japan 9%, UK 9%, Germany 6%, S. Korea 5%, Italy

Bahrain, Oman, Qatar and Kuwait represent smaller nations within the GCC. As a consumer market it is smaller than both the UAE and Saudi Arabia, and for marketers is treated as a collective. Indeed, whilst I headed customised market research for the Region whilst at the global giant Nielsen, these smaller nations were grouped together under their acronym as the BOQK region. The population of these nations collectively is less than 6 million, it nevertheless displays similar traits as those in Saudi Arabia and the UAE. They are run by hereditary tribal families, practice conservative interpretations of Islam and have relied on oil as the primary wealth driver. Qatar, other than oil has some of the largest gas reserves in the world and has propelled itself to become the richest country in the world with a GDP of 122000 dollars and a 12 per cent growth rate .

2.2 The Consumer Significance of the Middle East

Clearly, the Middle East consumer market is of increasing significance. Karimzadeh (2008), writing for the *Women's Wear Daily*, argues that the Middle East has become the 'hotbed' of luxury consumption.

With every rise in the price of a barrel of oil, the oil-rich region got a little richer. Places such as Kuwait, Qatar and Abu Dhabi became even more flush with cash, and that part of the world became one of the fastest-growing regions for luxury and fashion and deal-making.... They came with deep pockets and a seemingly endless appetite for luxury. It came as little surprise then that major luxury brands were rushing to the region to benefit from the momentum.

It is estimated that there are around 279,000 millionaires in the Gulf alone (Luxury MEMP, 2013).

The Middle East attracts much interest from brand-name companies. In September 2008, Bloomingdale's opened two stores: a three-level, 146,000-square-foot men's and women's apparel and accessories unit and a one-level, 54,000-square-foot home store at the Dubai Mall attached to the Burj Dubai, the world's tallest building. Across Qatar, a man-made island development called The Pearl will, when completed, will offer 280,000 square feet of retail space for luxury brands. In January 2009, a collector from the Middle East paid \$3.3 million for Piaget's new, one-of-a-kind Tourbillon watch, studded with 1,200 diamonds and shaped like an ancient temple (Middle East Directory, 2010).

In their article, entitled, 'Brands rush to expand in surging Middle East', Ilari and Socha (2008) refer to other key markets, Saudi Arabia, Qatar and Dubai, in the study area.

'The market potential is huge and growing', agreed Christophe Caillaud, President of Jean Paul Gaultier, which boasts 11 stores in the region. 'Dubai is becoming a hot tourist destination and all business of the Middle East passes through Dubai. Rich countries like Qatar and Bahrain are opening to Westerners and to high luxury fashion brands, and more people.' They go on to argue that *'Markets like Qatar and Bahrain are only seeing now the development of luxury retail. Even Kuwait and Saudi Arabia need to be developed further'*.

The nature of luxury expression is an area of much business interest. In their analysis of the Middle Eastern luxury-buying consumer, INSEAD note that the conspicuous display of luxury is very much apparent. This represents challenges and opportunities for luxury brands.

Although conservative Western luxury tastes are still followed, more and more individual cultures and markets are demanding that their own styles are accommodated. A supersized LVMH handbag with large tassels, gold buckles and logo might not turn the head of any self-respecting, fashion-conscious Frenchwoman, but in places where a handbag is the only conspicuous accessory allowable by culture, or sometimes by law, somehow that form of expression begins to make sense. Younger customers also care less and less for established fashion norms.

This reinforces anecdotal knowledge of the region that I have from my experience in undertaking consumer insight studies (Nielsen, 2008) and the presence of expert data gives further confidence to investment of time and resources being expended. A recent visit to Abu Dhabi in January 2012 included a visit to the Avenue—the biggest luxury shopping mall in the region. My research will explore the dynamics in developed luxury markets amidst those that are developing, and this aspect is reflected in the design of the Middle East Millionaire Panel.

At a general consumer level, I delivered a paper in Dubai entitled Marketing to Women from the GCC (2008). This paper argued for a need to understand the cultural dimensions that act as a positive or negative trigger in buying choices and will provide signposts for shaping my thesis. Monget (2010) writing in *Women's Wear Daily*, argues, *'Understanding Islamic religious practices and cultural traditions, which can vary from country to country, is a necessity and partnerships among Western brands and local companies are the most effective way to surmount obstacles and avoid any misunderstanding'*.

This is an area that I propose to explore in great detail. As Lily Arjomand, former general merchandising manager of Saks Fifth Avenue in Dubai, comments in the same article, *'Navigating this maze is difficult for many brands and retailers. Even to do ads for Dolce & Gabbana in Dubai we had to Photoshop long sleeves on evening gowns, and we had to get approval from both D&G and the local government before running the ad'*.

The issues include understanding how to convey a brand's marketing message adequately. For example, in Dubai, a window display of sleepwear, bodywear or provocative evening

wear is acceptable. However, in Saudi Arabia, stores can be closed by the *Mutaween* (religious police) for showing in store windows a mannequin of a female form or marketing pictures of women. And only men are allowed to sell lingerie, even though they are forbidden to speak to female customers. The Saudi government also regulates hours of operation during religious periods, often requiring stores to close or dim lights during prayer times.

In the same article, Nina Steele, regional coordinator for UK-based retailer Monsoon, which has 130 stores in Bahrain, Kuwait, Qatar, Oman, United Arab Emirates, Saudi Arabia, Egypt, Jordan, Lebanon and Libya, raises a question that draws upon an important aspect of my study—that of culture versus free choice. There is little understanding that women like to dress up underneath their *burqas*, and that in contrast to their black outerwear, it is the brightest and most embellished products that are often bestsellers.

Jean-François Seznec, a visiting associate professor and director of Arab Studies at Georgetown University, said women in Saudi Arabia wear *abayas* (black floor-length shawls) in public, but wealthy families may have private parties for men and women in their homes, where women wear ‘extremely provocative’ eveningwear.

2.3 Considerations that Underpin the selection of methodologies for the narrative

An important facet of this research is the critical evaluation of existing research techniques, and the refinement or development of new approaches or tools that could best elicit optimum insight. The world of a professional market researcher is fraught with balancing client research objectives with cost, time and rigour. This often manifests in the adoption of a best-fit approach. If the client wants to unearth deep insights from existing empirical evidence, then a qualitative approach would fit well.

For example, whilst at Ethnic Focus I was asked to explore the reasons why Caribbean communities consistently had lower satisfaction scores with British Telecom services. A series of focus groups helped to give insight into the factors shaping these negative perceptions. On the other hand if the objectives were to scale the potential opportunity within a market, then a quantitative study would have worked well. This is illustrated by my study for Tesco, which comprised a quantitative research applied across a large sample of ethnic consumers to quantify the size of the market opportunity as well as test reactions to a number of concept propositions.

In shaping any business research for clients, a primary consideration is that of the reliability and validity of any findings. As a corporate research insights specialist I recognise that my role in the design and execution of a study has at times led to millions of pounds' worth of investment in new product development. I can recall how an Indian life insurance company with over 90 per cent market share in India sought to win over the buy-in of the Indian diaspora in the UK. My research formed the basis of significant investment in the UK to market the new proposition, based upon the insights generated. Target

segments were identified as well as a clear proposition to win across the varied demographics. Similarly, a household-name bank commissioned my team to design a wide ranging research to test a new financial product aimed at HNWI Muslims who were consciously avoiding an interest-earning product, as interest is prohibited by Islamic scripture. We were also involved in devising and testing a name for the product across the research study. It follows that the need to be rigorous is not exclusively an academic consideration.

This professional responsibility means that one addresses issues of bias. There are three types of design bias that can arise and it is important to recognise their presence and likely impact. This acknowledgement of bias and associated preconceptions are integral to the process of reflexivity. Measurement bias, sampling bias and procedural bias are considered below. Measurement bias arises from the data collection process. For example, there could be peer pressure on focus group participants, and triangulation enables the researcher to combine individual and group research approaches to help minimise this bias. Similarly, 'response bias' arises when participants narrate what the researcher wishes to hear. A triangulated approach would enable self-reported and observational research methods to be combined to help counter the tendency. The second type of bias is sampling bias. This arises when the population that is being covered attains only partial coverage due to convenience. Triangulation combines the specific strengths of multiple methods to ensure that adequate coverage of target groups is achieved. The third bias is procedural bias, when participants are placed under a degree of pressure to provide information. Triangulation allows the researcher to combine short research interactions with longer interactions, when participants have more time to give carefully considered feedback.

The concept of triangulation, also known as ‘mixed method’ research, can be regarded as the process by which the combination of a number of research methods is employed to study one subject. It may be inevitable that these methods overlap each other to reflect a complementary or competing perspective. This has an effect of counter-balancing each method so as to give a richer and hopefully truer conclusion.

As Denscombe (1998), states:

What he or she gets instead are different kinds of data on the same topic, which allow the researcher to see the thing from different perspectives and to understand the topic in a more rounded and complete fashion than would be the case had the data been drawn from just one method.

In respect of this DProf research I sought to combine techniques that balanced each other out, that is, quantitative versus qualitative, individual versus group, short semi-structured engagement versus long cognitive engagement, and so on. This is central to the idea of triangulation.

I deliberately focused on ensuring that the specific techniques were used appropriately on a best-fit basis. For example, if I wanted to find out measurable priorities of choice then a questionnaire sufficed, but if I wanted to ascertain deeper reasons for the basis of choice, then detailed cognitive interviews were considered more appropriate.

Triangulation was also attained by having two (or more) people working on the project. This helped formulate pertinent observations as part of the analysis process. In multiple

country research the interaction between the moderator and the research analyst brings myriad perspectives from the interpretation. This can help counter-balance the research.

Given the combination of quantitative and qualitative approaches, another means of achieving triangulation was to carry out research on a 'brick upon brick' basis. The quantitative stage took the form of a macro, broad level to identify top-line issues, which was fed in to the next 'brick' stage. That next 'brick' was more detailed and concentrated on a micro and focused area.

The nature of this research was to develop insights as the research progressed. The feedback loop enabled comments made by an individual or anecdote obtained through a cognitive interview to be validated by subsequent internal discussion or formalised research interviews with brand influencers or local expert interviews.

Throughout the research stages I sought to be reflexive. I looked for any preconceptions that I or my colleagues might have had. The use of multiple researchers helped minimise my own preconception—I kept a journal to examine how I felt at a particular time and summarised this findings to identify any potential bias that may have affected the research. The range of research activities necessitated planning and logistics. As I worked for STRC International Research, I had familiarity with conducting multiple method and country studies. This meant that I was able to utilise internal recruitment resources from within the sponsor organisation. However, this was predicated on the assumption that all participants were fully aware of the nature of this 'academic' study. All participants were given a participant information sheet setting out details pertaining to the title of the study, its purpose, the reason for selecting them to potentially participate, their rights associated with

choosing to participate or otherwise, time expectations, confidentiality, how the research will be using their views and results disseminated as well as details of academic, and contacts in the event of queries.

Fieldwork took place between February and December 2012. Throughout the quantitative stage I was involved in designing the questionnaire, developing the data processing script for analysis, and undertaking the final analysis of the data. I was involved in managing and conducting fieldwork briefing and progress. At the qualitative stages I was involved in designing the discussion guides, developing concepts for testing, training moderators for in-depth cognitive and undertaking depth interviews with brand influencers, as well as analysing qualitative data. This was performed by a content analysis process whereby groups and depths were populated on the x axis with themes on the y axis. This enabled established, dominant, emergent and contradictory verbatim quotes to be viewed visually using colour coding. I was responsible for weaving the analysis of the individual components of the research into the overall body of the research. Having spent over a decade in international research I was able to understand notions of significance of findings, as well as review data that required further analysis. This could take the form of seeking supporting information gathered through in-depth interviews, focus groups and quantitative findings as an ongoing 'validation' exercise. In addition I was reporting findings to STRC as part of their internal business product development portfolio and this served also as a feedback mechanism for reviewing ongoing findings from the data. This process created a climate for the development of follow-up strategies identified as components of the product architecture outlined in Part 2.

2.4 Sampling Strategy

In the context of market and social research, there are two types of sampling techniques—probability sampling, and non-probability sampling. Probability sampling is predicated on the notion that the respondents that are selected for the sample are chosen on the basis that the researcher has some knowledge of the probability that these will be representative of the whole population being studied. Conversely, non-probability sampling is carried out without such knowledge.

As a researcher, I did not have sufficient data about the sample to undertake probability sampling and the detailed demographic make up the population. Under these circumstances, I adopted variations of non-probability sampling as the basis for selecting the sample. The key characteristic of non-probability sampling are that the selection of respondents in the sample is not a random selection. Streubert and Carpenter (1995) point out that there is no need to select individuals randomly because control is not the objective of the exercise. Utilising non-probability sampling does not mean that the researcher will know nothing about the demographics, yet not enough to use probability sampling (the absence of a Western-style census throughout the GCC is a case in point).

Purposive sampling is a form of non-probability sampling. The sample is ‘hand-picked’ for the various research elements. As mentioned earlier, as the researcher I already knew something about the specific people and deliberately selected respondents, screening for eligibility those who had some exposure to the themes being discussed. As Dane (1990) points out, the advantage of purposive sampling is that it enables the researcher to focus on the respondents, crucial for this research. Rather than directing resources for typical

scenarios, whether a cross-section or a balance, the researcher will be able to focus on instances that display wide variation and even concentrate on extreme cases fully to explore the research question at hand. In this sense this approach represents economy of resources as well as giving a degree of insight in a way that traditional probability sampling cannot (Denscombe, 1998).

One rationale for the use of non-probability purposive sampling is that it arises from the idea that the research process is one of discovery, rather than of evaluating and testing a hypothesis. It is a strategy, described above as 'brick by brick' or by Lincoln and Guba (1985) as *'emergent and sequential'*. Akin to an investigator, the researcher follows a series of clues, which takes the researcher along a particular line of enquiry until the questions have been answered and matters can be adequately explained (Robson, 1993).

I sought to establish the rationale for a multi-method approach on the grounds of:

- a) Triangulation benefits

- b) Giving depth to insights identified

- c) Giving further meaning to emergent findings.

My research explored GCC consumers' attitudes towards general and luxury consumption. It followed that the sampling rationale for the study should move from a broad focus that arose from the indicative themes identified at the quantitative stage to areas of further expansive evaluation across the qualitative stages.

Indeed, rather than presenting the results in the form of numerical data, qualitative research produces words in the form of verbatim comments. Its emphasis is to determine people's attitudes and experiences from their own perspective, rather than from that of the researcher.

The idea of qualitative research is not to collate numbers but to understand how participants feel about the reality presented to them against the reality lived by them. This further justified the reason for using qualitative research techniques as the primary basis of investigating how non-English-speaking Arabic consumers view Western brands.

Phenomenology examines human experiences through detailed descriptions of the people being studied, in this case non-English Arabic national consumers residing in the GCC. As a method, its essence involves investigating a small number of subjects through extensive engagement to highlight patterns and relationships. Through this process the researcher is 'bracketing' his or her own experiences to avoid bias and to give primacy to the understanding of those participants. Indeed, Ashworth (1996) asserts that to describe the world of another person from their perspective it is imperative that the researcher is able to bracket and put aside any preconceptions.

Intensive research methods focus on causality rather than immersion and 'specific' identifiable individuals (Sayer, 1992). Human actions at an objective level do not in themselves make sense unless we immerse and theorise about the nature of individuals, that is, their potential to act in certain ways and the circumstances that may make particular social actions possible.

Dickens (1989) refers to a process known as '*necessary relations*', that is, for particular actions to take place a person must be in possession of certain connections. To unpack these '*necessary relations*', involves a process of uncovering the layers of social ties. I, as the researcher, had to examine the importance of hidden structural relations and meanings that bind society together. As Dickens (ibid) observes,

The real world is not flat '*empirical*' terrain beloved by positivism but is a multi-layered stratification of a highly complex, differentiated reality.

A critical review of realist epistemology centres on the view that causal structures underpin observable phenomena. Social constructionist approaches explore reality as the outcome of actors negotiating the meanings of both situations and actions. Interpretive processes form the basis of analysing individual experiences. Thus, in the context of this study, how an individual interprets their environment would be the basis of their current and future actions, and this is a vital aspect of the enquiry.

The social constructionist approach is one of defining reality as a system of meanings. These meanings are not stagnant but vary culturally and over time. It is interesting that structuration ontology also stresses the vital importance of meanings in enabling and constraining action. In the context of this DProf it follows that a social constructionist approach to the relationship between brands and Middle Eastern consumers would seek to explore key aspects of working processes, negotiated agreements, values, ethos and power, through the analysis of observations and commentary from key respondents. Central to this is the examination of their individual meanings and the exploration of these within wide structural dimensions.

A key feature is the identification of research approaches that facilitate this process. Questions such as whom to interview, how to interpret individual responses, and how to generate an interpretation of the aggregate comments of all actors were important considerations. The methodological assumption that I made was that interpretive accounts would be developed by knowledge of wider market research practice in the field between and across various actors and groups—for instance, issues relating to brands and Middle East millionaires.

In order to ensure that there was a coherent rationale and process that would lead to the production of valid, reliable and actionable findings, for the purposes of this particular study I sought to present research questions alongside specific research approaches and proposed tools. It was anticipated that this explicit research mindedness would serve as a catalyst for an intellectually robust approach throughout the practical project.

In essence, the focus of my sampling strategy was to describe a Middle East consumer perspective from a general base down to that of the luxury-buying consumer. In order to embrace the heterogeneous cultural diversity across GCC nationals, I looked at the six member countries. Figure 1 below summarises the research process, predicated upon eliciting indicative themes from the quantitative stages towards the formulation of exploratory areas across the qualitative stages. I designed all stages and, in my capacity as Director of Research at STRC, personally briefed all fieldworkers and moderators. Data was collected through CAPI (Computer Aided Personal Interviewing) to ensure efficiency of collation. As I designed the questionnaire, I was able to analyse the returns from the field at the time, as well as review pilot data. I was also involved in all content analysis process across qualitative stages, and the interviewing of brand influencers.

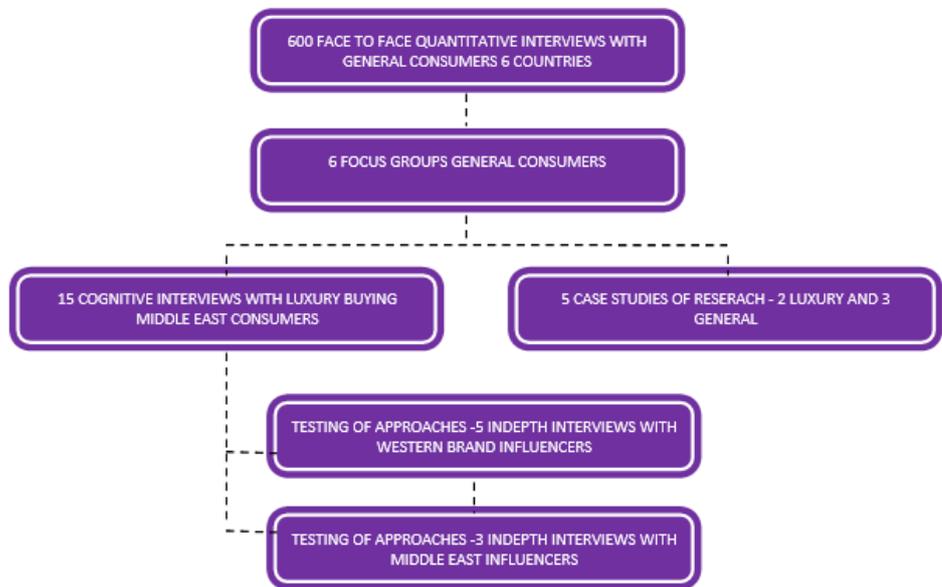


Figure 1: The key stages

Table 1 summarises the main questions addressed, by source of data.

Main Question	Method Phase
<p>a) <i>How can cultural features associated with Middle Eastern consumers' norms impact upon the suitability of research methodologies?</i></p>	<p><u>Phase 1a</u>; 600 Quantitative face-to-face interviews with general Middle East consumers across six countries, UAE (Sharjah, Dubai, Abu Dhabi), Saudi Arabia (Riyadh, Jeddah, Madina), Qatar (Doha), Oman (Muscat), Bahrain (Manama), Kuwait (Kuwait City) (Feb–May 2012)</p> <p><u>Phase 1b</u>; 6 focus groups with general Middle East consumers across 6 countries, UAE (Dubai, Abu Dhabi) Saudi Arabia (Riyadh, Jeddah), Qatar (Doha), Oman (Muscat), Bahrain (Manama), Kuwait (February-May 2012)</p>
<p>b) <i>What are the most appropriate qualitative and quantitative approaches that serve to maximise consumer engagement across research studies?</i></p>	<p><u>Phase 1</u>; 600 Quantitative face-to-face interviews with general Middle East 1 consumers across 6 countries, UAE, Saudi Arabia, Qatar, Oman, Bahrain, Kuwait <u>Phase 1b</u>; 6 focus groups with general Middle East consumers across 6 countries., UAE, Saudi Arabia, Qatar, Oman, Bahrain, Kuwait</p>
<p>c) <i>What enhancements to research approaches can be developed to maximise consumer engagement of Middle Eastern consumers?</i></p>	<p><u>Phase 2a</u>. 15 Cognitive in-depth interviews with Middle East consumers of luxury (May–October 2012) <u>Phase 2b</u>—Case studies of 5 research projects (2 with a luxury focus and 3 with a general focus)</p>
<p>d) <i>What will attract Western brands to take up the Middle East Millionaire Panel?</i></p> <p>e) <i>How can the Panel and associated services be marketed in local and international markets</i></p>	<p><u>Phase 3a, b</u> Testing of approaches—through 5 in-depth Brand influencers, and 3 Middle East influencer interviews (October–December 2012)</p> <p><u>Phase 3ab</u> Testing of approaches—through five in-depth Brand influencers, and 3 Middle East influencer interviews</p>

Table 1: Methods to address research questions

The interlocking nature of the specific research phases is a central feature of this thesis and is discussed below.

Phase 1a and 1b

This combined qualitative and quantitative phase sought to explore the following research question:

- *How can cultural features associated with Middle Eastern consumer's norms impact upon the suitability of research methodologies?*

Phase 1a: Quantitative

The key feature here was to establish cultural aspects that better explain usage and attitudes as consumers, as well as gauging attitudes towards brands from the perspective of Middle East consumers. Attitudinal statements that test for cultural adherence and flexibility were incorporated. The quantitative stage comprised a face-to-face questionnaire survey of 600 respondents from nationals of the six GCC countries, a hundred interviews in each country that enabled a robust analysis of differences at country level to be undertaken. Moreover, an equal gender split enabled differences between genders, within and across countries, to be assessed.

The design of questions for the quantitative consumer survey explored individual agents' relationships with structures and the interplay of structural relationships. A questionnaire

was designed in consultation with interested internal parties working across the Middle East client diaspora.

The format of questionnaire design reflected a need to ensure a degree of measurement of affinity to statements, as well as to enable respondents to prioritise their attitudes. This was achieved through a combination of simple closed questions, ranking scales and attitudinal pre-code statements interspersed with a series of battery statements. The aim was to understand consumers' behaviour in a market by taking a statistical sample of customers to understand the markets as a whole. Based on statistical and numerical measurement, data relating to awareness, usage, market size, market share, penetration and market growth rates was explored. I recognised that a sub-sample of a hundred per nation is not a representative demographic picture, and as such acknowledge that any findings need to be treated with caution.

However, as has been highlighted, the role of this stage was to give indicative direction for further exploration in subsequent phases. The use of ten piloted questionnaires ensured that the final questionnaire incorporated improvements in respect of length, flow and comprehension. From the pilot testing it was clear that the questionnaire was running at a reasonable 20–30 minutes average length and that any improvements that were made were of a minor nature, relating primarily to comprehension.

The questionnaire was translated into Arabic by the in-house resources of the organisation. Fieldwork was conducted by my team of trained staff, who received questionnaire briefing from me on the rationale of the study, sample criteria, question instructions and administration protocols. I personally trained the three fieldwork supervisors responsible

for the fieldworkers. Table 2 presents the sampling distribution. In brackets are the respective city locations.

Kingdom of Saudi Arabia (Riyadh, Jeddah, Medina)	100 - 50-50 m/f
United Arab Emirates (Dubai, Abu Dhabi, Sharjah,)	100 - 50-50 m/f
Oman (Muscat)	100 - 50-50 m/f
Qatar (Doha)	100 - 50-50 m/f
Kuwait (Kuwait city)	100 - 50-50 m/f
Bahrain (Manamah)	100 - 50-50 m/f

Table 2: Quantitative study—Sample profile

Phase 1b -Qualitative focus groups

Having established the broad measurements of usage and attitudes as well as obtaining statistical data on the strength of opinion, it was apposite to explore the 'why' behind the 'whats' established from the survey. There was always going to be layers of opinion, shades of grey amidst the black and white. These included further exploration of culturally based views that cannot be so easily extracted through simple Likert scales of pre-coded statements. Indeed, from the interim top-line Statistical Package for Social Science (SPSS) data outputs from the quantitative survey, complex themes arose. These included the enabling and inhibiting aspects of culture pertaining to gender mixing, education or its lack, music, imagery and other perceived taboos that were apparent across gender and nationality. Based upon my experience in the region, I had anticipated that this would require further probing and deeper follow ups, and had determined at the research design stage that the most suitable means of generating such insights was through qualitative study.

The approach was also suited to exploration of unknown territories, new products, new markets and new brands. Though at this stage I had not sought to explore new brands, I wished consumers to be spontaneous in their reflections of the brand experience, and this would be best nurtured through qualitative enquiry. During the course of the research design I had to consider that, whilst group discussions have the benefits of generating depth exploration, facilitating excitement, being free-flowing and gauging feelings across the group dynamic, they also present risks such as ‘group effect’ whereby an individual dominates, or a comment made by one individual becomes the defacto ‘group view’. This was a moderation issue, and in order to minimise it, it was anticipated that multiple groups would in part address this through extracting points of dissonance or areas that require further exploration and probing. An alternative approach was to utilise in-depth interviews that would enable one-to-one facilitated feedback that would not be subject to group dynamics. However, this was rejected on the grounds of the time and financial resources that would need to be expended in the recruitment of eligible individuals for the study. Moreover, it was felt that, through experienced moderation, projection and enabling techniques would facilitate the articulation of subconscious thoughts, thereby addressing any negative group dynamic effects.

Six focus groups were identified for this aspect of the project. Recruitment was undertaken through well-defined market research processes such as experienced recruiters working to standards of cultural familiarity and ethics during the screening stages. My initial thoughts were for the groups to reflect gender separateness and geographical coverage of the target domains of the GCC. The rationale for gender separateness was predicated on the belief that social intercourse between the sexes outside the family fold was considered inappropriate. In order to ensure that the themes were adequately addressed and

participants were given enough scope to express themselves, the issue of the number of participants per group was important. In accordance with best practice in market research, recruitment was for eight, with a final group of six being the ideal size. I trained all moderators and was present to observe two all-male sessions. Female groups were moderated by an experienced female moderator, since there are limits to acceptability if the project was to observe cultural traditions and expectations. Whilst it would have been preferable from a researcher perspective for me to have viewed the female groups, the reality of society inevitably shapes the conduct of business and social intercourse, including research. According to the convention of research in the region, the use of contemporaneous notes from the moderator, a briefing and comments on the transcription, as well as being part of the content analysis, gave a richness beyond mere receipt of a transcription. Table 3 illustrates the focus group composition.

Qatar	Doha	Male 1 group
UAE	Sharjah	Male 1 group
Kingdom of Saudi Arabia	Jeddah	Female 1 group
Kuwait	Kuwait City	Male 1 group
Oman	Muscat	Female 1 group
Bahrain	Manama	Female 1 group

Table 3: Focus group composition

Phase 2a and 2b

These phases explored the following research question:

- *What are the most appropriate qualitative and quantitative approaches that serve to maximise consumer engagement across research studies?*

Findings from Phase 1a and Phase 1b were summarised as a checklist for the design of research documentations, in the form of discussion guides for Phases 2a comprising cognitive interviews, and for phase 2b the selection of related case studies.

Phase 2a: Cognitive in-depth interviews

This stage took the form of 15 in-depth cognitive interviews focusing on luxury-buying behaviour and the habits and rules that underpin choices. The cognitive interviews were designed on the basis of the following criteria:

1. Four in UAE, four in Saudi Arabia, two in Qatar, two in Kuwait, two in Bahrain, one in Oman
2. The gender split was on the basis of eight men and seven women
3. All must have purchased a luxury product or service within the last six months

Cognitive interviews with luxury-buying consumers and brands allowed for a deeper analysis of empirical research through the exploration of the often multiple subconscious

reasons that contribute to the hidden rules of buying behaviour. This stage also explored the general attitudes towards Western brands and communication approaches identified through the 600 quantitative interviews and subsequent focus group themes. The nature of the cognitive interview was based on the application of the DeltaQual Cognitive Interview methodology that I utilised whilst I was at Nielsen (2008).

The principles of memory reconstruction are predicated on encouraging the respondent to think back to the original event by recreating the thoughts, emotions at a precise time. Figure 2 below suggests the dynamics associated with the cognitive interview themes that form the initial basis of my new product.

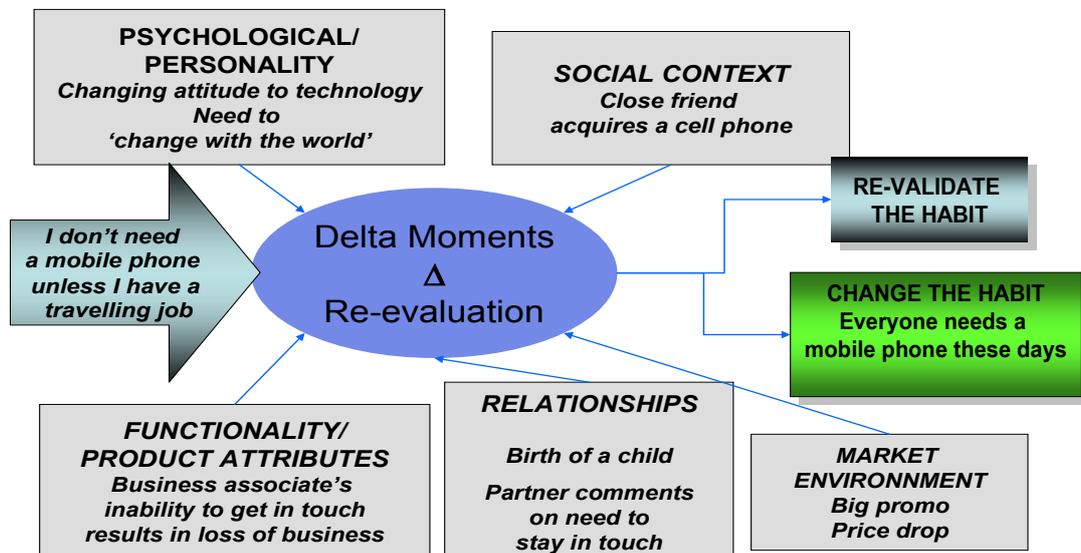


Figure 2: The cognitive interview (DeltaQual, Nielsen 2007)

The chart demonstrates a history of the interaction between psychological, social, function attributes, market factors and personal relationships that shape the brand journey over time.

Whilst at Nielsen I led the regional training across the 14-country MENAP region, and this experience was highly useful in internally training five team members in the cognitive interview application.

This interview stage was intended to feed into the creation of bespoke charts representing the cognitive process that has evolved into rules (omegas) and habits (delta moments) for each luxury buyer.

Phase 2b: Case studies

As the direction of this research was to evaluate a range of methodologies to develop competitive innovation, it was felt that a natural and feasible approach would be critically to review recent studies that involved, brand health—qualitative and quantitative, projection and personification techniques, semiotics, ethnographic, and concept tests. These were presented as detailed case studies of at least five distinct applied projects with specific methodologies across varied sectors that I have been involved in as a professional researcher.

Two represented targeting wealthy audiences, that is, Emaar luxury housing and Kuwait Airlines, whilst three represented general consumer products, Doritos crisps, Kit Kat chocolate, and Armani perfumes. In doing so a critical evaluation of the methodological approaches and techniques used for specific category insight was undertaken. Moreover, these case studies fed into the formulation of methodologies underpinning the research objectives. The case studies served also to illustrate and explore in greater depth the themes identified in the literature review and in the analysis of the questionnaire data.

By employing this approach a greater depth of information was obtained, enabling the analysis to build on that derived from the related research data. Whilst the literature review discussed key trends from an academic perspective, these applied, real world case studies added richness to the literature discussed as well as providing a practical dimension to the research methodological discourse. Thus, the series of case studies contributed to a deeper appreciation of the processes at work, through comparative analysis between selected case studies, and within individual case studies themselves. Walton (ed. Ragin & Becker, 1992), writes:

The new case is justified by showing not only that it pertains to the interpretive issues generated in similar cases, but also that it adds something to substantiate or, preferably, expand earlier understandings. (p. 125)

The issue of the number of case studies was important. Within this context, sufficient is seen in terms of enough information, rather than in numerical terms. Platt (ed. Ragin & Becker, 1992) refers to the ‘unimportance of numbers of cases to theoretical explanation’ (p. 24).

Similarly the essence of the case study is aptly illustrated by Yin (1984: 23):

As an empirical inquiry that investigates a contemporary phenomenon within its real life context: when the boundaries between phenomenon and context are clearly not evident and in which multiple sources of evidence are used.

Phase 3: Testing of new approaches

This phase explored the following research question:

- *What enhancements to research approaches can be developed to maximise consumer engagement of Middle East consumers?*

From the evaluation of feedback from Questions a and b, deriving insights from the integrated key learning from associated questions, I sought to develop and test enhanced approaches. The testing process took the form of developing two research modifications to methodologies. In the initial stages of this study it was envisaged that these were based on refined cognitive interviewing and personification variations pertinent to brands wishing to optimise business success with Middle East consumers. However, upon reflection I realised that as the research unfolded, insights as to the research methodological innovations necessitated a response far different from that initially envisaged. The development of a brand health quantitative tool for luxury Middle East millionaires, rather than a brand personification approach, would be attractive. The research also reinforced the case for a refined cognitive interviewing tool.

Testing was undertaken in the form of in-depth interviews with five Western brand influencers and three Middle East influencers. The rationale for the use of in-depth interviews was simply that, as an approach, it offered a bespoke opportunity to explore the above question from the key perspective of the brand. These interviews were benchmarked against the views of three Middle East influencers who were also presented with the prototype 'innovation tool'.

These phases also explored the following research questions within the in-depth interviews, which addressed in turn:

- *What will attract Western brands to take up the Middle East Millionaire Panel?*
- *How can the Panel and associated services be marketed in local and international markets?*

Background research and trade intelligence suggests a strong demand from Middle East consumer markets for Western brands. The Bernstein Global Intelligence Report (September 2010) suggests, *'The Middle East should not be overlooked as it is already a sizeable reality in the business of luxury, with an estimated market size of 7 billion Euros, 4.5% of global demand'*.

The in-depth interviews allowed for a depth exploration of the concept of the Middle East Millionaire Panel. I designed the discussion guide and moderated it on the principles that incorporated standard concept testing themes, that is, appeal, relevance, salience, credibility, communication, differentiation, brand positioning and likelihood of purchase. The eight brand influencers, split between five Western and three Middle Eastern, derived from the following sectors: wealth management, marketing, branding, property, lifestyle, high-end cars and watch and jewellery sectors. Western brand influencer perceptions were analysed and contrasted with the perception of Middle East influencers, so that clear insights could be generated in relation to identifying the trigger points for take-up of the Middle East Millionaire Panel.

2.5 Analysis of Data

Quantitative data from the 600 interview face-to-face questionnaire survey was analysed through the use of the industry-standard SPSS. This ensured that the data was analysed at frequency and cross-tabulation level, in order to establish relationships between key variables within and across specific locations. Given that sub-groups of a hundred formed the basis of the study, it was recognised that further sub-group analysis would not be possible due to the small numbers rendering statistical interpretation of minimal value. Analysis of sub-groups was restricted to a minimum of 50 respondents.

Some questions had ‘other, specify’ responses, and were coded into a code frame in accordance with coding agreed with my data processing team. As I am familiar with SPSS, I designed the SPSS file to match the questionnaire’s intentions.

Data entry directly to SPSS can present problems, as human errors can occur, for instance incorrectly punched codes. This can arise because SPSS does not have inbuilt data entry filters that prevent incorrect entry. The use of QPSMR (Qualitative Package for Social and Market Research) is a data entry package that enabled data to be punched in a user friendly manner with inbuilt logic checks to minimise human error. This ensured that any subsequent analysis when transported back to SPSS format was done on the basis of a clean file. Reflecting on this approach, I was able to derive advantages in the context of time, rigour, consistency and ability to test general observations through further cross-tabulations. For instance, across the 600-interview survey, with sampling on the basis of a hundred interviews per country, I would be able to generate robust overall frequency data. I could then undertake analysis by specific demographics, such as gender, and determine if

there were any differences across gender. If, however, I had to analyse differences within gender across age levels at a country level, then sub-group analysis would not be meaningful as the actual numbers subjected to analysis would be too small. This is the reason why further exploration at a focus group or depth level may be necessary.

Qualitative methods using cognitive, standard-depth interviews and focus groups generated much information that was in Arabic and transcribed in English. Given the volume of data, there was a need for consistency in the analysis. The notion of reliability and validity is crucial in research and in the context of qualitative research it has been hitherto under-explored. Kirk and Miller (1986) identify '*sophisticated procedures to guide the interpretive acts of social researchers*' (p. 5).

Qualitative data was analysed using company software for multiple depth interviews in an automated fashion, as the software allowed variables and quote to be cross-related. An important consideration was the need to preserve language and metaphors that might be lost in translation.

My familiarity with the Arabic language and associated issues served as an advantage, although I was all too aware of my limitations since it is not my first language and, combined with variations in dialects across the six countries, meant that local moderators were carried out interviews or conducted them interviews jointly with me. All participant consent forms were translated into Arabic, if required to supplement the English version. All moderators debriefed me contemporaneously and transcribed data was entered into the programme on the basis of a code frame that allows for verbatim quotes to be tagged consistently, according to the convention on a spreadsheet. I held a team meeting with my

moderators to establish coding so that labelling represented an element of faithfulness to the participant narratives. Transcriptions followed Transcription Guidelines (STRC, 2008). From the coding, moderators were encouraged to develop themes and contradictions manually as part of the feedback session to the team. In essence, the outputs took the form of thematic observations produced as an output document against group profiles. I was able to see whether there were any new or dominant themes emerging that could be further expanded by reference to verbatim quotes. This enabled me to have a macro as well as a micro perspective of the qualitative data. I was also able to incorporate this within the discussion of the findings in the context of the quantitative interviews. This was particularly useful when exploring country-specific and gender variations where there was cross-comparability between quantitative and qualitative findings. I was able then to link these findings to my professional experience.

My 20 years of market research has involved direct experience of managing and conducting research across 14 Middle East countries whilst based in the region, and this enabled me to have a reflective and benchmarking approach to data interpretation. I was able to look at findings and establish whether they more or less conformed to ‘on the ground’ business reality and assumptions across demographics, area and subject matter. Indeed, this ability to review data at a macro level is supported by my involvement in Middle East Research conferences such as Marketing to GCC Women, and Halal Finance, as well as masterclasses to corporates reviewing Middle East consumer trends. Accordingly, in the context of this research I was able to use this experience in giving context to findings.

The approach taken to use both quantitative and qualitative data to draw insights was greatly useful and this runs through this commentary. A series of questions was asked of respondents during the quantitative survey and the follow-up qualitative focus groups. These questions are discussed below.

Chart 1 shows that men overwhelmingly are the main decision makers in the household. This was true across all the nations. When tested across focus groups, it was apparent that this figure masked interesting underlying dimensions. Women mentioned that, as men tended to be the main breadwinners they were allocated the resources for spending.

My husband pays, but I tell him what I want. (Bahrain 35)

I know more about fashion, bags, rings and matters such as those that are in my domain as a woman. My husband obliges. (KSA 39)

My husband delegates some things to me such as the house running. (Oman 35)

My husband was in the UK shopping and whilst in Harrods he called me to ask which perfume I was requesting.... He purchased it. (KSA 28)

Many women suggested that whilst the husband was the main decision maker when shopping, their requests were seldom refused. This was apparent across all groups.

If I want a new house, then he would make it a priority. (KSA 40)

There are times when it is not wise to shop on your own, so the husband will go. (Bahrain 35)

Appropriateness was mentioned on several occasions and, when probed, it was clear that for both men and women image was important.

We tend to go as groups of women to shop for clothes, or with the husband. (KSA 27)

It is not considered wise to shop on your own unless we know that shop manager. (Oman 28)

People talk... respect is important. (UAE, male 34)

There are times when people can be rude to women who are alone. (Qatar, male 29)

Distinctions were made between big ticket spending and general day-to-day purchasing.

If it's food, then we send our servant or have it delivered. (KSA, 37)

If it's an outing then my wife may decide. (UAE, male 38)

If we are going abroad then the family including the wife decides on preference—we pay. (Kuwait, male 37)

We give money to family members. My wife has money and the cards to buy what she needs. (Qatar 42)

Thus what emerged from the quantitative survey was that respondents gave the socially desirable response, to heighten the role of men in the shopping process. When probed further, women across all nationals were major influencers at every level, irrespective of visibility.

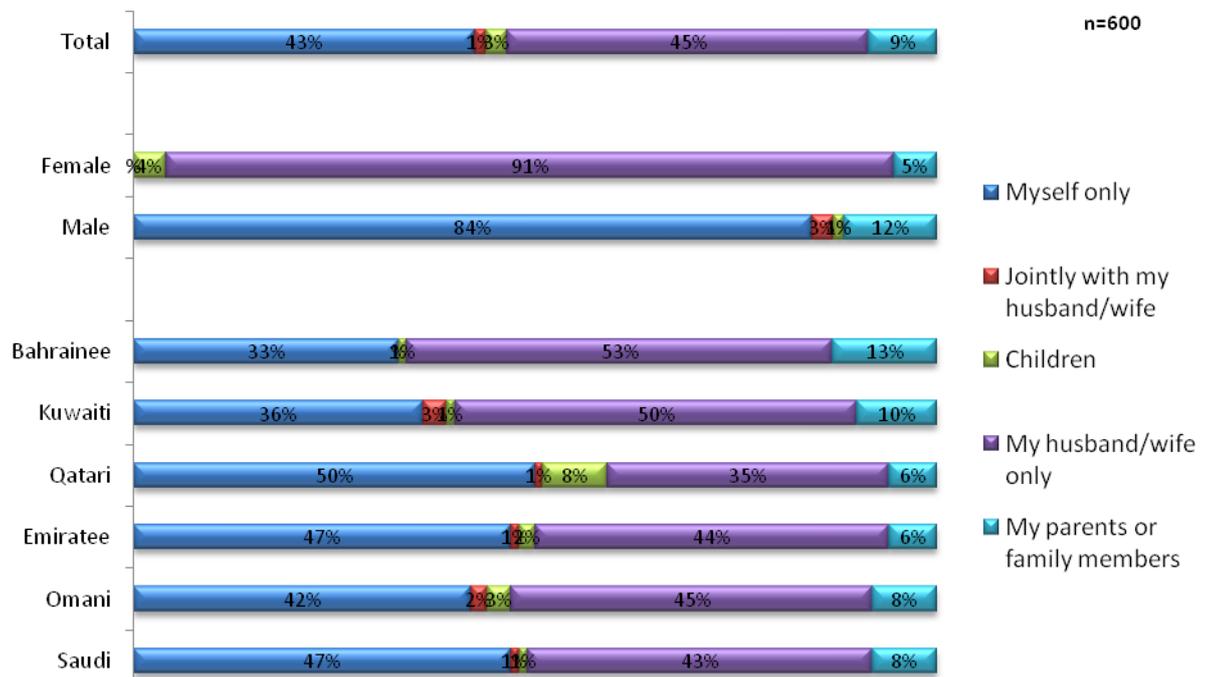


Chart 1: Who is the main decision maker for shopping in your household?

Fridays represents a main shopping day. It represents the beginning of the weekend.

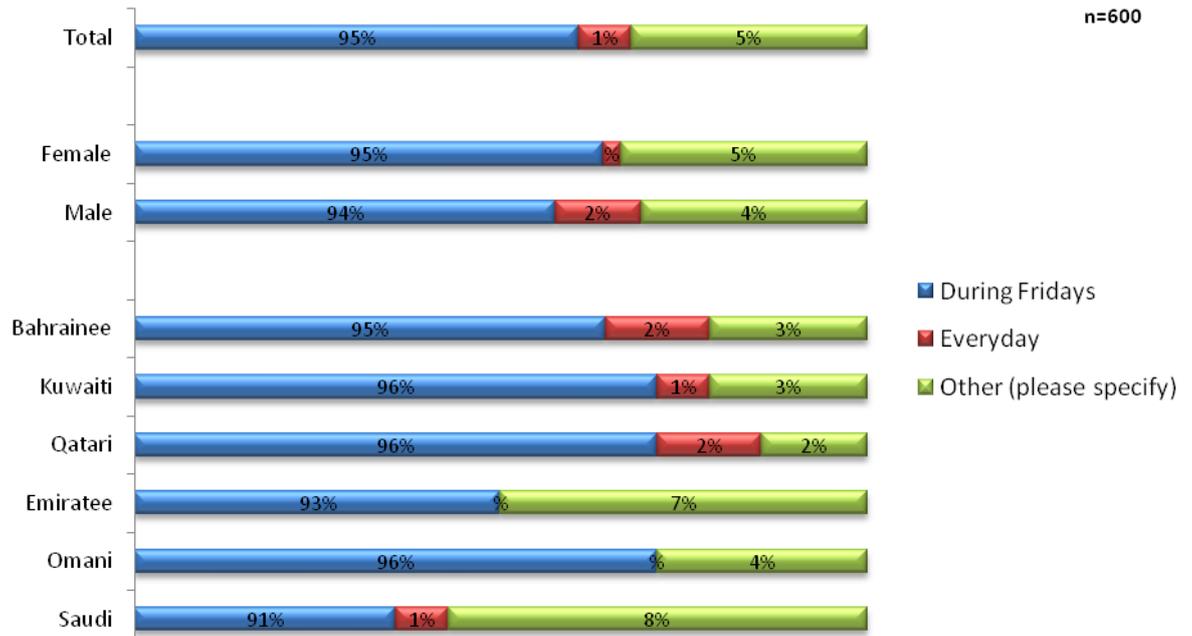


Chart 2: When do you generally do your shopping the most?

Unlike Chart 1, which sought to explore who was the main shopping decision maker, that is, male, Chart 3 suggests that, for women, shopping is a social experience with the family. This contrasts with men, a third of who responded that they shopped alone.

When probed further in the focus groups, women found shopping a shared experience of fun and testing products.

I like to go shopping with the family as I get to see what they like, what I want and also meet friends. (Oman 23)

The shops know my family and it may be they talk with my sisters as well and get them to buy. (KSA 34)

Men thought that going alone represented a break from family life:

I like to meet my friends for tea, and talk about life in between buying things.

(UAE, male 36)

Some shopping is better seen as done by men, as only men are present. This includes property, cars and banking issues. (Qatar, male 28)

If I buy a house then I will consult but we decide on the basis of what my family wants. (KSA 39)

I don't need a wife to tell me what car I need. (UAE 40)

The notion of expectation was apparent. Image was central to this. However, holidays abroad represent a break from convention:

My husband is different when we are abroad and we can be freer. (KSA 35)

Nobody judges if I am in London or Paris or KL. (Oman 26)

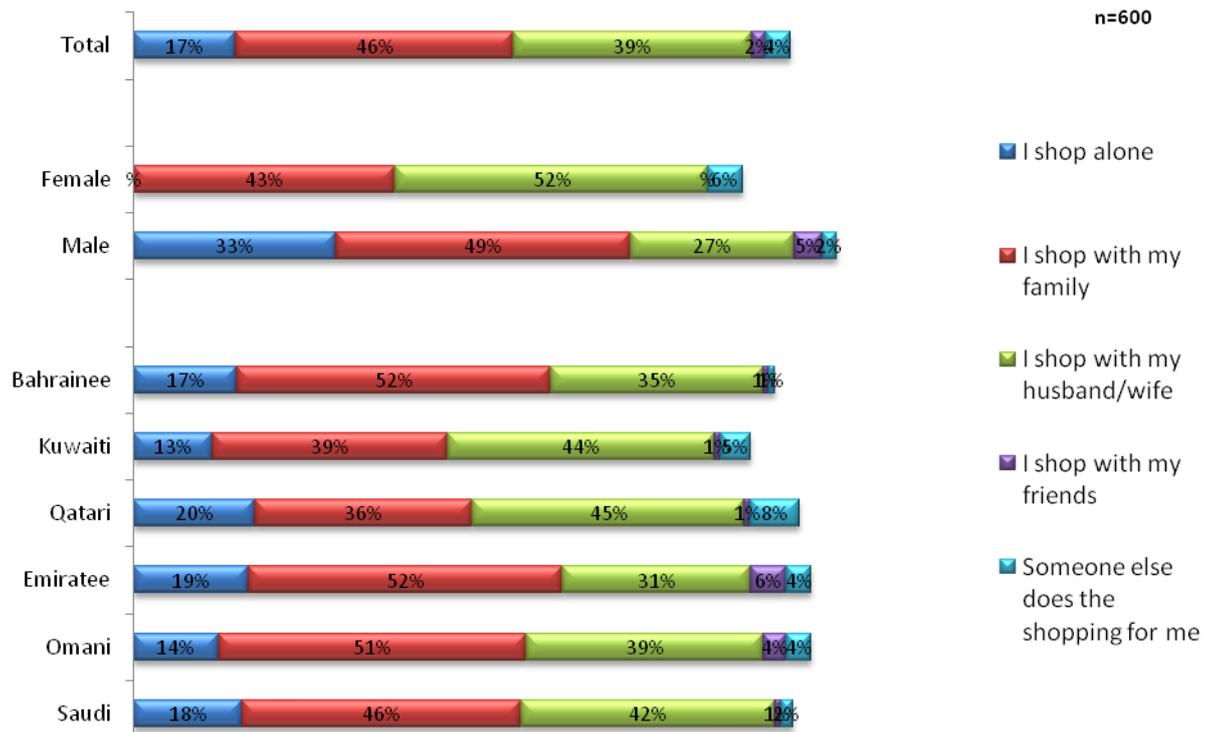


Chart 3: Which of the following best describes your shopping habits?

In all the focus groups, as has been mentioned, when shopping habits and decision making was being explored participants made a distinction between everyday shopping and big-brand shopping. Indeed, the preference to be associated with famous brands was clearly evident, with over nine in ten indicating the importance of this (see Chart 4). Evidently, for Gulf nationals, big-brand association was apparent and was reinforced by focus groups:

At a wedding we may have to spend around 600,000 *dihrams* on gifts and presents (£100,000). This is mainly on things like Dior, Versace, Gucci, Prada, and everyday things. (UAE, male 43)

If you have money, you should spend it on your family. (KSA 29)

The notion of sharing and gifting was mentioned several times:

We have gifts to share and pass on to loved ones during occasions and it is a necessary pleasure. (KSA 29)

It is *Sunnah* (Prophetic Tradition) to give gifts. (Oman 34)

If you do not buy a famous name, people think you are very ungenerous or very much someone who hoards money. (Kuwait, male 30)

In my tribe, I will be expected to present a good image to others. (UAE, male 38)

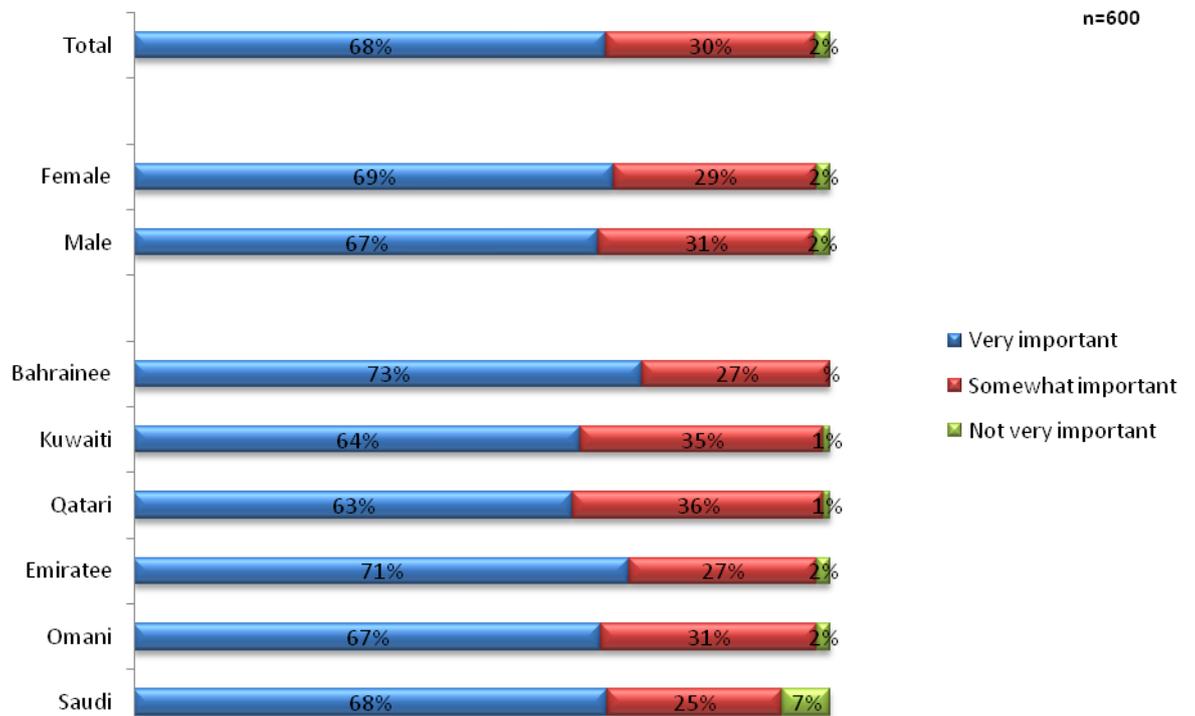


Chart 4: How important is it to for you to shop for famous brands?

Chart 5 reinforces the main drivers for shopping for famous brands. These included a combination of factors. Focus groups explored each of these drivers in detail, and it became obvious that there were multiple factors that, when combined, reinforced a love of famous brands for both men and women. Both displayed similar push and pull factors towards famous brands.

When I am wearing famous brands, driving a famous brand car, and eating in famous name places—I feel someone. (UAE, male 43)

Every women asks the other what they wear, buy from where and we look at one another. (Bahrain 26)

If I buy a famous name—it is the best quality. (KSA 45)

Because we are locals, the other communities expect us to be the best and we are. (Qatar, male 34)

As nationals we are role models of Emiratees—we must be impeccable in honour of our Rulers and nation. (UAE, male 35)

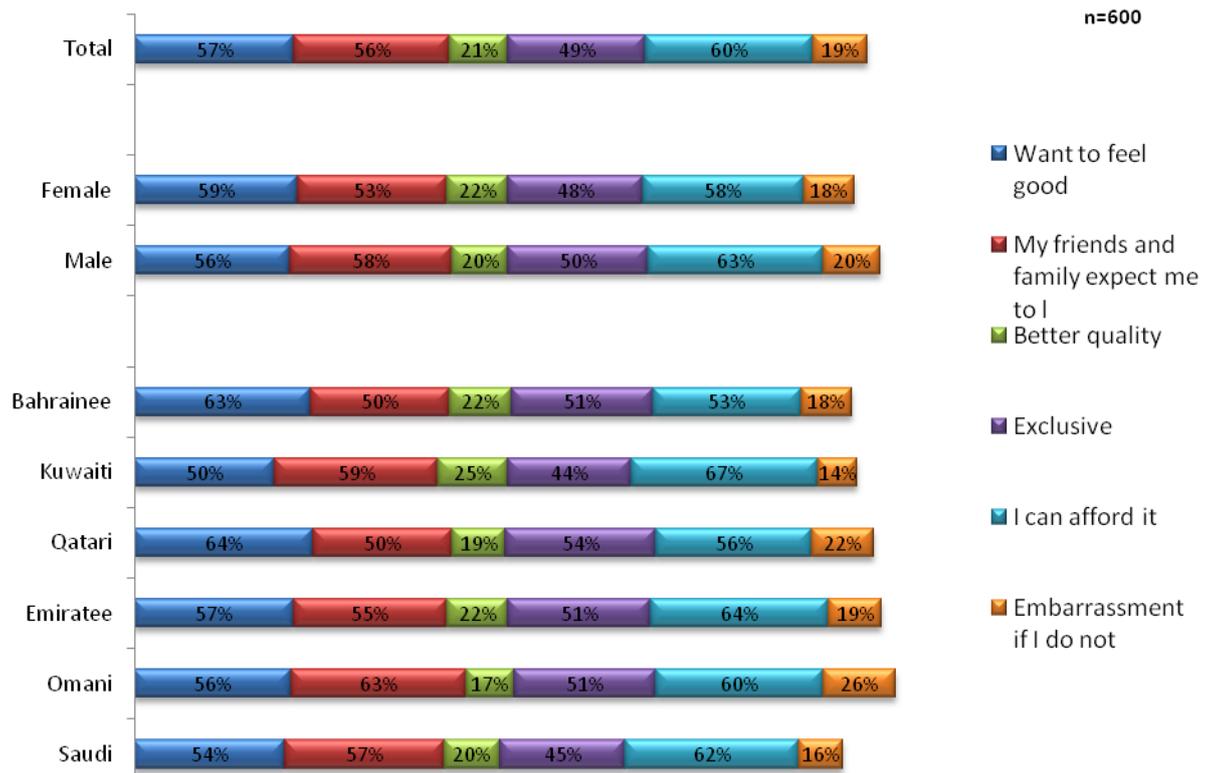


Chart 5: What usually prompts you to shop for famous brands?

There is significant spending on Western brands, as illustrated by Chart 6, with most participants spending between 40–60 per cent of their income on Western brands, whether day-to-day or luxury items. This was reinforced during focus groups:

I drink Starbucks, and eat McDonalds and buy Italian cheese.' Kuwait, male 27)

Our Malls are full of Western brands. In Abu Dhabi, In Emirates Towers we have The Avenue. Those that shop there have so much shopping luxury chance. (UAE, male 32)

Car dealerships sell Ferrari. (Qatar, male 27)

We prefer banking with our own national banks as we trust them. (KSA 26)

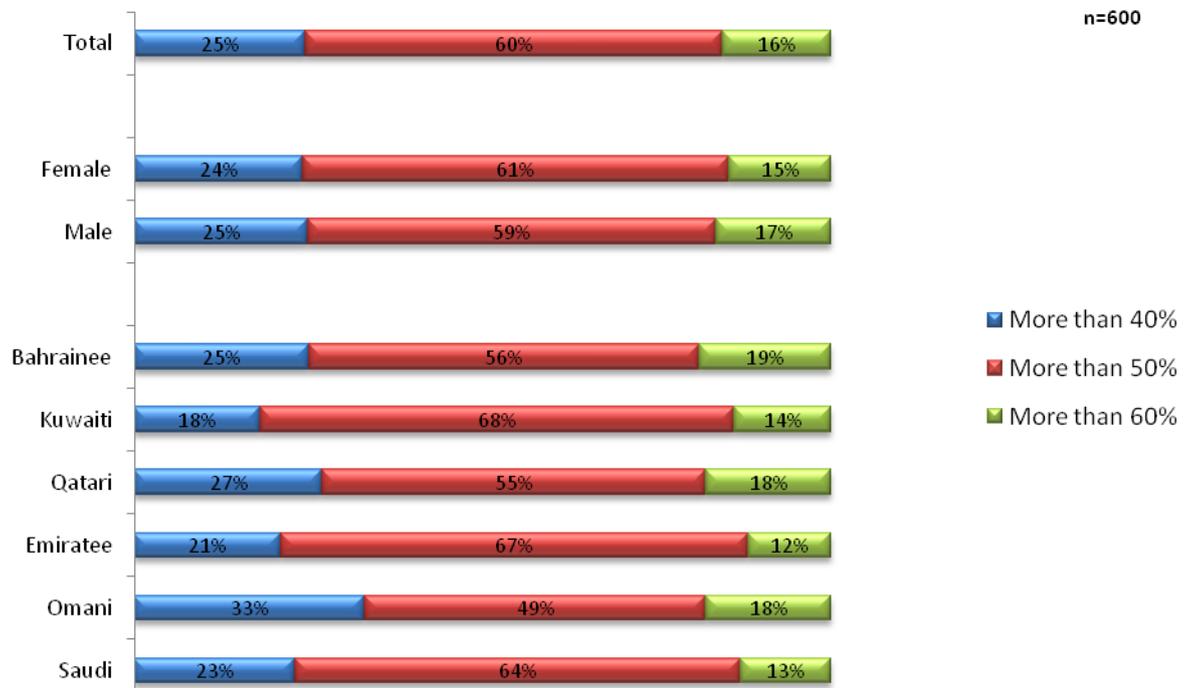


Chart 6: In your opinion, what proportion of your income goes towards buying famous Western brands?

Chart 7 shows the importance of faith. In purchasing brands, 90 per cent of participants indicated its importance. This was further explored in focus groups where faith was seen as implicit:

We are allowed to spend on what is lawful and refrain from unlawful. (KSA 26)

Unlawful means anything that is *haram* such as alcohol, *riba* (interest). (UAE, male 29)

The notion of extravagance was considered:

Some would say buying luxury products is wasteful, and that money can be spent on less expensive things. I spend 30,000 on a handbag because I have the money and it is not wasteful because I can afford it as a necessity. I still give to other causes as well. (KSA 28)

When we go abroad we live the best because we are figures of our nation, we project ourselves positively. (Qatar, male 39)

There were differences amongst Saudis, who are not exclusively elite shoppers:

We are not part of huge wealth and have to be careful. It is a myth that we are all wealthy. Some are some are not but as Saudis we have opportunities to lead and be successful. (KSA 39)

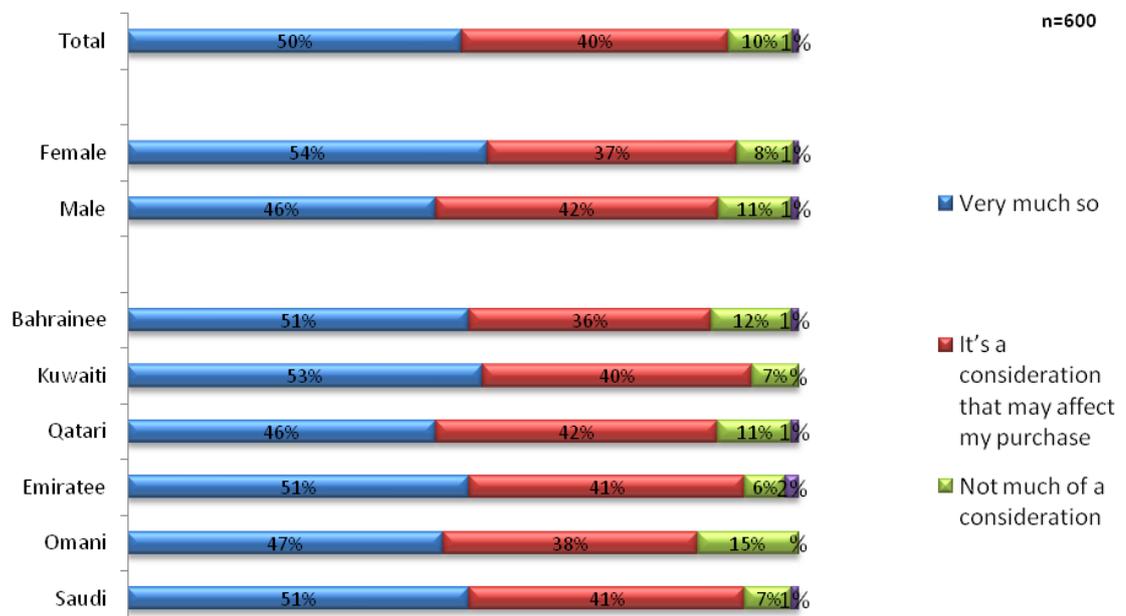


Chart 7: How does your faith affect your purchasing of brands?

Around seven in ten people had bought something they described as a luxury (see Chart 8). The pattern was evident across all nationals and a reflection of the power and draw of luxury to these consumers.

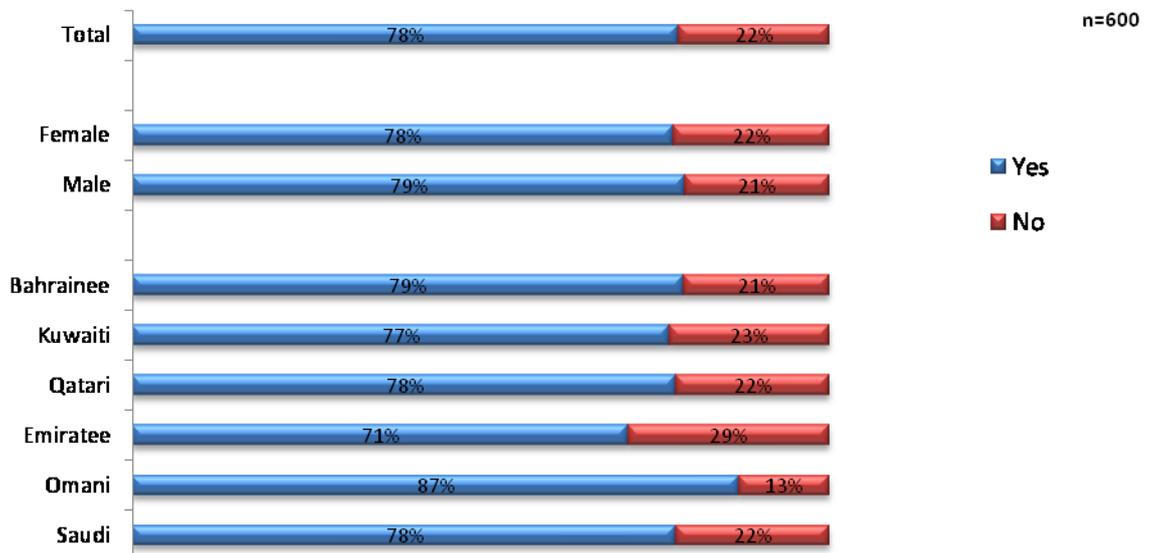


Chart 8: Have you bought anything that you would call luxury over the last six months?

Questions 11 to 17 presented a range of statements to respondents to gauge the degree of affinity to the views presented. Chart 9, shows that 70 per cent associated buying with happiness. This was similar across gender and supported through focus groups.

If you earn and spend on what you want of course you are happy. (Oman 34)

Quality is a source of happiness. (UAE, male 36)

I like spending on things that make me look good. (KSA 26)

I buy to look good for my husband. (Bahrain 34)

I feel good when my new car is there for me to drive and enjoy. (Qatar, male 28)

There is no price to happiness. (Kuwait, male 38)

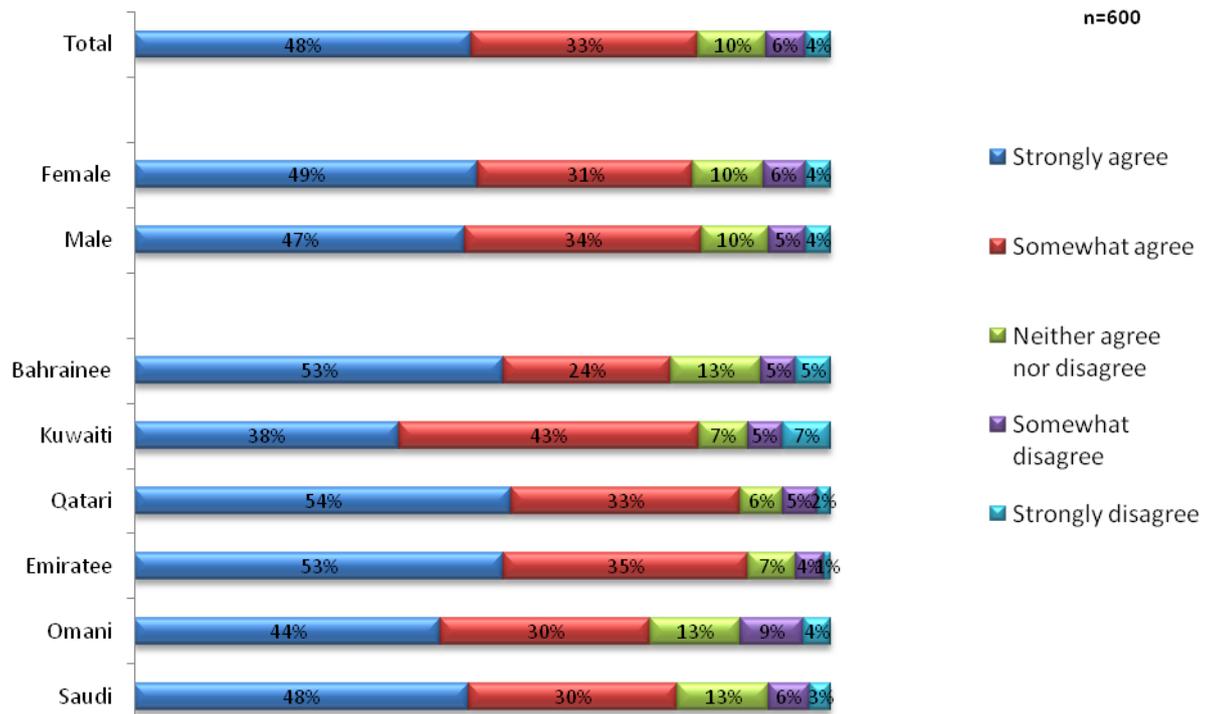


Chart 9: How much do you agree or disagree with the following statement: 'I don't mind spending on expensive brands if it gives me happiness'?

As has been mentioned, cultural expectations at peer level and tribal affinity reinforce the expectation to spend on expensive brands. Six out of ten people agreed that there are cultural expectations that encourage people to spend on expensive brands (see Chart 10).

These findings also relate to earlier questions on spending preferences where push and pull factors were mentioned.

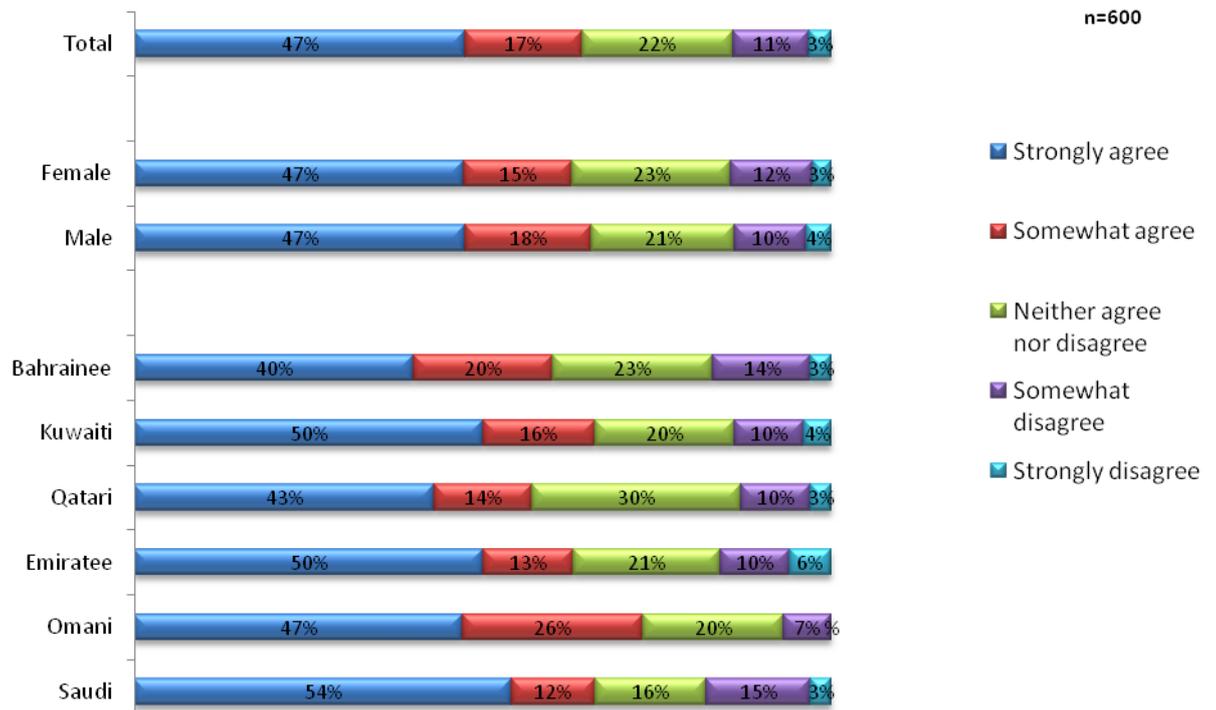


Chart 10: How much do you agree or disagree with the following statement: 'In my culture I am expected to spend on expensive brands'?

Despite having a preference for luxury brands, around half felt that brands could do more to advertise appropriately (see Chart 11). In focus groups views were divided between those who felt brands did not need to do much, because they sold themselves, and those who thought that brands tended to be Western-focused and missed cultural norms:

If I buy a chocolate I do not need to see some inappropriate message like have this chocolate and you can enjoy a relationship. (UAE, male 42)

The product is luxury—it does not need to do more to win me. (Qatar, male 37)

Brands think we think like them. They don't understand the culture. (Bahrain 34)

I find the adverts funny. (Kuwait, male 32)

In KSA we do not like to see overt images of men and women in compromised Western stylistics (KSA 34)

We have morals here and we do not need Western styles of communicating. (Qatar, male 42)



Chart 11: How much do you agree or disagree with the following statement: 'Western brands understand my culture when they advertise to people like me'?

A frequently mentioned assumption is whether there should be gender separation in advertisements. Around 60 per cent thought that there was no need for separation. Focus groups suggested that some brands tended to get messages wrong, although well intentioned.

We do not have free mixing so it's better to have some discretion. (KSA 34)

It is normal to have mother and father, or mother and son—these are family pictures but we prefer not have suggestive advertising [that] promoting free mixing. (Qatar, male 38)

Interestingly, those from younger age profiles did not think mixing in advertisements would be a problem, if handled well.

If it is done with a conversation between two people with people around it's OK. (UAE, male 22)

It's life. Get on with it. (Bahrain 21)



Chart 12: How much do you agree or disagree with the following statement: 'It is not important for men and women to be separated in advertisements'?

Having established the importance of faith, Chart 13 shows despite the penchant for Western brands: if they were perceived to be disrespectful of the faith and culture, then 80 per cent would reject that brand. The notion of respect is seen in terms of religion, gender, nation throughout the focus groups:

I don't want to see adverts which are disrespecting my faith. (KSA 32)

I hear that when the Danish newspapers ran some disrespectful media about our beloved Prophet we did not buy their product in mass. The Danes realised we were serious. (KSA, 34)

Disrespect is also about treating women as women and not objects as is the case in the West. Look at their music and films. (Qatar, male 39)

Children shouting back is against our ways. (Oman 35)

If they disrespect the flag we will not hesitate in ending our ties with them. (Qatar, male 39)

If they support our heritage we support them. Ralph Lauren supports horses—we like that. (UAE, male 48)

The culture show is about supporting our heritage. (Kuwait 36)

My tribe are *Bedouins* by heritage—we like camels—if they disrespect us by their profanity we will not like that. (UAE, male 36)

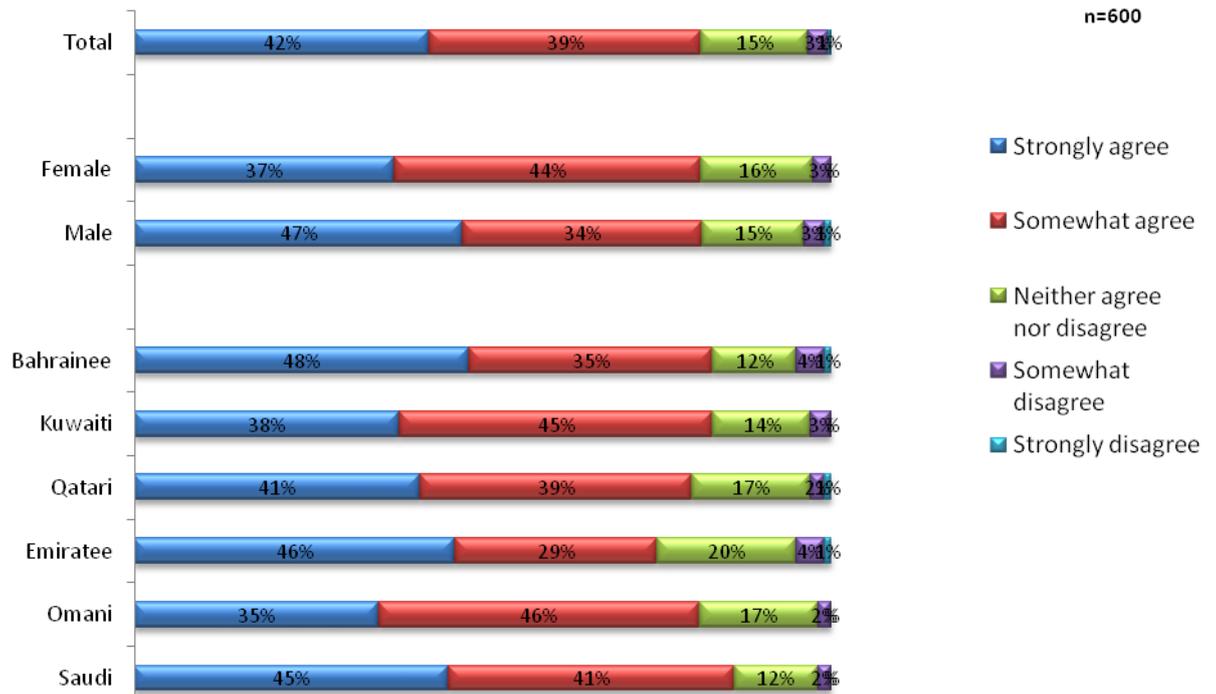


Chart 13: How much do you agree or disagree with the following statement: 'If I find a brand is disrespecting my religious and cultural values I will reject it'?

The connection between Western brands and quality is described by Chart 14, where 90 per cent agreed with the statement 'Most quality brands that I come across are Western'. Focus group comments associated names such as Rolex and Ferrari with the hallmarks of quality. Some were quick to point that the brands were not Western brands but universal, as this comment suggests: '*creating a brand takes time—if film stars endorse it, and our Royalty also adopt it then we too want to be part of the universal prestige wherever you go in the world.* (UAE, male 38)

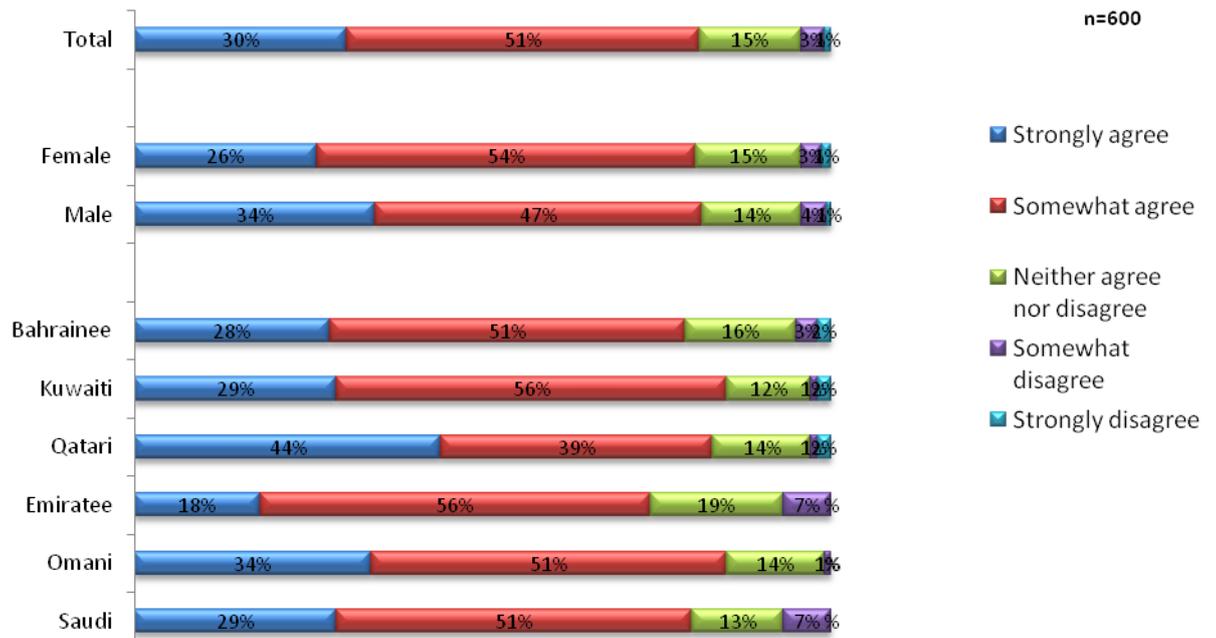


Chart 14: How much do you agree or disagree with the following statement: 'Most quality brands that I come across are Western'?

On average 40 per cent found the quantitative research exercise useful (see Chart 15). When probed further during focus groups, participants had the feeling that the questions only partially tried to understand how such people really think:

If you ask question, I can say yes, no may be—what does that tell you? (Oman female)

I like the idea of giving my ideas—this is good to be able to listen to others (UAE male)

There were mixed opinions from those participating in the focus groups, from *'groups are boring'* to *'good to share what I think'*:

I want to say something other than what people thinks. (Kuwait, male 36)

If you have a personal experience how can you share it? Oman 29)

We have to keep it general. (Bahrain 38)

They are good ways of giving you ideas about what works and what does not.

(UAE, male 30)



Chart 15: How much do you agree or disagree with the following statement: 'I find that research exercises like this useful in giving me the chance to inform companies what I think'?

2.6 Summary

There were valuable findings from the quantitative and qualitative survey. Together they reinforced some key points:

- Western brands are very popular amongst nationals
- Luxury brand association is inextricably linked with national lifestyle
- That cultural connectivity could be better understood
- Decision makers mask the importance of influencers. The outward perception of male domination in shopping does not equate to their doing the thinking—they are highly influenced by women
- Research exercises such as those used could be more personalised to reflect the complexity of shopper behaviour.

The next section explores the product innovation context that drives the goal of constant improvement and competitive advantage. Recent advances in research have focused on getting closer to the consumer; the co-creation research environment is examined against the backdrop of innovation theory. This leads on to a critical evaluation of five case studies of real projects in the Gulf that could have benefitted from further user-focused refinements. These serve to put these findings in to a reflective complementary overview of approaches, prior to consideration of redefining existing or developing new approaches.

3

Product Innovation in Research

3.1 Setting the Scene for the Development of Innovation-focused Research Products

This chapter explores the context for developing the research innovations. Throughout my research career, classic research approaches in the form of surveys, interviews have had a somewhat top-down feel. I always felt that as experts we would design the research study, pre-empting the sort of considerations and options consumers would have. This was especially apparent in the development of pre-code statements, which tended to be researcher-generated and analysed by the degree of affinity of the consumer to each statement along a Likert scale. This would generate snapshots of typologies that would give rise to further insights through follow-up cross-tabulation analysis against key demographics. However, the industry is changing fast and the drivers for developing new product solutions in research are directly related to getting as close as possible to the voice of the consumer.

This chapter looks at the emergence of co-creation as a research product discipline and sets the context for a discussion on how research studies could become more innovative through the application of new products. The use of case studies from areas of my work will serve well to illustrate the thirst for developing products to add value to insights on subsequent projects. This will feed into a discussion of cognitive and brand health approaches.

3.2 Product Innovation through Getting Closer to the Consumer—Co-creation

Significant social, economic and technological movements are shaping new relationships between the brand and consumer. Businesses are increasingly being driven to change their approaches and in doing so develop new competencies that stimulate and foster customer value co-creation. These present challenges and opportunities. Weaver (2008) and Trainor (2012) articulate the nature of these challenges from the perspective of existing companies without fully suggesting how to do so. Similarly, acknowledging that we are in the age of co-creation, Abbas (2012) argues that businesses must harness co-creation as a catalyst of transformation of the value to consumers, as the customer experience is evolving. One of the challenges in the co-creation literature has been to find a perspective that demonstrates the working of co-creation.

C.K. Prahalad and M.S. Krishnan (2008) present a lucidly argued representation of co-creation, from the expertise of Prahalad as a global business strategy expert and Krishnan as an IT expert. To them, co-creation is the process by which firms and their customers mutually create products and services that connect with consumers' individual, unique nuances. Illustrations include the iPod music player and the Facebook website. They articulate with frameworks on how strategy interconnects with co-creation execution, with a foundation of an embedded IT and management infrastructure. Five essentials are presented including smart analytics to measure customer engagement, total commitment to improving customer-facing and back-end processes, treating all individuals, customers and suppliers as unique, cross-cultural working and ensuring that high quality but flexible low-cost services are delivered speedily by teams.

The influence of information technology has created new opportunities for creativity in the formulation of co-creation. Füller (2010) argues that the interaction of consumers and organisations during virtual co-creation can be explored through social exchange theory. There is a ‘give and take’ process where curiosity marries needs—an ideal environment for the creation of a virtual co-creation experience to be developed. Chen, Marsden and Zhang (2012) extend this novel discussion by reiterating the very real challenge for companies to become more and more innovative so as to create a sustainable pipeline of enhanced products and services. They note that companies are fast becoming adept at gathering the ‘collective intelligence’ of consumers through firm sponsored mechanisms, which they refer to as ‘*Company-Sponsored Online Co-Creation Brainstorming*’ (COCB). They argue that the benefit of this platform is to trigger open and voluntary co-creation through contribution and sustained participation. Empirically analysing COCB activities over a two and half year period, they conclude:

Our analyses demonstrate that the level of peer feedback and the responsiveness (speed) of sponsor company feedback have significant influences on both members' contribution levels and duration of active participation. The sponsoring company's feedback, however, seems to influence only the quality of member's contribution level. On the practical side, the outcomes suggest that sponsoring companies should develop efficient processes for reviewing and responding to submitted ideas.

A particular shortcoming of the study is the partial coverage of the notion of efficient processing. Nonetheless, the study did give rise to a convincing case for company-sponsored co-creation.

Company-sponsored co-creation is also the subject of detailed analysis by Ramaswamy and Gouillart (2010), who coin the phrase ‘co creative enterprise’. They identify four principles of co-creation:

1. Stakeholders will not participate wholeheartedly in customer co-creation unless it produces value for them, too
2. The best way to co-create value is to focus on the experiences of all stakeholders
3. Stakeholders must be able to interact directly with one another
4. Companies should provide platforms that allow stakeholders to interact and share their experiences.

Their conclusion is worth mentioning for its very clear and unequivocal endorsement of the primacy of the modern day consumer: *‘The New Paradigm of co-creation presents an enormous opportunity for enterprises that can figure out how to harness it. Individuals are far ahead of most organisations in their eagerness to engage in co-creating value, and organisations must now respond’*.

Co-creation is increasingly therefore being seen as an enabler or catalyst for change. Zwass (2010) argues that sponsored co-creation requires enabling information technology that reflects the changing context of the relationship between product, consumer and supplier. One such example is that of Customer Relationship Management (CRM tools). Trainor (2012) coins the phrase *‘social CRM’*—the need to link CRM with the domain of the social customer and technological developments.

In giving recognition to consumer sovereignty, Schreier et al. (2012) go one step further by exploring consumer perceptions of firms that sell products designed by users themselves. Compared with the orthodoxy of professional designers employed by firms leading the design task, the authors found that a design from users increases consumers' perceptions of a firm's innovation capability. They refer to this as the '*innovation effect of user design*' and highlight the benefits associated with this in terms of purchase intentions, willingness to pay, and consumers' willingness to advocate the firm to others. A particular strength of this contribution is its pragmatic cautionary advice on the need to be wary of the environment in which user innovation can take place. Consumer familiarity with user innovation and the complexity of the design tasks are pivotal as parameters for the innovation effect of user design.

Research into the user experience of co-creation through the medium of the internet was the subject of what is regarded as the first detailed large-scale (of 727 consumers) evaluation of how consumers are empowered through internet-based co-creation projects. In this study Fuller et al. (2009) suggest that, whilst information technology ensures that new forms of producer-consumer collaboration are devised in new product development processes, little is known about how far consumers felt empowered through such co-creation platforms. Key questions surrounding support, perceptions of empowerment, task enjoyment and willingness to participate in subsequent co-creation projects are explored quantitatively.

The study concludes that key triggers can enhance empowerment and enjoyment, namely the design of the virtual interaction tool, the consequent enjoyment of the virtual interaction, the task assigned to the participants' and products' involvement, and the

responsibility to creatively apply lead-user features. The authors suggest that the marriage of perceived empowerment and enjoyment plays a vital role in future participation in virtual new product development projects. The notion of perceived enjoyment is a most telling and evocative finding. Indeed, whilst the process of co-creation is important in any relationship between company and consumer, it is important not to lose sight of the fact that it is not the process that is important but the end result for the brand, in the form of positive user perceptions. This is a point further developed by Helm and Jones (2010), who argue that co-creation offers vital ingredients to brand health and safeguards the brand value in the long term. A brand is more than a firm, being made up of multiple stakeholders and as such there is a need to look at co-creation through sophisticated conceptualisations that are consumer and stakeholder focused, as opposed to firm focused. As information technology offers consumers so much information about them, brands have increasingly become focused on not simply being good producers of functional experience, but recognising themselves as service providers. Indeed, the terms of service design and delivery systems have entered the vernacular of customer value co-creation. The work of Lih-Bin and Hock-Hai (2010) identified that service design was an integral aspect of value creation in a co-creation study comprising about 300 consumers.

This supports the work of Rajah, Marshall, and Nam, (2008) who conclude, *'while lower order needs are still important, these represent the lower end of the spectrum of customer expectation. To create customer value businesses need to focus on competitive advantages that relate to satisfying higher order needs of customers'* (p. 370). Their structural equation model demonstrated that co-creation reinforces the premise that engagement engenders satisfaction and trust.

The focus on the social can be supported by a body of literature that explore creative contributions through competition. Fuller et al. (2010) introduce the prevalence of 'virtual design competitions' as a vibrant source of invigorating innovation through the use of 'design-ideas' of external designers and motivated consumers connected by an enthusiasm to contribute to design. They cite the 'Swarovski Enlightened Jewellery Design Competition' and conclude that the importance of the co-creation experience has deeply positive impacts both in terms of the quantity and the quality of design contributions by consumers. This personalisation of the creative space has been the subject of recent work by Harwood and Gary (2010), who identify an evolution from product–firm centrality to personalised consumer experiences. Their findings point to discerning, collaborative-minded consumers assuming ownership, to set their frame and formulate their own post-product consumption experiences. More and more companies are investing in co-creation as an integral component of their product planning and development strategy. McEleny (2010) draws upon the co-creation of Dell, clothing retailer New Look and the consumer goods manufacturer Unilever.

McEleny argues that co-creation is not an afterthought but an integral process of involving consumers at the start of product development through the use of social media and online communities. Indeed, when co-creation works powerfully it does so spectacularly; Hardy (2011) cites the success of the UK telecoms company Giff Gaff's co-creation, comprising a hundred consumers who could answer a set of questions with accuracy in less than a minute.

Maklan, Knox and Ryals (2008) argue that traditional market research-centred approaches have been rigidly prescriptive through testing and reliance on models. As consumers

become more participatory and empowered to shape their own feedback, the authors contentiously argue that market research is in danger of being sidelined. As a market researcher, my initial shock at the hypothesis was replaced by a sense of acceptance of the logic. The argument establishes a premise that, as co-creation establishes a foothold in the internet-enabled technological age, it is not market researchers who will be ambassadors of the movement but behavioural marketers. They do, however, give market research a saving fillip by making the case for action research as a necessary alliance between market research and co-creation, arguing:

In today's economy where customers are active participants, innovation does not stop a new product development and line extensions refined through qualitative and quantitative testing. Action Research techniques enable the market researcher to engage more effectively with customers as the co-creators of innovative solutions, whether relational, process based or indeed new to market offering.

Any new product innovation needs to evaluate the scope of the opportunity. Utterback (2009) mentions that in the age of information technology an invading technology has the capacity for delivering far superior product performance and describes this as the *'Invasion of stable business by radical innovation'*.

Co-creation, or interactive user-centred research innovations, requires the assessment of the market ecosystem. At STRC the use of collaborative partners has become increasingly apparent, and partnership with non-traditional and non-research institutions are evident. Adner (2007) argues that there is a need to match the innovation with the ecosystem strategy. He concludes, *'when they work, ecosystems allow firms to create value that no*

single firm could have created alone'. The contribution of the founder of modern innovation theory, Clayton Christensen (2009), cannot be understated. In his groundbreaking work on 'disruptive technologies' in Bower and Christensen (2012), he argues that all companies need to adapt. This includes research organisations such as STRC. He writes that *'staying focused on your main customers can work so well that you overlook disruptive technologies... the consequences can be far more disastrous than a missed opportunity'*.

3.3 Methodological Applications to Middle East Consumer Studies

Working across multi-business sectors brought forward a number of creative challenges and opportunities to apply methodologies that would elicit the best information to meet the specific business objectives.

This section presents five distinct case studies of projects that I have been involved in as a professional researcher. Two represent targeting HNWI audiences, that is, Emaar luxury housing and Kuwait Airlines, whilst three represent general consumer products: Dorito crisps, Kit Kat chocolate, and Armani perfumes. The aim of the case studies was critically to evaluate the methodological approaches adopted.

Key findings have been highlighted to identify the specific cultural reactions to stimuli and concepts that could be taken forward as part of the development of innovative methodologies, based upon what worked, what can be dismissed and what could be refined from the collective learning.

3.4 Case study 1. Emaar—Luxury housing developments

Emaar is the premiere provider of new developments across the United Arab Emirates. The focus of the study was to 'understand what intenders look for in the property they plan to purchase. The study was divided into two separate segments: a) usage and attitudes and b) concept development.

The key was to understand the overall usage and attitudes towards property purchase as a generic exercise across localities. Specifically, the research was to address the following questions:

- How are the intenders different across markets?
- What are the triggers and factors for property consideration?
- What are the current areas of dissatisfaction?
- What are the decision-making processes?
- What is the evaluation of developers?

The study was to understand the expectations and associations or value additions between segments, as a concept development exercise in the various localities in respect of the following:

- What are the hygiene factors when considering a development?
- What are the specifics relating to the unit?
- What are perceived as value additions?

The research methodology comprised eight focus groups and four paired depths in each centre (Dubai had only three paired interviews) and KSA (Jeddah, Riyadh and Dammam). Paired in-depth interviews were used for each gender. The recruitment criteria were that participants had to be decision makers on property and come from diverse ethnic profiles, that is, nationals, Westerners, Arab expats and Asian expats. In addition to this a screening question was applied to incorporate coverage of a mix of intenders of EMAAR and competition property developers. This approach is consistent with applied market research projects when a client is exploring potential interest.

The approach sought to give the client understanding of the target audience. This was achieved by incorporating a series of discussion points within the interview schedules to elicit pertinent locality insights. These included that Jeddah was the most aspirational of the three. People of Jeddah looked up to UAE and Dubai, and young people in particular aspired for a more luxurious lifestyle. From the discussions, it seems they sought modernity and Westernisation in the feel of their homes, whilst respecting Saudi norms and lifestyles. However, they were much restrained by their budgets.

Dammam was a mid-way between Jeddah and Riyadh in terms of people's property needs. They sought modernity but more in terms of quality of materials used and external décor. They were conservative about holding onto traditional lifestyle features.

Those from Riyadh tended to be more basic in their needs; they preferred more functional and practical features to aesthetic and lifestyle options. The approach of engaging potential intenders enabled the identification of specific hotspots in Saudi Arabian towns, as illustrated by the following example of Riyadh (see Figure 3).



Figure 3. Respondent-identified key hotspots in Riyadh

The research approach sought to explore emotional and rational triggers so that EMAAR could modify its existing or develop new targeted messages. Figure 4 identifies the key aspects that emerged under each trigger:

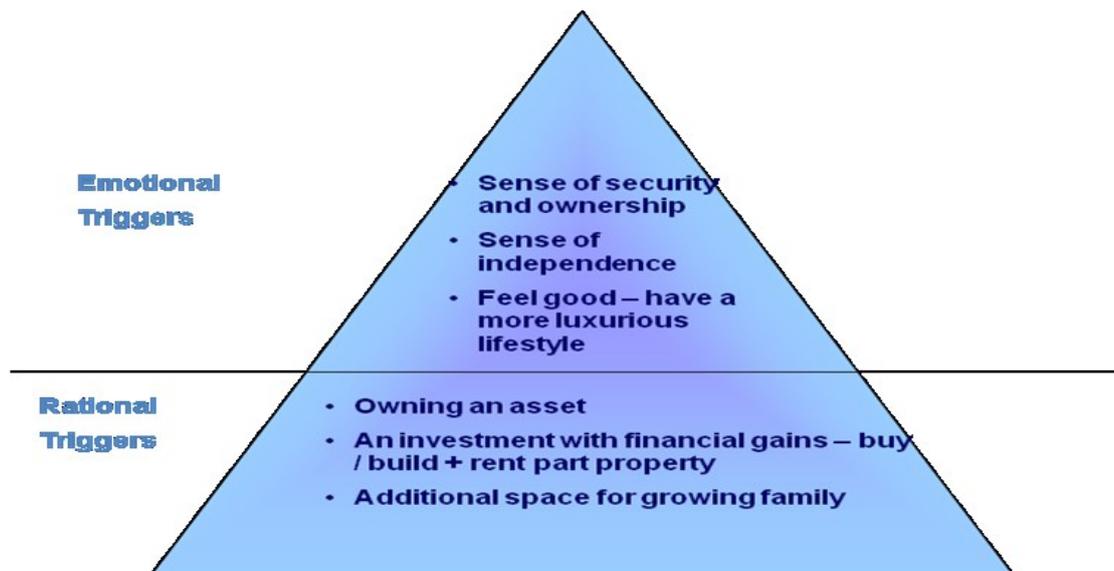


Figure 4: Key emotional and rational triggers to purchase decision

The key findings derived from the sessions identified that growing families meant more children, which in turn meant demand for extra space:

Have kids who are growing up fast. (Dammam)

This house does not satisfy our needs—want a large villa with rooms for all the kids. (Jeddah)

Reviews of current ready-made properties were not perceived to strike the right balance between price and space offered. Therefore, people needed growing room for their families in their new homes. The implication of this was the rational need to optimise space as a critical decision-making parameter.

The key findings derived from the sessions were that there was an emerging sense of independence amongst the younger generation. Younger potential buyers who planned to marry soon sought homes for themselves and family—but in close proximity to their parents' homes.

There was a shift from joint families towards a nuclear setup. This was also encouraged by parents, who themselves purchased property for their children:

When you marry you should have something of your own. (Jeddah)

Want to have a villa close to mine for my son. (Riyadh)

The implication of this was an emotional need for more housing options for nuclear families.

An evaluation of the methodology would draw out the following positives. The combination of focus groups and paired depths served to balance out respective strengths and weaknesses. Paired interviews ensured detailed coverage of personalised experiences, whilst focus groups gave broad-based macro-level insights. The validation of potential hotspots through both methods gave a sense of credibility to planners of the schemes and verbatim quotes shaped the development of potential strap-lines for communication collateral.

Key potential areas for improvement rested on the development of emotional and rational triggers. Whilst comments were compartmentalised into these domains, the exploration of the psychological associations and journeys associated with owning were marked by their absence. This represented a missed opportunity to give real depth to the attributes being sought. As property is as much about appealing to the subconscious, the implication of this is that EMAAR could have benefitted from more cognitive insights within the methodology to capture the property experiences of potential buyers. Another missed opportunity was the lack of differentiation and any details of the luxury buyers. Such coverage would have personalised the research to give almost a defined typology of luxury buyers.

3.5 Case study 2: Kuwait Premier Airline—Winning high net worth Kuwaitis

Kuwait National Airways (KNA) was planning to launch a new airline based out of Kuwait. The airline aimed to position itself as a premium airline primarily targeted at Kuwaiti nationals. The recruitment criteria were for male and females, Kuwaiti nationals, who had travelled at least once in the last 12 months by business or first class. The study comprised 409 interviews using a structured questionnaire, carried out across all six governates. The questionnaire was designed to capture potential interest in the proposition, as well as gauging reactions to competitor offerings. It used a number of approaches to generate respondents' own weightings to attributes. For example, one such question invited respondents to engage in formulating their own scoring (see Figure 5).

As I read out each attribute, please give your importance rating from one to 100 where a score near to 100 indicates that it is very important to you and a score closer to one indicates lesser importance of that attribute to you.

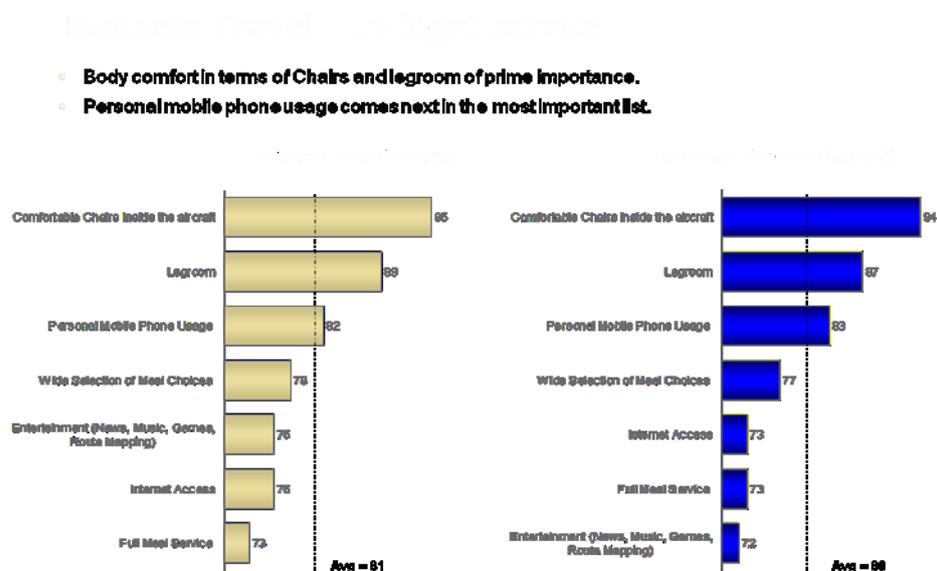
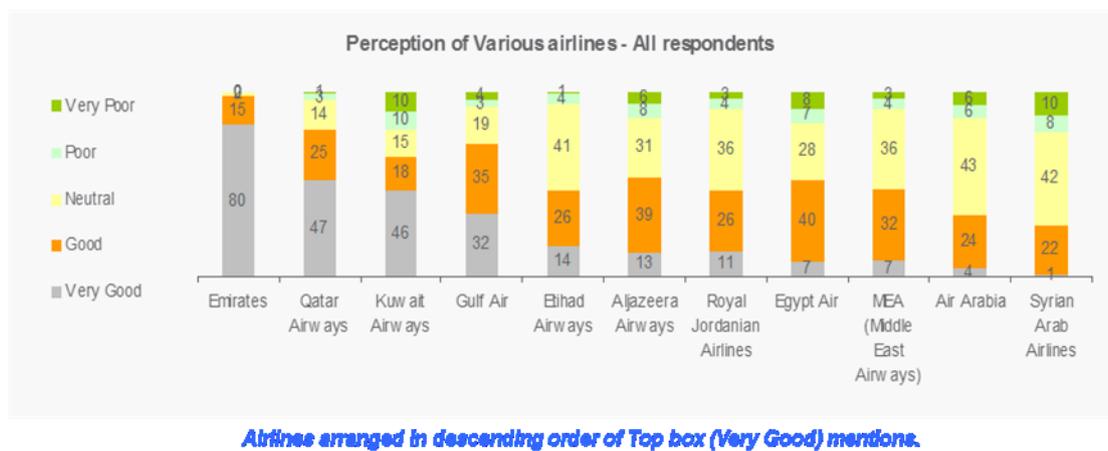


Figure 5: Respondent-driven index

The study was characterised by a large enough national sample to enable cross-tabulation analysis to be undertaken. This was particularly evident when attitudes towards competition carriers were being analysed. Accordingly, clear, authoritative insights were being drawn out, as illustrated in Figure 6.

- **Emirates airlines was airline with a clear unanimous no. 1.**
- **Qatar Airways followed by Kuwait Airways were second and third respectively.**



Base: 409

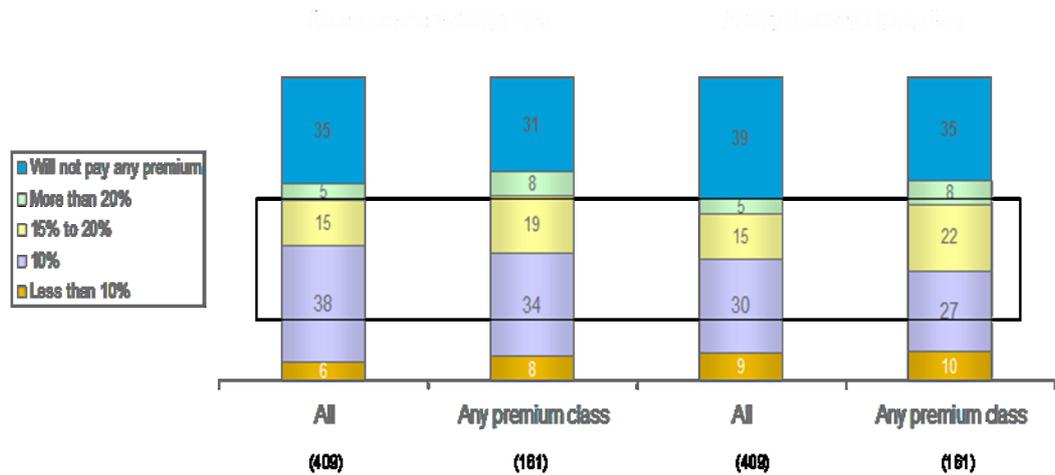
Figure 6: Airline characteristics

Another impressive feature of the research design was the range of questions, enabling identification of the propensity for premium pricing (see Figure 7).

In evaluating the methodology, it was clear that the design closely linked with specific client objectives.

Would you pay a premium for an airline with a new service?

- Around a third of the respondents were not willing to pay any premium for an airline with the mentioned premium features.
- Most of the respondents would pay around 10% more than the current Economy or business class fares.
- Close to a 5th of those who have traveled premium class, are willing to pay a premium of 15-20%



Q: if an airline with the features mentioned on this card were operating from Kuwait, what is the premium that you would be willing to pay over and above the current fares that you are currently paying

Figure 7: Premium pricing parameters

There was a robust sample size and an impressive series of questions. These allowed for the respondent profile to be assessed on the basis of frequency of travel, positive features expected and importance versus satisfaction, before moving on to explore the proposition against the expected criteria from quality competitors. A robust choice-based options appraisal was considered in the context of premium pricing, which appeared to work well. In summary, this exploratory study sought to test the market appetite for the proposition as well as to identify key factors for success. The quantitative study worked well and was clearly the most suitable for the enquiry.

3.6 Case study 3: Armani Perfumes—A new proposition for UAE women

This study across the UAE sought to examine the role of perfume as an accompaniment to consumers. The key objective was to enter the list of the top ten fragrance brands in the Middle East by capitalising on the glamour side of the brand and on the success of the name 'Armani Code'. A central focus was to explore how the research would contribute to 'Armani Code' could be presented as:

- Being contemporary in answering women's demand for pleasure and seduction
- Creating a breakthrough in Armani women's image to instill femininity
- Becoming a key actor in the women's fragrance market.

The research brief required the five Ps of the Armani Code to be addressed within the qualitative design and execution:

Product Attributes

- Is the fragrance appealing in terms of likeability, strength, and long-lasting?
- Does the fragrance reflect on the proper positioning?

Positioning

- Was Armani Code positioning a mysterious, irresistible, sensual fragrance appealing to women?
- Is Armani associated with men's perfumes only or with female as well?

Packaging

- Assess the overall packaging with emphasis on design, calligraphy, colours, texture, look and feel, emotions evoked and convenience
- Focus on the blue sapphire, oriental flower and sensual curves (any other attributes).

- **Places**

- Understanding country-specific insights, similarities and differences; behavioural and attitudinal.

- **Pricing**

- Priced and un-priced purchase proclivity (qualitatively).
- Expectations and need gaps.

- **Channels of purchase considered**

- How is it different to purchase perfumes from wholesale shops than from exclusive outlets like Paris Gallery, Debenhams, Faces, etc?
- Which outlets are considered for Armani?
- What is the role of ‘Duty Free’ shops in the purchase of perfumes?

The study was novel in design, characterised by two phases shown in Table 4:

- Phase 1: Product placement: (pre-group trial and feedback on the product)
- Phase 2: Mini-groups, consisting of four respondents each.

The specific recruitment criteria of respondents were female, 18–40 years old, social economic grade ‘B’ (semi-professionals), from nationals of UAE, KSA and Kuwait and expatriate Arab and Asian population residing in UAE.

Day 1 (Product placement)	Distribute all Perfumes (A, B and C) to all participating respondents	Instruct respondents to use one perfume a day, and distribute self completion forms for each perfume	Apply rotation across groups to avoid order bias
Days 1, 2 and 3 (Product usage)	Respondents using one perfume a day	Respondents filling in self completion sheets post each product trial	-
Day 4 (Reconvened groups)	Hold the mini group discussion	Include the self completion details in the discussion	Use the actual packs and communication as stimulus

Table 4: Research design components—Armani perfume

It was felt that a mini-group would serve better than a full group, as respondents could talk openly and candidly about the subject in greater depth. Given the category and the nature of the product being tested, and in order to secure genuine, undiluted insight from the respondents, it was felt appropriate that the participating respondents experienced the product before they give their feedback. For example, unlike food which can be tasted immediately, perfume represents a distinctly different dynamic for research. It is longer-lasting in effect and the reaction to it can only be tested if used over an appropriate length of time.

Mini-groups were conducted immediately after the trial so as to prevent information loss due to lack of recall. This would also aid of the self-completion forms, where the comments were presented to contextualise the insight.

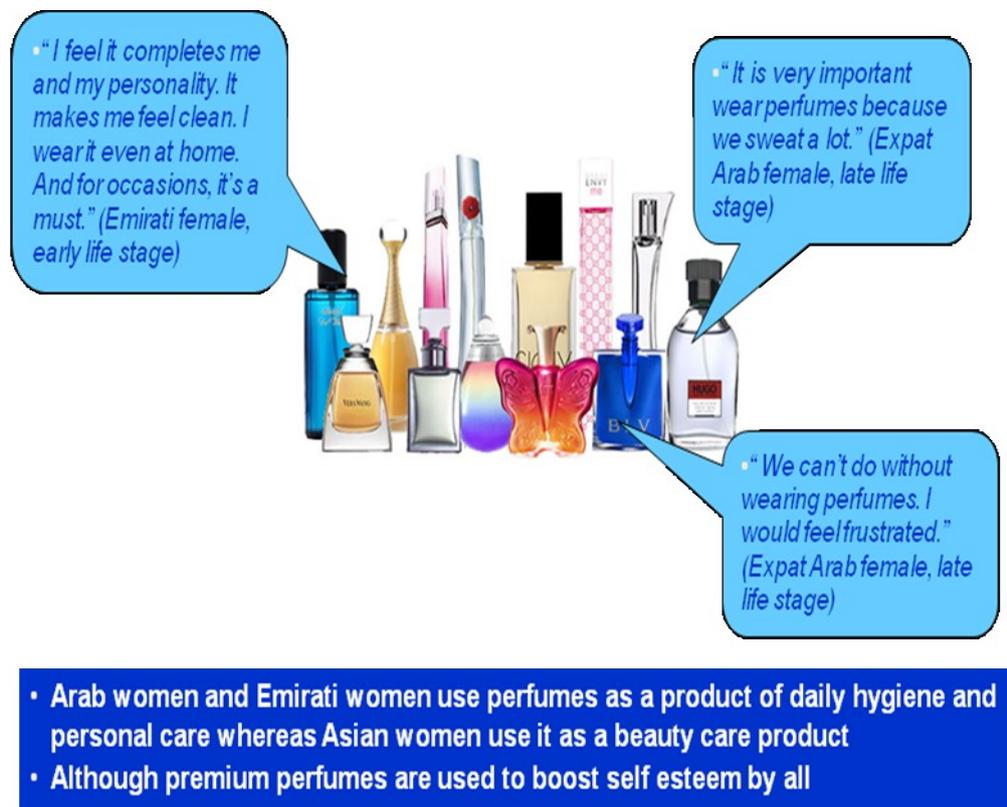


Figure 8: Perfume usage and attitude

Another aspect of the study was to assess the reactions to the print advertisement, presented as an easy-to-follow reaction grid.

Emirati—early-life stage women	Emirati—mid-life stage women	Expatriate Arab—late-life stage
Dark colours not liked	Liked more—as her back is covered	Looks Western—nothing Arabic about it
Dark colours also create confusion—party vs non-party	Mysterious looks—appreciated	Layout appreciated but concept seemed far from the perfume
Lady’s expressions seemed devilish	Colours well liked	
Ad did not make them feel that this product is for them	‘Seductive perfume’—well understood	
Advertisement does not change their perception of the perfume as daily wear perfume		

Table 5: Segmentation typologies

A key aspect of the exercise was to test reaction to a TV and print advertisement. The lady was seen as being seductive, which led to some vivid feedback, as summarised below:

- The lady's looks seen as devilish.
- Her open back in the value chain (TVC) was not approved and was replaced by a closed back dress to reflect expected standards (as illustrated):



Figure 9: Armani Woman test

In evaluating, the methodology was impressive in design as a logical approach to address the Armani four Ps. The combination of mini-groups, product placement and reconvening as well as a self-completion exercise made for a wholesome engagement between consumer and researcher. A cognitive journey that explored the conscious and subconscious aspects of a woman's journey in selecting perfumes would have captured less evident but valuable hidden aspects to buying behaviour. The use of semiotic techniques to understand the role of perfume within society and its evolution would have been highly useful. Such innovations would have bought further life to a very structured study.

3.7 Case study 4: Kit Kat. Getting the communication advertisement right

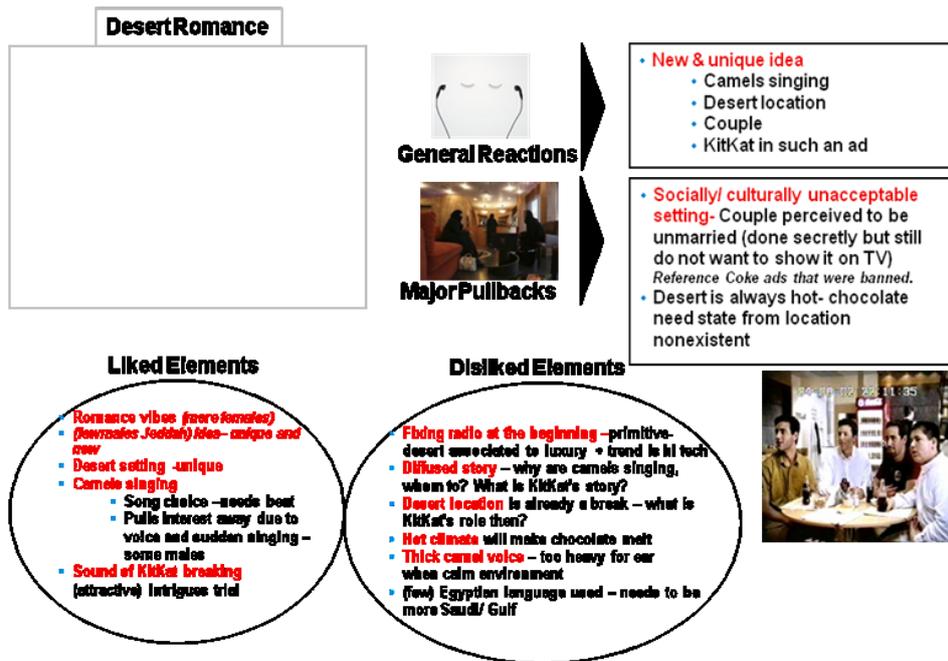
Nestle wanted to test a number of storyboards developed by its creative agency, based upon its global brand platform: ‘KIT KAT gives a moment of satisfaction in your break’. It wanted the research to inform which of the four storyboards would be best received in the UAE and Saudi Arabia. The Saudi element comprised of four focus groups with Kit Kat consumers: one female, one male, in both Jeddah and Riyadh, with people in the 25–35 age range. In addition two focus groups were held with non-Kit Kat consumers.

The project involved a concept test of advertisements destined for TV. One such advertisement that was internally favoured but required final validation was known in-house as Desert Romance (Figure 10)



Figure 10: Desert Romance advertisement

The advertisement involved a young couple relaxing in the desert when approached by a camel who proceeded to sing a love song. Focus group participants across the conservative Saudi Arabian cities of Jeddah and Riyadh viewed the advertisement with great derision. Figure 11 presents the key feedback including direct verbatim quotes in Arabic with English translated captions.



Desert Romance... Quotes

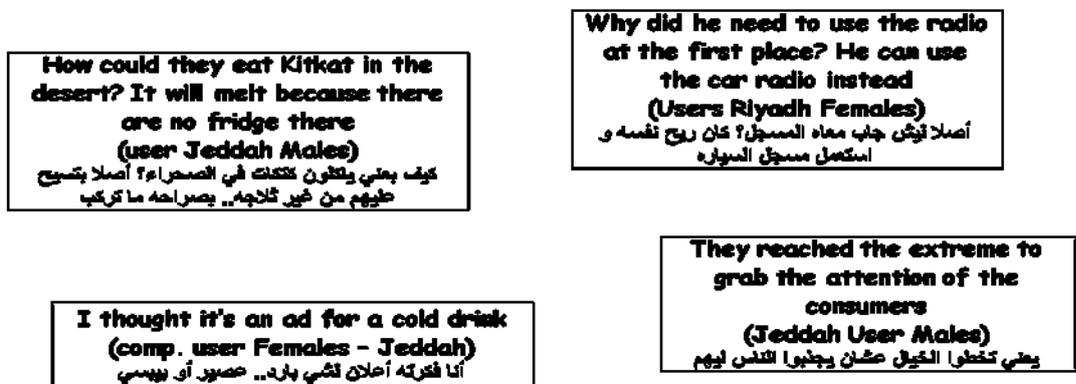


Figure 11: A journey charting the response to Desert Romance

Despite the intention as a humorous chocolate Kit Kat break advertisement, the Saudi focus group shifted to unravelling the rationale for creating such a sexually suggestive communication piece. Figure 12 sought to demonstrate how this connection between a chocolate and perceived inappropriateness led to its failing to raise any positive interest.

At the end of the ad, consumers seem to be trying to still comprehend a few points and the link to KitKat.

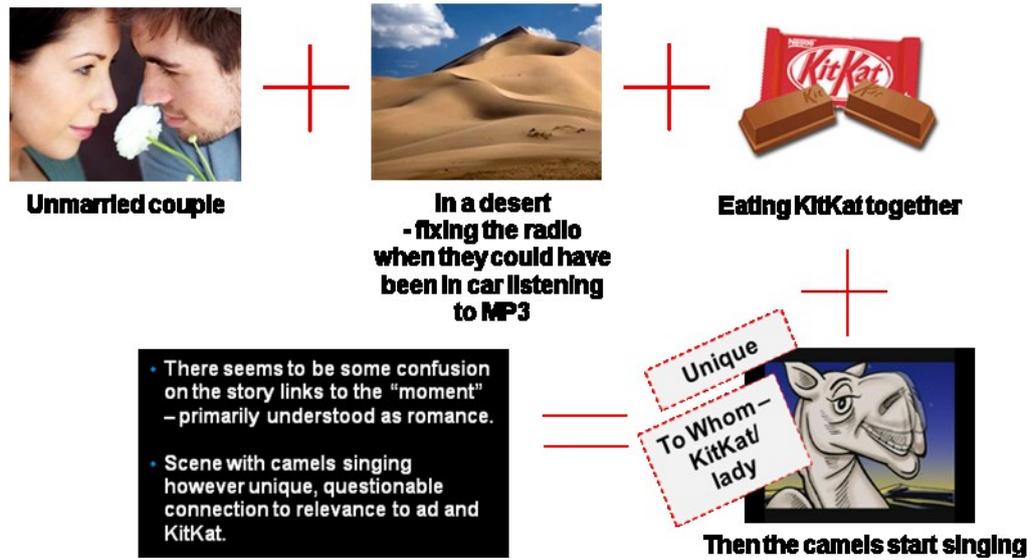


Figure 12: Rationale for rejection of Desert Romance

The research vividly captured the strength of feeling of Saudi participants with its respondents' language relating to each aspect of the advertisement. The use of probing in the discussion guide enabled a richness to emerge that was vividly expressed through the structured summary of the concepts (Figure 13):

	Summary	Way Forward
Appeal 	✓	
Comprehension 	✗	<ul style="list-style-type: none"> • Link camels singing to moment • Ending – show why they are happy • Show to whom camels are singing
Imagery 	✓ ✗	<ul style="list-style-type: none"> • Subtle romance vibes in relevance to culture • Or show benefit of KitKat in ad (emotional) – more explicit • Location change from desert to a place that is not already associated to being a 'break'
Credibility 	✓ ✗	<ul style="list-style-type: none"> • Change location as desert is always associated to being hot – chocolate occasions non-existent
Relevance 	✗	<ul style="list-style-type: none"> • Couple in desert – show they are married • Radio substitute to MP3 – or hi tech • Camel voices to be more Saudi/ Gulf • Song choice to be Gulf originated
Persuasiveness 	✗	<ul style="list-style-type: none"> • Links to the story • More emphasis on the KitKat bar break sound

Figure 13: Concept test summary

Evaluating the study and approach, it is clear that its success lay in its ability to capture in respondents' own language how they felt. The use of translated captions ensured the depth of feedback was not lost in a report or summary. The success of the study was not confined to sampling but lay in the execution in respect of skilled moderating and excellent content analysis.

3.8 Case Study 5: Doritos Crisps—Driving youth interest through exciting open competition

This brand of crisps has been associated by the use of complementary dips and sauces. There is an association with 'party' life and this research evaluated two campaigns developed for the Doritos brand, with eight activation ideas per campaign.

The recruitment focused on eight focus groups with separate genders, 16–19 years old local nationals in Saudi Arabia (4) and UAE (4), who loyally snacked at least once a month and were non-rejectors of Doritos. One of the concepts related to an open competition for a 15–25 minute film or production about what the Dorito crisp means to the individual (see Figure 14).

SHORT FILM FESTIVAL

Doritos invites you to produce your own short film (15 to 20 minutes) by using video or a photo montage set with sound to express your view of what Doritos and its Triangular World means to you. Discover more about yourself through the art of film -- and we'll let the world discover you. The best submission will have the opportunity to work alongside with one of the world's premier film directors during one of their productions.

Doritos

Figure 14: Doritos–Short Film Festival

This innovation required testing across groups and reactions had to be captured. Figure 15 suggests in participants' own language the positive and negative aspects of the concept:

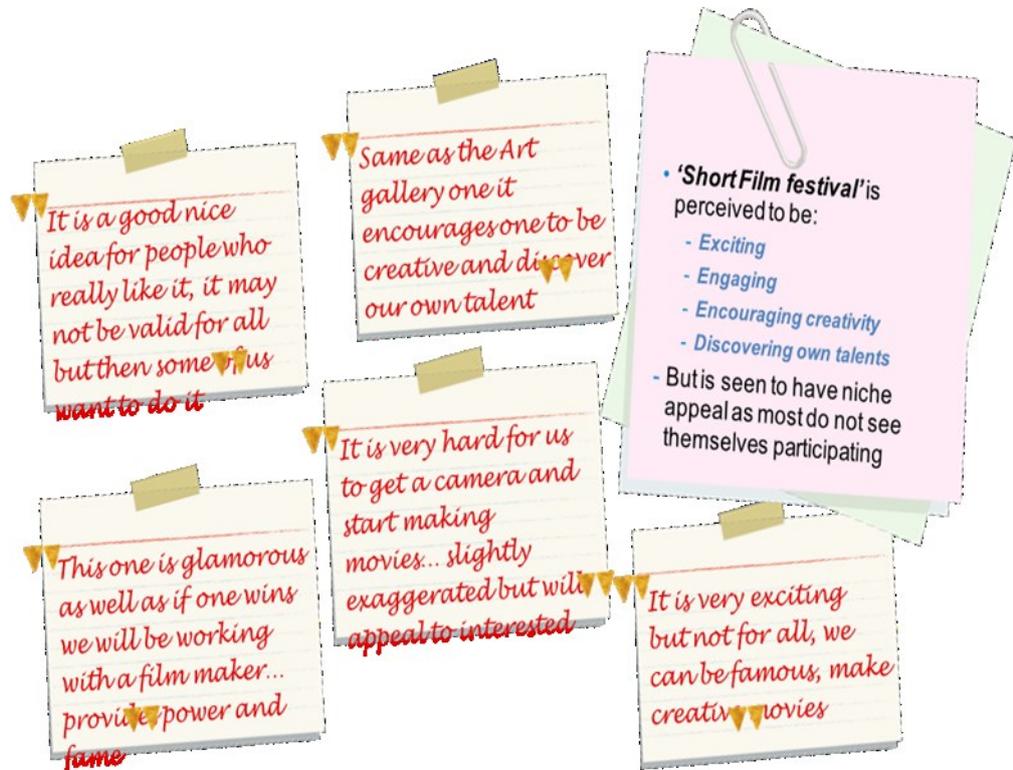


Figure 15: Respondent-speak—Short Film Festival

The evaluation of the group feedback resulted in the reporting of results in an innovative format (Figure 16).



Figure 16: Overall ratings—Short Film Festival

This similar approach was used in examining the next concept, which was fundamentally different but far more audacious. The Doritos *Eco-demolition* competition invited people to identify a very eco-unfriendly car, take pictures of it being destroyed and submit this to Doritos! This 'Western' culture fun piece was the subject of consumer focus group research (Figure 17):

Figure 17: Doritos—Eco-demolition

The reality of capturing reactions in the form of verbatim quotes was captured as respondent-speak in Figure 18. Culturally the idea did not work, as the notion of wanton destruction did not seem to sit comfortably with respondents, as illustrated:

'Doritos Eco-demolition'

Reactions



Figure 18: Respondent-speak: Eco-demolition

The summary of findings was reported back in an easy-to-see representation (Figure 19):



Figure 19: Overall ratings: Eco-demolition

In evaluating the methodology a simple focus group exercise generated considerable insight. This could be attributed to the degree of involvement in the exercise. The stimuli were unconventional and un-cultural, so much so that they generated in themselves deep reactions. Creative reporting heightened interest in the output, which served the study objectives effectively. The richness of the data suggests that the groups worked well, and it would be unwise to suggest alternatives. However, the study could have been improved by culturally relevant stimuli opportunities. Did it take focus groups to determine the feasibility of these approaches? Would paired depths have elicited similar reactions or a quantitative study? These questions suggest possibilities that could have been explored.

3.9 Lessons from the Case Studies in the Development of New Research Innovations

The evaluation of the above five case studies has illustrated that a number of creative research design and execution strategies led to insightful outputs, which in turn met client business objectives. The case studies suggested that adding refinements to methodologies could have contributed to greater richness for all concerned. The Kuwait airline study highlighted aspects of competitor brand health without fully delving deeper into the cultural aspects that impact upon it. This is an area that could be developed as a qualitative opportunity. On the qualitative side, cognitive enhancements would certainly add greater depth to studies looking at perceptions towards concepts, usage and attitude or new product development.

The quantitative and qualitative research undertaken to date as part of this study observed that in respect of consumer perceptions of the research approaches, the potential to engage in a richer, insightful manner was much desired. The evaluation of five case studies suggested that whilst valuable insights were obtained through varied techniques, an opportunity to enhance insight generation was apparent. It also highlighted the need for creativity and innovation in brand health and cognitive interviewing that could add value. Initially, I had envisaged exploring cultural aspects of projective and enabling techniques that could be developed but, after reviewing the case studies, which at their core looked at consumer behaviour and thinking at a deeper level than the conscious, I felt that cognitive psychology research innovations would be more beneficial to the research company than improvements in projection techniques. Allied to this, as the company was working with Middle East HNWI, the need for a brand health tool to generate insights for luxury brands from the HNWI Middle East Millionaire was seen as a highly advantageous area for development. The cognitive interviewing and brand health research innovations are examined in turn.

3.10 Cognitive Interviewing Tool

For the purposes of this study I refer to the Nielsen DeltaQual cognitive interviewing module, based upon my exposure to the approach and its applicability to practice. Underlying this approach is a focus on the inter-related influences on consumer behaviour.

DeltaQual was seen as an innovative approach to understanding and influencing the changing dynamics of consumer buying experiences. Nielsen wanted a product that would differentiate its qualitative offering from the competition. The focus was upon was in-store customer behaviour rather than customer perceptions of brand imagery, product attributes, and so on. DeltaQual was developed to answer two broad questions: ‘What factors drive consumers’ loyalty to brands?’ and ‘What factors make consumers switch brands?’ The methodology was intended to help clients in a number of ways. These include identifying and understanding consumer buying habits, isolating consumers’ hidden rules, and enable these rules to be reformulated with a view to influencing purchase of a particular brand.

A central aspect of any DeltaQual approach is personal history. Through facilitation, respondents are encouraged to reconstruct their experiences with brands and the category of focus in great detail as possible. The emphasis is not upon asking general questions about why they do something, or their feelings or attitudes (for instance, ‘Why do you buy Nescafe?’ or ‘What comes to your mind when I say Nescafe’). Instead, it is about allowing them to give a narrative of specific experiences—for example, ‘Tell me about the last time you went to buy coffee’, focusing on details such as when was it, what was happening at the time, what kind of shopping trip it was it, where was the shop, how much time did you spend, what did you see and look for in the coffee aisle, what was going on in your mind,

what did you consider purchasing, what did you finally purchase, did you notice or were you tempted to try anything else?... and so on. The role of the facilitator is critical, as he or she is engaged in active listening to capture the ‘rules’ people follow when they are shopping, that is, the repeating patterns of current behaviour that arise from their stories. For instance, if the respondent makes comments such as ‘it had a nice colour, so I picked it up’ or ‘I stopped using that one because my kids didn’t like the colour!’, and you notice that colour-related issues have come up a few times in her story, then ‘Buy a product that has a focus on colour’ is a rule that she follows.

These ‘delta moments’, or moments of possible change, emerge from the themes in the stories that indicate what makes people rethink or change their behaviour, feel tempted to purchase something else or feel some dissonance with their current brand. These are often one-off experiences, not recurrent themes, for instance a good promotion, a bad product experience, trying something new at someone else’s house, seeing an effective advertisement, seeing an attractive pack, receiving a discount, getting married, switching jobs, having a baby, moving to a new city, reading an article, and so on.

There are two predominant techniques used to obtain the personal history: cognitive interviewing and narrative building. Cognitive interviewing is a set of techniques that helps respondents to remember their stories in great detail. The emphasis is upon asking them to give detailed accounts of distant, forgotten events that are not even very interesting—do you remember what happened during your visit to the supermarket last month? Or when and where you first bought your current brand of toothpaste? Narrative building means that we are encouraging respondents to tell their stories in as ‘free-flowing’ a way as possible, and use probing carefully to help them build their stories. These are examined in turn.

3.11 Cognitive Interviewing Techniques

These include questions that take the person back in time to the event. For instance, if asking about a shopping trip, the interviewer asks 'What day was it? What else was happening that day? How did you get to the store? What does the store look like? Where do you enter from?' This context recreation enables the respondent to retrieve that experience. Multiple angles of questioning and multiple retrieval attempts would help the recollection process, through using different forms of the same question and trying again and again. For instance, if the aim is to know about the first brand of breakfast cereal someone used and they do not remember, it may be useful to start with what they are eating nowadays, then work backwards to what they were eating before this, and before that—and so on. Or if they cannot remember what shampoo they were using in their teens, one could ask questions about it—'Did everyone at home use the same one? Who usually decided what to buy? Were you ever asked for your opinion?', and so on. This would assist in bringing the memory back. Central to cognitive interviewing is the process of focused concentration, where the respondent is encouraged to reflect, think and concentrate. This also means giving them the time and space to concentrate on the moments in question. The use of silence is extremely important in facilitating the ability to remember. Allied to this is breaking eye contact to encourage the respondent to turn inwards and focus on remembering, rather than trying to maintain social interaction with the moderator.

3.12 Narrative building

Narrative building involves asking open-ended questions that allow respondents to tell their own story with minimal probing. It is thus critical to listen carefully and build on the respondent's narrative, rather than go by a set of predetermined questions in a guide. For example:

Tell me about the time that you first began to think about shampoos, or think about buying shampoos. Then what happened? Did you buy the shampoo, how did you buy it, how did you feel after using it, did you continue using it, did others in the house use it too, how long did you use it, what made you stop.... What are you using now? Tell me how you started using it... when, in what situation, how did you learn about it, what about it attracted you?

And so on.

It is important to communicate to the respondent that even the trivial things are part of a story, and any such details would be very valuable, for example: *'Let's rewind, and tell me again more slowly'* (and interjecting when you need detail, until the respondent gets the idea). *'Tell me as if it is happening in slow motion'*. *'Imagine every moment of your life has been recorded as part of a TV show. Let's rewind to the time that xyz happened and play it from there'*. Or, *'Assume I need to shoot a film and I have to visualise the whole scene—help me visualise it.'* *'Where were you standing, where was your companion, what does the shop / bar / your kitchen look like, how are the shelves arranged, what is kept*

where. In which direction were you facing, what could you see, what did you move towards first?' ... and so on.

Through an ongoing narrative, inevitably it would become apparent that over time rules get broken, challenged, or wear out within a dynamic market and an array of influences. These 'delta moments' lead to change and/or continuity as illustrated below (Figure 20).

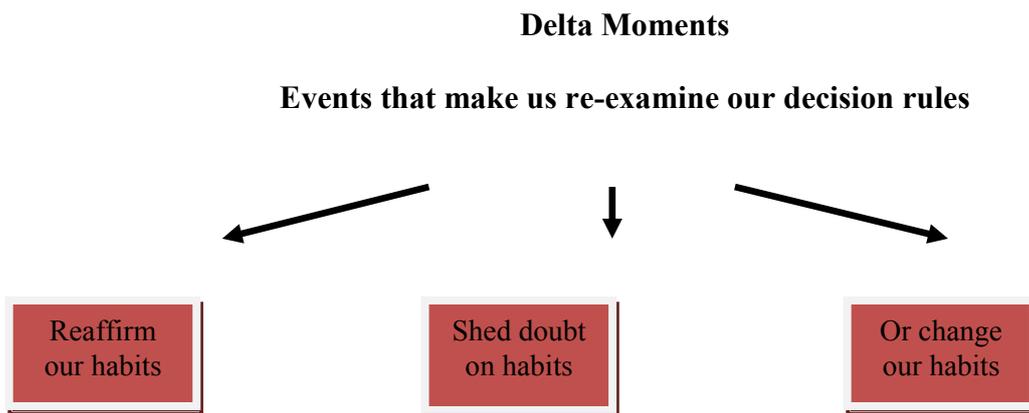


Figure 20: Delta moment influences

Delta moments are caused by a variety of pressures and the interview explores these to be examined throughout the narrative (Figure 21).

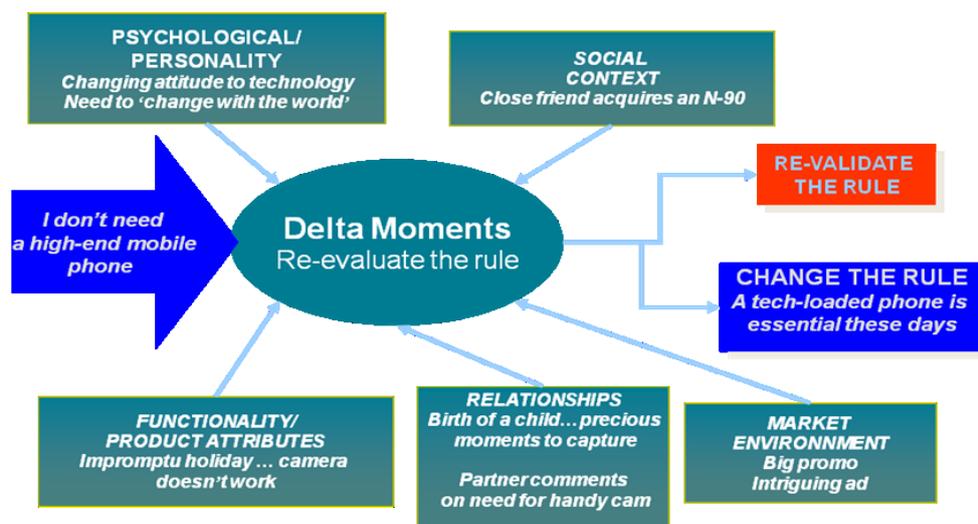


Figure 21: Interplay of factors that lead to change in habits

In summary, the DeltaQual interviewing technique is focused on individual behaviour, and prompts memory of the little details that matter. It combines cognitive interviewing and narrative building techniques, with a focus on ‘passive’ attentive dialogue in a relaxed, flexible and spontaneous dialogue with minimal interruption. In doing so, richer and more reliable stories may be derived, enabling an intensive individual story-based content analysis, aided by DeltaQual analysis tools to identify recurrent patterns of behaviour that provide pointers to autopilot rules, as well as to the fleeting shifts that are potential moments of change, that is, deltas. This can be illustrated by the following example of how shoppers evaluate a brand from tangible pre-store and in-store indicators (Figure 24).

Shoppers evaluate the brand on tangible indicators, pre-store and in-store

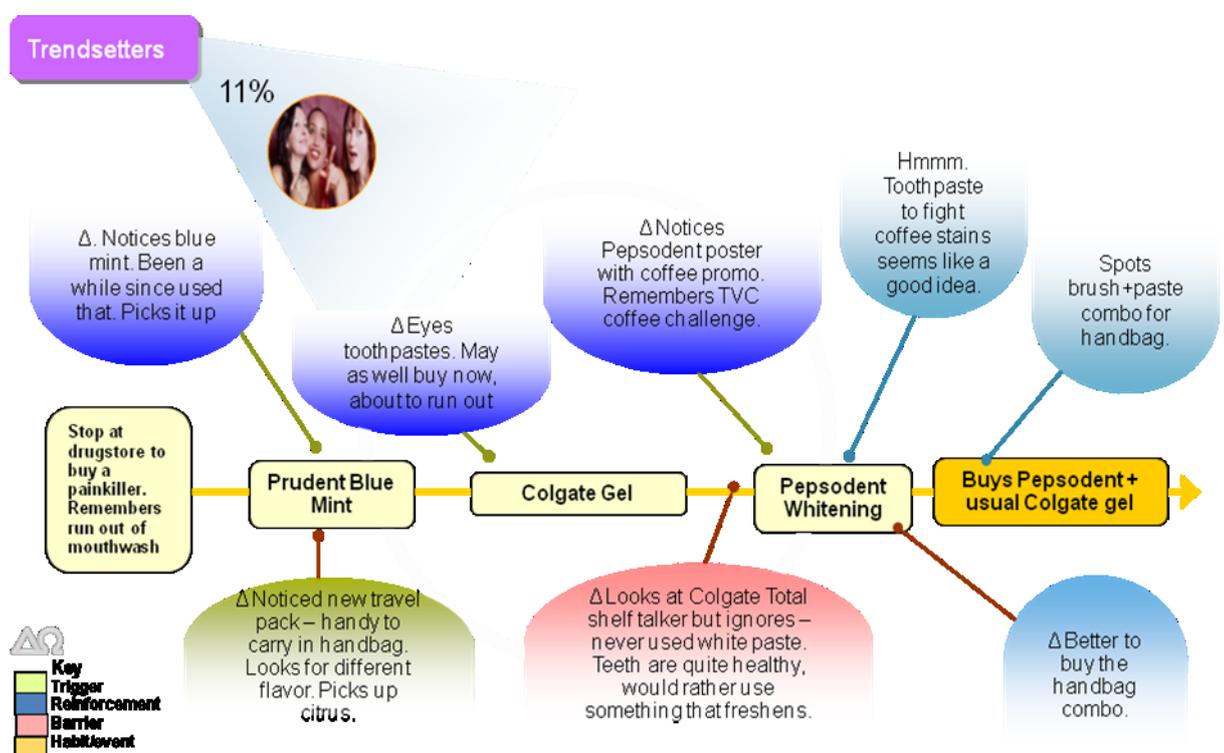


Figure 24: DeltaQual in action: Toothpaste

These approaches have been used in the Middle East with consumers in general. The main advantage is the depth of coverage of a holistic range of themes, although many of my team members felt that it was time consuming. For the purposes of this thesis I wanted to apply this approach critically and evaluate its applicability to luxury-buying consumers. Though the DeltaQual interview I wished to assess perceptions of length, comprehension, flow and insights generated. I intended developing 15 charts that would be followed by discussions as to how the tool could be improved.

3.13 Brand Equity Model for Luxury Brands

In simple terms, brand equity is a construct designed to reflect the real value that a brand name holds for the products and services that it accompanies. Brand equity is considered important because brands are believed to be strong influencers of critical business outcomes, such as sales and market share. Brand is currency, and much of the work I have been engaged to undertake for myriad brands has revolved around measuring their brand health relative to other brands. Essentially, brand equity is a measurement tool that is strategically crucial yet famously difficult to quantify, because most attributes that we want to measure are intangible. For example, perceptions about a brand's values, personality and heritage all factor into consumers' sentiments towards a brand. The purpose of brand equity metrics is to measure the value of a brand and there are many brand equity models in the world today. There are two traditional views of brand equity:

- Consumer-driven approach—focused on brand building, by measuring brand awareness, familiarity, image and loyalty
- Data-driven approach—focused on brand profitability, by measuring market share, time in market, annual marketing spend.

The data-driven approach is the easiest way to calculate brand equity, however it only provides a narrow financial viewpoint. Marketing professionals prefer to use the consumer-driven approach; although much harder to quantify, it provides a more accurate picture. Within the consumer-driven approach there are two well-known brand equity models from which most other brand equity models are constructed:

- Keller’s brand equity model—depicts the process that goes into building strong brands.
- Aaker’s brand equity model—identifies five brand equity components. There is no weighting of the attributes or combining them in an overall score, as the model believes any weighting would be arbitrary and would vary between brands and categories. Rather, it recommends tracking each attribute separately.

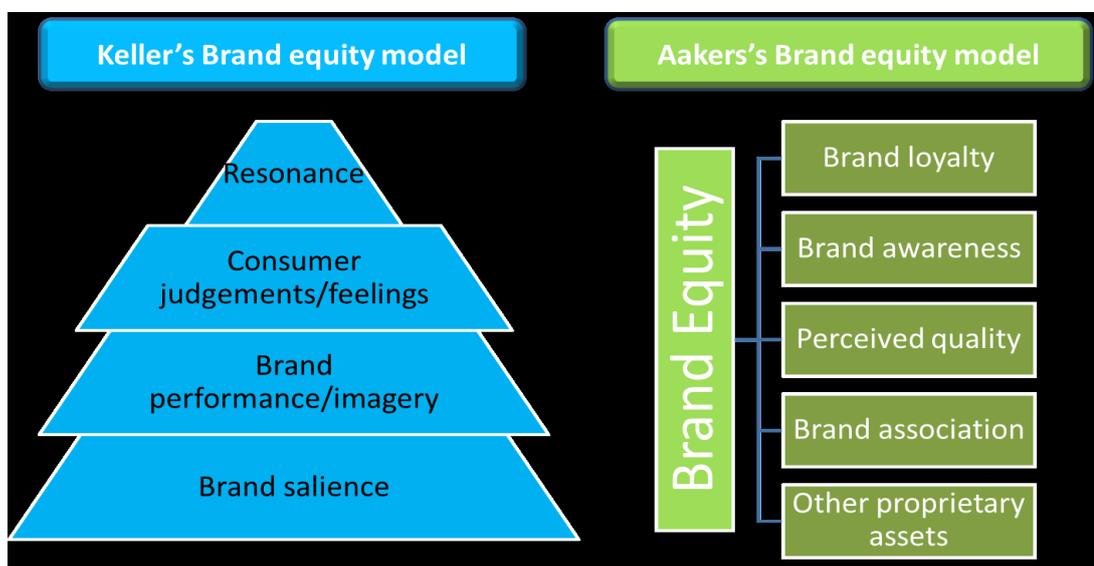


Figure 25: Keller’s and Aaker’s brand equity model

The model is made up of a number of steps that should be taken in a fixed order. It describes six dimensions of brand equity, as shown above. The highest level of brand equity is realised when the top of the pyramid is attained, that is, ‘Resonance’. This is when a consumer has a high level of awareness and familiarity with the brand and holds a strong, favourable and unique brand association. Brand salience is the first step in the development, revolving around the question, ‘Who am I?’ The second is brand performance and imagery, trying to answer ‘What am I?’ Moving up the pyramid chain towards judgement and feeling, the concern is more about how consumers think and feel about the brand, then finally at Step 4, the top of the pyramid comes ‘resonance’.

3.14 Aaker's Brand Equity Model

The model identifies five brand equity components as described above. Taking each one in turn with brand loyalty first, this is about to what extent are people loyal to the brand, that is, repeat purchases, fast reaction time to promotions. With regards to awareness it is simply to what extent is the brand known among the public. Moving along to perceived quality, to what extent is the brand considered to provide good quality products. Brand association is measured by the ability to retrieve association from the consumer's brain through channels such as TV advertising. Finally others relate to propriety assets for instance, patents, intellectual property, and so on.

3.15 Other Brand Equity Models

Derived from these models are variations by research companies. The following are from the top agencies in this field, offered to many companies to measure their brand:

- Ipsos Brand Health Model
- Research International Equity Engine
- Millward Brown’s Brand Dynamics.

3.15.1 Ipsos Brand Health Model

This model assesses three brand drivers—attitudinal equity, consumer involvement, price and value perceptions. The vendor begins with a list of existing customers, structured into segments by the client. Working with a sample of 300 to 1,000 respondents, Ipsos conducts one-to-one interviews online, by telephone, by mail or in person. The company’s proprietary Equity Builder* model allows the company to analyse the equity components found below (Figure 26).

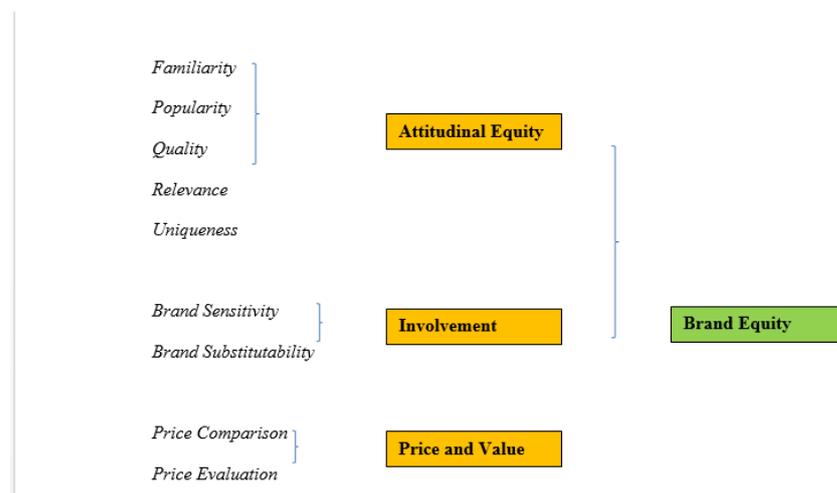


Figure 26: Ipsos Equity Builder

Utilising the company’s proprietary weighting analysis model, Ipsos compares the client’s brand to competitors’ and creates an index.

3.15.2 Research International Equity Engine

The Equity Engine's two major components are affinity (emotion) and performance (function).

- Affinity (emotion)
 - Authority
 - Heritage (reputation, leadership)
 - Trust (trustworthiness, reliability)
 - Innovation (leading edge)
 - Identification
 - Bonding (Consumer's emotional comfort w/ brand)
 - Caring (brand understands consumer)
 - Nostalgia (association with happy memories)
 - Approval
 - Prestige (upscale)
 - Acceptability (seen as 'good choice' by peers)
 - Endorsement (experts/respected authorities approve)
- Performance (function).

3.15.3 Millward Brown's Brand Dynamics

Millward Brown has measured brand equity in over 35 countries, across 175 categories, covering 17,000 brands. A pyramid approach describes the journey to loyalty and strong relationship with consumer:

- Presence (awareness of brand, 'Do I know about it?')—Level 1
- Relevance (personal relevance, 'Does it offer me something?')—Level 2
- Performance (adequate performance, 'Can it deliver?')—Level 3
- Advantage (superior performance, 'Does it offer something better than others?')—Level 4
- Bonding (bond with brand, 'Nothing else beats it'), presence—Level 5 (top of pyramid).

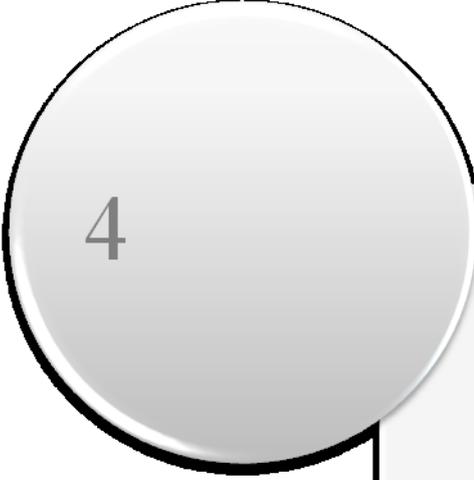
3.16 Relevance to High Net Worth Individuals from the Middle East

Brand equity models in their varied manifestations as described above are rather generic and tend not include price as an attribute. For a brand equity model to be successful in measuring luxury brands in the Middle East with UHNWI, it is imperative that it is specifically targeted towards luxury brands.

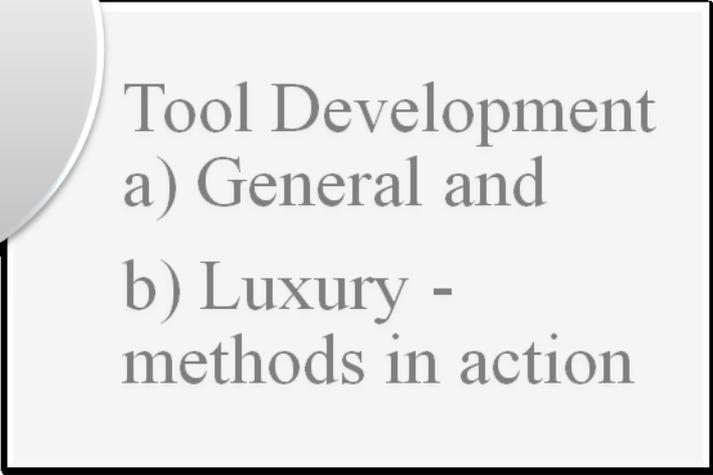
Moreover, allowances must be made for the cultural differences between Middle East and the West, and it is essential to take a flexible approach in the application of the tool. For example, although quantitatively orientated, the interviewer must be present to elaborate and discuss the rationale of each question in almost a semi-structured qualitative manner as part of rapport building.

When price is recognised as a crucial element of a brand's association set, it is usually in relation to a luxury brand. The status of a brand such as Louis Vuitton, Prada or Rolex is underpinned by the price at which it is sold. Its high price sets it apart and makes it exclusive; it is an integral and a crucial part of its equity. The high price is part of the badge value that the brand's consumers enjoy.

Since the Middle East Millionaire Panel comprises a panel of 150 millionaires in the Middle East, the numbers warrant a qualitative approach, as the sample size would not be robust enough for a quantitative approach. For these reasons there is a need to produce a brand equity model designed solely for luxury brands in the Middle East that can be tested on UHNWI qualitatively. At the moment no such model exists, thereby it would provide STRC with a unique selling proposition and thus advantage over its competitors.



4



Tool Development
a) General and
b) Luxury -
methods in action

4.1 Emergent Findings from the Research Stages

Emergent findings from the consumer quantitative and qualitative research stages suggested a need for innovation. The key drivers from a general and luxury market can now be integrated in the development of a coherent tool. This stage took the form of 15 in-depth cognitive interviews focusing on the luxury-buying behaviour and the habits and rules that underpin choices.

The cognitive interviews were designed on the basis of the following criteria: four in UAE, four in Saudi Arabia, two in Qatar, two in Kuwait, two in Bahrain, one in Oman. The gender split was on the basis of eight men and seven women. All must have purchased a luxury product or service within the last six months (Table 6).

Person	Country	Age	Gender	Luxury sector
1	UAE	50	M	Banking
2	UAE	45	M	Property
3	UAE	29	F	Property
4	UAE	30	F	Cars
5	KSA	28	M	Property
6	KSA	59	F	Banking
7	KSA	47	M	Retail
8	KSA	38	M	Mobile
9	Qatar	30	F	Car
10	Qatar	42	M	Yatcht
11	Kuwait	28	M	Car
12	Kuwait	51	F	Retail
13	Bahrain	47	M	Car
14	Bahrain	33	F	Retail
15	Oman	45	F	Retail

Table 6: Cognitive interview respondent characteristics

This interview stage was intended to feed into the creation of 15 bespoke charts representing the cognitive process that has evolved into rules (omegas) and habits (delta moments) for each luxury buyer.

Charts would be appended for each person who drew out the key omega rules and delta moments that led to change. Attraction and veto, over time, would be recorded. In terms of the process, respondents were overwhelmingly positive of the methodology, enjoyed the interview process and were surprised at the ability to reconstruct experiences through reformulating distant experiences:

I was shocked I could remember the biscuit tin my father kept his Rolex in, 20 years ago. I could even smell the rust in the corner of the tin and the fading words at the sides! (Kuwait, male 28)

I enjoyed talking through why I chose a red Ferrari—now I know that it was not by chance but through experiences. Red has always been there but I did not know why and when—now I do. (Bahrain, male 47)

Thank you for letting me think about why I buy this brand, and why it means so much to me. (UAE, female 29)

When I bought my property I asked my family. Only my wife spoke, but I never listened until I went to part with my money. At that time I noted what she said, and I acted likewise—each room had to have a balcony. I bought this because of her advice and preference—price was less important. (UAE, male 45)

The main criticism of the approach concerned time. Some interviews ran on for two hours, with the average taking around 90 minutes for each person. As the approach worked, it was agreed that it could be streamlined. There were repetitive questions on early memories that could be condensed. The notion of cultural affinity was captured by the interaction of myriad influences other than functional attributes. One area that could be captured was probed using the sense of importance attached to owning a luxury product or experience; this was an important area that could be further developed. In terms of capturing a snapshot of the journey, any chart could be refined to incorporate the 'meanings of the experience'. This refinement could be integrated into the development of subsequent alternative models and would be the subject of discussion with brand influencers.

The Nielsen focus on omega rules and delta moments was perceived to be overly prescriptive and the charts, whilst useful, were seen as too rigid. This presented a challenge:

If you are trying to get the flow from the respondent in cognitive flow, then why are you putting them in to boxes of experiences? Use verbatim and hand-drawn symbolic representations and then scan them as immediate unadulterated finding. (Chief Knowledge Officer, STRC World)

An internal STRC meeting made this comment strongly and I was charged with the responsibility of developing a cognitive approach that built upon the strengths of the DeltaQual Model, but in doing so to reflect the need to remain as close as possible to the respondent voice. In other words, some of the weaknesses of DeltaQual could not exist in any refined cognitive STRC approach. At a cognitive level especially, when one is part of

a deep journey of reflection with the respondent, the voice is speaking volumes and every step must be taken to avoid the loss of fluidity. The charts in their rigid form would be replaced and follow a free-flowing, raw convention. As such the working model that would be taken to brand influencers would be simplified, as follows:

1. It was recognised that all consumers have conscious and subconscious rules for shopping. These would be referred to as **Drivers**.
2. When consumers respond to change the articulation of these 'moments' would be referred to as **Change Influences**.
3. The Nielsen emphasis on attractors and vetoes was perceived to be overly complex, and the STRC approach would simply consider the process as **Why**.
4. All the sessions, unless indicated otherwise, would be conducted in **Arabic**.

The STRC approach would be to 'cherish and produce the 'hand source' –authentic Arabic version, with a subsequently translated version if necessary. Upon reflection, I did not anticipate reworking the cognitive reporting process, but the feedback from interviews and the team gave such a powerful steer to its necessity that, as a researcher, I had to make additional time to step back, take in the critique and reformulate the STRC cognitive interviewing approach. I took the view that the Nielsen DeltaQual questionnaire was based on the universal principles of cognitive interviewing, and as such was not a problem. Our cognitive interviewing approach is presented in Part 2 and reflects the opportunity for memory construction, narrative building, the opportunity to reflect and the role of the

interviewer as a listener. I welcomed the opportunity of creating a reporting framework that was raw and unadulterated. At the time, however, I recognised that I needed to be clear as to how our specialist approach would look and feel. The changes presented above were incorporated. An illustration of the reporting format of the STRC approach is shown in Figure 27. I was keen to test this further with brand influencers.

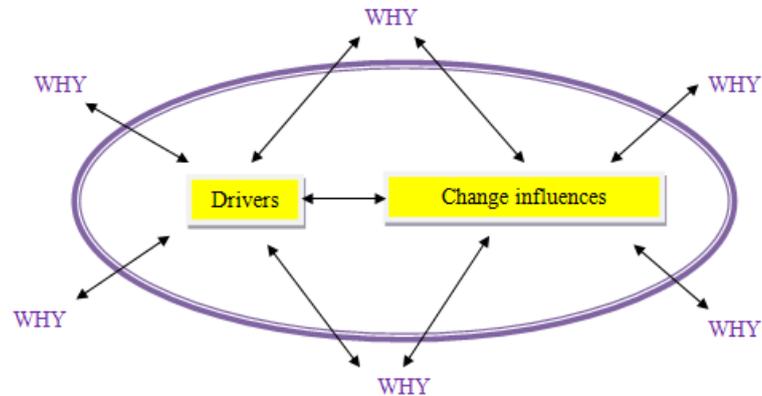


Figure 27: Proposed STRC cognitive model

Testing was undertaken in the form of in-depth interviews from five Western brand influencers and three Middle East influencers. The rationale was simply that, as an approach, it offered a bespoke opportunity to explore the question from the perspective of the brand. They were benchmarked against the views of three Middle East influencers, provided with prototypes. These phases explored the following, addressing in turn:

- a) What will attract Western Brands to take up the Middle East Millionaire Panel?
- b) How can the Panel and associated services be marketed in local/international markets?

The in-depth interviews allowed for a depth exploration of the concept of the Middle East Millionaire Panel. I designed the discussion guide and moderated along the principles that incorporated standard concept testing themes, that is, appeal, relevance, salience, credibility, communication, differentiation, brand positioning and likelihood of purchase.

4.2 Cognitive Interviewing Tool

The participants were presented with the rationale of the cognitive interview framework after presenting the key findings of the quantitative and qualitative stages pertaining to consumer perspectives of the research methods experience. The eight brand influencers, split between five Western and three Middle Eastern, derived from the sectors of wealth management, marketing, branding, property, lifestyle, high-end cars, and watch and jewellery sectors.

Western brand influencer perceptions were analysed and contrasted with the perception of Middle East influencers so that clear insights were generated in relation identifying the trigger points for take-up of the Middle East Millionaire Panel. This led to a discussion centred on their experience of research and brand insight. Irrespective of location, brand influencers suggested that existing research approaches could do more to engage their communities of interest:

Models tell us something but sometimes not much. (WBI)

Brands want ‘eureka’ moments—research and insight agencies can only do that if they try to win over and closely connect with users. (WBI)

Superficial approaches lead to superficial results. (MEB)

Our brand needs layers of detail. As each layer is peeled there is an added complexity that needs unearthing. It's great when we get that. (WBI)

In terms of the cognitive approach, the memory reconstruction comments were highly positive.

This is what we want. (MEBI)

People are complex—I want the brand to connect with those complex sources.
(WBI)

We want the whole journey and not the beginning or end' the middle may not mean much to the researchers but it does to us. (WBI)

Capturing change in attitudes over time is vital. (MEBI)

If we are to be relevant our research has to be relevant. (MEBI)

I showed respondents a DeltaQual chart and the STRC chart. Opinion was divided over which they preferred:

I like the systematic chart of Nielsen—it's clear and structured. (WBI)

I can see the logic of this (Nielsen). (MEBI)

Others felt that:

The real story is here with the handwritten chart—it is how people think. (MEBI)

I like the authenticity of this—it's frank, and simple. (WBI)

It was clear that the cognitive approach had not totally won over brand influencers and further work would have to be done. However, it was equally clear that the headings of Rules, Change Influences and Why were well received:

This is the language we work with. (WBI)

I like this structure. (MEBI)

The questions we have are encompassed by these headings. (MEBI)

Brilliant—we can work with this, if the feelings are captured through the journey. (WBI)

As the brand influencers worked across general and luxury brands, without exception all thought that the cognitive tool would be equally applicable to both categories. In conclusion, the cognitive tool was well received as a workable, well received concept. The graphical reporting would need further work in visual representation and this would be subject to further developmental work outside the scope of this study.

4.3 Brand Health Tool

As has been described, the brand health tool was revised to reflect a range of measurable weighted attributes. These were tested with brand influencers using the dummy concept of a luxury car selection process. This required influencers to complete the questionnaire as they would as potential buyers, in the light of other options.

The goal was to provide clients with added value through insight into Middle East UHNWI's attitudes, preferences and behaviour towards luxury brands. A unique selling proposition would be to provide a luxury brand equity score specifically tailored to the Middle East region, so that the top luxury brands would be able to measure and track their own performance as well as their competitors.

A luxury brand equity score could be obtained through a well-designed questionnaire tailored to the Middle East UHNWI, taking into account the cultural differences within the region. The score representing ease of understanding would be standardised: 1 for 'very poor' and 100 for 'outstanding'. An arbitrary value would have little meaning. The questionnaire would be administered through a tablet, for instance an iPad, and would take only about 10 minutes. The questionnaire would be engaging and at the same time thought provoking.

The brand equity questionnaire goes far beyond providing a metric score, and seeks to understand the triggers and motivations behind purchases and to try to establish some behaviour patterns within this niche.

The questionnaire would provide a brand equity score taking into account the customer journey from Experience, Advocacy to Converted, that is, up the brand equity model. The model for luxury brands in the Middle East was based on a mix of brand equity models, with a simple hierarchical approach and attributes related to luxury brands (Figure 28).



Figure 28: Brand equity—experience to conversion

In order to measure key attributes, arbitrary weights were developed to reflect relative importance of attributes (Figure 29):



Figure 29: Brand equity weightings

Central to success was the ability of the questionnaire underpinning the model to be engaging for the respondent. There was a need to understand the behaviour, attitudes, triggers and drivers for purchasing the luxury brand product or service, and each question focused on addressing the process of ‘experience’, ‘advocacy’ and ‘converted’.

‘Experience’ is made up of the following questions:

- ✓ Q1 A (Unprompted awareness)
- ✓ Q1B (Prompted awareness)
- ✓ Q2 (Prompted awareness—Specific model)
- ✓ Q3 & Q4 (Personality and sentiment)
- ✓ Q5 (Popularity)

‘Advocacy’ is made up of the following questions

- ✓ Q6, Q7, Q10 & Q11 (loyalty)
- ✓ Q9 (Satisfaction)
- ✓ Q12 (Quality)
- ✓ Q3—If ‘High Quality’
- ✓ Q4—If ‘High Quality’

‘Converted’ is made up of the following questions

- ✓ Q13 (Price)
- ✓ Q14 (leadership)
- ✓ Q15 (Differentiation)
- ✓ Q16 (Respect)

There will be weights and factors to be applied and standardisation of the brand equity score to between one and one hundred.

To gain understanding of shopping habit behaviour, Q8 was formulated with an open end to delve further into reasons for choosing the brand at Q15.

In order to gain customer insight into preference choice, Q17 was developed, taking the form of a conjoint exercise to understand what is more important: price, incentives, prestige or performance.

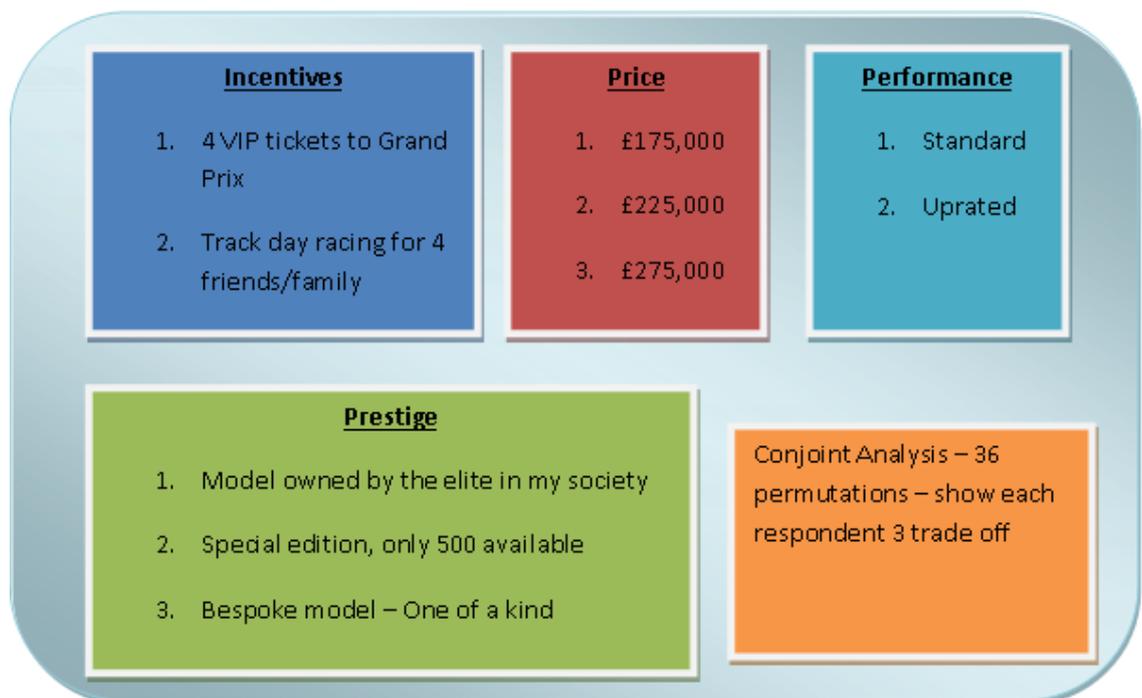


Figure 30: Brand equity option assessment

On the whole, comments were positive:

It's easy to use, follow and logical. (WBI)

This would give good insight especially since you have weighted for culture.
(MEBI)

I like the trade off-which can be measured against non-price factors. (WBI)

It's fun. (WBI)

It's a solid brand health study with a focus on a luxury audience. (MEBI)

Influencers were particularly pleased with the scenarios that were presented, reflecting a reality that faces luxury-buying consumers.

There are many related factors that go into buying a luxury car. This tool shows how these are interrelated. (WBI)

I like the choices—it shows you know the market. (MEBI)

What was interesting was the consistency of influencers' comments that reinforced the need for researchers to really understand the product or category:

We expect you to understand the consumer, that's what you do. You know what makes them want to talk. But you must understand the product and brand; otherwise you will ask the wrong question to the right person. (MEBI)

We like partners when it comes to design. I could work with this approach and detail. (WBI)

Our brand health studies test competitor brands and we make our marketing moves on this basis. We rely on these brand health studies. Millions of pounds hang on the back of brand equity scores. (MEBI)

4.4 Summary

The development of a cognitive interviewing tool and brand health model represent the formulation of approaches that have arisen from ongoing feedback across various inter-related aspects of the research stages. Both models represent refinements to elicit an innovative and relevant response for greater cultural relatedness. .

5

Reflexive Account of the Professional Journey

My role in this project may be described as the link between the emotional and practice. The choice of the word 'emotional' is deliberate, for the DProf process has enabled me to reflect upon my accumulated learning acquired through the programme to date. This has also shaped my development as a professional researcher, practitioner, manager, new product creator, agent of change and person. Indeed, if one is seeking to generate insights with fellow mankind, through whatever labels we attach to them, be they consumer, respondent or participant subject, then it is necessary to establish an 'emotional' connection.

As a designer of studies and someone who is paid to undertake this niche research, capturing the emotion in any research relationship with a consumer is challenging and rewarding in equal measure. It could also be said that having spent over 15 years working with myriad 'hard-to-reach' ethnic communities has been 'emotional', both professionally and personally; running projects and working with organisation is nothing short of emotional, as I reflected upon in the Review of Learning DPS 4520. This gave me the opportunity to present a life story with research capability running through the narrative. It enabled me to provide a critique of key learning along my professional life journey through various experiential contexts, such as previously being a PhD student in industrial, research, consultancy and educational environments. It follows that, in the course of crafting this thesis, my role has been and will always be one of a reflective practitioner in the varied domains of enquiry at different levels, countries, people and at different times.

The exposure to the Middle East has been illuminating and often gave rise to as many questions as answers to my curiosity. The company that I formerly worked for, Nielsen, and my current firm, STRC World Research, have provided me with exposure to brand

interest in the Middle East consumer market. The development of the innovative insight research methodologies pertinent to engage Middle East consumers generally and specifically Middle East millionaires has been the subject of my professional and academic interest. The work of professional analysts such as Ledbury Research and Bernstein Research reflect the monumental interest in the luxury Middle East market in particular. Their role is to sell syndicated market analysis reports on trends from regions such as the Middle East and, whilst their focus as professional commentators is to give a macro perspective, I felt a need to explore the micro.

Recently I completed a Postgraduate Diploma in Strategy and Innovation at Said Business School, University of Oxford. In part, my project explored the potential of Middle East millionaires in shaping new product development through co-creation with brands. The course introduced concepts of innovation analysis supporting the focus of innovation that is an important element of this thesis' emphasis on innovation research methodologies pertinent to Middle East consumers, including UNHWI.

This DProf submission has sought to integrate innovation in research through engagement consistent with cultural expectations. Engagement is directly linked to cultural awareness and knowing which research approaches work best. This has been documented in the Review of Learning and RAL claims through applied professional knowledge practice. The Middle East market presents an extension of this experience of ethnic diversity research, prompted by my professional experience of the development of new approaches. Moreover, my training from the Middle East reinforced that traditional bespoke research approaches needed reconfiguring and enhancing, without compromising quality.

This thesis has aimed to build upon my position as a professional researcher who has developed skills and capabilities over time, to the point where I am able to take my understanding towards the development of insight research tools that could be used as insight generation opportunities for brands engaging Middle Eastern consumers. During my stint as Regional Head of Customised Research, I was responsible for projects on leading global brands for countries stretching from Morocco to Qatar. I created research teams in Cairo, Lebanon, Saudi Arabia, Pakistan, Kuwait, Dubai and Qatar. I assumed directorial responsibility for the development of specialist research methodologies pertinent to emerging markets.

One of my current duties across the Middle East region is connecting brands with HNWI consumer segments through the ‘Middle East Millionaire Panel’, a bespoke opinion-tracker of millionaires across the GCC, namely, United Arab Emirates, Kuwait, Qatar, Saudi Arabia, Oman and Bahrain. Naturally, my professional interest in the region is interwoven with this topic. Having worked in both Western research domains and the Middle East, I was fascinated by the notion of methodologies and their relevance to end research subjects. I felt that there was a need for a robust tool that specifically focused on this niche to give brands a platform to evaluate their products at concept stage, or on the basis of usage and attitude studies. Given the paucity of knowledge in the area, I believed that there was considerable potential for adding to the body of knowledge within this sphere for two reasons: first, the Middle East, in particular the countries comprising the GCC, possess highly significant global economic strength by virtue of huge oil and gas revenues. Second, if brands are to extend their reach to growing consumer segments in these wealthy nations, as well as extending to ultra-wealthy consumer segments, of vital importance is knowing how to reach consumers through relevant research approaches (Khan, 2010).

Throughout the fieldwork, from pre-, on-site to post-field operations, there was constant re-engagement with respondents on areas such as anonymity, ethics, level of information-appeasement, reassurance to respondents, and the training of field teams. This served to connect with people so as to ensure that the first aspect of any research engagement is met: that is, the development of a rapport to secure participation.

During travel to field locations I had to contend with schedule shifts whilst ensuring that related activities were synchronised, such as co-ordinating the data entry process. This constant reflection of where we were at, against where we want to be, meant that I had to negotiate with internal STRC stakeholders such as the Data Processing Unit. To that end, I had to handle internal unit reactions revolving around ‘what's in it for me?’ When data was being received from the 600-strong survey the following themes were noted in my reflective diary: *re-evaluation* of targets, *reflection* of progress, *reformulation* of themes, *receptiveness* to change and *recognition* of mistakes. These five Rs served me well as a necessary 'time out', especially during the six months of field research. There were high and lows in enthusiasm levels. Working across diverse cultures meant nurturing 'players' at different levels of the research process, and I had to undertake massaging the egos of those who demanded the attention befitting their station. That sat uncomfortably with me, but I had become familiar with the norms of research in the Middle East, where I was once recalled to see a client just 24 hours after arriving back to London following a meeting with him. The protocols are often quite different to London. The project enabled me to see the overall DProf as a battlefield metaphor, where the terrain had to be assessed before the attack. In formulating the 'attack' I had to ensure that I had taken the steps of connecting the dots of related networks in terms of who knows who, where, when, and how to connect. I also had to look at my position as an insider at STRC, an insider-outsider at

Middlesex University and feeling an outsider when dealing with non-British ways of relating to people. This complexity meant that I wore a range of often 'colourful' hats. I asked in my reflective diary, 'Which hats do I enjoy wearing?' This was really dependent on how smoothly things were going and how much time I had to 'enjoy the process'. Shaping the research product offering was particularly enjoyable, as I was recording 'their' (the varied consumer manifestations') views.

This way of looking at the world gave me an insightful journey that linked elements of my emergent learning to moments of clarity. When those moments came, I was able to experience the happiness of an investigative researcher who has unearthed a real gem of a finding. For example, when I reviewed the case studies I was able to identify a missing link that was tentatively raised in the earlier stages of the quantitative and qualitative elements. The testing stages were more of an ideation session than a formalised laboratory experiment. Issues of who to meet, when and moving dates were frustrating. One potential influencer demanded payment. Given that all influencers across the testing stage had genuinely volunteered, this exceptional situation eroded energy and time in equal measure, before he suggested that he would no longer participate. That said, the testing stage was very much a case of seeking peer validation and this aspect was particularly fulfilling. Meetings with my advisor gave a chance for reflection whilst acting as a mental checklist for keeping focus.

As mentioned earlier, the multiple aspects of the research interventions required my technical input at every stage. This included drafting the questionnaires, all the discussion guides, the cognitive interviewing schedules and the design of the in-depth brand influencer semi-structured interviews. In an ideal scenario I should like to have been able

to have full command of the Arabic language to engage in interviews and ensure meanings were not lost in translation. However, as the sponsor of my DProf research is an international market research agency, the company was interested in the actionable insights as opposed to the mechanics. I had access to trained interviewers whom I moderated and maintained close daily contact with. The briefings I conducted ensured a consistency of approach and made for clean data from the quantitative survey data to be entered. I was able to analyse the data personally using the industry-standard software, SPSS, against a range of variables. This worked well and allowed me to be fully immersed with the objectives of the research as I analysed the data. At a qualitative level I was able to draw on my indicative and emergent findings to design relevant discussion guides and schedules that built upon the research as a cohesive journey of knowledge. For example, I was able to test reactions to gender dimensions and expectations that emerged from the survey, across the subsequent group stage research design. In addition, I was able to present collateral at the influencer stage, based upon analysis of both the cognitive interview and focus groups. The process of qualitative analysis has been discussed, and upon reflection the benefits of close contemporaneous debriefing from moderators was invaluable. The analytical framework of a content analysis input worked well in identifying emergent, dominant and contradictory findings. Colour coding of themes, interviews and groups served to capture the narrative well, and this was supported by further enquiry with brand influencers who were more than willing to give constructive feedback. This was evident in the feedback of the prototype developments that drew upon the research findings. Endorsements from industry professionals reinforced the view that the research interventions and analysis were robust and met the exacting standards of international professional market research.

Upon embarking the DProf, I had no idea that I would be asked by STRC to undertake a specialist Postgraduate Diploma in Strategy and Innovation at Said Business School, University of Oxford. This led me to reflect on my DProf from the perspective of innovation. Indeed, one of the mantras of innovation theory is that an idea can be classed as an innovation only if it adds value. I started thinking almost regimentally in terms of adding value.

During the course I spoke to one of the most popular tutors on the subject of innovation ecosystems, Dr Marc Ventresca, and asked if he would be interested in acting as a consultant to my DProf, and to my delight he obliged. The role of the consultant was to bounce ideas around and I found that our discussions were very much about the wider world of the Middle East, which served me to share anecdotes and approaches. I was also fortunate that my supervisor on the Oxford Innovation project was Dr Chris McKenna, who happened to be the Programme Director on the Diploma in Strategy and Innovation. His specialist area was the historical development of innovation, and I found that my project on co-creation from the perspective of UK consumers and Middle East millionaires gave me a grounding in exploring where we are at now, before thinking of where we want to go. Indeed, my conversations with Dr Ventresca were able to assist me in exploring how the work of theorists was pertinent to my research. For example, the notion of taste as defined by Bourdieu (1979) gave me a parameter to understand how this could be related to Middle East consumers and the varied aspects of the implications associated with the perceived 'ownership' of cultural capital.

I also found the work of Giddens pertinent in the way he talks of choices within a heavily constrained structural environment. This realms of individual agency are limited and it was

evident that in the cognitive interviews the notion of choice as it relates to product consumption had multiple layers of identification. Throughout the research I sought to understand the relationship between global brands and a Middle East consumer. It was clear that the process of exploring the perspectives of choice preferences of consumers also identified a range of structural variables that, in effect, limited real exercise of preferences under the guise of choice. These were manifested by capturing cultural realities that are influences upon respondent choice-based decisions. In light of this, Giddens' work was useful in respect of enabling a methodology to be informed by structuration theory, which brings these tensions to the surface. Indeed the development of a mixed-methods approach served to answer the research questions. I found the use of alternate lines of enquiry a potent and invaluable means of unpacking the realities of choice and the structures around which they exist. The deliberate research strategy enabled the aims of the project to be realised.

The academic contribution to research method innovation was aptly illustrated by the work of Virginia Valentine (1979) on her work on semiotics. Whilst still work in progress, my new research innovations such as the cognitive interviewing tool and the brand health product recognise that in capturing the 'rules', a person's identity has to be integrated. Accordingly, whilst there was no semiotics tool created, the essence behind Valentine's message is relevant, especially to time codes. Her notion of re-shaping '*the zeitgeist (the spirit of the age) and its expression through that society's own particular forms of 'popular culture'*', resonated with the need to understand and to avoid underestimating a society and its own forms of popular cultural paradigms in getting closer to the consumer.

Continuing with the theme of getting close to the consumer, the emergence of co-creation as a transformative process of value creation for consumers and brand alike is an important dimension of thinking about a central pillar of the research, namely product innovation. As my senior management corporate stakeholders in STRC group and the Middle East Millionaire Panel are ultimately interested in new marketable products, the work of Prahalad and Krishnan (2008), Weaver (2008) and Abbas (2012) is enlightening, drawing on the importance of consumers being empowered to contribute to the development of brands. Across the organisation, we have to create a co-creation culture whilst advising the brands we work for to embark on this enterprise. Accordingly, I was drawn to the work of Ramaswamy and Gouillart (2010), who coined the phrase 'co creative enterprise'. Their four principles of co-creation will be taken forward within the research organisation and its associated global brand consultancy practices. In particular, we shall be paying particular attention to the first principle in our corporate messages, namely that stakeholders will not wholeheartedly participate in customer co-creation unless it produces value for them, too. This dual buy-in has been incorporated into corporate and brand consultancy practice as a core value.

Indeed, upon further reflection I was able to validate that my Oxford project on co-creation would complement the focus on innovation in research methodologies comprising the subject of my DProf. I particularly enjoyed producing the first 'co-creation measurement potential awareness grid' of its kind as part of my Oxford project. The grid gave me valuable insights into the development of research tools and products, prompted by the DProf. Throughout I frequently met SRC research executives regarding emerging knowledge and links to professional practice that might form the subject of further investment. The search for the meaning of 'innovation' became a topic of internal

discussion and I benefitted by attendance at the International Conference on Front End Innovation in Florida, USA, in April 2012, as well as active membership of the Linked In group, 'The Epistemology of Innovation'. In terms of outputs from the research, much thought was spent on the format and how to disseminate it. My organisation had a preference for a STRC-templated product presentation in PowerPoint format, with examples of innovative research approaches to take to market—and signposts of how to market it to wider brands. As I work in the marketing industry, this format is the default presentation, and I found it enabled me to simplify the key approaches for decision-making executives. The portfolio of the brand health model for the luxury-buying consumer and the cognitive interviewing model was well received, especially following the refinements that were incorporated. The brand influencers suggested that the graphical visualisation would need further development; this will be the subject of ongoing work beyond the scope of the DProf.

In particular, the luxury car brand health questionnaire worked well with influencers, who went through the instrument as potential Ferrari buyers. The cognitive interviewing model and brand health tool were presented to the internal STRC qualitative professional, who will be applying it in the next two projects.

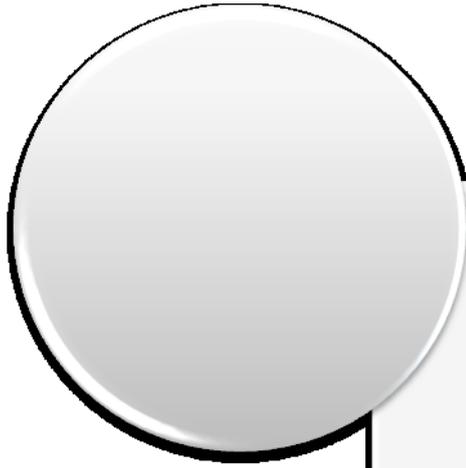
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Part 2

Evidence of achievement

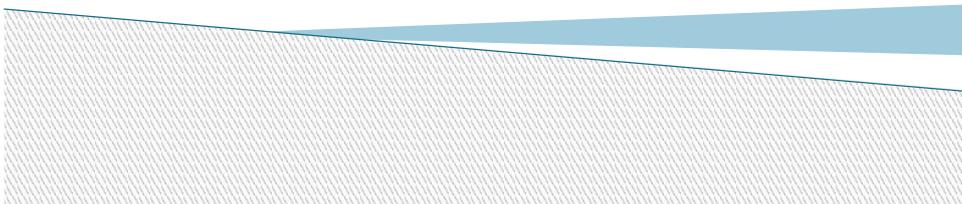
6.1 Introduction

The Board of Management required a PowerPoint presentation that reported on the products arising from the varied research interventions. These products had to be *'relevant to our current business voyage and bring potential revenue streams through value added insight opportunities.'* (Minutes BOM,20th June 2011) . The screen shots are derived from censored presentations and strategy papers that are deemed commercially sensitive for public release.

6.2 Brand Equity Model for Luxury Brands - Middle East Region- presented to STRC Board of Management 6th May 2013

Brand Equity Questionnaire

Researching high networth consumers in emerging markets

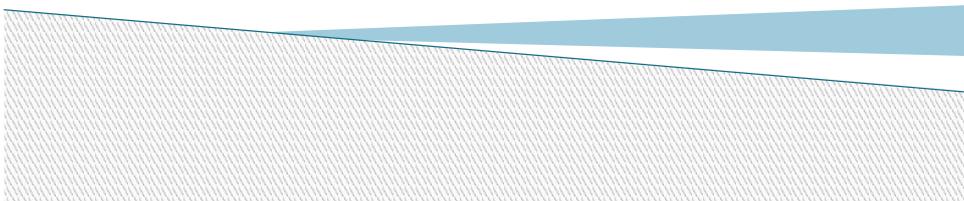


Agenda

- Summary
- Approach – Brand Equity model and weights
- Other factors involved in questionnaire
- Questionnaire



Summary



Summary

The goal is to provide clients added value through insight into Middle Eastern ultra high net worth customers attitude, preferences and behaviour towards luxury brands.

A USP would be to provide a luxury brand equity score specifically tailored to the Middle East region, so that the top luxury brands can measure and track their own performance as well as their competitors.



Summary

A luxury brand equity score can be obtained through a well designed questionnaire which is tailored to the Middle East ultra high net worth individual, taking into account the culture differences within this region.

The score will be standardised between 1 and 100 for ease to understand 1 is very poor and 100 is outstanding. An arbitrary value will have little meaning.



Summary

The Brand Equity Questionnaire goes far beyond just providing a metric score, but to understand the triggers and motivations behind the purchases and try to establish some behaviour patterns within this niche space.

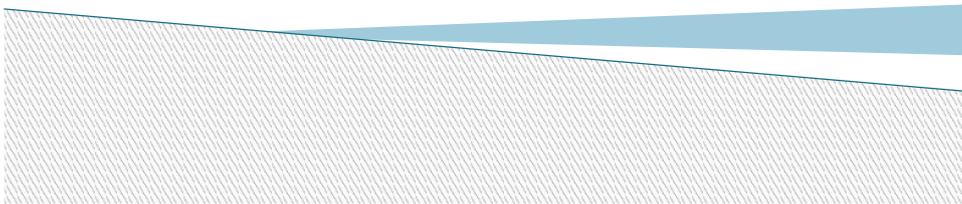


Summary

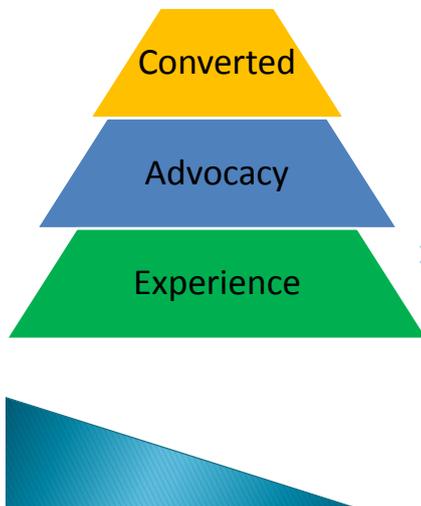
The Brand Equity Questionnaire goes far beyond just providing a metric score, but to understand the triggers and motivations behind the purchases and try to establish some behaviour patterns within this niche space.



Approach – Brand Equity model and weights



Approach



- Write a questionnaire which will provide a brand equity score taking into account the customer journey from Experience, Advocacy to Converted i.e the Brand Equity model.
- Furthermore to gain a better understanding in customer insight, attitude and behaviour towards luxury brands or services.

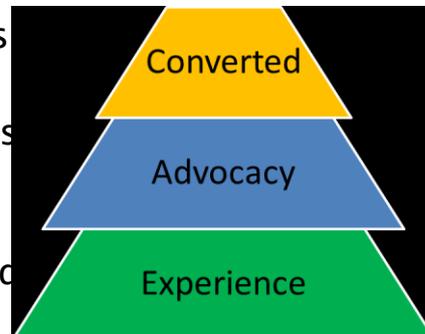
Assumptions

- Assumption that all 150 potential respondents across all the regions will be invited and expect that at least 100 would be completed.
- Assume standard demographic questions would be included.



Experience – Base of pyramid

- Q1 A(Unprompted awareness)
- Q1B(Prompted awareness)
- Q2 (Prompted awareness Specific model)
- Q3 & Q4 (Personality and sentiment)

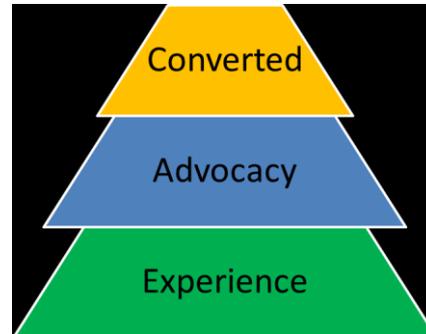


- Q5 (Popularity)



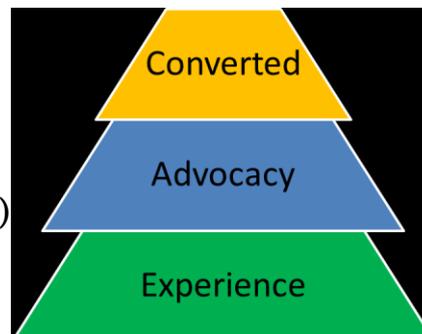
Advocacy- Middle of pyramid

- Q6, Q7 , Q10 & Q11 (loyalty)
- Q9 (Satisfaction)
- Q12 (Quality)
- Q3 - If “High Quality”
- Q4 - If “High Quality”



Converted - Top of pyramid

- Q13 (Price)
- Q14 (leadership)
- Q15 (Differentiation)
- Q16 (Respect)



Luxury brand equity model

- There will be weights and factors applied.
- Also standardise the brand equity score to between 1 and 100.



Other factors

- To gain understanding in shopping habit behaviour we have question 8.
- Also have an open end for reasons choosing the brand at Q15
- To gain customer insight into preference choice we have Q17, which is a conjoint exercise to understand what is more important, price, incentives, prestige or performance.

Conjoint Exercise – Q17

Incentives

1. 4 VIP tickets to Grand Prix
2. Track day racing for 4 friends/family

Price

1. £175,000
2. £225,000
3. £275,000

Performance

1. Standard
2. Up-rated

Prestige

1. Model owned by the elite in my society
2. Special edition, only 500 available
3. Bespoke model – One of a kind

Conjoint Analysis – 36 permutations – show each respondent 3 trade off

Questionnaire

Q'aire – Unprompted awareness

Q1. A. Which luxury makes of car can you think of that are sold in Qatar, irrespective of where they are manufactured?

1. Rolls Royce
2. Bentley
3. Ferrari
4. Porsche
5. -----



Q'aire – Prompted awareness

Q1. B. Please tell us which Luxury makes of cars you have heard of?

Make of car	Never Heard of (1)	Aware of (2)
Aston Martin		<input checked="" type="radio"/>
Bentley		<input checked="" type="radio"/>
BMW		<input checked="" type="radio"/>
Ferrari		<input checked="" type="radio"/>
Jaguar		<input checked="" type="radio"/>
Koenigsegg	<input checked="" type="radio"/>	
Etc....		



Q'aire – Prompted awareness

Q2. Now I'd like to get your opinion on these particular luxury models of cars sold in Qatar.

	Never heard of	Aware of it a little	Aware of it somewhat	Know of it very well
 Aston Martin DBS Volante			<input checked="" type="radio"/>	
 McLaren MP4		<input checked="" type="radio"/>		
 Ferrari 458 Spider				<input checked="" type="radio"/>
 Lamborghini Aventador		<input checked="" type="radio"/>		
 Mercedes-Benz SLR McLaren				<input checked="" type="radio"/>

Q'aire – Personality & sentiment

Q3. Please move the words you most associate with car into the relevant boxes on the left.

Ferrari 458 Spider

Aston Martin DBS Volante

McLaren MP4

Lamborghini Aventador

Mercedes-Benz SLR

None of them

←

Trustworthy
Stylish

Innovative
Refined

Traditional
High quality

Sporty
Status symbol

Luxurious
Ostentatious

Fun to drive
Individual

Sign of success
Bland

Reliable
Prestigious

Elegant
Popular

Conventional
Has personality

Pedigree
Heritage

Q'aire – Personality & sentiment

Q4. Please rate the following characteristics in reference to the Ferrari 458 from 0 to 10, where 0 is not at all and 10 is very highly.

	Not at all								Very highly			
	0	1	2	3	4	5	6	7	8	9	10	
Elegant											<input checked="" type="radio"/>	
Prestigious										<input checked="" type="radio"/>		
Luxurious									<input checked="" type="radio"/>			
Ostentatious											<input checked="" type="radio"/>	
Stylish										<input checked="" type="radio"/>		
High quality									<input checked="" type="radio"/>			
Pedigree											<input checked="" type="radio"/>	
Heritage											<input checked="" type="radio"/>	

Q'aire – Popularity

Q5. How many of your friends or family own a Ferrari? (Pick one)

None

One

Two

3 – 5

6 or more

Q'aire – Loyalty

Q6. How many Ferrari cars have you owned in the past, including your current model if you have one? (Pick one)

None

One

Two



Three

Four

Five

More than 5

Q'aire – Loyalty

Q7. Which of the following Ferrari models have you previously owned or currently own? (Tick all that apply)

Model of car	Previously owned	Currently own
246		
308/328/348		
360	<input checked="" type="checkbox"/>	
456		
458		<input checked="" type="checkbox"/>
512		
Etc....		

Q'aire – Purchasing channel

Q8. How do you normally purchase your Ferrari?

Visit the local dealership



Buy on-line

Through a 3rd party supplier e.g importer

A contact who provides home visits

Other_____(Please specify)



Q'aire – Satisfaction

Q9. Please tell me overall how satisfied are you with your Ferrari and the particular models you currently or previously owned, rating from 0 to 10, where 0 is not at all satisfied and 10 is extremely satisfied? (Pick one)

	Not at all							Extremely			
	0	1	2	3	4	5	6	7	8	9	10
360											<input checked="" type="checkbox"/>
458										<input checked="" type="checkbox"/>	
Overall Ferrari									<input checked="" type="checkbox"/>		



Q'aire – Loyalty

Q10. Please tell me how likely are you to recommend a Ferrari to family or friends, rating from 0 to 10, where 0 is very unlikely and 10 is very likely?

	Not at all						Extremely				
	0	1	2	3	4	5	6	7	8	9	10
458											<input checked="" type="radio"/>
Overall Ferrari									<input checked="" type="radio"/>		

{Calculate Net Promoter Score = Promoter % - Detractors %.
 Detractors score = 0 to 6
 Passive score = 7 or 8
 Promoter score = 9 or 10}



Q'aire – Loyalty

Q11. During the past year have you ever recommended or received a recommendation to purchase a Ferrari from family or friends? (pick one)

- Yes
- No
- Don't know



Q'aire – Quality

Q12. Please tell me if the Ferrari performed better or worse than expected in terms of delivering quality? (Pick one per column)

Model of car	Ferrari Overall	Ferrari 458 Spider
Much better than expected		
A little better than expected		
About what I expected		
A little worse than expected		
Much worse than expected		



Q'aire – Price

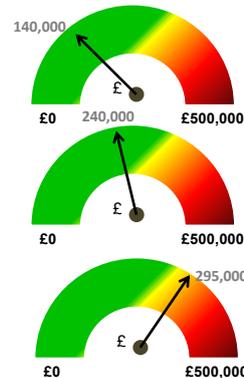
Q13. Now think about a Ferrari 458 Spider, at what price would you say:-

Use the slide ruler to choose your price

It is too cheap that you would consider not buying it.

A fair deal and would purchase it

Too expensive and consider another luxury make equivalent



Q'aire – Leadership

Q14. When purchasing your Ferrari, which other luxury makes did you consider? (Tick all that apply)

Make of car	Consider
Aston Martin	<input checked="" type="checkbox"/>
Bentley	<input checked="" type="checkbox"/>
BMW	<input type="checkbox"/>
Jaguar	<input type="checkbox"/>
Koenigsegg	<input type="checkbox"/>
Etc....	<input type="checkbox"/>



Q'aire – Differentiation

Q15. Why did you purchase the Ferrari over the luxury makes?



Q'aire – Respect

Q16. Please tell us how much agree or disagree with the following statements on how you feel when owning a Ferrari. (Pick one per row)

	Disagree a lot	Disagree a little	Neither disagree nor agree	Agree a little	Agree a lot
I feel privileged to own a Ferrari				<input checked="" type="radio"/>	
Makes me feel I am successful			<input checked="" type="radio"/>		
I gain respect when driving around in my Ferrari					<input checked="" type="radio"/>
Makes me feel important	<input checked="" type="radio"/>				
Shows I am doing better than most other people		<input checked="" type="radio"/>			
I feel proud to own a Ferrari					<input checked="" type="radio"/>
My Ferrari is my pride and joy		<input checked="" type="radio"/>			
It's a car for people like me					<input checked="" type="radio"/>

Q'aire – Respect

Q17. You will be shown a choice of two offers referring to the Ferrari 458 Spider. Please select which one you would choose if you had too. There will be 3 trade off in total.

Ferrari 458 Spider - Offer 1

1. 4 VIP tickets to a Grand Prix
2. Cost £125,000
3. Standard Performance
4. Special edition, only 500 available

VS

Ferrari 458 Spider - Offer 2

1. Track day racing for 4 friends/family
2. Cost £175,000
3. Upgraded Performance
4. Bespoke model – One of a kind



Q'aire – Respect

- Ferrari 458 Spider - Offer 3**
1. Track day racing for 4 friends/family
 2. Cost £250,000
 3. Upated Performance
 4. Bespoke model – One of a kind

VS

- Ferrari 458 Spider - Offer 4**
1. 4 VIP tickets to a Grand Prix
 2. Cost £175,000
 3. Standard Performance
 4. Model owned by the elite in my society



- Ferrari 458 Spider - Offer 5**
1. 4 VIP tickets to a Grand Prix
 2. Cost £125,000
 3. Standard Performance
 4. Special edition, only 500 available

VS

- Ferrari 458 Spider - Offer 6**
1. Track day racing for 4 friends/family
 2. Cost £175,000
 3. Upated Performance
 4. Model owned by the elite in my society



6.3 Driving forward the Middle East Millionaire Research Panel across the Middle East and the Silk Road opportunities



‘Developing value addition to the Middle East Millionaire Panel and its potential extension to the Silk Rd’

Saber Khan
March 31st 2013

1



In respect to:

- Business development
- Research innovation

AND

Critique the current Middle East Millionaire Panel website and explore how our expertise would add value to the research message

2



What is this opportunity?

- Opportunity to extend and enhance the research offering of STRC Research by:
 - Developing utilisation of the Middle East Millionaire Panel
 - Developing a strong presence in the emerging 'Silk Road' countries
 - Enhancing current client relationships
 - Creating and sustaining new customer relationships
 - Generating increased revenues and profits

3



What is this opportunity?

- In essence - An opportunity for us to create a significant and successful business **together**.
- But how?...
- By implementing a strategic plan which incorporates both business development and research innovation

4



Strategy Development

- Recognise that we are considering two very different propositions:
 - Middle East Millionaire Panel – Ultra/high net worth individuals
 - Emerging Markets (Silk Road) – general population research

- Two very different clientele (with potential overlap)

- Need to develop two strategic plans of action:

5



Strategy Development (2)

- Core to the success of each plan is:
 - Awareness (communication) – raising awareness of the research offerings with appropriate target clients
 - Research offering – development of relevant research products/vehicles
 - Credibility – raising further awareness of STRC credentials/experience to deliver in these regions and globally
 - Competition – understanding the market place we are working in
 - Relationship management

- Looking at each offering separately:

6



Middle East Millionaire Panel

- What is the proposition?
 - Unparalleled access to the opinions, attitudes and behaviours of the Middle East's most affluent and influential consumers/people

 - Approx 400,000 high net worth individuals
 - Approx \$1.3 trillion of wealth in 2008, forecast to reach \$1.9 trillion by 2013 (CapGemini Merrill Lynch Wealth Report 2009)
 - Truly unique proposition (Key message for the website)
 - Household access – head of household, women, young people

7



Middle East Millionaire Panel (2)

- Who are the likely clients?
- Luxury goods - automotive, jewellery, watches, real estate, travel, leather goods, cosmetics, fashion, telecoms, yachts, aviation...
- Financial Services – local and international companies, especially wealth management companies
 - Middle East seen as an area of expansion and development – requirement for cross-generational wealth management, more Sharia compliant products and broader portfolios
- Investors seeking opinions of influential business leaders
- C-suite research?
- Other research companies?

8



Middle East Millionaire Panel (3)

- What are we offering (products)?
- Qualitative access to the wealthy of the Middle East
 - Men
 - Women
 - Young People
 - Region – country specific
- Possibilities:
 - Bespoke projects
 - Luxury goods (brand) tracker
 - Youth tracker
 - General sentiment tracker

9



Middle East Millionaire Panel (4)

- What are we offering?
- Insights
 - It's not just about opinions – likes/dislikes
 - But it's also about helping clients to find a way to make their products/services appeal and have relevance – cultural insight and product/message development
- Luxury offering – beyond Middle East?

10



Middle East Millionaire Panel (5)

- Awareness building – This is a niche audience
- It is about networking, e.g:
 - Following up all leads from STRC Monthly seminar
 - Social Media – LinkedIn.com – being part of luxury groups,
 - Direct marketing
 - Reuters Global Luxury and Fashion May 23-25 2013 (Dubai/London/NY/Paris)(?)
 - Reuters Global Wealth Management Summit Oct 3-6 2013 (Geneva/Luxembourg/NY/Singapore)
 - Reuters Middle East Investment Summit Oct 24-27 2013 (Abu Dhabi/Beirut/Cairo/Dubai/Kuwait City/Riyadh)
 - Delivering conf/seminars e.g. private banking in the City, UK's Walpole British Luxury

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Middle East Millionaire Panel (6)

- PR stories in
 - Research publications e.g. ESOMAR, Research (UK)
 - Campaign magazine
 - Luxury press, e.g. Women's Wear Daily (WWD) – US/global luxury newspaper
 - Middle East media – to attract attention of those companies with local offices
 - ...
- Academic connections – awareness amongst future brand managers
 - lecture on luxury MBA courses (International University of Monaco, ESSEC...)?

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Emerging Markets

- What is the proposition?

Access to the opinions, attitudes and behaviours of the emerging markets of: Uzbekistan, Kazakhstan, Tajikistan, Kyrgystan, Turkmenistan, supported by the rigour of a major UK research company

- General population surveys
- The next wave of emerging markets

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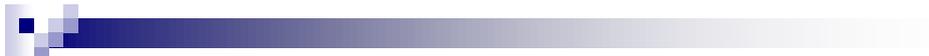


Emerging Markets (2)

- Why the Silk Road countries?
 - Sizeable populations
 - Future economic growth based on oil, mineral extraction, cotton...

Country	Population (m)	Real GDP Growth 2010 (est)	GDP per capita (2010)
Uzbekistan	28.1	8.2%	\$3,100
Kazakhstan	15.5	7.0%	\$12,800
Tajikistan	7.6	5.5%	\$2,000
Kyrgyzstan	5.6	-3.5%	\$2,200
Turkmenistan	5.0	11.0%	\$7,400

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Emerging Markets (3)

- What are we offering (products)?
- Qualitative and quantitative access to the Silk Road nations
 - Men
 - Women
 - Young People
 - Region – country specific
- Possibilities:
 - Bespoke projects
 - Omnibus, trackers
 - Country Profile reports

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Emerging Markets (4)

- Competition
 - We are not first to market with this offering
 - Agencies centred in Kazakhstan and Cyprus
 - Need to establish STRC credibility and strengths

- Who are the likely clients?
 - Multinational companies looking to expand, e.g. Unilever, Coca-Cola...
 - Other research companies?

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Emerging Markets (5)

- Awareness building – same process as for MEMP but different and wider audience
- It is about networking, e.g:
 - Current clients
 - Research conferences
 - Major global companies – across many sectors, FMCG, automotive, tobacco, drinks, financial services...

- PR stories in
 - Research publications e.g. ESOMAR, Research (UK)

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Strategy Development (3)

- First 100 days - Develop strategic plans to focus on:
 - Short term (6 months) objectives – awareness raising, ‘low hanging fruit’, current/warm clients
 - Medium term (12 months) objectives – greater presence and new clients, online store...
 - Long Term (18 months) objectives – new products/offerings, more new clients, repeat business

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Strategic Plan – 100 Days

- The route forward
 - Familiarise with current STRC activity
 - How MEMP & Silk Road have developed so far
 - Capture **all** new ideas (and enthusiasm) for development of business internally – ‘**Idea Day**’ possible discussion/workshop
 - Analyse and prioritise all ideas against strategic aims identifying specific opportunities and practicalities to delivery
 - Identify potential clients – profile panel
 - Strengthen MEMP website
 - Create Silk Road website/pages
 - Create client introduction presentations

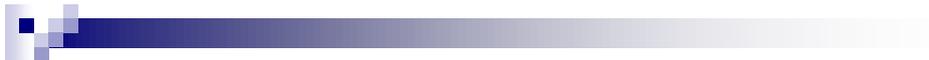
19



Strategic Plan – 100 Days

- Write strategy document for discussion
 - Deliver considered strategic plan and recommendations for discussion and agreement.
- Document will contain recommendations for:
 - 6, 12 and 18 months
 - Resources planning
 - Marketing plan
 - Managed revenue/project delivery planning
- Finalise agreed document

20



Timeline

- Strategy development -100 Days
 - 6 months
 - 12 months
 - 18 months
- Longer Term
 - Silk Road – establish products as the TGI of region?
 - MEMP - Expand luxury offering
 - HNW/Affluent
 - Develop other elite panels (China/Russia/India)?

21



Middle East Millionaire Panel website critique



MIDDLEEAST
MILLIONAIRE
PANEL

- An introduction
- What do we want the website to achieve?
 - Awareness
 - Interest
 - But ultimately Call to action

Contact STRC

22



Middle East Millionaire Panel website critique

- Look and feel is appropriate and welcoming, conveying affluence
- Core message could be tightened to reflect unique nature of offering:

Unparalleled access to the opinions,
attitudes and behaviours of the Middle
East's most affluent and influential
consumers/people

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Middle East Millionaire Panel website critique

- Can we honestly call it a 'household panel'?
 - Maximising usage and appeal
- Too detailed
 - numbers per country undermines message
 - gives user reason not to call
- Testimonials – do provide credibility

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Middle East Millionaire Panel website critique

- Branding – clarify brand hierarchy
 - Is this an offering from within STRC
 - Or a separate brand?
 - Who is STRC – no commentary/links
- Exclusive reports
 - Are these expensive enough?
 - Can we provide a sample/contents?

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How our expertise would add value to the research message?

- Wealth of relevant sector and research experience
 - Globally
 - Client and agency
- Entrepreneurial – ambitious
- Strategic and analytical
- Confident – comfortable with all audiences
- Good communicators
- Man management experience
- Self starters & Team players
- Excellent relationship management

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Thank you for your time and
consideration

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6.4 Strategy - Middle East Millionaire Panel

A Discussion paper to STRC Management Board

30th April 2013

The strategy goals are as follows:-

- Increase profitability on existing services through additional clients

- Increase profitability through additional revenue streams

- Increase the members within the Middle East Millionaire panel

- Take initial steps to emulate the Middle East Millionaire Panel in other regions such as Russia, China, India and Brazil.

a) Attending Dubai International Boat Show

We attended the Dubai Boat show on Wednesday 6th March 2013 at the marina and visited several potential suppliers who can offer us business opportunities. The initial meetings enabled us to set up discussions around working in partnership with suppliers who have access to Millionaires across the Middle East and world-wide.

The contacts we made fall into two groups:-

➤ Interior suppliers

- Greenline Yacht
 - Contact:- Mr Gianluca Ascheri
- Blue Ocean marine interiors
 - Contact:- Ms Catherine Fijten
 - Connected to Ocean Air (major player)
- Gumwood Yacht Interiors
 - Contact Mr. Parry

➤ Yacht sales and charter

- Fancy Yachts L.L.C
 - Contact:- Mr. Jyrki Jaamaa
- Behnemar Yachting
 - Contact:- Mr. Sebastian Rosener
- Oman Sail
 - Mr. Daniel Chamberlain
 - Offers chartering Yachts for special occasions to the ultra high networth individuals

All these contacts have access to Millionaires not only within the Middle East region but also world-wide. We now have the opportunity to increase the panel by cross sharing information and panel contact list.

Increasing our network with the right connections is imperative to growing the Millionaire panel in the Middle East and starting new Millionaire panels in other regions such Russia, China, India and Brazil (BRIC nations)

We would provide these suppliers access to our Middle East millionaire panel i.e potential customers. In return we would be provided access to their customer database, who by definition are millionaires because they would need to be in order to use these suppliers services.

How and in what way we share panel contact list would need careful consideration as we would not want to jeopardise our service in anyway. However, the view to increase our panel will make it far more attractive and easier to sell to luxury brands that want our Middle East Millionaire Panel services. Also we would be able to provide quantitative research studies in addition to our qualitative approach if we achieve sufficient levels of Millionaires in our panel.

These suppliers are also seen as potential clients as we could test products and services to the very target audience these suppliers are trying to attract. Thereby increase our profitability on our existing services

All the suppliers we met are in agreement to provide commission on any sales through our panel and thereby increasing profitability through additional revenue streams. E.g 2.5% commission on sales of a \$2.5 Million boat

The boat show is an excellent vehicle to represent our presence and build new business opportunities. The recommendation is that we should continue with this strategy.

I recommend we continue with this strategy of trading information and access to millionaires with other life style suppliers who also have access to millionaires.

b) Attending International Motor Shows

The initial idea is to attend some of Motor shows, where high end luxury car brands will be attending within the Middle East Region and future potential markets.

- Dubai International Motor show – 5th November 2013 (Dubai)

- Saudi Arabia International Motor show – 24th December 2013 (Jeddah)

- Oman Motor show – 2nd December 2013 (Muscat)

- Auto Shanghai – 21st April 2013 (Shanghai)

The strategy is to be invited in the VIP area of the luxury car manufacturer e.g Aston Martin; Bentley, Ferrari, Lamborghini, Maserati and Rolls Royce.

While at the VIP area we can then approach the Millionaires to offer them a proposition to join the Millionaire Panel, highlighting the benefits and rewards they can enjoy. This would consist of the exclusivity and networking opportunities with likely minded

individuals. In return all we require is that on occasions to contact them regarding luxury brands, and ascertain their opinions, attitudes and behaviour towards luxury brands.

The first barrier is how do we get invited to such an exclusive VIP area and have access to these millionaires. We will offer a luxury car manufacturer brand e.g Bentley, the opportunity to provide our millionaire panel a VIP invitation, as these would be the exact target audience they seek. We will stipulate that our panel partners receive the attention, courtesy and respect they have come accustomed too. In return we expect that we can attend the VIP area and approach their customers and pitch our proposal with the aim to grow our panel and network of Middle East Millionaires. I also envisage that if any of our panel Millionaires successfully purchase the car, that we would also be entitled to a commission, which will go towards our revenue from additional streams.

It maybe required that we will need the help of some our panel partners who have strong relationships with luxury car manufacturers in the Middle East region to facilitate this opportunity.

6.5 STRC Proposed Brand Health Model –Luxury Markets

Q1. A. Which luxury makes of car can you think of that are sold in [Pipe in country], irrespective of where they are manufactured?

1. _____ [First mentioned]
2. _____ [Second mentioned]
3. _____ [Third mentioned]
4. _____ [Fourth mentioned]
5. _____ [Fifth mentioned]

[Pipe in country = UAE; Saudi Arabia; Qatar; Bahrain; Kuwait; Oman]

Q1. B. Please tell us which Luxury makes of cars you have heard of? [Pre populate heard of from Q1]

Make of car	Never Heard of (1)	Aware of (2)
1. Aston Martin	<input type="radio"/>	<input type="radio"/>
2. Bentley	<input type="radio"/>	<input type="radio"/>
3. BMW	<input type="radio"/>	<input type="radio"/>
4. Ferrari	<input type="radio"/>	<input type="radio"/>
5. Jaguar	<input type="radio"/>	<input type="radio"/>
6. Koenigsegg	<input type="radio"/>	<input type="radio"/>
7. Lamborghini	<input type="radio"/>	<input type="radio"/>
8. Maserati	<input type="radio"/>	<input type="radio"/>

9. Maybach	<input type="radio"/>	<input type="radio"/>
10. McLaren	<input type="radio"/>	<input type="radio"/>
11. Pagani	<input type="radio"/>	<input type="radio"/>
12. Porsche	<input type="radio"/>	<input type="radio"/>
13. Rolls Royce	<input type="radio"/>	<input type="radio"/>
14. Spyker	<input type="radio"/>	<input type="radio"/>
15. Other specify _____	<input type="radio"/>	<input type="radio"/>
16. None {Exclusive}	<input type="radio"/>	<input type="radio"/>

Q2. [Continue if Q1B Ferrari = 2, otherwise close and thank you] Now I'd like to get your opinion on these particular luxury models of cars sold in [Pipe in country]. {Read out each make in turn and ask to rate from Never heard of to know very well} (Pick one per row)

{Rotate Models}

Never Aware Aware of it Know of
heard of of a it a somewhat it very
(1) little (2) (3) well (4)

Aston Martin DBS Volante



McLaren MP4



Ferrari 458 Spider



Lamborghini Aventador



Mercedes-Benz SLR McLaren



Q3. [Continue if Q2 Ferrari 458 = 2,3 or 4, otherwise close and thank you] Please move

the words you most associate with car into the relevant boxes on the left.

{Only show those cars where Q2 = 2, 3 or 4 i.e heard of}

MOVE ALL WORDS

Ferrari 458 Spider	Aston Martin DBS Volante		Trustworthy	Stylish
McLaren MP4	Lamborghini Aventador		Innovative	Refined
Mercedes-Benz SLR	None of them		Traditional	High quality
			Sporty	Status symbol
			Luxurious	Ostentatious
			Fun to drive	Individual
		Sign of success	Bland	
		Reliable	Prestigious	
		Elegant	Popular	
		Conventional	Has personality	
		Pedigree	Heritage	

Q4. Please rate the following characteristics in reference to the Ferrari 458 from 0 to 10, where 0 is not at all and 10 is very highly.

{Rotate Characteristics}	Not at all										Very highly											
<i>Characteristics</i>	0	1	2	3	4	5	6	7	8	9	10	0	1	2	3	4	5	6	7	8	9	10
Elegant	<input type="radio"/>																					
Prestigious	<input type="radio"/>																					
Luxurious	<input type="radio"/>																					
Ostentatious	<input type="radio"/>																					
Stylish	<input type="radio"/>																					
High quality	<input type="radio"/>																					
Pedigree	<input type="radio"/>																					
Heritage	<input type="radio"/>																					

Q5. How many of your friends or family own a Ferrari? (Pick one)

1. None
2. One
3. Two
4. 3 - 5
5. 6 or more

Q6. How many Ferrari's cars have you owned in the past, including your current model if you have one? (Pick one)

1. None
2. One
3. Two
4. Three
5. Four
6. Five
7. More than 5

Q7. [Ask if Q6 = 2 to 7 i.e at least one] Which of the following Ferrari models have you previously owned or currently own? (Tick all that apply)

Model of car	Previously owned	Currently own
246	<input type="radio"/>	<input type="radio"/>

308/328/348	<input type="radio"/>	<input type="radio"/>
360	<input type="radio"/>	<input type="radio"/>
456	<input type="radio"/>	<input type="radio"/>
458	<input type="radio"/>	<input type="radio"/>
512	<input type="radio"/>	<input type="radio"/>
556	<input type="radio"/>	<input type="radio"/>
575	<input type="radio"/>	<input type="radio"/>
599	<input type="radio"/>	<input type="radio"/>
California	<input type="radio"/>	<input type="radio"/>
Enzo	<input type="radio"/>	<input type="radio"/>
F358	<input type="radio"/>	<input type="radio"/>
F40	<input type="radio"/>	<input type="radio"/>
F430	<input type="radio"/>	<input type="radio"/>
F50	<input type="radio"/>	<input type="radio"/>
FF	<input type="radio"/>	<input type="radio"/>
Testarossa	<input type="radio"/>	<input type="radio"/>

Q8. How do you normally purchase your Ferrari?

1. Visit the local dealership
2. Buy on-line
3. Through a 3rd party supplier e.g importer
4. A contact who provides home visits
5. Other ____ (Please specify)

Q9. Please tell me overall how satisfied are you with your Ferrari and the particular models you currently or previously owned, rating from 0 to 10, where 0 is not at all satisfied and 10 is extremely satisfied?(Pick one)

	Not at all					Extremely					
	0	1	2	3	4	5	6	7	8	9	10
{list each model previously or currently owned}	<input type="radio"/>										
Overall with Ferrari	<input type="radio"/>										

Q10. Please tell me how likely are you to recommend a Ferrari to family or friends, rating from 0 to 10, where 0 is very unlikely and 10 is very likely?

	Very unlikely					Very likely					
	0	1	2	3	4	5	6	7	8	9	10
Ferrari overall	<input type="radio"/>										
Ferrari 458 Spider (Show if coded at Q6)	<input type="radio"/>										

{Calculate Net Promoter Score = Promoter % - Detractors %.

Detractors score = 0 to 6

Passive score = 7 or 8

Promoter score = 9 or 10}

Q11. During the past year have you ever recommended or received a recommendation to purchase a Ferrari from family or friends? (pick one)

1. Yes
2. No
3. Don't know

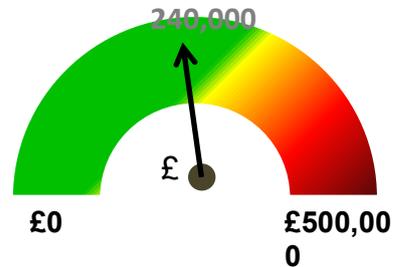
Q12. Please tell me if the Ferrari performed better or worse than expected in terms of delivering quality? (Pick one per column)

	Ferrari overall	Ferrari 458 Spider (Show if coded at Q6)
Much better than expected (5)	<input type="radio"/>	<input type="radio"/>
A little better than expected (4)	<input type="radio"/>	<input type="radio"/>
About what I expected (3)	<input type="radio"/>	<input type="radio"/>
A little worse than expected (2)	<input type="radio"/>	<input type="radio"/>
Much worse than expected (1)	<input type="radio"/>	<input type="radio"/>

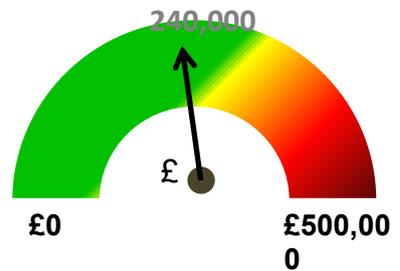
Q13. Now think about a Ferrari 458 Spider, at what price would you say:-

Use the slide ruler to choose your price

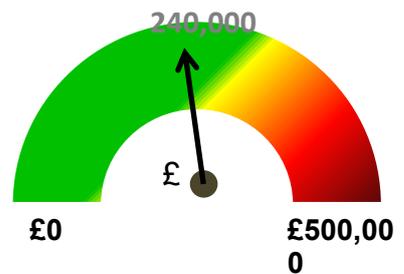
1. It is too cheap that you would consider not buying it.



2. A fair deal and would purchase it



3. Too expensive and consider another luxury make equivalent



Q14. When purchasing your Ferrari, which other luxury makes did you consider? (Tick all that apply)

1. Aston Martin

2. Bentley

- 3. BMW
- 4. Ferrari
- 5. Jaguar
- 6. Koenigsegg
- 7. Lamborghini
- 8. Maserati
- 9. Maybach
- 10. McLaren
- 11. Pagani
- 12. Porsche
- 13. Rolls Royce
- 14. Spyker
- 15. Other specify_____
- 16. None {Exclusive}

Q15. Why did you purchase the Ferrari over the luxury makes? (Open ended)

Q16. Please tell us how much agree or disagree with the following statements on how you feel when owning a Ferrari. (Pick one per row)

{Rotate statements}	Disagree a lot (1)	Disagree a little (2)	Neither disagree nor agree (3)	Agree a little (4)	Agree a lot (5)
I feel privileged to own a Ferrari	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Makes me feel I am successful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I gain respect when driving around in my Ferrari	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Makes me feel important	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shows I am doing better than most other people	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel proud to own a Ferrari	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My Ferrari is my pride and joy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It's a car for people like me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q17. You will be shown a choice of two offers referring to the Ferrari 458 Spider. Please select which one you would choose if you had too. There will be 3 trade off in total.

Ferrari 458 Spider- Offer 1
1. 4 VIP tickets to a Grand Prix

Ferrari 458 Spider - Offer 2
1. Track day racing for 4

V
S

Ferrari 458 Spider - Offer 3
1. Track day racing for 4

Ferrari 458 Spider - Offer 4
1. 4 VIP tickets to a Grand Prix

V
S

Ferrari 458 Spider - Offer 5
1. 4 VIP tickets to a Grand Prix

Ferrari 458 Spider - Offer 6
1. Track day racing for 4

V
S

6.6 STRC Cognitive Interviewing Tool

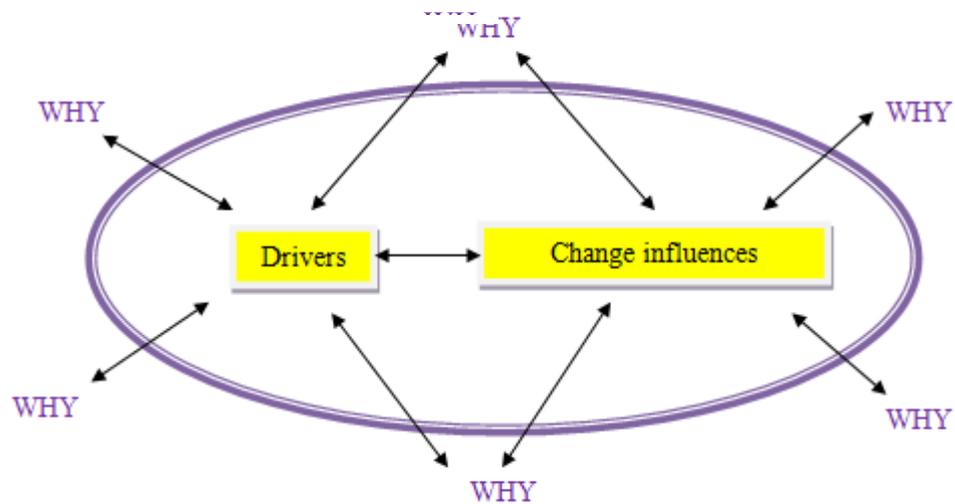


Illustration 27. Proposed STRC Cognitive Model

The proposed STRC Cognitive Interviewing Model is predicated on establishing factors that connect two interlinking dimensions. Central to this is the cognitive discussion guide, which acts as a process generator between drivers and change influencers.

Drivers set out the rules that are social, economic, functional and psychological. The interplay between these forces are examined through a series of detailed why follow ups. Discussion guides should follow the accepted conventions. The following summary is based upon my role as former cognitive interviewing specialist at Nielsen, and are presented accordingly as part of the exploration of running a cognitive interview as proposed by STRC.

How are memories accessed?

- Most of the ‘forgetting’ we experience is caused by searching inappropriately for the stored mental record. It still exists – but we fail to locate it.
- Three proven ways to aid recall:
 1. Context recreation
 2. Focused concentrated
 3. Multiple retrieval attempts

a) Context recreation

An everyday example of the link between context and memory is:

You are at your desk when you think about something you want to talk to a colleague about. You leave your desk and walk to their workstation, and find you have ‘forgotten’ what you came to discuss with them. Covered in embarrassment, you retreat to your office – where you ‘remember’ the original discussion topic.

You ‘forget’ because the context of the situation changes, and then you ‘remember’ again when the context of the original event repeats itself. You did not actually forget or remember - the information was always present in your brain – you were just not able to access it.

An alternative way to remember would be: while you are in your colleague’s office, imagine yourself at your desk and recreate the time, surroundings, physical state and (especially) what you were thinking about immediately before you were thinking about the idea for discussion. Your idea is likely to return to you without the trip back to your office.

We use context recreation during interviewing by encouraging the respondent to think back to the original event, recreating her thoughts, emotions, and physiological state at the time.

The interviewer should evoke the memory by asking the respondent to think about the immediate environment she was in at the time, including elements such as:

Room / surroundings, sights, smells, noises,
weather, time of day, season

The interviewer should also ask people to recreate their thought processes at that time – what was she thinking about? Was there anything special/unusual about the time period e.g. if we were discussing a particular shopping trip we could ask her to remember if she was thinking about anything special – a specific need, getting ready for a birthday party, someone was sick, a festival coming up etc.

b) Focused concentration

Memory retrieval like other mental acts, requires concentration

Any interference is disruptive

During a good interview, focused concentration should be apparent in the respondent's appearance and movements (see previous section)

Because the task is so mentally demanding, many respondents are reluctant to attempt it. Motivation is therefore important. The interviewer must keep reminding the respondent that this is hard work and that they need to concentrate. S/he should also provide positive feedback and encouragement.

In addition, the environment must be controlled to ensure it is quiet and distraction free → a quiet room with no meaningful visuals

c) Multiple retrieval attempts

In general, the more retrieval attempts are made, the more will be recalled. Much of the difference between people who think they have ‘good’ memories and people who think they have ‘bad’ memories, is the number of retrieval attempts they make to access memory.

Those who believe they have ‘good’ memories are more motivated to make more retrieval attempts than those who believe they have ‘poor’ memories and so, are more successful at remembering.

In addition, because a memory can be represented in more than one memory code, using several different retrieval strategies aimed at activating different memory codes, will increase total recall. For example; if a respondent picked up a product, the memory may be stored as both a visual code and a tactile code. You need to activate both of these to recall both kinds of information. E.g.

- ✓ *“now think about when you picked it up and looked at it, take a minute now to go back to that time and remember everything you can about how it looked”... pause....*
- ✓ *“now think about when you picked it up, go back to that moment now and try and recall everything you can about how it felt in your hands” ... pause....*

The respondent should therefore be encouraged to use a variety of different retrieval approaches – and these retrieval attempts should try and use different strategies to unlock different memory codes. (This is not just repeating the same question several times)

d) The 13 Basic Cognitive Interviewing Skills

Establishing rapport

Listening actively

Telling the respondent to actively generate information and not wait for questions

Asking open questions

Pausing after responses before asking follow up questions

Not interrupting

Explicitly requesting detailed descriptions

Encouraging the respondent to concentrate intensely

Encouraging the respondent to use imagery

Recreating the original context

Adopting the respondent's perspective

Asking compatible questions

Following the sequence of the CI

Appendix

Middle East Consumer Attitudes

Private & Confidential
2012

ADULTS AGED 18 and OVER

Respondent Name: _____

Address: _____

Postcode: _____

Telephone No: _____

Interviewers Declaration:

This interview was conducted by me with the respondent under the Code of Conduct laid down by the Market Research Society and according to the instructions I was given.

Date of Interview / /

Signed: _____

Interviewer Name: _____ **Interviewer No.**

Middle East Consumer Attitudes

Signed off by: _____

STRC 1

Signed off by: _____

Ethnic Focus

Signed off by: _____

DP

Good morning/afternoon/evening, I am..... from STRC. We are an independent market research company working with many communities across the world. We are carrying out a research project and I would like to ask you some questions. Before I do this, I want you to read the 'information Sheet, that gives you details about the research.

We work to the rules of the Data Protection Act and The Market Research Society, which mean that as we are only interested in your opinions you can be assured that your identity will be treated with the strictest of confidentiality and not passed onto anybody.

Q1. Who is the main decision maker for shopping in your household?

1. *Myself only*..... 1.
2. *Jointly with my husband/wife*..... 2.
3. *Children* 3.
4. *My husband/wife only* 4.
5. *My parents or family members*..... 5.

Q2. When do you mainly do your shopping? SC

1. *During Fridays*..... 1.
2. *During holidays (EID, Ramadan)*..... 2.
3. *Every day*..... 3.
4. *Non in particular* 4.
5. *Other (please specify)* _____ 5.

Q3. Which of the following best describes your shopping habit? MC

- 1. *I shop alone*..... 1.
- 2. *I shop with my family*..... 2.
- 3. *I shop with my husband/wife*..... 3.
- 4. *I shop with my friends*..... 4.
- 5. *Someone else does the shopping for me*..... 5.

Q4. How important is it to for you to shop for famous 'Brands'?

- 1. *Very important* 1.
- 2. *Somewhat important*..... 2.
- 3. *Not very important* 3.
- 4. *Not important at all* 4.

Q5. Please suggest why you say this, and what do you mean by 'famous'?

Q6. What usually prompts you to shop for famous brands? MC (Ask if answered 1 or 2 at Q9)

- 1. *Want to feel good*..... 1.
- 2. *My friends and family expect me to I*..... 2.
- 3. *Better quality*..... 3.
- 4. *Exclusive*..... 4.
- 5. *I can afford it*..... 5.
- 6. *Embarrassment if I do not*..... 6.
- 7. *Other (please specify)*..... 7.

Q7. Please expand on your answer?

Q8. (If buying Western brands)In your opinion what would proportion of your income goes towards buying Western brands ? (i.e. 20% of 100 is £20) SC

- 1. - 1-5%..... 1.
- 2. More than 5%..... 2.
- 3. More than 10%..... 3.
- 4. More than 20%..... 4.
- 5. More than 30%..... 5.
- 6. More than 40%..... 6.
- 7. More than 50%..... 7.
- 8. More than 60%..... 8.

Q9. How does your faith affect your purchasing of brands?

- 1. Very much so..... 1.
- 2. It's a consideration that may affect my purchase..... 2.
- 3. Not much of a consideration..... 3.
- 4. No consideration at all..... 4.

Q10. Have you bought anything that you would call luxury over the last 6 months?

- 1. Yes..... 1.
- 2. No..... 2.

Q11. How much do you agree or disagree with the following statement 'I don't mind spending on luxury brands if it give me happiness'?

- 1. *Strongly agree*..... 1.
- 2. *Somewhat agree*..... 2.
- 3. *Neither agree nor disagree* 3.
- 4. *Somewhat disagree* 4.
- 5. *Strongly disagree*..... 5.

Q12. How much do you agree or disagree with the following statement 'in my culture I am expected to spend on expensive brands'?

- 1. *Strongly agree*..... 1.
- 2. *Somewhat agree*..... 2.
- 3. *Neither agree nor disagree* 3.
- 4. *Somewhat disagree* 4.
- 5. *Strongly disagree*..... 5.

Q13. How much do you agree or disagree with the following statement 'Western brands understand my culture when they advertise to people like me '?

- 1. *Strongly agree*..... 1.
- 2. *Somewhat agree*..... 2.
- 3. *Neither agree nor disagree* 3.
- 4. *Somewhat disagree* 4.

5. *Strongly disagree*..... 5.

Q14. How much do you agree or disagree with the following statement 'it is not important for men and women to be separated in advertisements'?

1. *Strongly agree*..... 1.

2. *Somewhat agree*..... 2.

3. *Neither agree nor disagree* 3.

4. *Somewhat disagree* 4.

5. *Strongly disagree*..... 5.

Q15. How much do you agree or disagree with the following statement 'If I find a brand is disrespecting my religious and cultural values I will reject it'?

1. *Strongly agree*..... 1.

2. *Somewhat agree*..... 2.

3. *Neither agree nor disagree* 3.

4. *Somewhat disagree* 4.

5. *Strongly disagree*..... 5.

Q16. How much do you agree or disagree with the following statement 'Most quality brands that I come across are Western'?

1. *Strongly agree*..... 1.

2. *Somewhat agree*..... 2.

3. *Neither agree nor disagree* 3.

4. *Somewhat disagree* 4.

5. Strongly disagree..... 5.

Q17. How much do you agree or disagree with the following statement 'I find that research exercises like this are useful in giving me chance to inform companies what I think'?

1. Strongly agree..... 1.

2. Somewhat agree..... 2.

3. Neither agree nor disagree..... 3.

4. Somewhat disagree..... 4.

5. Strongly disagree..... 5.

DEMOGRAPHICS

D1. Gender

1. Male..... 1.

2. Female..... 2.

D2. What is your ethnic background? SC

1. Saudi..... 1.

2. Omani..... 2.

3. Emiratee..... 3.

4. Qatari..... 4.

5. Kuwaiti..... 5.

6. Bahraini..... 6.

8. Other (please specify)..... 8.

9. Refused..... 9.

D3. Could you tell me which age bracket you fit into?

1. 18-29..... 1.

2. 30-49..... 2.

3. 50-64..... 3.

4. 65+ 4.

D4. What is the highest level of education you completed?

1. High school..... 1.

2. College..... 2.

3. University (Graduate / Post Graduate) 3.

4. No education 4.

D5. Which of these best describes the level of your main work or activity? SC

1. University educated professional (teacher, journalist, lawyer, doctor etc)..... 1.

2. Business owner/entrepreneur..... 2.

3. White collar, higher management (public and private)..... 3.

4. White collar, lower management (public and private)..... 4.

5. Artisan/Craftsman/Shopkeeper..... 5.

6. Skilled worker (including nurses)..... 6.

7. Labourer..... 7.

8. Military/Police..... 8.

9. Agricultural Worker/Farmer (including fishermen)..... 9.

10. Student..... 10.

11. Housewife..... 11.

12. Unemployed..... 12.

13. Refused..... 13.

D6. In which of the following ranges would you place your total income per year?

(Income from all sources: pay, benefits, pensions, savings etc.) SC interviewer to record and convert to pounds

1. None / Nil..... 1.

2. Up to £20,000..... 2.

3. £20,000 - £40,000..... 3.

4. £40,000 - £60,000..... 4.

5. £60,000 - £80,000. 5.

- 6. £80,000 - £100,000..... 6.
- 7. £100,000 and over..... 7.
- 8. Prefer not to answer..... 8.

D7. How observant are you with regards to religious values?

- 1. Observant..... 1.
- 2. Somewhat observant..... 2.
- 3. Not Observant 3.

Thankyou

Is there anything else you would like to add about your experience of this questionnaire and how it could be improved further?
