



Out of this world, and into theirs

'Never work with children', or so the saying goes. But that's not an option for **Richard Ellwood**, Disney's research director. *Lucy Fisher* finds out how he keeps up with the kids

Disney might be in the fantasy-creation business, but it's a business very much grounded in the real world. Or should that be 'worlds', plural: that is, the world that kids inhabit and the one where the rest of us live.

That's the way it feels for Richard Ellwood, Disney's EMEA research director – a man very much caught between these two worlds. His job is figuring out what kids want, which is easier said than done. "The difficulty is that you can't bring children into our world," says Ellwood. Nor can we, as adults, join kids in theirs. But Ellwood's task is to find a way around this in order to deliver the insight Disney needs to shape its strategy.

Research, of course, provides a route to understanding. But Ellwood says he's "not inspired" by traditional qualitative focus groups, or the notion of taking children to a "sterile" viewing facility. "They may not feel comfortable," he says. "And, in group settings, some are very sensitive to peer conformity."

Ellwood stresses the importance of trying to replicate the environment in which children would experience Disney properties – whether toys, games, films, and even theme parks – as well as having to overcome the challenge of communicating with children sufficiently clearly and helping them to feel at ease. And, of course, children's research is also a highly regulated field.

With only five people in his team and a Europe-wide remit, Ellwood often partners with agencies and says he values those with an

CV
RICHARD
ELLWOOD

Ellwood holds a BA (Hons) in marketing from Manchester Metropolitan University, which he describes as a "pragmatic, vocational" degree. "I did a research module as part of my degree," he says. "I thought: 'Nothing else really falls into place if you don't understand your audience'."

2002 – 2005:
Senior research executive, BMRB

2005 – 2008:
Senior research manager, Vodafone, leading brand and marketing research and establishing a quantitative and qualitative employee research programme.

2008 – present:
Research director, The Walt Disney Company, with responsibility for managing research to develop or evaluate content, marketing and product initiatives, working closely with franchise leads and division heads.

expertise in children's research. "We purposefully don't have a roster though," he adds. "We find that quite restrictive, from previous experience. I'm always looking for exciting, innovative agencies all across Europe – those with different specialisms: TV, qual, quant, shopper insights."

On the right track

Back in 2008, when Ellwood joined Disney, he set about establishing a 12-country quantitative tracker – now with additional qualitative elements – which could be used to measure franchise performance among children and teenagers across the continent, and which is now widely



► used in day-to-day marketing decision-making.

"We needed to have a continuous dialogue with our audience," he explains. "Technology can evolve very rapidly. We need to have our finger on the pulse; to know what's new, what's emerging. We use the quantitative tracker as a barometer. We call it the EMEA Kids' Tracker. When I joined five years ago, I noticed there was a lack of syndicated children's research that was looking at emerging trends across the whole of Europe, so I set up a bespoke tool."

Via this tracker, Disney talks to almost 50,000 kids aged 14 and under, and their parents, each year. Ellwood works with TNS to deliver the data, but says that it's his own team's job to take the resulting "mountain" of information and find out what it all means for Disney as a company, and for its separate divisions.

"The challenge," he admits, "is that I have so many different stakeholders – in TV, in retail, in digital.

"We have to address their needs within that survey and look at media consumption, engagement metrics, content and characters, and we need to deliver granularity."

Ellwood says that the tracker provides a foundation of consumer insight onto which it is possible to overlay additional behavioural data, such as TV viewing habits, electronic point-of-sale summaries and unique visitors to online properties.

"There's one summary each quarter," he explains, "and it is available as a tool for everyone across the European business, on the company intranet."

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Ages and stages

The tracker has evolved quite substantially in the five years since it was established. Regina Deck, director at TNS Infratest, the German arm of TNS, leads the agency's account with Disney. She says that previously the tracker was very focused on the Disney Channel. "Now it's focused on all kinds of media usage. We try to cover the whole range of touchpoints, to look at how the audience gets in contact with Disney, or rather how Disney gets in contact with them."

Deck says the questionnaire structure is roughly 90% the same across Europe, but requires tweaking to reflect the varying competitive landscapes. "The reporting is done market-by-market; it's highly tailored," she explains. "But Disney wants to see at a glance what works well across Europe, so broad trending is key, too."

She also notes how important it is to design the questionnaire in an age-appropriate fashion, and says they often use colourful characters or elements of gamification in the surveys.

But age isn't the only consideration when it comes to designing research with children. Damien Flannagan, one of the founders of Gusto Research – another agency that has been working with Disney for some time – points out that while there are similarities with kids across markets in terms of cognitive development, it is important to consider cultural differences, and the varying impact of media and technologies in markets, when drawing any assumptions.

"There's a danger in generalising too much by ages and stages," he warns. ►

INFINITY... AND BEYOND

Will Disney's \$100m videogame bet pay off?

In recent months, Disney launched Disney Infinity. Part toy and part videogame, Infinity was developed at a rumoured cost of \$100m.

It works like this: Infinity players have to buy small character models, a game disc and a device called Infinity Base. Character models are placed on the Infinity Base, which reads the near-field communication devices embedded in the models and brings a representation of the character into the game world.

The concept is very similar in execution to that of Activision's wildly successful Skylanders franchise, which launched several years ago. "Activision has first mover advantage," says games industry analyst Piers Harding-Rolls, of IHS. "But in terms of distribution and legacy, Disney has a great strength; it's incomparable."

Activision paved the way for Disney, given that there was no established market for such an offering prior to Skylanders' release. Retailers may not have initially understood it, or how to market it. However, Activision's moves set the stage for someone like Disney to come in, says Harding-Rolls.



But will it be a success?

Skylanders certainly has been – generating \$1.5bn in revenue since launch. However, the mobile apps space is proving particularly challenging for big videogame publishers.

Breakout hits from previously unknown players – such as Rovio's Angry Birds, which became a global phenomenon – will no doubt be a cause for concern for Disney.

That said, Robert Porter, analyst at Euromonitor International, believes that Disney's vast amount of character IP could see it eventually "dominate" this new category of games.

"There are many characters that Disney can release onto the Infinity platform, each with their own following already established," says Porter. And of course, Disney now owns the Star Wars franchise – and we're only two years away from a brand new movie release. That could very well be a game-changer for Infinity.





» **Grown-up talk**

Flannagan has been working with Disney on a 200-member community of parents. This is refreshed annually, he says, and a “snowball” effect is encouraged within online discussions, whereby parents talk freely to other parents about issues that are important to them. Respondents are deliberately chosen so that they include both Disney-fans and those that are “ambivalent” about the brand.

Various research approaches are employed by the community, including Skype interviews, video feedback and even coffee mornings – which can work well, Flannagan says, because of the relaxed setting.

Meanwhile, Ellwood notes that the decision to encourage the parents to talk to one another has been particularly effective in generating insight.



Encouraging parents to talk to one another has been ‘particularly effective’ in generating insight for Disney

“It’s been great, as we get a better understanding of their need states through these naturally occurring conversations,” he says. “We don’t introduce a lot of the topics that are discussed.”

But even with these sources of feedback on tap, there must be very little that is predictable these days, when it comes to understanding children. Their world “changes so quickly”, Ellwood says.

Fortunately, he doesn’t seem daunted by the size of the task in front of him. While Ellwood admits that having a huge number of stakeholders across many individual and powerful franchises can leave him feeling pulled in many directions at once, Ellwood says he loves the variety that the role offers. After all, very few people get the opportunity to explore another world. ■

NOT CHILD’S PLAY Conducting research with kids isn’t easy

The challenges associated with kids research are manifold, according to Charlotte Butterworth, qualitative MD at SPA Future Thinking, which works with Disney on brand partnership evaluations, franchise development and merchandise opportunities. “It’s about how you sustain engagement within an adult construct,” she says.

It’s particularly important, she notes, to remember how “literally” kids understand language. Children may not have the range of vocabulary, nor the maturity, to accurately express their feelings, she says – and their feelings are likely to change at the drop of a hat.

“Their likes and dislikes can turn 180-degrees, depending on who they’re with and recent influences,” says Butterworth. As such, she adds, there’s a need to “de-code” body language and to observe how they live at home.

Katie Toll, head of research at consumer insight consultancy Future Foundation, has also done some work with Disney. She says that it’s important for research now to be accessible via newer devices such as tablets. “Make it short and engaging,” is her advice, particularly when it comes to researching kids. She points out, too, that it can be useful to run a qualitative study before a large-scale quant exercise, and to imitate some of the language used by younger generations when trying to delve into their thinking.

But despite the difficulties, Butterworth points out that there’s also much to enjoy about children’s research. “Adults are always stymied by the thought: ‘Is this possible?’” she says. “Children are more open to change; their habits have not yet been formed and they are more open creatively.”