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Locating and leveraging inside sources of consumer insights

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Abstract

Purpose – Inside sources are people who interact with target consumers on a frequent or intense basis. They can have powerful insights about why consumers behave as they do. This paper aims to focus on how to identify, interview and leverage inside sources to uncover new insights about target consumers and how to better engage with them.

Design/methodology/approach – This paper provides field-tested techniques on how to elicit the most useful insights from inside sources. The paper demonstrates how the generated insights can be used for everything from more precise targeting and message development to modifying products and services to increase loyalty, usage frequency or switching behavior.

Findings – Generating novel insights about a unique target market involves four steps: identify, locate, interview inside sources and then apply the insights.

Research limitations/implications – There can be limitations to interviewing inside sources, such as interviewer bias, respondent bias and the Hawthorne effect. Some individuals react differently to different events, and some insights are not generalizable.

Practical implications – Costly wide-scale surveys, laddering interviews or focus groups are not always needed to uncover insights about target consumers. Within 24 hours, inside sources can produce the insights needed to better market products, develop research questions or design interventions.

Originality/value – Generating novel insights about a unique target market can be done quickly and inexpensively. It involves leveraging inside sources – those people who interact frequently or intensively with target consumers.

Keywords Inside sources, Target market

Paper type Viewpoint

Using inside source interviews to generate insights can impressively uncover unique insights that would otherwise be overlooked through much more involved, complicated and expensive forms of marketing research. Inside sources are people who either frequently or intensively interact with the target market in a service-related context. While not credentialed or trained as psychologists, anthropologists, sociologists or marketing researchers, these front-line individuals may have developed unique lay theories about the target market that are unlikely to otherwise be revealed through focus groups (Fortini-Campbell, 1990), laddering interviews (Wansink, 2003) or quantitative means. Locating and leveraging these inside sources can be an insightful way to quickly learn more about a target market, whether they be purchasers of high-end electronics, soft drink switchers, power tool buyers, energy drink lovers or new car shoppers.

Over the past 10 years, we have conducted over 700 inside source interviews for over 200 different consulting projects for groups like the Food and Brand Lab. What follows is what we have learned by developing and perfecting this technique.

Assume we are focused on a particular target market of consumers who behave in a way we would like others to behave. In a marketing context, these might be consumers who buy Brand A versus another brand, consumers who are price insensitive in a particular category, consumers who are frequent users of a particular brand and so on. In a public health context, they can include people who exhibit any behavior we would like to expand or encourage on a wider basis. These might include people who serve and eat vegetables during every dinner, people who recycle, people who use the USDA MyPlate (Wansink and Kranz, 2013), parents with healthy weight children (Bevelander *et al.*, 2014), people who drink more milk than soft drinks and so on. In all of the above instances, the first step is to find inside sources that can help us efficiently generate insights about whatever target market we are trying to better understand.

Using inside source interviews involves questioning and projection. With questioning, the researcher questions an inside source about how a target market of consumers behaves, what they talk about, what related preferences they might have and so on (Plummer, 1984; Wells and Tigert, 1971). With projection, the researcher asks the inside source to project why the targeted consumers behave in the way they do or why they have the preferences they have (Haley, 1985; Wansink *et al.*, 2013). While using third-party projection is uncommon (compared to directly questioning consumers), it

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can tap in to deeper insights from the inside sources, as they have observed the behavior of thousands of people making similar decisions. These inside sources often have subtle insights that would not otherwise be detected by the consumers themselves.

This paper illustrates that field-tested techniques can be used to elicit the most useful insights from inside sources. We then demonstrate how the generated insights can be used for message development, targeting, product design, pricing and placement.

Identifying inside sources

As mentioned earlier, inside sources are individuals who deal with the target market on a frequent or intense basis. For example, if the target market were Fortune 500 CEOs, possible inside sources might be personal assistants, charter flight pilots, the Chief Operating Officer, tailors, tax accountants, attorneys, luxury car dealers or chauffeurs (Fortini-Campbell, 1990).

In the language of Corbin and Strauss (2014), inside sources are “embedded” in a repeated situation that can give them a tacit understanding of subtle behavior patterns that would go unnoticed by even a trained observer who had not been a part of thousands of repeated encounters (Anselm and Corbin, 1998; Epp and Price, 2008, 2011). These thousands of experiences might enable them to naturally develop customer typologies (Reynolds and Gutman, 1988) or prototypes (Wansink, 1994), to see tendencies in impulse buying patterns (Jones *et al.*, 2003) or to predict critical incidents that might alienate a shopper even before the incident happens (Holloway and Beatty, 2008). Different target customer segments require different types of inside sources. Table I suggests inside sources that would be useful to understanding highly specific target markets.

There is wide latitude to the types of individuals who can be insightful inside sources. This speaks to the flexibility of the method, but it also has key implications for how to most effectively approach inside sources for interviews. For example, if the goal is to better understand the business-to-business buying habits of high-tech chief technical

officers, both a Silicon Valley software engineer and an airline club bartender at San Francisco (SFO) might prove to be useful inside sources, but they would have to be approached very differently. Regardless of the inside source, however, the objective of the interview is to gain notable or unexpected key insights into the behavior of the target segment. Whereas some inside sources require financial incentives – usually ranging from US\$30 to US\$400 for a 45-minute interview – many others are willing to freely share their insights over coffee or lunch.

Interviewing inside sources

There are a wide range of insights one can get from interviewing inside sources. Table II shows how varied some of these insights can be for various clients and how the insights can vary widely – yet not inconsistently – between one source and another.

To best capture such useful insights, it is important to approach the interview as more of an engaging conversation rather than as a checklist of questions that has to be sequentially asked. After thanking the individual and acknowledging them as a reliable inside source, it is best if the interview flow naturally and that the interviewee have time to fully explain his responses rather than for him or her to be repeatedly asked a cadence of questions. This also allows you to obtain more information beyond one-word answers or overgeneralizations. At the same time, however, it is important to guide the interview so that it does not stray too far from the intended aims.

The examples in Table II demonstrate the breadth and depth of questions that can be asked and answered in an inside source interview. However, it should be noted that inside sources sometimes have trouble generating the insights you are looking for or they claim to lack such knowledge (whether consciously or unconsciously). To effectively elicit insights from inside sources under these circumstances, tactics similar to those used in laddering interviews can be used. Laddering is a directed interviewing approach in which an individual is probed with a series of introspective questions that delve beyond initial attributes and benefits to uncover the

Table I Specific illustrations of identifying possible inside sources

Client	Objective	Target market	Possible inside sources
High-end electronics chain	Attract stereo equipment buyers when new items are first introduced	Early adopters of stereo equipment	Tech bloggers, night club owners, electronics repairmen, sales people at electronics retail stores (such as Best Buy)
New golf equipment company	Build word-of-mouth excitement for new line of golf clubs	Golfers	Caddies, pro shop staff, golf instructors, groundskeepers, country club waiters, snack shop vendors, event coordinators
Private client investment service	Attract more high-worth clients	Fortune 500 CEOs	Chauffeurs, personal assistants, charter flight pilots, chief operating officers, tailors, accountants, attorneys, luxury car dealers
BBQ sauce manufacturer	Increase BBQ sauce usage among light users	People who like to barbeque	Butchers, shelf stockers, tailgaters, park managers
Arizona spa	Reposition itself for elite Southern California market	Affluent women	Jewelers, personal shoppers, hairdressers, nannies, personal trainers
Restaurant in a famous Memphis hotel	Increase visits to the restaurant by out-of-town travelers on business accounts	Frequent travelers to Memphis	Airport bartenders, flight attendants, airport security staff, taxi drivers, hotel staff

Table II Consulting project insights from inside sources

Client's goal	First inside source	Insights	Second inside source	Insights
On-line cosmetics company: Increase sales of imported soaps	Beauty consultant at cosmetics store	<p>Customers like to test products before purchasing</p> <p>Customers bring in magazine articles featuring products that interest them</p> <p>Pre-teen and teen girls enjoy shopping in groups</p> <p>Many people buy online but return in store after they see and test product</p>	Employee at store for spiritual and holistic health books and supplies	<p>Customers are interested in alternative medicines and natural ingredients</p> <p>They like personal relationships with store employees</p> <p>They like communal atmosphere of shopping and appreciate recommendations from fellow buyers</p>
Container and storage supply company: Increase sales of recyclable aluminum containers to restaurants and food service companies	Director of Sales of metal distribution company	<p>Businesses often need product specifications and dimensions. They want reliable and consistent quality</p> <p>Businesses are already informed; they do not need to be educated about the product. They buy only what they need, not what they want, whereas retail consumers buy what they want and not what they need</p> <p>Most business-to-business companies have a few key accounts, a small but loyal customer base. Face-to-face contact is valued highly</p> <p>Distributors should develop partnerships with customers (e.g. purchase their stock and offer on-site support if needed). This helps maintain business relationship in the long-term</p> <p>The "stronger" or "sweeter" a soda tastes, the better it masks the grease in the meal</p>	Waitress at restaurant that uses recyclable aluminum containers	<p>Customers who "doggie bag" food in aluminum containers often order larger, more caloric dishes</p> <p>Food supply and storage needs vary month to month depending on price changes and diners' preferences</p> <p>Most family-owned restaurants are looking for a long-term relationship with their suppliers for better prices and customer service</p> <p>The recyclability of these containers is a major selling point, and buyers like to see companies that care about the environment and sustainability</p> <p>When drinking a lot of soda, he doesn't always stick to a "favorite" brand, just to add variety</p> <p>Variety in soda choice can add excitement to an otherwise routine schedule</p>
Manufacturer of chewable calcium supplements: Market supplements to women as means of preventing osteoporosis	Pharmacist	<p>Pharmacists approve of calcium supplements, but they don't make direct recommendations to customers</p> <p>More people take calcium for treatment than as a preventive measure</p> <p>Purchasers of supplements tend to be well-read, physically fit, pro-active and seek self-improvement</p> <p>People respond to fear tactics</p> <p>People like "combo items" that include calcium and other vitamins</p>	Registered dietician at assisted care facility	<p>People who start taking supplements usually take them continually, becoming customers for life</p> <p>Many older users started taking them even before entering a medical facility or assisted care situation</p>

consequences and values underlying those attributes and benefits (Wansink, 1994, 2000, 2003, 2005a). The aim of laddering interviews is to penetrate past the common answers that people provide when asked about an issue and to be able to probe from different directions to arrive at more meaningful explanations why they feel as the do.

While a wide range of useful questions can be asked to help them unlock or uncover some of their insights, eight useful types of questions. Each of these questions provides an illustration of how it has been successfully used to generate actionable insights:

- 1 *How is the target market different?:* What are some of the different ways that men who buy Hartmann luggage differ from ones who are not? This can include how they act, what they talk about, what they wear, what they might be carrying with them, how they order or ask questions, what they prefer, how they treat the person they might be with and so on (Wansink, 1994).
- 2 *What clues would you use to predict who's a member of the target market?:* If there were two people in front of you and you knew one of them ate canned tomato soup twice a week and the other one almost never ate it, how would you guess which was which? (Wansink and Park, 2000).
- 3 *What questions do they ask and when do they decide?:* Tell me about the last time a person came in and bought a Cadillac instead of a foreign import car they were also considering. What were some of the questions they asked? What was the turning point where they seemed to change their mind in favor of the Cadillac?
- 4 *What are some unusual or funny things you see customers do?:* Some of your Dunkin' Donuts customers come in every day and others come in less regularly. What are some unusual or funny things you've seen people do if they are not regular customers?
- 5 *What have you overheard?:* What are some of the things you've overheard people say that suggests why they might have come to your restaurant (or Olive Garden) than the restaurant (or TGI Fridays) across the street? (Wansink and Hanks, 2014).
- 6 *How have you helped change somebody's behavior?:* Tell me about the last time you were able to convince someone at your bar to buy an expensive wine they ended up liking rather than instead buying cocktails or beer? (Wansink et al., 2006).
- 7 *What do you find surprising?:* When a customer is trying to decide between buying a really expensive gas grill and a less expensive one, what do you sometimes find surprising about the point in the conversation where a person all of a sudden decides to buy the more expensive grill?
- 8 *What would you do?:* Let's suppose that your manager said that he made a lot more money selling the Shrimp Salad than selling the Bacon Nacho plate. Given all of the orders you've taken from customers, what are some of the tricks that you or one of the other sharp waitresses might use to encourage more customers to order the Shrimp Salad? (Wansink and Hanks, 2014).

The flow of each interview will differ for each researcher depending on their familiarity with the topic, their chemistry with the inside source and the location where the interview takes place. While it is important to focus on the questions you

are most interested in directly addressing, it was important to be flexible. Early in the interview, it may be crucial to resolve suspicions the inside source might have or to alleviate their hesitancy to speculate or – on the other hand – to over-generalize. Common questions often have to do with the interview process (“What’s the point of all of these questions?” or “Why are you doing this?”). In other cases, it is more important to move the inside source away from making gross generalizations (“Rich people like expensive things” or “It all depends on price”) but to also prevent them from making dismissive comments (“Everyone is different” or “I never thought about it”). Table III provides some common answers that have arisen in our consulting interviews and the types of follow-up questions that we have found effective in helping interviewers steer the conversation towards valuable insights.

Most inside sources need guidance and encouragement to dig deep enough to generate insights they might not yet have articulated or even thought about until now encouraged. During a 45-minute interview, the most productive point of the interview is usually in the middle – between the 15-30-minute point. Before that, they may be nervous and defensive, and after that they can become tired or repetitive. Yet, if an inside source can even only give you a few minutes during a break or during a slow part of their day, the insights can be valuable. When once using bartenders as an inside source (Wansink et al., 2006), most of the inside source interviews were conducted during working hours and were done in short five-minute segments when they were not busy serving customers. The key to great interviews is doing them face-to-face. Attempting to conduct an inside source interview over the phone, with a Webcam or on-line nearly always results in the inside source being distracted, irritated and superficial in their responses. To try and be more efficient, we have experimented with inside source interviews over the phone, over Skype or over email and instant messaging, and 90 per cent have been a frustrating waste of everyone’s time. Inside source interviews are more productive over a table for even five minutes than over the phone or Internet for an hour.

Yet, even with a highly experienced and skilled interviewer, not every inside source interview yields insights. On average, 20 per cent of inside sources offer no useful insights, 60 per cent of inside sources offer one or two useful insights and the remaining 20 per cent will offer a wide range of insights and observations that are invaluable. Put differently, suppose an experienced researcher interviews five inside sources. On average, one will have outstanding insights, one will have no insights and three will have a couple. My Food and Brand Lab has found that most inside source interviews usually get repetitive after 10-12 total interviews are done (by at least two experienced interviewers). Still, if one is pressed for time, even only two or three interviews – conducted in a 24-hour period – can provide surprisingly more insight into the target market than one would think.

Translating insights into action

To leverage insights from inside sources, it is useful to organize these insights in a way that shows how they can be fully integrated into all four components (4 Ps) of the marketing mix: promotion, product, price and place (Wansink, 2005a). Interview-generated insights can yield

Table III Proven tactics for interviewing inside sources

When your inside source says	It often means	Try responding like this....
"What's the point of all these questions?" "Who/What are you doing this for?" "Why are you asking me ?"	They are skeptical about the purpose of the interview	"These questions help us understand (insert organization or company here) and how they can improve their operations" "We're looking for ways to increase sales/participation in (insert organization or company here)" "You're a knowledgeable source for (insert target segment here) since you interact with these people often" "Think of the last customer you had" "Who was your most memorable customer? What made them memorable?" "What are some of the most popular or common items that were selected?" "If you were convincing a customer to come, what would you say?"
"I don't know" "I never thought about it..." "I can't think of anyone right now" "It's hard to say...everyone is different"	They are thinking too generally and are not thinking about specific individuals or encounters	"Let's think beyond the price, what would be the second biggest influence on whether someone would purchase this?" "Instead of thinking about these folks as a group, let's focus on individuals you've met. Try to picture a specific person who exhibited this behavior." "What kinds of people do you see (insert a specific action or behavior here)?" "Can you recall any specific behaviors or unusual habits that your patrons have?" "What other types of people might be interested in (insert topic here)?" "Describe a prototypical customer. What is the typical profile of a loyal customer?" "What are some professions of your average customer?"
"It depends on the price" (or another response related to price)	They are relying on a easy answer without wanting to dig any deeper	
"Rich people who like expensive things" "People like high-quality products"	They are again thinking too general and not about exceptions to these basic rules	
"There's not one certain 'group' or 'category' that all our customers can be placed in" "All our customers are different and behave in different ways"	They have difficulties thinking in terms of patterns or sub-segments	

concrete suggestions in any or all four of these areas, with the ultimate goal to suggest specific actions that will change behavior.

To illustrate this, Table IV takes the insights given in Table II and shows how they can next be turned in to specific marketing actions related to each of the 4 Ps of the marketing mix. Table IV shows exactly what actions can be taken because of the key insights that come from these interviews. While not all insights necessarily lead to actions in all four aspects of the marketing mix, some insights may generate multiple suggestions for a single aspect.

Discussion

Inside source interviews can impressively uncover unique insights that would otherwise be overlooked. Following the previously mentioned steps facilitates the process. They show how to choose a research objective (do you want to learn more about heavy users, loyal consumers, price-insensitive consumers, switchers and so on), select appropriate inside sources, determine the specific questions that will elicit meaningful responses and it illustrates how tangible actions can be generated for the marketing mix. This method for obtaining these insider tips can be used with a wide range of sources and can be applied to a wide range of issues.

If there is a need to quantify the insights generated by inside source interviews, this can be accomplished with surveys. In a

wide number of situations, inside sources have been used to generate initial insights that were then turned into surveys or experiments to improve marketing efforts to promote the purchase of healthier foods (Wansink, 2005b). Inside sources with health food store employees and yoga instructors generated the initial insights that the world's largest tofu company – House Brands Tofu – was making a mistake by trying to expand the overall tofu market by focusing on the health benefits of tofu. Our interviews showed they should instead focus young women, and they should emphasize that tofu provides light energy and not spoiling like chicken. Given this insight, in a large national survey of 500 women, 20-35 confirmed this insight, and the company its packaging, positioning and in-store promotions to target this specific high-potential segment (Wansink, et al., 2013). For Bird's Eye frozen vegetables, inside source interviews with chefs told us that diners thought the main course of a dinner tasted better if it was served with vegetables – even if the diners did not eat the vegetables or even like them. A national survey again confirmed this (Wansink et al., 2014). The company began promoting frozen vegetables as the easiest way you can look like a better cook to your family and friends (http://foodpsychology.cornell.edu/OP/Loving_Cook).

Yet, using inside sources also has limitations. There are limitations when interviewing inside sources; they can lack of objectivity, resulting in interviewer biases and Hawthorne effects.

Table IV How to generate specific actions from inside source insights (from Table II)

Goal	Insights (from Table II)	Promotion	Product	Place	Price
Increase business-to-business sales of aluminum recyclable containers	Purchasers are informed about products they want	Interactive Web site with that tracks loyalty points to use toward future purchases and allow customers to construct personalized purchase and delivery packages	Welcome letter to first-time customers	On-site recycling and machinery that saves energy and made of earth-friendly materials promotes image of sustainability and saves money	Offer payment extensions for companies that struggle to pay on time
	Appreciate reliability, consistency and precise product specifications	Newsletter	A clean, sleek company logo should be apparent on all packaging to promote brand	Make meeting place for buyers a nice place so they feel respected and comfortable; display quotes or statements that promote trusting, caring, long-term relationships	Offer variety of package options to suit product and delivery needs of a variety of customers
	Develop a few key accounts with close relationships and face-to-face contact	A loyalty program to track customers' good behavior (e.g. on-time payments, eco-friendly business practices) rewarded with coupons or discounts on future purchases	Include detailed product specifications with each order	Set aside space in production facility to hold stock for customers	
	Recognizable brand	A detailed product specification booklet	Sales-people meet buyers regularly to maintain relationship; ask buyers if company's products suit their needs; develop new products as needed		
Encourage more people to take chewable calcium supplements	Focus on sustainability Buyers need flexibility as purchase needs vary according to customers preference				
	Pharmacies don't often recommend these products to customers	Direct advertising campaign at pharmacies	In developing other supplements in the future, companies should include combinations to vitamins and minerals to encourage purchase	Free samples by mail, in pharmacies or doctors' offices	Emphasize savings in time or convenience
	People respond well to fear tactics and combination items	Attempt to reach customers early in life so they begin taking supplements as a preventative measure		Ask doctors to put in bowls at reception desk and in office waiting room (like candy)	Chewable supplements can be taken at any time without water and are individually wrapped so may be taken anywhere
	People who start taking supplements early are often customers for life	Use doctors and other health professionals as authority figures in promotions			
	Purchasers tend to be well-read, physically fit, pro-active and seek self-improvement				

(continued)

Table IV

Goal	Insights (from Table II)	Promotion	Product	Place	Price
Increase online sales of imported soaps	Customers like to test products before buying	Ask yoga and natural beauty bloggers to promote and link to company Web site	Emphasize product ingredients on Web site and how they aid in skin care	Send product samples or scent samples by mail	Price may be raised because customers focus on ingredients rather than cost
	Younger customers tend to shop in groups	Make Web site highly interactive: create newsletter, blog or chat forum		Give samples to yoga studios for bathroom use	
	Most buyers appreciate recommendations from fellow buyers	Include feature on Web site for customers to recommend products to friends or write product reviews			
	Buyers like natural ingredients Buyers refer to products seen in magazines				

Furthermore, an interview may generate idiosyncratic insights that are not generalizable to others individuals or situations. While inside source interviews are useful, they can also be combined with laddering and prototyping (Wansink, 2000, 2005a) to produce a richer profile. In addition, these insights can also be quantitatively tested by using a wide-scale survey.

The inside source approach should not be limited to marketing. As can be shown, it can also be put into practice to illuminate social concerns, such as healthy eating, but it can also be used to encourage active lifestyles (Dohle and Wansink, 2013) or better financial well-being (Bogan et al., 2013). The process of identifying and translating insights into marketing actions shows that there are more effective ways to motivate positive behavior change than are typically considered by the public health community (Wansink, 2015). Future research in this area could compare the inside source approach to other techniques such as laddering interviews or motivational interviewing. Showing evidence of complimentary results will further encourage its wider use.

Conclusion

In the end, costly laddering interviews, series of focus groups or wide-scale surveys are not always needed to arrive at a deep understanding of a target market. Locating and leveraging inside sources can quickly – within 24 hours – produce the initial insights needed to more effectively market products, develop research questions or design interventions for the public good.

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