

final report

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Fast prototyping value added meat products – A pilot trial of Watch Me Think mobile video ethnography for product and concept testing

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Executive summary

Why the work was done – problem?

MLA constantly strives to increase innovation success rates for projects it supports by finding better ways to connect with the authentic experience of consumers. While there are many exciting new ideas that could add value to the overall category, MLA aims to help its members focus on those that drive the most consumer appeal and relevance and will build a sustainable pipeline of innovation.

Watch Me Think are an Australian headquartered qualitative mobile ethnography agency. Launched in 2011 Watch Me Think have co-created their mobile ethnography innovation research solutions with the R&D teams of many of the leading Global FMCG clients including: Unilever, Nestle, KraftHeinz, Coca-Cola, Cereal Partners Worldwide and Mondelez.

The primary objective of this project was to investigate whether mobile ethnography can help better understand the consumers experience of products and concepts on projects MLA supports than can be achieved by traditional qualitative methodologies such as focus groups.

The key questions the project hoped to answer were:

1. Does mobile ethnography provide an opportunity to observe genuine pain points and pleasures of consumers, with regard to the meat category?
2. Does mobile ethnography provide an opportunity to hear how consumers naturally talk about meat, benefits & sustainability, that could help identify more relevant messaging?
3. Understand where mobile ethnography provides the most benefits during the
4. innovation process (i.e. concept testing, physical samples or both)?
5. Does mobile ethnography provide additional insights than those achieved with traditional methodologies such as focus groups?

This project tested several MLA new meat concepts using in-home consumer immersions via video ethnography. This format is a pilot for MLA to explore “running to ground” MVP and ideation themes. The range of ideas that were tested included:

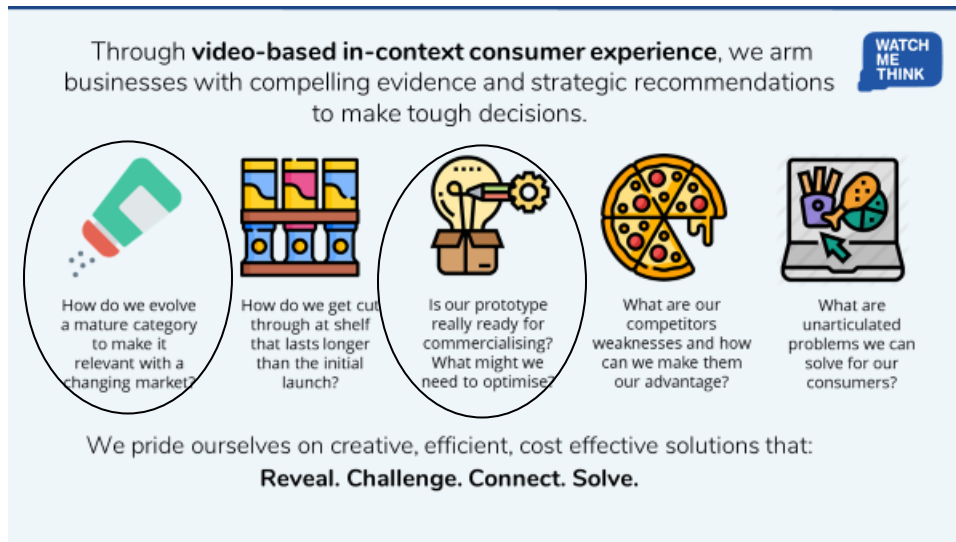
- 1) Meat Chips – based on 4 variants of product prototypes; 4 marketing concepts, 4 pack designs, and 2 naming conventions
- 2) Wellness meat – full-colour pack mockups that reflect meat positioned for muscle support, joint health, vitality and immunity (visualized as Porterhouse and mince cuts)
- 3) Sustainable Meat – carbon neutral, better for me, better for animals, better for planet positioning (visualized as a Porterhouse and diced rump cuts)

How it was done?

MLA commissioned three pilot projects with Watch Me Think.

One of these pilots involved a qualitative in-home usage test prior to the product being launched and the other two involved qualitative concept tests.

Both approaches have been successfully used with FMCG companies worldwide to answer key business questions that occur at different stages of the innovation process.



For Meat Chips a Pre-launch Consumer Review was conducted which is one of WMT’s lean solutions co-created with FMCG clients to deliver fast and affordable learning from the consumers themselves about what elements of the marketing mix need optimizing before it is progressed to a commercialization phase or which to monitor after launch.

In a mobile ethnography pre-launch product review, product samples are sent to the participants and they are asked to self-record videos of their experience of trying the product in a normal usage occasion. The Watch Me Think research team observe all the video data multiple times and use this to collate their findings and recommendations

For Wellness Meat and Sustainable Meat, a concept test was conducted.

In a mobile ethnography concept test, stimulus is sent to the participants and they are asked to self-record videos as they respond to the stimulus. Each piece of stimulus is evaluated first in the context of their current repertoire and secondly in relation to each other so the client can see plainly what’s working and what’s not working around appeal, relevance, uniqueness and whether the language used to communicate the proposition resonates and is believable for the target audience, or not. This step in the innovation process is critical to ensure that concepts going into quantitative testing are sense-checked by consumers, so assessment is made on the idea itself and not the presentation of the idea.

What was achieved?

This pilot trial with WMT accomplished three broad objectives for MLA:

- 1) Showcased the use of target consumers in the form of mobile video ethnography to quickly and objectively gauge whether **product prototypes** are ready to progress to commercialization before further investment is made in the current design.
- 2) Showcase the use of target consumers in the form of mobile video ethnography to assess and provide feedback on **concepts** in their own time and space without the influence of peers or a moderator.
- 3) Highlight the advantages and challenges of using **mobile video ethnography** for testing products and concepts when **compared to other methodologies** employed by MLA like focus groups or online surveys.

Industry benefits that will arise from the work?

Broadly speaking, this project demonstrates to industry partners that there is more than one way to get feedback from consumers and that not every piece of consumer research has to take months and require a large budget. This project also highlighted that different methodologies and approaches will give different answers and that a variety of approaches should be considered every time an industry partner has a business challenge that requires consumer input; sometimes focus groups are employed because they are familiar and stakeholders feel more in control as they sit behind the glass. But asking consumers to explain what they like and don't like and why in front of a peer group and with the influence of even the best moderator, is never going to reveal the nuance of truth that occurs in one's own time and place, using a product as they normally would, with all the extenuating factors playing into their response. Seeing is believing, even if in a small sample size of target consumers; seeing and hearing at the same time evokes a call to action.

More specifically, this project provided an MLA partner with a significant amount of consumer feedback around their meat chip prototypes as well as the marketing bundle they had already put substantial investment into before presenting both to the retailers. Along with compelling consumer feedback in the form of video footage trying the products, the qualitative researcher who delivered the analysis and recommendations, and has worked with FMCG companies worldwide to launch genuine innovation like these meat chips, provided clear next steps to lower the risk of a failed launch. This case study will be an excellent tool for MLA to share with similar industry partners and will show how touching base with target consumers early on in the development process is key to making the right decisions at the right time, before too much time and money is spent on developing the wrong products or designing marketing material that misses the mark.

Finally, this project provided MLA with some clear guidance on where they are likely to get the most bang for their innovation bucks when it comes to broad concepts that will impact the entire meat industry; concepts like Meat for Wellness vs Sustainable Meat are both worthy concepts in their own right but this project gave MLA some consumer perspective on what is likely to have more relevance and credibility in the current political and cultural climate .

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1 Background

Since 2011 many of the leading Global FMCG organisations have added qualitative mobile ethnography to the mix of market research methodologies that they use within their innovation stage gate process.

Qualitative mobile ethnography involves target consumers self-recording videos on their smartphones as they capture their natural behaviours and emotions as they use products or respond to stimulus in context.

One of the primary objectives of mobile ethnography is to better understand in-context behaviour and emotion where there is no researcher or moderator present and allow stakeholders to observe that unfiltered reaction.

The qualitative mobile ethnography agency Watch Me Think has co-created a range of research solutions with their Global FMCG clients throughout the stage-gate process.

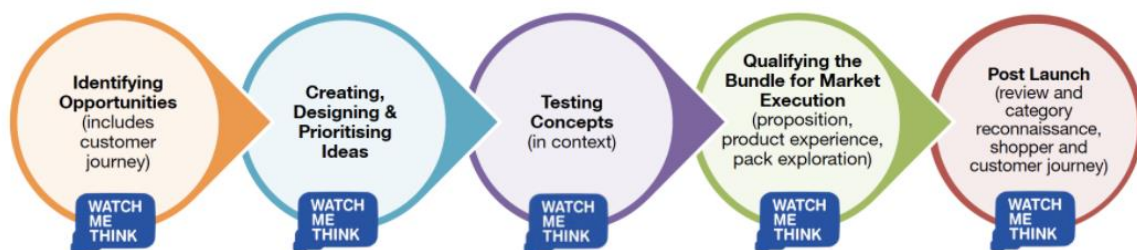


Figure 1. Qualitative Mobile Ethnography in the Stage Gate Process.

MLA continually seek to find new ways of increasing innovation success rates of the projects they support, especially those that involve new product development and packaging design. MLA agreed to commission three qualitative mobile ethnography pilot studies with Watch Me Think to investigate whether the methodology could add value for its members around these areas of product and pack design.

2 Project objectives

The primary objective of this project was to investigate whether mobile ethnography can help better understand the consumer experience of products and concepts on projects MLA supports than can be achieved by traditional qualitative methodologies such as focus groups.

The key questions the project hoped to answer were:

1. Does mobile ethnography provide an opportunity to observe genuine pain points and pleasures of consumers, with regard to the meat category?
2. Does mobile ethnography provide an opportunity to hear how consumers naturally talk about meat, benefits & sustainability, that could help identify more relevant messaging?
3. Identify where mobile ethnography provides the most benefits during the innovation process (i.e. concept testing, physical samples or both)?
4. Does mobile ethnography provide additional insights than those achieved with traditional methodologies such as focus groups?

3 Methodology

3.1 Pre-launch Consumer Review

A Pre-launch Consumer Review via mobile ethnography was tested with a live MLA partner project that involved product prototypes and packaging designs.

This approach was recommended as the original research objective was to understand sensory appeal, concept relevance and fit with consumer behaviour, and any critical optimization to the product needed to lower the risk of failure post launch and to ensure the ultimate sustainability of the launch on-going .

After consulting directly with the client it was learnt that in fact, they were not at a stage where they could provide “near-finished” prototypes and instead were earlier on in the development process and needed some guidance around the overall sensory profile, flavour variants, pack designs, proposition, naming conventions and possible flavours that could ultimately be included in a range.

This provided fertile ground for us to test the mobile video ethnography. Not only would we be testing the meat chip itself (product), but in 4 different flavours and with a bundle of marketing materials (concept). In a focus group, this would have been challenging to get through in 90 minutes (or even 120 minutes); however with the ability to send the products and marketing stimulus home to target consumers, we were able to breakdown the tasks over the course of a week to allow each piece of stimulus to be given fair and equal focus.



Figure 1: Product Stimulus

3.1.1 Stimulus assessed

As we had limited numbers of prototype samples, it was critical that they be handled with the greatest of care to ensure respondents received the products on time and in their optimal state (i.e. not broken, wet, or heat altered as can sometimes happen with AUS Post courier services).

Each respondent received a hand-delivered package of materials that included:

- 4 meat chip flavours (Refer to Figure 1): Sweet Chili, English Mustard, Korean Bulgogi and Peppercorn
- 4 concepts that included branding, artwork, claims and a sensory description of the product
- 2 different names for the chips
- 4 pack designs
- 24 conceptual flavours that could potentially be part of the meat chip range

The consumers had a week to assess all the stimulus and were required to follow a “Do Guide” which instructed them which concepts to start with and then which products to taste, in each of the two films they made of their assessment and trial. The product stimulus was assessed one flavour at a time while the concept stimulus was assessed comparatively over the course of the two films (the first two in film one, then the next two in film 2, then all four at the same time.)

3.1.2 Target sample

Twelve target consumers living in the Brisbane area were recruited from the WMT consumer panel using standard industry screening methods. This centralized location was selected to allow the manufacturer to hand deliver the prototypes to WMT head office so they could be hand-delivered to respondents.

The structure of the sample was designed to cover the following criteria:

- Main or joint grocery buyers only (familiar with the snacking aisle)
- All to have reduced their meat consumption in the last 18 months (for various reasons, not only for health reasons)
- All to be non-rejecters of beef, lamb
- All to be actively seeking products that contain protein (plant-based or animal based)
- All to be seeking out “healthier” snacks with a specific benefit (e.g. satiety, muscle-building, low sugar or carbs, high protein, gluten-free, convenient format for out of home, etc.)
- Natural fallout of life stages (SINKs/DINKs, Younger Families, Older Families)

3.1.3 Assessing the meat chips and concepts

The Pre-launch Consumer Review via mobile ethnography was co-created with FMCG clients globally to center around the 6 Ps (6 brand levers) most commonly used to guide the marketing mix prior to launch as well as to help assess the success of the launch afterwards:

- **Proposition** - What the product stand for, its values, benefits and reasons to believe
- **Packaging** – The product’s appearance, the sensory cues it provides, the functionality
- **Product** – How well the product performs against the expectations over time in a typical time and place when they would normally consume the product
- **Price** – What the consumer is willing to pay, the regular and promotional price relative to other products they currently buy for the same occasion
- **Placement** – Where the consumer expects to find or wants to find this product
- **Promotion** – How the consumer expects to hear about this product, credible sources, context needed

To both keep the product affordable and to ensure respondents stay engaged and complete the assessment quickly and accurately, the approach typically includes two film tasks only. Those two film tasks that respondents are asked to complete can range from an in-store task and an in-situ task so that both the shopping context and consumption context can be captured. In this case, because there was so much stimulus to get through, the respondents were asked to do two in-home tasks which allowed us to split the stimulus set up into manageable chunks.

Over the course of the two film tasks, respondents were asked to respond to questions and prompts around the appeal, uniqueness and relevance of the meat chips in the context of their typical snacking behaviour as well as give candid feedback on the respective marketing materials in relation to the 6 brand levers.

The Meat Chips Proposition, in the form of 4 different full concept expressions, was evaluated by the 12 respondents on film without a moderator present, to gauge their genuine reaction to the overall idea. Respondents assessed the idea across a number of key dimensions and spoke to each of these while they showed us the stimulus they were referring to:

- Comprehension of the idea
- Overall appeal – Liking
- Fit of the 2 different names to the idea and the product what first came to mind when they heard these names
- Relevance of the proposition to their snacking needs
- Uniqueness to what they had seen or heard of in the market
- What they liked/disliked about 2 different pack designs
- What stood out on 2 pack designs (e.g. benefits, visual cues, ingredients, etc.)
- Whether the products looked like good value, and what they would expect to pay for them
- Finally, they were asked whether the proposition and marketing material would drive them to want to seek out and try the product

Subsequently, the same respondents tried the 2 samples assigned to Film 1 monadically so they could focus on and respond to the following questions about each product profile specifically:

- What does the product look like, smell like, taste like? How does it make you feel?
- Does it taste like you thought it would based upon the description on pack?
- Is there anything you would change about the product?
- Would you likely purchase this meat chip on an ongoing basis?
- How often do you think you would purchase them

This line of questioning was repeated in Film 2 with the remaining stimulus: 2 concepts, 2 pack designs, 2 product flavours and a list of 24 possible flavours. At the end of Film 2, respondents were asked to show us which concept was most appealing and why. Then they were asked to show us the pack design they like the most and the one they like the least. Finally, after trying all 4 flavours of meat chip prototypes, they were asked whether they would buy any of these again, and if not, why. Respondents were also asked to consider how they would want to find out about these snacks and where they would expect to buy them (e.g. which supermarket aisle and/or other channels they would want to find them).

3.1.4 How Meat Chips performed in the eyes of the Target Customer

Overall, the idea of a crispy meat chip was a winner but there was very clear consensus that there is still work to be done on the product design and the marketing material to meet the expectations of target consumers. Based on the analysis of consumer-generated videos showing individual feedback about the product, pack and proposition, WMT was able to provide the client with actionable recommendations on next steps in the development process from minor tweaks to the product itself, to more major changes around the concept, the naming conventions, the flavour range and potential channel opportunities. Results were delivered in a written report and supported by 20 minutes of highlight reels based on the consumer-made footage and curated by the qualitative researcher to bring the story to life and connect the client directly with the consumer (Refer to Figure 4 for a link to an example highlight reel)

The following key learnings were shared with the client in addition to MLA:

- The idea of a meat chip that comes in different flavours and crunches like a potato chip truly excites the target cohort who enjoy meat and love chips but are aspiring to healthier eating habits. It is highly relevant and off-the-scale unique in the context of savoury snacking options.
- The promise of a 100% Quality Australian beef chip that is high protein, low fat and gluten free is key to this product finding a place in consumers' regular snacking repertoire.
- The imagery of the chip along with the sensory descriptions laid out in a FAQ format lower the risk of trying something they have no palate experience with but also set very high expectations. The flavours are mostly appealing but conjure up associations with the strong flavours found in gourmet chips which sets the flavour bar very high. Consumers expect the product to be moreish like a gourmet chip.
- The name Chipstas makes the most sense but beyond that, there is work to be done to create one visual concept that is relevant to a broad target. This will be a matter of combining the best elements of each concept and ditching the Hipster with the Covid mask.

- The four pack designs are all appealing. The various fonts and background colour hues and orientation are a matter of personal preference and in reality are not considered by shoppers as much as the information and cues on the front; the colour blocks signaling the flavour variant and product imagery which they will use to select off the shelf. Putting a lens on what consumers will see from the shelf reveals which pack attributes to leverage and which are not adding anything to the selection process.
- The first bite of a meat chip is dynamic. The thin non-uniform appearance and crispy texture nail it and exceed expectations for what they expect from a meat chip. But by the time respondents work their way through each flavour, the majority find the chips lacking differentiating aroma and flavours, except for Peppercorn.



Figure 4: Link to example highlight reel in the final report on meat chips. Hover mouse over image and then Control click to access the video

3.2 Concept Test

A Concept Test via mobile ethnography was piloted with two MLA concepts in development. These two new ideas aim to add value to the overall category: Sustainable Meat and Meat as a Superfood. MLA wanted to sense check these ideas with target consumers in their context in order to gauge the level of appeal before investing more time and money in developing them.

There were two key reasons why mobile ethnography was employed for concept testing rather than conventional focus groups:

- MLA wanted to witness first hand what consumers think about meat, its benefits and its relevance to sustainability and hear it in their words so that future messaging is credible and relevant.
- MLA wanted to understand where this ethnographic approach provides the most benefit during the innovation process and as pilot was being done for product testing with Jim's Jerky, this project proved a useful testing ground for concepts

The same respondents that were recruited for the Meat chips product testing were also leveraged for this concept test as the target profile was the same and savings could be gained by utilising the same sample. The concept test was done on different days from the product test over the course of a week and included three separate film tasks all done in-home.

Basic concepts were put together by MLA with strawman concept visuals, pack format and pricing. WMT tailored the concepts to a consumer-friendly format so that the ideas could be assessed fairly and with as little impact as possible from variability in the presentation of the ideas.

3.2.1 Stimulus Assessed

The concept boards were printed out in full-colour and put in envelopes with codes to help respondents refer to the correct stimulus when following the Do Guide. These concepts were hand-delivered at the same time as the meat chips.

As the Meat as Superfood concept needed some context around it for the ideas to make sense to consumers, an explanation about the concentrated nutrients that are found in certain cuts of meat was provided for respondents to read before they assessed four executions of this idea. (Refer to Figure 5 for the explanation to set the context in Film 1). Respondents were then asked to assess four different executions of this idea of Meat as Superfood: Join Health, Muscle Beef, Vitality and Immunity. (Refer to Figure 6 for the four concept executions).

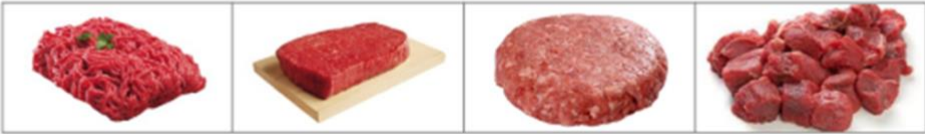
The Sustainable Meat concept was meant to replicate what respondents would see in-store so minimal text was provided and respondents were encouraged to assess the overall idea via the pack mockups. (Refer to Figure 7 for the concept stimulus respondents assessed in Film 2).

Red Meat is one of the most nutrient dense foods, both as a **complete protein source**, and as a **provider of important vitamins and minerals** like: Iron, Zinc, Potassium, Vitamins D & B12 and Omega 3, plus many more. Many of these nutrients are **lacking in the modern diet**, leading to health and wellness issues.

Closer inspection of different cuts of red meat has revealed there are significant **natural variations in the concentration** of these nutrients.

With careful selection, it's possible to produce cuts of red meat with superior nutritional properties (20+% more) that can **naturally address a health & wellness issue**.

These red meat products are 100% Beef / Lamb, are all natural and deliver the **same taste and texture** that we currently enjoy and in the forms we're used to.



A

Figure 5: Context for Meat as Superfood stimulus for Film 1


The Stimulus for Film 1.

INTRODUCING JOINT HEALTH BEEF

Rejuvenate wearying joints and maintain cartilage to free yourself of the aches and pains associated with age-related degradation. When compared with regular cuts, **Joint Health Beef** contains superior nutritional properties like:

- **Collagen** a building block of connective tissue
- **Vitamin D** aids absorption of Vitamin C needed for collagen synthesis
- **Zinc** reduces joint inflammation
- **Omega 3** provides joint lubrication

All-natural benefits with the same great taste and texture you love.




JH

INTRODUCING MUSCLE BEEF

Build muscle strength, enhance your fitness, accelerate injury recovery and boost brain development. When compared with regular cuts, **Muscle Beef** is found to be higher in key amino acids, vitamins and minerals like:

- **Creatine** for muscle development & performance
- **Vitamins D & E** to boost hormone production to feel rejuvenated
- **Zinc** to accelerate tendon repair for injury recovery

All-natural benefits with the same great taste and texture you love.




MB

INTRODUCING VITALITY BEEF

Energize your circulatory system and sharpen your mind, overcoming feelings of tiredness and lethargy and replacing them with feelings of wellness and vitality. When compared with regular cuts, **Vitality Beef** is found to be higher in key vitamins and minerals critical to healthy blood flow.

- **Iron & B12** boosts red blood cell production and enriches oxygen levels throughout your body
- **Potassium** makes your nervous system work effectively
- **Omega 3 & B12** accelerate brain cell regeneration and enhance feelings of positivity

All-natural benefits with the same great taste and texture you love.




VB

INTRODUCING IMMUNITY BEEF

Power up your immune system to fight off colds, flu, and other viruses. Reduce the risk of being struck down by chronic disease while enhancing wellness and slowing down the process of cell damage that comes with aging. When compared with regular cuts, **Immunity Beef** contains higher concentrations of those elements your body needs to fight sickness.

- **Protein** the key building block needed to create antibodies
- **Zinc & Vitamin D** critical for enabling an immune response
- **Iron** helps immune cells to multiply
- **Vitamin E** is a key antioxidant, slowing down the aging process of cell damage

All-natural benefits with the same great taste and texture you love.



IB

Figure 6: The four concept executions of Meat as Superfood as stimulus for Film 1

The Stimulus for Film 2.



Figure 7: The Sustainable Meat concept stimulus for Film 2

3.2.2 Target Sample

Twelve target consumers living in the Brisbane area (refer to Figure 2) were recruited from the WMT consumer panel using standard industry screening methods. The same respondent sample was used for the concept testing as for the product testing to consolidate recruitment and delivery of stimulus.

The structure of the sample was designed to cover the following criteria:

- Main or joint grocery buyers only (familiar with the snacking aisle)
- All to have reduced their meat consumption in the last 18 months (for various reasons, not only for health reasons)
- All to be non-rejecters of beef, lamb
- All to be actively seeking products that contain protein (plant-based or animal based)
- All to be seeking out “healthier” snacks with a specific benefit (e.g. satiety, muscle-building, low sugar or carbs, high protein, gluten-free, convenient format for out of home, etc.)
- Natural fallout of life stages (SINKs/DINKs, Younger Families, Older Families)

3.2.3 Assessing the concepts

Respondents were asked to make 3 self-filmed videos in their own home. In the first film they were asked to record their first reactions while looking at the Meat as a Superfood explanation and responding to the information and then monadically going through the four executions and answering specific questions about each. For the second film task, respondents were asked to record their first reactions to the Sustainable Meat concept and answer specific questions about what they understand and like or don't like about the pack mock-ups. In the third film, respondents were asked to show what they have in their snacking "stash" that could be similar to the two ideas they evaluated (Meat as a Superfood and Sustainable Meat).

The key dimensions that respondents spoke to while they assessed the two ideas included:

- Are the ideas appealing?
- Does either idea sound like anything they'd heard of before?
- What foods do they currently have in their diet that are eaten for specific reasons/benefits?
- Other products or packaging they have recently noticed that do a good job around sustainability or ethical sourcing
- What do they think of the concepts for Meat as a Superfood? What do they like/dislike and does anything confuse them?
- What do they think of the concept for Sustainable Meat? What do they like/dislike and does anything confuse them?
- Is there anything they would chance about either idea?
- Would they buy either of these in the future? Why or why not?
- How would they want to hear about these new offerings? What are credible sources?
- Where would they expect to find either of these offerings?

3.2.4 How the meat concepts performed in the eyes of the Target Customer

Both the Meat as Superfood and Sustainable Meat concepts were highly appealing amongst the target cohort. However, the Sustainable Meat concept resonated more strongly and genuinely addressed more of the tensions these consumers have around their meat consumption. While it is recommended that MLA progress with both ideas, the Meat as Superfood concepts require some optimization before they are ready to be tested quantitatively to determine the size of the market.

The Sustainable Meat idea hit the mark in every way from the clarity of the proposition to the way the pack visualizes the benefits, believability of the offering and even the proposed pricing. There are a few areas of optimization around the pack and recommendations for how consumers would like to hear about this product and who might be credible sources for endorsement.

The following key learnings were shared with MLA:

- Respondents want to reduce their red meat consumption because they feel bad about the impacts, not because they don't like eating red meat
- Meat as a Superfood & Sustainable Meat both solve the problem of feeling bad about eating red meat but the level of enthusiasm for a carbon neutral beef is much stronger than for a benefit-led meat
- The perceived uniqueness of the sustainable meat concept explains the high level of interest; a carbon-neutral beef is something they've never seen before.
- Meat as a Superfood is novel but these respondents already have plenty of alternative available to them that provide similar benefits to those communicated in the concepts
- Carbon-neutral beef is crystal clear; Benefit-led meat is confusing
- A sustainable meat offering is arguably more compelling than organic beef
- Both concepts can command a premium for specific cuts
- Regardless of the medium used to communicate these new ideas, the credibility of the messenger is non-negotiable

A full report has been submitted to MLA on the outcomes of this concept test, including 25 minutes of highlight reels supporting the analysis and recommendations and curated by the qualitative researcher. For an example of one of these highlight reels please refer to the link in Figure 8.

In addition, MLA now has access to 6.5 hours of raw footage generated by the respondents. This footage can be re-purposed for use internally to search, edit and clip into future presentations.



Figure 8: Link to example highlight reel in the final report on the Meat as Superfood and Sustainable Meat concept test. Hover mouse over image and then Control click to access the video.

Results

The main focus of ‘the results’, for the purposes of this report, are in relation to whether mobile ethnography has worked in providing MLA with an efficient and effective alternative to leveraging consumers early on in the innovation process to decide which projects should go ahead.

The success of these two pilots was down to a number of factors related to mobile ethnography, which don’t necessarily relate to whether a successful market entry is realised for any of the ideas. In fact, the mission has been accomplished if MLA is able to leverage the consumer feedback from this study to optimize, prioritise or put on hold any of these projects with a greater sense of confidence than they would have had without the consumer input :

- **Product Testing Outside the Fishbowl:** Rather than developing the Meat Chips offering internally and using family members, consultants and MLA staff to validate its appeal, Meat Chips were tested with target customers, in a time and place when they would normally snack and over the course of a week when they could trial 4 different flavours and get feedback from others living in their household. The approach was also flexible enough to accommodate the changing needs of the product and marketing teams and offer a solution to testing many pieces of stimulus in a way that wouldn’t fatigue the respondent and compromise the results.
- **Product Experience instead of Product Evaluation:** Sensory testing is often conducted in labs or in focus groups where the digital survey or moderator controls what, when and how the products are tasted. While this is sometimes the best approach when a controlled environment is critical, that kind of approach doesn’t allow for the respondent to experience the product in a time and place, and in the way they want, which is how we normally eat, especially snacking. By allowing the respondent to do their tasting at a time of their choosing, we are more likely to get valid and complete responses and we can see their reactions and behaviour in addition to their words (e.g. picking the meat chips out of their teeth)

- **Concept Testing in context:** Being able to see and hear consumers in real time as they read through a concept reveals much more than whether they like a concept or not based on survey questions. Their non-verbal communication and “thinking out loud” often reveals things that wouldn’t fit in a code frame such as the level of confusion around words, images, ideas or what provokes them, frustrates them, amuses them and excites them. This approach also provided a window into the consumer’s snacking repertoire in a way that a survey or even a focus group couldn’t as they showed us products that they thought did the same “job” as what the concept was promising to do. A consumer’s competitive set is often much broader than the categories we confine ourselves to because of the way retailers impose categories on producers. This is difficult to accurately access when asking respondents to recall what they normally buy or what’s in their pantry at any given time.

For both the Meat Chips product test and the Meat as Superfood & Sustainable Meat concept tests, there was a depth of learning that has equipped MLA with strong insights that will enable them to make decisions about these projects based on consumer input rather than internal analysis.

4 Discussion -

WMT Mobile Video Ethnography vs Conventional Focus Groups

When compared to conventional focus groups, this mobile ethnographic approach allowed for genuine individual responses without the burden of moderator or peer influence. It also allowed for unadulterated interpretation of the responses through use of video highlight reels that while synthesized and curated by a qualitative researcher, demonstratively show rather than tell how consumers responded to the product, pack and conceptual stimulus. This approach also provided a snapshot of target consumer lives, their beliefs, values and attitudes spoken or revealed by them directly down the lens of their smartphone. This will provide MLA with consumer touchpoints beyond these two projects as the tasks were set up to give consumers permission to talk about meat in general, their relationship with it and their pain points. Something that they are very passionate about as the footage reveals.

In terms of the overall approach taken, this mobile ethnography pilot has addressed the project's stated objectives:

1. *Determine which project should go ahead*

While MLA is likely to go ahead with both Meat as Superfood and Sustainable Meat concepts, it was clear from the study that Sustainable Meat is likely to have more resonance with consumers at this point in time and the concept is already well-formed and needs little optimizing. Jim's Jerky's Meat Chips are also progressing but with some crucial optimization to product and proposition needed before it's ready to present to retailers.

2. *Observe genuine pain points and pleasures of consumers as they relate to the meat category*

3. *Hear how consumers talk about meat, benefits and sustainability so that messaging is credible and relevant*

The 40 minutes of highlight reels across the two projects, curated by the researcher and aligned with the key insights and recommendations has enabled MLA to meet the target consumer in their space and hear what they had to say about these ideas without the influence of peers or a moderator.

4. *Understand where this ethnographic approach provides the most benefits during the innovation process*

Testing Concepts in Context and Testing Product Experience in Context using mobile ethnography does have a place in the innovation process. After piloting the approach with these two projects, we learnt that the "strawman" concepts tested for Meat as Superfood and Sustainable Meat were tested at the perfect time, before a great deal of time and resource when into design work. Consumers were not only able to assess the propositions, the benefits, the pack design and even the price, they were able to help craft the concepts by providing the language and the benefits that would be most credible to them. This will allow MLA to go back and refine the concepts so they are ready for quantitative testing, knowing target consumers have had input into their design.

In regards to Meat Chips, mobile ethnography was very effective and efficient in testing the product in several flavours and providing guidance around the proposition, pack design and potential flavour range. While this exercise could have been done in a focus group environment, we wouldn't have gotten the depth of response to the products (being tasted over a week) nor would we have heard the unfiltered individual responses to the marketing material. There is no doubt that when a moderator is present along with a group of peers, consumer response is tempered at best or false at worst. The only aspect of this pilot that we would recommend doing differently next time is to present consumers with strawmen propositions like was done for the Meat as Superfood and Sustainable Meat concepts as consumers would've been able to feed into the language, tone, benefits and even visual cues most appealing and relevant to them before spending lots of money on designing promotional material and pack designs on professional mockups. Refer to Figure 9 below for an indication of where we believe mobile ethnography would be best applied:

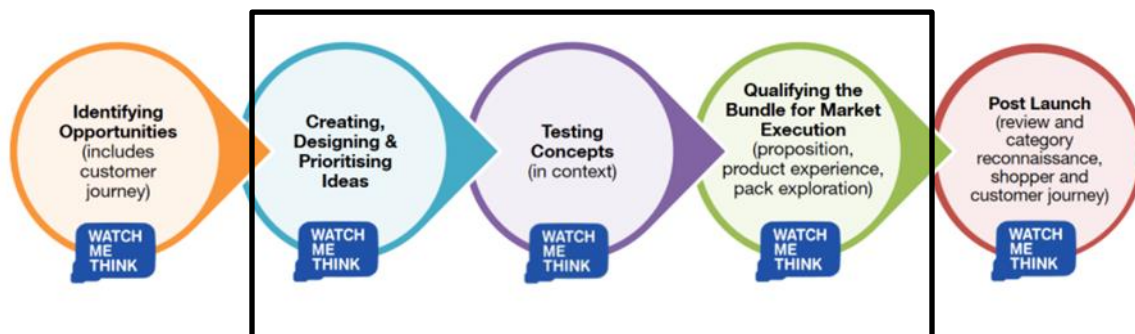


Figure 9: Key stages of innovation and where WMT mobile ethnography is most effective for MLA Feasibility and business case

While the main focus of this pilot was to test mobile ethnography as an alternative or addition to conventional focus groups and one could argue that this was proven to be both feasible and cost effective, we did amass enough insight to feed into the broader discussion around the feasibility of each of the three projects and considered it worth mentioning below:

The Meat Chips (Refer to Figure 10)

We learnt the client has a strong case for progressing to further development. The idea was appealing and truly unique and target consumers articulated a genuine need for a savoury snack that doesn't make them feel guilty or harm their bodies. The triple benefits of high protein, low fat and gluten-free were highly relevant amongst mainstream consumers and across many categories, particularly snacking. The key will be to produce a chip that delivers to their high expectations based on the premium packaging, which they associated with gourmet potato chips. Whatever flavours go ahead, they need to be recognizable and as bold as the flavouring on potato chips. The meat flavour should be secondary. The thin crispy texture of the chip was surprisingly moreish but there are issues with the product becoming sticky when mixed with saliva and this causes the product to get impacted in the teeth. This is not a deal-breaker for this cohort of consumers, but it is a watch out. Aside from feedback and recommendations around the product, the client also received very pointed feedback around how the proposition needs to be executed if it is to resonate with the broad target that is genuinely interested in this product. Meat Chips are not just for hipsters and if it's positioned that way, it is more likely to remain a niche product.

Meat as Superfood

We learnt that as the concepts stand, the idea of adding value to the meat category by providing cuts that contain concentrated nutrients that deliver to specific benefits (e.g. Muscle Beef, Joint Health Beef, etc.) is worth progressing with industry partners. However, this idea is still in a nascent phase and the feedback from target consumers highlighted several key areas of the idea that need re-thinking or refinement before full concepts could be tested in a quantitative manner to size up the market. Refer to Figure 11 for some of the recommendations that came out of the mobile ethnography concept test.

Sustainable Meat

We learnt that this concept is highly appealing, relevant and unique. Although a qualitative sample is not enough to form a business case around this concept, the response was so unanimous and overwhelmingly positive that it's clearly an idea that is in step with the times and should be progressed with industry partners. Like the Meat as Superfood concepts, this concept is in a nascent phase and still needs to be tested quantitatively with more work around pricing to ensure it makes sense for the producer and the retailer; however, unlike Meat as Superfood concepts, this concept is in a suitable state to test as is (aside from pricing). Refer to Figure 12 for a summary of the response to the concept.

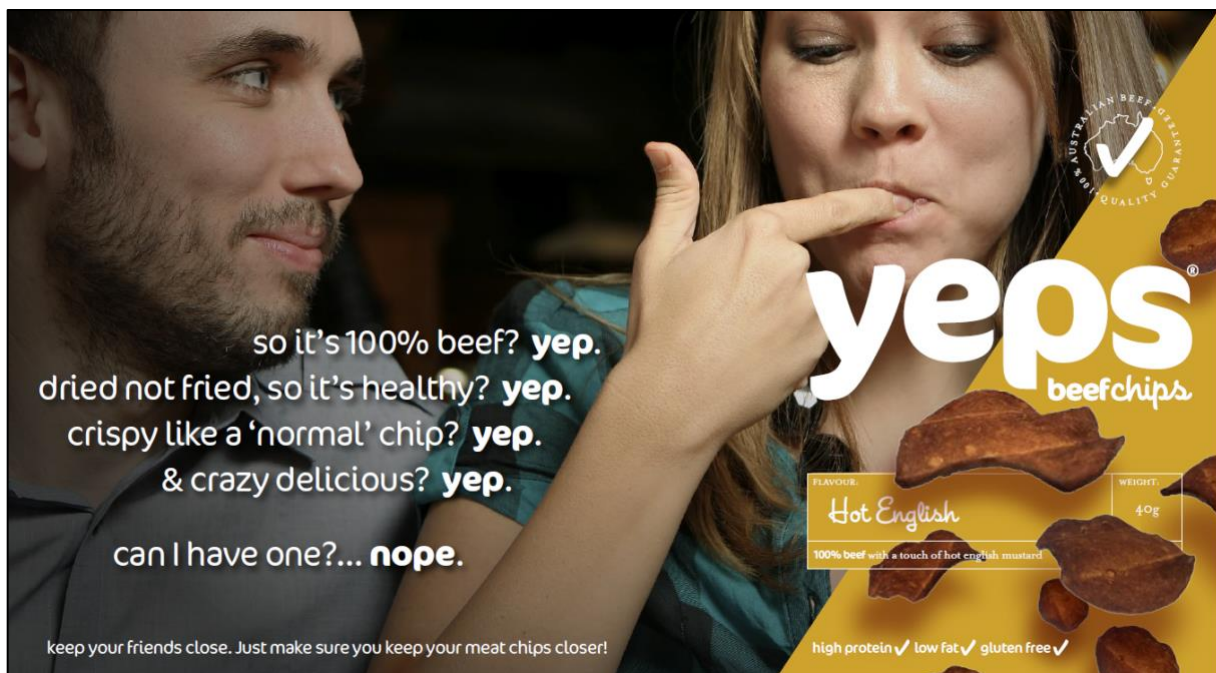


Figure 10: Meat Chips example concept (the visual concept execution that was most appealing but with the Chipsta name, not Yeps)

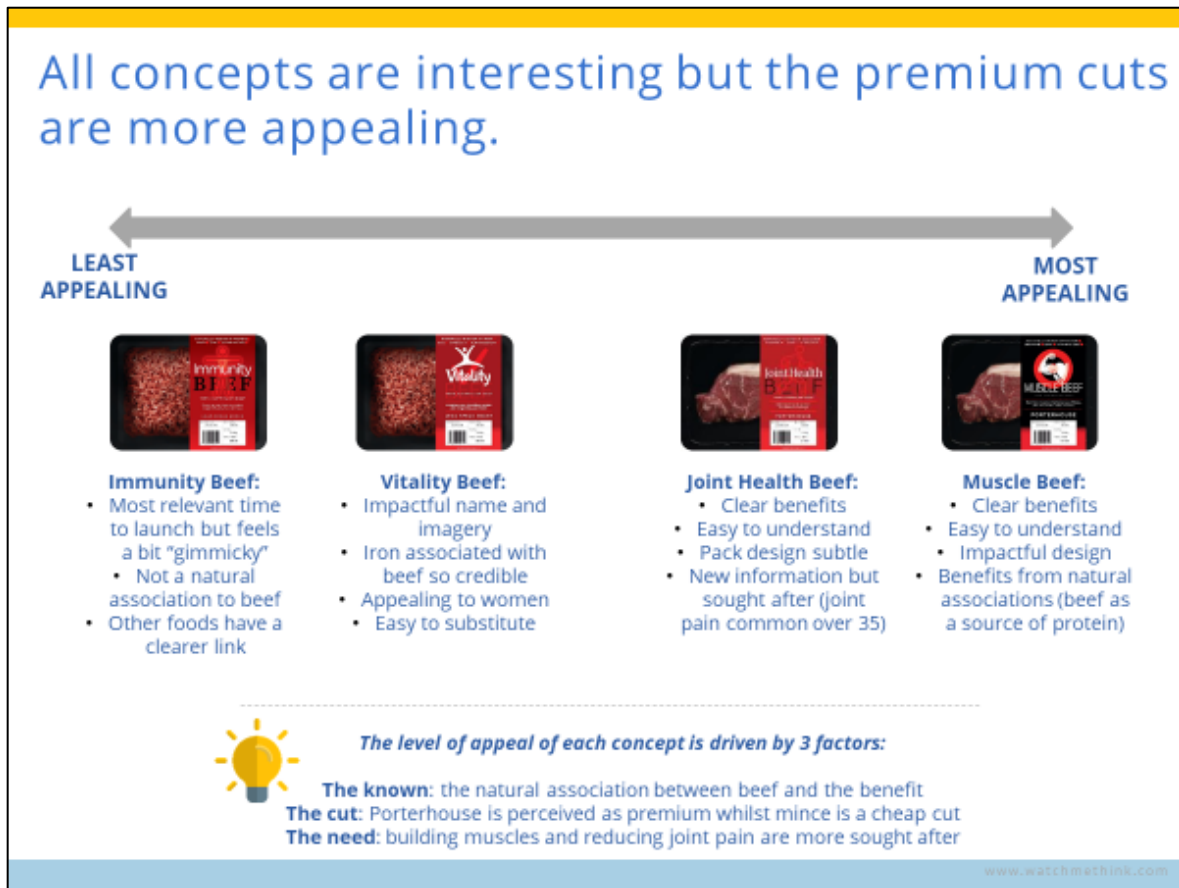


Figure 11: Example output based on target consumer feedback on the Meat as Superfood concepts

The pack ticks all the boxes.

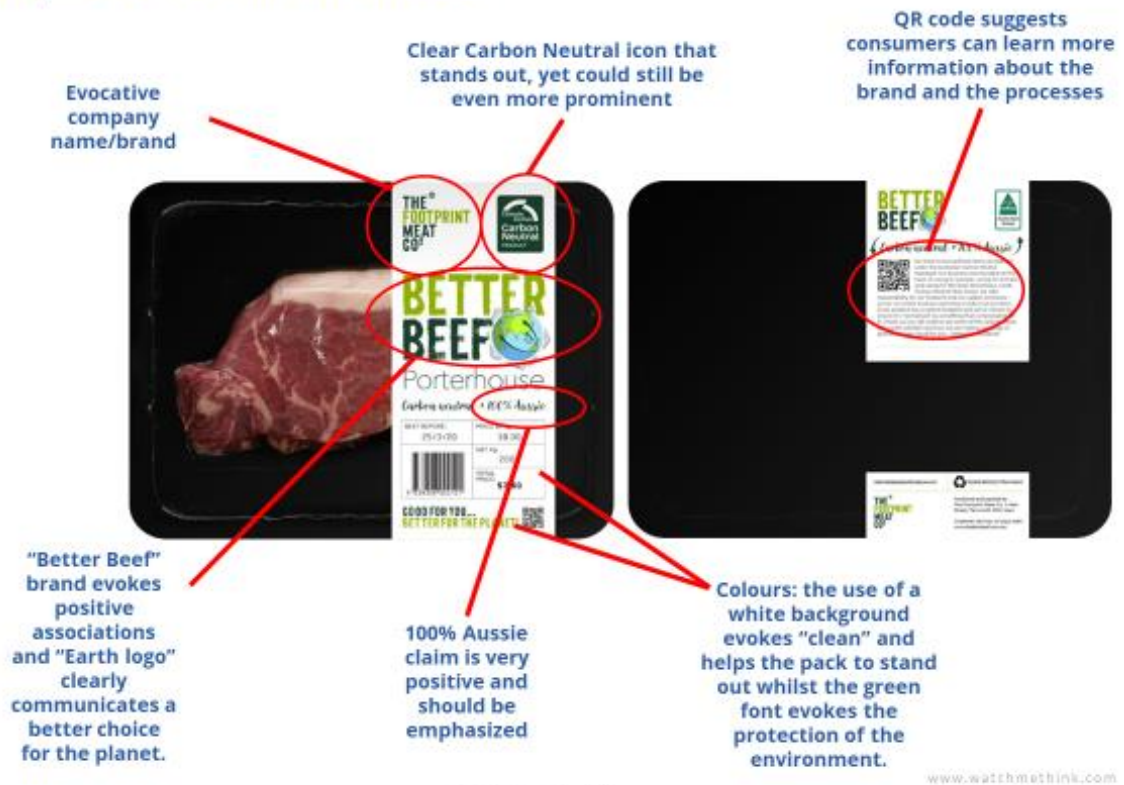


Figure 12: Example output from Sustainable Meat concept test

5 Conclusions/recommendations

Engaging target consumers early on in the innovation process will indeed lower the risk of progressing ideas that are not ready for market. Testing products and concepts via the mobile ethnography approach developed by Watch Me Think will provide MLA with consumer connection beyond Power Point slides and statistical charts. The insights mined from in context consumer-made footage along with the curated highlight reels produced by the qualitative researcher will allow MLA to make decisions more quickly, more cost effectively and with the benefit of ready-made storytelling assets that can be used with internal stakeholders as well as retailers :

In terms of where this approach is most beneficial, the following discussion points are relevant:

- When testing products for launch as a “disaster check,” the stimulus should be as close to market quality as possible and should be in as near-finished packaging as possible and with one proposition to provide context. In this case a Pre-Launch Consumer Review lean solution is an appropriate approach and will be a very cost effective and efficient way of a) ensuring the concept bundle is ready for launch and b) provides the producer with compelling consumer footage to share with retailers.
- When products and concepts are in an earlier stage of development, such as they were with Meat Chips, and there are several prototypes, several concept executions and several pack designs to test, a mobile ethnography approach can still be leveraged as it was in this pilot; however, the cost and timelines will be more than for a lean solution. One could argue that this was a more consumer-friendly and authentic approach than a focus group as respondents were able to trial the products and review the concepts over a longer period of time than they would in a focus group therefore minimizing fatigue and giving each piece of stimulus equal attention and depth of response.
- The Meat as Superfood and Sustainable Meat strawmen concepts were ideal stimulus to put in front of consumers at this early stage of concept exploration. By leveraging this approach, we were able to not only get typical feedback on appeal, relevance and uniqueness of the concepts as you would in an online-survey or focus group but also we were able to hear how the consumers talked about these ideas in their language enabling MLA to refine the concepts before progressing to quantitative testing.

6 Key messages

The following are the key messages recommended to convey to Red Meat Producers or Processors who are considering embarking on innovation.

- Red Meat still plays a central role for consumers even if they are trying to reduce the amount they eat. There is a genuine need around helping consumers feel “less bad” about eating the red meat they have always enjoyed and want to continue to enjoy.
- Snacking is indeed a fertile space for meat to play in because of the swell in interest of high protein, low sugar and gluten-free. The love of savoury snacks has been built around exposure to potato chips and the way that category has blossomed. Those in the red meat space could learn a lot from observing how the potato chip category has evolved with macro trends around *authenticity, health, provenance, simplicity*
- It is never too early to test product ideas with target consumers. Investing a little time and money at the beginning of the innovation process, if set up with clear hypotheses, will save time and money in multiple iterations of prototypes and concepts in the long run.