Steve Greenland - Visual Perspectives for Emerging Markets Research (work in progress)

Abstract
Lyons, Standard Chartered’s Chief Economist (2008) indicates emerging markets are crucial for the future health of the global economy and there are potentially huge returns for organizations appreciating these consumers. However, population data associated with developing countries are often unavailable, or lack the necessary detail for effective market segmentation. This paper provides an effective visual research framework for describing and evaluating market segments in emerging economies.

Historically visual research, in a marketing context, has been overlooked as an effective tool in the researcher’s arsenal. However, it is particularly helpful for enhancing understanding of consumer segments in emerging markets…

This qualitative-visual research approach involves taking a cross section of over 250 households from a major Sub Saharan African capital city. The research is sponsored by Africa’s Market and Social Research Association and data were collected in September 2008 by leading research agencies operating in the region (including ACNielsen, Research International and Synovate). Over 20 images were collected for each household along with other more traditional segmentation and lifestyle data. The visual data are analysed by creating a photo montage for each household, which are then ranked in terms of perceived living standard. Initial analysis reveals distinct divides, which allows households to be grouped together into broader lifestyle segments. Analysing the visually derived segments against more traditionally defined market segments will help reveal other key life quality indicators that need to be included when more traditional segmentation based approaches are applied to emerging markets. Furthermore the visual data facilitate organisations in gaining a swift and detailed overview of societal composition in an emerging economy. Visual research is therefore a valuable compliment to other more traditional approaches to market segmentation.

Introduction
Emerging markets are complex and data taken for granted in more developed countries are not so readily available. This complexity, in conjunction with the inappropriate application of traditional Western research approaches, can result in unreliable or inaccurate views about these markets.

This paper presents a visual research methodology for identifying and evaluating market segments in an emerging economy. (The research is supported by the MSRA, Africa’s Marketing and Social Research Association - www.msra.or.ke).

Emerging Markets
Emerging economies present particular challenges to international marketing researchers. Population data are frequently unavailable, or lack the necessary detail for effective market segmentation. Where population data are available their reliability must be assessed. For instance census data are often questionable (Philips, Anderson and Phindiwe Tsebe, 2003) frequently under representing certain population groups.
Compounding the comparative lack of reliable population data is the fact that developing countries have extremely complex social structures. For example, Kenya, the focus of this paper, has one of the world’s biggest rich-poor divides (UN-Habitat, 2003), as well as over 30 tribal groups (Kenya Central Bureau of Statistics, 2002). The population is also extremely dynamic with high proportions of workers living in densely inhabited urban centres but supporting family members living upcountry. Nairobi, Kenya’s capital, therefore has a hugely diverse population.

While extensive market and social research has been conducted in emerging markets, this tends to focus on specific societal groups and there is a dearth of work examining societal make up as a whole. Perspectives on the society are therefore frequently unbalanced and conflicting views on the different groups in society result. Furthermore international marketing research conducted in emerging markets also frequently adopts traditional Western approaches, which may not be applicable given the significant disparities (Davies and Young, 2002).

**Visual Research**

The complexity of emerging markets and the gaps in available research data help explain the more prevalent use of qualitative research (e.g., see Craig and Douglas, 2001). While visual research is more qualitative in nature, historically it has been somewhat overlooked and undervalued as an effective tool in the marketing researcher’s arsenal. Visual data is however being published with increasing frequency in sociological research (Harper, 2005).

Visual research has been most commonly used in social anthropology and sociology, where it typically focuses on particular groups of the population (Banks, 2001). However, it is becoming more frequently used marketing and market research (e.g., Orient Pacific, 2003). As with most qualitative techniques criticism typically includes subjectivity and researcher integrity. All qualitative data rely on the researcher’s interpretation in reporting the key issues identified from the mass of descriptive information (e.g., Greatorex, 1997).

**Research Methodology**

An initial visual pilot study conducted in Nairobi to aid market understanding revealed the potential for a more structured visual research application to market segmentation (see Rayman-Bacchus and Greenland, 2007). This study involves capturing images across from 250 households from Kenya’s capital city Nairobi, in conjunction with general demographic and quality data. Details of images collected are presented in figure 1:
Given the sensitive nature of capturing and using household images, the data collection process adhered to the European Society for Opinion and Marketing Research (ESOMAR) strict guidelines for collecting market research data. Respondents participating in the study also provided permission for the images to be used in subsequent publications.

Analysis adopted a grounded theory approach (see Figure 2).

**Figure 2 Grounded Theory Approach to Visual Research**

1. Collect visual data
2. Identify themes or develop concepts
   - Review and compare other data (in relation to identified themes)
   - Collect additional data to support or negate identified themes
3. Confirm / discard / refine / elaborate themes / concepts

- USE MULTIPLE METHODS / TRIANGULATION TO ADD TO DEPTH OF UNDERSTANDING
- UNDERSTANDING IS BASED ON FAMILIARITY, I.E., THE LONGER YOU SPEND WITH IT THE GREATER THE INSIGHTS

(Based on Denzin & Lincoln 2005; Flick 2002; Taylor & Bogdan 1998)
The visual data were analysed by creating a photo montage for each household, which were then ranked in terms of perceived living standard using a variety of visual lifestyle cues.

**Conclusions**

Observation and content analysis of the montages revealed distinct breaks or divides in terms of living standard, which allows households to be grouped together into broad lifestyle segments. Analysing these visually derived segments against the more traditionally defined market segment data also helped reveal the key life quality indicators that need to be included when more traditional segmentation based approaches are applied to emerging markets. Such aspects include shared utilities / sanitation, power supply, household product ownership, communal living and the ratio of income earners to dependents. Ongoing analysis will facilitate further insights to these aspects.

**References**


Urry, J., 2001, Globalising the Tourist Gaze, published by the Department of Sociology, Lancaster University.