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## **Roy Morgan plans single-source survey in India**

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<http://www.livemint.com/2011/07/04231550/Australian-firm-plans-singles.html?atype=tp>

**One of the ways in which marketers try to make sure they're doing the right thing is to send around young men and women armed with clipboards and make them ask a lot of questions. Knowing the consumer is essential in a market that's exploding with choices. Australian market research company Roy Morgan Research is trying to take that to a new level by introducing so-called single-source surveys in India.**

Rather than rapidly assessing the preferences of an impatient shopper with a five-minute questionnaire, the single-source survey captures the decision-making process that drives the choices of subjects in a much more detailed manner and across a longer time period. It's time intensive and expensive, but Roy Morgan says the scope of the data is several times greater.

"This study is not just 9-10 times larger in scope than existing surveys, it's also a lot smarter," said Joseph Eapen, chief executive at Roy Morgan Research India. "That's because bankers, car makers, retailers and FMCG (fast-moving consumer goods) marketers have tweaked the questions over the years (in various markets)."

The quarterly study, the pilot for which begins in August, will tabulate information on demographics, purchase behaviour, attitudes and lifestyle, retail activity, products, brands, and other variables. The sample size will be at least 265,000 people (representing a universe of 800 million; those below 12 are excluded). Categories that will be covered in depth include appliances, retail, travel and tourism, finance, automotive, beverages, fast food, personal care, health care, and telecommunications.

The methodology will be face-to-face multiple visits, Eapen said. The survey will be fully funded by Roy Morgan Research and the company will recruit 525 interviewers exclusively for this exercise. The company will tie up with a leading research agency in India to handle the mandate.

The key differentiator will be the level and scale of information available to the advertiser, Eapen said. For instance, in the automotive category, the survey will cover ownership of vehicles (market size, category and brands), intent to purchase, reasons for choosing a certain brand, reasons for not choosing a certain brand, recall of advertising, satisfaction levels, and previous and current vehicles owned.

Some clients have already been signed up, Eapen said.

“We are not disclosing client names at this point in time. We don’t want to use client names to leverage our marketing,” he said. “We want marketers to see the merits in the study and our reputation, and decide. Roy Morgan Research has been conducting single-source surveys since 22 years and has over 300 clients, subscribing and renewing every year. We want to do the same in India.”

The cost of subscribing to the data will be higher than prevailing rates and will differ across categories.

“Haircare clients have to pay as much as `20 lakh per annum and telecom clients will have to pay `70 lakh per annum, per advertiser,” Eapen said.

The survey will also generate information on media consumption habits. Television and radio metrics will be by day of the week, time segments and programme name. Print will be at title level and sections read. Internet findings will provide information on websites visited, purpose, frequency and time spent, Eapen said.

Roy Morgan had previously signed a memorandum of understanding with Media Research Users Council (MRUC) for launching a single-source study in India, but that plan was scrapped late last year.

MRUC is a non-profit body that publishes the quarterly Indian Readership Survey (IRS), the acknowledged standard by which print penetration is measured. The body still plans to convert IRS into a single-source study. That survey currently has an annual sample size of 255,888 households and reports data from 75 towns.

IRS already has a robust sample size and MRUC will soon be floating a request for proposal (RFP) to convert it to a single-source study, said the council’s chairman Lloyd Mathias.

The RFP will be floated among leading research companies, including Roy Morgan Research, he said.

Companies currently use a host of different research products, said Abdul Khan, senior vice-president at Tata Teleservices Ltd.

Khan and other users are divided on the merits of a single-source survey.

“If you’re looking for ad awareness and brand recall, you typically go to a Millward Brown,” he said. “If you’re looking for retail information, you go to ACNielsen. We have not had a robust research that combines it all. Then again, companies need continuity of data—a comparison of today versus yesterday, which some of the first movers (Nielsen and others) may be in a better position to provide.”

Khan added that it was a challenge for newcomers to grasp the “crazy dynamics of the Indian market” and that most marketers wanted customized surveys rather than a one-size-fits-all approach.

When asked about the steep pricing, Khan said: “If it’s an all-or-nothing deal, then Roy Morgan will find it difficult to make a breakthrough. But if a marketer can go up to them and say that ‘I have these marketing needs, I don’t want all of the data, but just what’s required for this purpose—I will give you a few lakhs initially and let’s see how this works out’, and if they are open to it, then it’s a workable proposition.”

A single-source survey is more cost effective because it addresses diverse research needs via a single agency, said Sanjay Tripathy, executive vice-president and head (marketing and direct channels) at HDFC Standard Life Insurance Co. Ltd. Yet, it’s challenging for a single agency to grasp all the facets of marketing research and consultancy services.

“There are concerns on a single agency handling such large-scale studies in a country like India,” he said. “There is also the question of respondent fatigue that may occur when a respondent has to answer larger questionnaires used in single-source studies.”

Customized research agencies have held their position in many markets, Tripathy said. Given that this is the first time that a single-source study is coming into India, it will be essential for the agency to address client concerns and establish credibility.

Media buying specialist Shashi Sinha, chief executive of Lodestar UM, said there are agencies that track media consumption and link it to purchase intent. “So, while the sample size may be impressive, the most critical thing will be for it to be endorsed by the industry—clients, advertisers and agencies. Unless that happens, it will lead to a lot of confusion,” he said.

Single-source surveys point the way to the future, said Srikanth Raman, general manager (research and insights) at Starcom MediaVest Group.

“So far we’ve had to rely on different sources—one that gives us media consumption and the other (retail audits) which give sales and offtake,” he said. “It’s difficult to link the behaviour of the consumer on the shop floor, to what he may have consumed on television or print, and the impact it had. So, in that sense a single-source survey will offer more specific solutions.”

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