



Understanding the Consumer through Market Research

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ABSTRACT

The housewife is potentially a source of an endless flow of extremely valuable information about product usage, attitudes to products, evaluation of formulation changes, and ultimate purchase of the product. She is both the ultimate dictator of success or failure and the willing supplier of information against which progress toward this success or failure can be measured. While the industry generally is now very much more willing to treat her as an equal partner in this evaluation, there still remains a fund of data to be collected and used in product development and marketing by those disciplined enough in their thinking and creative enough in their approach to understand what is available to them.

INTRODUCTION

A pleasing characteristic in detergent development over the past 25 years has been the increasing willingness to accept the housewife as something like an equal partner with the technician in product development. Many remember past marketing failures that stemmed primarily from an unwillingness to accept that, where consumer opinion and technical opinion on a product differed, the latter might not automatically be "right" — "right" at least in the sense of ensuring the ultimate sale of the product. In the end, the housewife has the last word; she can buy or not buy and all the technical belief in the world will not force her to buy if she does not perceive the advantage to her one way or another of a particular product development.

Acceptance of this is now widespread and with it has come the realization that it is important to understand how the housewife behaves, how she looks at and evaluates products in testing, and how acceptance of her as a sensible, intelligent, and involved participant can assist in the whole process of developing, marketing, and using a detergent product.

The achievement of this partnership cannot be a matter of dipping into consumer opinion at long, irregular intervals. It is better seen as an evolving situation in which a continuous flow of information about the housewife and the way she behaves can be used as: (a) background thinking for product development; (b) the reference data against which laboratory testing methods can be evolved; and (c) the reference point for testing and using new products.

HABITS AND ATTITUDES

The continuing process of product development is best seen against a background of constant modification in consumer usage and washing habits. Fabric development, washing machine innovation, improvements in hot water supplies, changing personal and social habits which involve modification in the use and washing of clothing, and the technical development of washing products themselves, all form a continually interacting pattern, modifying the whole shape of washing practice. Even the widely differing inter-

national patterns of washing habits may be modified (generally in terms of becoming more alike) through this process.

As habits alter, what the housewife is looking for in detergent products changes too, presenting marketing opportunities for those who can anticipate these needs. Outstanding examples of changes of this kind have been, in the U.K., the movement away from very high temperature washing. The "boil" wash, once characteristic of the majority of main washes in the U.K., is now seldom seen. The process of no longer "bluing" the wash and the advent of rinse conditioners are other such examples, as are the complex uses of machine washing.

To understand the housewife and to anticipate her needs, it is important that the monitoring of these changes in habits should be regular and comparable over time. A flow of information on how the wash is done and why the housewife does it that way is essential to planning future product change. Equally, it is necessary to the planning of controlled laboratory testing of formulations as they are developed. Unless standard methods of testing build into themselves the main characteristics of washes as they are carried out by the housewife, there is the constant hazard that they will have little relationship to reality.

Similarly, the regular, repetitive obtaining of attitude data — attitude both to existing products and brands, their strengths and their weaknesses, and to the nature of washing tasks — fills in the background understanding of consumer needs. The data may be quite simple in form; their primary value lies in comparative assessments — one brand against another, the same brand over time, or changes in attitude to a brand compared with known changes in formulation or in marketing. It is from such comparisons that possibilities for innovation may appear.

EXAMINATION OF PRODUCTS

The use of this background flow of information is not confined to product innovation, however. It is also of value in understanding the way housewives evaluate new product developments and in creating appropriate testing procedures among samples of housewives as product development proceeds.

It is commonly said among technicians, and indeed appears in the draft international standards for comparative testing of detergents for washing fabrics, that "there is no single assessment that will give the overall performance of a fabric washing product." In laboratory terms, this is true; in housewife terms, it is not. In the end, the housewife makes one overall performance assessment of a product. Whatever relative value she attaches to the individual aspects of its performance, however she is looking at it against other products, in the end she makes one judgment which may be reflected in the simple phrase "I will/will not buy." How she arrives at this assessment, the way she looks at individual physical and sensory characteristics of products, the messages that are conveyed to her by various physical and other characteristics of performance — for the understanding of all this, the careful and on-going study of all aspects of housewife reaction in product testing is neces-

sary.

Basically such testing may be used either for Formulation Testing, both of technical performance and of sensory characteristics, and for Acceptance Testing. Formulation Testing covers all those tests where the variables under test arise from variations in formulation or production process. These may be concerned either with formulation improvement or with changes in processing, where no product improvement is involved but reassurance is required that there is no change in product performance. Acceptance Testing is used to examine the level of consumer acceptance of a product at its final stages of development, including what is sometimes referred to as "marketing mix testing."

Since the technical performance of washing powders has reached very high standards it is increasingly difficult to make major improvements in the product. Where major breakthroughs are achieved, there are few difficulties in obtaining an overall consumer evaluation. Where, however, improvements in real performance are small, as is usually the case, measurement of reaction to them in order to decide whether they should be incorporated in the product presents considerable difficulty.

The principle of using the level of significance in the comparison of difference/preference between two or more products as an action standard is a sound one for most purposes, but it needs to be examined closely in the light of actual practice in those fields where improvements in an already highly efficient product are marginal. The greater the need to use sophisticated equipment to measure real differences between formulations, the less likely the consumer may be to detect that difference in the home. Product improvements which depend on build-up effects over a large number of washes, for example, may be unlikely to achieve significant results unless the improvement is substantial. (A 6-months' in-home test of a product with and without fluorescers showed a marked difference in "reflectance" by physical measurement; the consumer, however, could detect no difference.) A policy of product development depending solely on consumers' ability to detect differences between two formulations under conventional product testing situations may, in such circumstances, result in the rejection of worthwhile technical improvements. It is, therefore, self-evidently of importance that this kind of testing be constantly reexamined, and reexamined particularly in the light of knowledge about consumers.

Formulation improvements may be in sensory characteristics or in actual technical performance. It may well be necessary to look at these quite separately. Sensory characteristics are, of course, all those which can be detected by human senses and include not only such physical characteristics as the granule size, color, smell, flow, etc., of the dry powder but also qualities detectable by the senses during the wash process itself, e.g., lather, solubility, ease of rinsing, smell, and residual smell on the washed clothes. These can be appraised by the housewife individually and separately from the end result of a wash or may be used by her consciously or unconsciously as cues as to what she expects in the finished result. The relationship between these sensory characteristics or cues and the physical changes that may have been made in the product is not

always straightforward. Understanding the consumers' reaction in this case — and using it valuably in product tests — can mean the patient unraveling of the interaction of one sense upon another.

The technical performance, on the other hand, relates to the end result on clothes, and it is this improvement that sometimes cannot be detected by the housewife under limited normal product testing conditions. In all product testing, the housewife's opinion must be the sole judgment in the end; but in these difficult areas of technical performance her opinion of performance may usefully be complemented by physical measurement obtained either when the product is used under normal conditions in the home or in controlled laboratory conditions. Work in developing this area is by no means exhausted. Four prime measurements, for example, of end results — bleaching, detergency, re-deposition, and fluorescence are often used to reflect the technical judgment of a good wash. There is some evidence that these dimensions do not always reflect the consumers' criteria of judgment. Work to reconcile these two areas still remains to be done.

It is possible also to discuss at length the relative virtues in these measurement situations of paired comparison and monadic testing among housewives. Generally speaking, it is usually asserted that monadic testing most nearly reproduces the conditions under which the housewife normally does her wash, whereas the paired comparison test is less normal. This may be true if the objective is to find the level of acceptance of the product or the marketing mix but may be less valuable if the objective is to find which of two formulations is preferred and why. In this situation the comparative or paired test's greater sensitivity and its ability to discriminate better than monadic testing will be of greater advantage.

The whole area of product testing, its implications and interpretation, has been reopened recently with a feeling that creative and carefully controlled use of all variables at one's disposal may be a valuable way to track down the true nature of the factors affecting housewives' preference for products and to compare this with technical evaluations.

PHYSICAL MEASUREMENT

A further area of consumer measurement that has perhaps been too little used and developed lies in complex physical measurement of one kind or another done in home conditions. The examination of actual normal soil in the home laundry is one such measurement. There are others that may be equally valuable. Comparatively little is known about the real temperature and solution concentration normally used in the home or, indeed, those used in actual product tests. The insertion into the wash and subsequent collection of standard soiled or unsoiled fabrics, the collection of samples of solution from the actual wash, etc., may be techniques that could usefully be further developed to help technicians understand both how their products are used and perhaps also some of the reasons why housewives are making the judgments they are, particularly where these differ from the technical view.