

Come Dine With Me, Australia

Overview

In this paper we use original research to explore the challenges both clients and researchers face seeking to future proof insights using the emerging trend of Market Research Online Communities (MROC). The history and development of MROCs is summarised and then applied to a client question to give insight into where consumer trends are going with evening meals. This is in the context of the constantly changing demands of shifting Australian consumer trends and meal preparation patterns as well as increasing competition amongst retailers and manufacturers for consumer attention.

Introduction

A challenging environment means greater need for efficient, inspirational research

Intense competitive pressures in the Australian FMCG marketplace are making the landscape look more like a battlefield with every year that passes. Retailers are looking for growth with limited scope for price increases or ability to steal share from competitors. Brands are challenged to generate category growth by the grocery heavyweights, whilst facing the looming threat of private label. Raw material costs – for ingredients and for packaging – are increasing faster than prices. Different and new channels, such as grey imports, food service and internet shopping, are proving strong alternatives. All this pressure is intensified by low consumer confidence and its impact on discretionary spending.

In this challenging context, companies are looking to innovation to help them break out of the cycle of price reductions and declining margins, yet investment for new product development is limited and under more scrutiny than ever before. Research is seen as a highly valuable source of inspiration and insight into how to steer companies forward, in developing products that meet new and unmet needs. However, research projects also have to demonstrate good value and so clients' needs are becoming more demanding (van Lieven 2011). Faster and cheaper are often key requirements within briefs, meaning research agencies are under similar pressures to their clients in rethinking their offerings.

MROCs offer great potential for in-depth, far reaching and inspirational insights

The kind of forward thinking insights, that can inspire ground-breaking, consumer relevant innovation, are often timely and costly to generate. Traditionally, they have required spending lengthy periods of time, face-to-face with consumers, entering their worlds and understanding their lives. At best, they are done with forward thinking consumers, sometimes the types who are ill inclined to attend formal research sessions. More efficient methods run the risk of merely giving specific answers to known questions, rather than exploring people's lives looking for nuggets of inspiration. Or they better explain the past, rather than open people's minds to the future.

So how can market research move forward? How does our discipline provide consumer based inspiration in an efficient manner? How can market research help brands forecast and impact the

future in a timely way? How can it provide real insights on consumer trends which inspire action and change? In the case of our specific example, where does an iconic Australian food company - like Campbell's - look for inspiration, when developing forward-looking and consumer grounded new product and recipe ideas that will differentiate it from the competition?

In looking for alternative approaches, to answer strategic research questions and to provide inspiration by collaborating with consumers, an emerging MR tool naturally comes to mind: Market Research Online Communities (MROC).

MROCs are worth of consideration because they have many benefits over traditional research methods whether qualitative or quantitative:

- Size - Larger than focus groups, allowing for coverage across more target segments.
- Reach - Given the online format of research communities, they are able to cover the whole of Australia and internationally if needed.
- Depth - Given the longitudinal nature of research communities, it is possible to go much deeper on a given topic than in a focus group.
- Breadth - Research communities allow you to cover a wide range of topics.
- Flexibility – The ability to adjust the approach and discussions as you go to respond to emerging themes

An MROC represents an ideal approach to explore habits around the evening meal

The MROC that we conducted was named 'Come Dine With Me, Australia'. In it we investigated the evolution of the Australian evening meal to answer questions like 'What does the evening meal look like now?' 'How did it get there?' 'What does this mean for the next 5/10 years?'

These questions are not only extremely important to brands, but also to retailers and the media if they want to stay ahead of the consumer curve, something vital to future success.

Campbell's tasked Direction First with finding the answers to help them think about this and the future of their brand, to find those deeper insights by thinking outside of the box and really getting an understanding of what is happening today with the evening meal, and what this means to the Campbell's brand. In particular:

- The evolution of cooking habits: How do people prepare their meal? How has it evolved over the years and why?
- Sources of inspiration: Has the media really influenced how people plan, cook and eat their evening meal? What ingredients do they use and where do they shop for them? How do people source their recipes? How do they interpret them? Do TV programmes like *MasterChef* and a plethora of other cooking programmes have any influence on what people are doing to get their evening meal on their plate?
- What is the future going to look like? What does this mean going forward? Are consumers going to plan, cook and prepare their food in a different way? What are their needs and expectations going to be on this journey? What does this mean for brands and retailers?

These 3 topics were explored with consumers using an MROC platform that enabled them to explore the topics in different rooms. In these rooms they were encouraged to converse and collaborate and exchange ideas.

Each of the rooms guided participants with relevant topics, challenges, tasks and games to ultimately meet the project objectives.

Below is a screenshot of the 'Come Dine With Me' MROC:



Multiple influences impact the Australian evening meal

It is already known that Australia is a melting pot of different cultures and ethnicities. As a consequence, everything from meal ideas, sourcing recipes, preparing food and how it is eaten is a result of many years of influence and change, including:

- Immigration: The ancestry of many Australians includes English, Irish, Scottish, Italian, German, Chinese, Greek, Dutch, Vietnamese and Indian just to name a few. With new ways of cooking and new demands for exotic ingredients, a whole new world of tastes and sensory delights were opened up for Australians.
- Advances in technology: Over the years there have been many new appliances and gadgets being used in the Australian kitchen like the cooker in the 30s, the fridge in 60s, the slow cooker and food processor in the 70s and the microwave in the 80s. All of these causing a revolution with the possibilities it opened up for what could be cooked and made.
- In addition to this, communication got much easier and information was much more accessible as the TV was introduced in the 50s, mobiles in the 80s and the internet in the 90s. Then, the general introduction of the Iphone in 2007 also brought with it apps which made information much more accessible to consumers than ever before.
- Media influence: There is the age old debate over whether life imitates art or whether art imitates life and this is a perfect example. Over the years food has become extremely topical within the media, we have seen a huge increase in popularity of food related TV programmes (MasterChef is a prime example), food websites (Taste.com now has 24,000 recipes online) and now apps (where you can do anything, shop, source recipes, view cooking videos, follow diets, be educated on food nutrition, you name it.). Are consumers reacting to what they see and hear in the media or is the media reacting to what they think consumers are saying and doing?
- Lifestyle: Mum's role was traditionally a 'stay at home Mum' looking after the children, the home, and preparing and cooking meals (particularly from scratch). Now it is a very

different story. Lifestyle expectations have increased and coupled with two working parents in households, the pace of life has increased and the luxury of spare time in the week to cook from scratch becomes a rarity.

Before we talk about how we used an MROC to understand the evening meal today in Australia, let's discuss the background to the evolution of the MROC as a strategic research approach.

Redefining the role and use of an MROC

MROCs have undergone a rollercoaster journey since inception

MROCs have been around for a while now and they have had a roller coaster journey. Despite a lot of discussion, there is still some misconception about what an MROC is (especially as opposed to an Online Research Panel) and how it is best used.

To quote the first original definition by Forrester Research in their report in April 2008 titled "Will Web 2.0 Transform Market Research?" (Bortner et al., 2008). The report defines an MROC as a:

"Captive interactive group of people online, joined together by a common interest, which are systematically harvested for qualitative market research purposes."

In that definition, no mention of the size of the MROC is given and no boundaries to what the common interest is. Moreover, the term 'harvested' still implies some logic of a one-way conversation between respondent and researcher.

We borrow Forrester's definition and adapt it into a refined characterisation of MROC as a:

"Small group (50-150) of highly engaged people online joined together by a common passion (for a brand or a subject), which are systematically engaged for qualitative market research purposes, especially co-creation or even collaboration."

We have come to this definition by following the evolution of MROCs and researching best practices and failures (Kennedy, Verard 2009). Following a typical trend of new methodologies, there was an initial rise and a lot of buzz for this new holy grail of research, which was a perfect fit with the new web 2.0; the rise was followed by a steep decline in buzz and negative sentiments as people overestimated its power and underestimate the difficulties to make it work in field. An increase in dissatisfied clients emerged and MROCs started to be reviewed critically, leading to a revamp of the methodology, which bridged the chasm in the adoption curve and reached its tipping point. Today, not only is it well established, but about two-thirds of companies expect to be using online communities in 2012 (Murphy, 2012).

The new MROC paradigm focuses on stronger collaboration

So what is this change and improvement about? Numerous case studies have been published which allowed classifying best and worst practices and one key point was identified as participant engagement (Muniz & O'Guinn 2008, Communispace brief report 2008a, Communispace brief report 2008b, Barber 2012). Further research (Ludwig et al 2010) allowed identifying optimal

elements for a richer MROC experience for participants, which translates into higher engagement and ultimately deeper insights.

The recipe for a successful MROC:

- They are limited in number: 50 to 150 participants is the range. 150 – the Dunbar's number (Dunbar 1993) - is a cognitive limit to the number of people with whom one can maintain stable social relationships, which is essential in an MROC. If the number is stretched even more it is suggested that people will hesitate to share openly with a few hundred people, but with less than 150 fellow participants it becomes much less daunting to share and connect (Foley 2011).
- They are not representative. The key idea is to recruit people who are engaged with the brand, who show typical Maven traits (people who know and are willing to share their knowledge and opinions).
- The environment is qualitative. Even if some basic quant polls can be carried out, sample size and sample nature does not make it suitable for quant research (not representative).
- The aim is to collect 30 posts by participants on a given topic. Research showed that n=30 is a threshold for posts to move from on-topic to off-topic. Therefore posts should be limited to 30 to maximise the signal/noise ratio (Schillewaert et al 2011).
- The co-creation element is strong. As pointed out by Blades and Brown (2009), the times where we have treated respondents as just that, people who respond to the researcher's questions are closer and closer to an end. Nowadays, consumers are taking a more active role in the development of brands, and research participants want to take an active part in the research process.

There are three other points - key in the evolution of MROCs:

- The engagement is enhanced by introducing elements of gamification.
- The use of (some) participants as co-researchers.
- The use of a mobile platform, which allows participants to upload photos and videos, brings to life participants' opinions.

Targeted recruitment of participants is of paramount importance for the success of an MROC. We look for people who are engaged with the brand or the MROC subject, as brand and/or topic identification is an important predictor of active participation within the MROC. Participants are then willing to share opinions and experiences, especially with today's technology of uploading images or videos. We also believe that we need to give back to participants in order to generate initial interest and maintain it. This can be done in a number of ways, i.e. feeding back the findings to them or research related incentives. This ensures that the main driver for them to participate is being able to have an impact on the future of a certain brand or product.

Previous research (De Ruyck et al., 2008) showed that the first week of an MROC is crucial. People need to develop their own trust with the MROC, the moderator, each other and the brand behind the project. For this reason kick-off sessions are conducted to brief the participants on how the MROC works, what the different 'rooms' are, what the specific goals are and what the ultimate goal is of the MROC. We bring together participants with our moderator, one another and the client (where required). This session explains what they will also get out of the MROC, and for them to raise any questions or concerns, which allows us to reassure them, create a rapport and increase engagement.

In our MROCs, a very detailed conversation guide alongside enriched content like photos and videos when posting topics and challenges for participants is used. Each topic is written in an engaging and entertaining way, using projective techniques and gaming elements. Discussions are

combined with polls, photo uploads, star ratings and research related rewards. There is also a lot of value and learning in allowing participants to talk freely amongst each other without being led by topics and for this reason we also have a room for this reason exactly (a social lounge).

Moderation requires dedication. A good moderator is not only a good qualitative researcher; there are almost elements of a DJ, selecting the right record at the right time in the right mix, i.e. the right mix of research topics and social topics, of challenging questions and easier tasks. The MROC moderator must follow the 4 values of openness (being authentic, honest about the goals of the research, and honest about themselves), dedication (we are in a 24/7 environment, both for the participants and the moderator. If participants have an urgent question or during the weekend something major happens that calls for immediate attention then this needs to be actioned), passion (given the nature of the communities, the moderator must be engaged with the topic) and forward thinking (to foresee actions that are needed to make sure that the MROC stays healthy the following week).

In addition to the above, the techniques and skills required to be a good online qual researcher are different to traditional offline approaches and therefore this shouldn't be underestimated.

Motivation and involvement are enhanced by gaming elements

“Gamification” is a word that cannot be found in any dictionary, and if it is typed into Word it is underlined in red; yet it is not a typo, it has been one of the big themes of 2011, and the second most popular buzzword in market research (#mrx) after “mobile”. (Tarran 2011).

Despite being a hot topic, there is still a lot of misconception on what gamification is and how (or if at all) it can help market research: will it be here for a day, having its 5 minutes of fame, or is it here to stay.

Gamification is not about adapting video games, it's not about creating avatars; it is a lot more subtle than that. It is trying to motivate someone to answer a question or participate in an activity by using fun as an engagement tool. Fancy graphics or video games aren't necessary, so long as the elements of gaming are there - a clear goal, some rules, feedback, and you understand how to progress - that is gamification. (Puleston 2012a, 2012b).

An example of gamification in an MROC environment is the battle for “badges” or to unlock further content. Participants are given a challenge, and they are told what they need to do to win. For everything they do (and especially for winning) the participants receive points which enables them to unlock the next level. Badges are a form of an extra virtual reward that can be granted (at zero cost, but very motivating to participants, in much the same way that sites like Ebay and Tripadvisor have different classifications for members). The combination of points and badges indicate the users’ status, and is most powerful when shared over a social network. If the participants post quality content, they get points; when they reach a point threshold, then they get information as a reward. More information leads to more on-topic posts in a virtuous circle.

In our MROCs, gamification happens at three different levels (De Ruyck & Veris 2011).

- Question level: questions are turned into real challenges and quests, asking participants to use imagination and semi-scientific experiments (e.g. activation/deprivation exercises) to encourage creative thinking.

- Individual level: if MROC members participate well within a given room and in the MROC in general, they could earn points, badges and achieve a certain status, as mentioned before.
- Group level: Battles are organised between certain subgroups of the MROC, therefore helping them develop new ideas and fresh insights.

The process of using game thinking and game mechanics have shown to generate up to 7 times more on-topic arguments (De Ruyck et al, 2011). Integrating these elements can not only engage users, it can also solve problems. There are 2 levels on which we integrate these game thinking elements: think harder (more posts, more on-topic arguments or in other words: Productivity) and think different (more creative posts, more contextual thinking, less rationalization, or: Creativity, Context and Emotional response).

An example of using gaming to encourage participants to think harder is putting a timer on a challenge. This initially increases the interest and then encourages them to think quickly, without rationalisation, which often produces the best ideas.

The thinking behind the ‘Come Dine With Me, Australia’ MROC

In addition to the above approach for our MROCs, the following outlines the specific approach taken by Direction First to help Campbell’s delve deeper into the consumer world.

Our MROC consisted of n=50 participants covering 4 different life stages (SINKS, DINKS, young families and older families) as life stage is a major influence of eating and cooking habits, ingredients used and type of food. Their age range was between 25 and 45 years.

Mavens, role playing and imagery brought findings to life

We looked for people who engage with food, enjoy cooking and are willing to try new ideas; these people can be defined as Cooking Mavens. According to the definition given by Feick and Price (1987), Mavens are:

“Individuals who have information about many kinds of products, places to shop and other facets of the market, who initiate discussions with and respond to information requests from other people”

The concept of mavens was made popular by Malcolm Gladwell in the “The Tipping Point” (2000), where he also added the notion that Mavens “are amongst the first to spot new and innovative trends”. Moreover Mavens are able to articulate their answers and comments with much more richness and detail compared to non-Mavens, thus making them a preferred target for identifying trends and market opportunities (Cappuccio & Kenny 2011). Because of their engagement with the topic, their willingness to share knowledge and opinions, and their tendency to spot new trends they are the ideal candidate for a successful MROC.

To encourage our participants to think differently they were given challenges to role play in various different guises in the discussions. An example is a fantasy task like ‘3 wishes from a genie in the lamp’ to encourage blue-sky thinking and using these ideas to build on.

Another example of encouraging thinking differently is using the traditional technique of using imagery to describe products/thoughts and bringing this online. Participants were able to help us understand how they felt about cooking by using an online collage tool. The advantage of doing this technique online is that they can use their own images/photos to express their feelings too, making it much more personalised. An example is below:



Well my collage is reflective of zest for life and my fun personality. The picture in the middle is one of my favourite spots in the world's "To Sua Trench" Samoa. It reflects my whole attitude to life " Be fearless and never be afraid to take that jump!" Other pictures are of my friends and the rainbow cake I made for my girlfriends birthday. The other pictures are of my favourite dishes I got to taste and take pictures, when I was in France. The children in my pictures are my youngest two Indiana and Maxwell who always love to help me cook when they can. While the other pictures are taken while I was back home in Samoa, Watching the Waterfalls, and laying by the beach sipping on cocktails and beer.

Respondents can add greater value when empowered as co-researchers

We explored a further development: turning some participants into co-researchers. MROCs allow for the opportunity to empower some participants to be part of the research team and become actual co-moderators, therefore being able to bring new research topics to the table and even report back the findings. We defined two types of co-moderators: 'by role' and 'by mission'. To understand the impact of the co-moderators, participants were divided into two groups, one group had access to Lounge 'A' and the other group had access to Lounge 'B'. When co-moderators helped in moderating in these rooms it had a direct and positive impact on engagement and activity.

The co-moderator task 'by role' was endorsed as another moderator in the MROC. They could start discussions by themselves, moderate them and summarise and give feedback. The main benefit of having a peer acting as moderator is that the general engagement of the MROC increases, and the conversation can be even more open as it is peer to peer, speaking the same language. Also the findings were summarised from a consumer point of view, not a researchers, thus bringing another mind and a different perspective to the analysis process. It can also be very rewarding for both the co-moderator and other participants:

"I really enjoyed being a co-moderator, it really felt like I was playing an important role and that I was being heard. Thank you for asking me to do that, I would love to do it again"

Co-moderator in 'Come Dine With Me, Australia' MROC

"How interesting that you used a couple of the other members to help you and ask us questions too. It's a great idea, they know where we are coming from, and they understand what we are talking about so it's easier to talk to them"

A 'Come Dine With Me, Australia' MROC participant talking about a Co-moderator

The co-moderator 'by mission' was acting as a '007' taking part in a secret mission. The task was to join an already existing discussion (in the specific case the topic was "Your ideal restaurant experience") and stimulate the conversation to keep the topic active. Then, as in the case of the co-moderator "by role" they had to summarise and report back to the moderator.

***"I accept the challenge and look forward to reporting back to you with my findings.
Should be fun!"***

Initial reaction from the co-moderator by 'mission'

When comparing co-moderators by 'role' and by 'mission' there are benefits of each. For both they helped in increasing activity and engagement in the MROC, they further help the moderator in the analysis by summarising findings in their own words. Using co-moderators also reaffirms to all participants that the MROC is about listening, sharing and collaborating together.

Using mobiles aids richness of outputs and enthusiasm to participate

With the number of smart phones overtaking rapidly the number of computers, mobile research is a natural enhancement to research and the next evolutionary platform. Mobile research though is not the mere translation of current research on a smaller screen. The difference is like tasting a coffee sitting at a café or while commuting to work: still coffee but the experience is different.

The use of smart phones represents a perfect complement to MROCs. It allows participants to capture pictures and videos, uploading them and commenting on the spot. It allows research on-the-go, which can be extremely useful in an MROC environment where we give participants tasks, which could be out of home tasks, for example related to when they are shopping.

In the case of the 'Come Dine with Me, Australia' MROC an ad hoc mobile app allowed our participants to upload photos and videos whenever they wanted to i.e. photos whilst out shopping, whilst preparing a meal etc. This is an excellent tool to gain deeper insights into cooking/shopping behaviour especially when in-situ. It's an additional layer of information, not based on memory like in the case of a diary written at the end of the day, but rather on emotion. Participants took pictures of what they felt was interesting in that particular moment for that particular task, thus enriching research by allowing the collection of more personal and more contextual data.

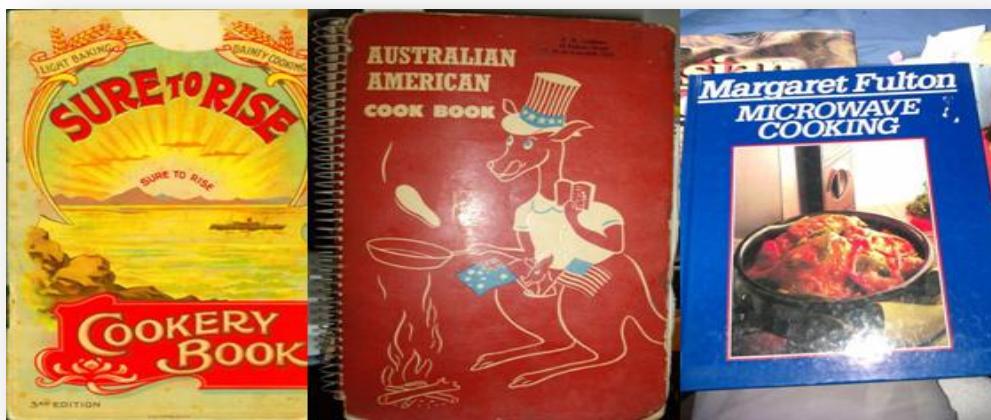
There are a number of benefits of a mobile integration of the MROC (data collected in a post-MROC survey); mainly helping participants stay in touch with the MROC because of 24/7 accessibility, and improving the feedback process. Participants also confessed that they would have spent much less time on the MROC, if they did not have the app available. As mentioned, some technical aspects are critical, such as uploading pictures and videos, which also helped in allowing participants to be involved and express their thoughts in a more visual and engaging way. This in turn improved the overall experience for all participants.

A taste of the ‘Come Dine With Me, Australia’ MROC findings

As you can imagine 50 participants posting heavily over a 3 week period provided a tremendous amount of insight into consumers lives in how they shop, cook and eat their evening meal. For client confidentiality reasons we cannot reveal all of the insights gained. Below is an overview of some of the findings and how the MROC enabled us to gain them.

The evening meal used to be all about ‘meat and 3 veg’

- The MROC allowed us to understand attitudes and behaviour from previous decades in many ways. Facilitating visualisation was a key component so that we weren’t just relying on recall. This included enabling participants to upload old food photos of what they used to eat and sharing food/meal images from links on the internet to demonstrate and visualise their memories. Video tasks set for participants that asked them to interview older generations also allowed us to widen our scope and gain valuable insights from others not taking part in the MROC.
- We were able to see and understand how meals were much heavier and richer. ‘Meat and 3 veg’ is an example of this and was a popular meal. It met the needs of families wanting their children to eat healthily, it met the needs of Dad who wanted to feel “full”, it met the needs of Mum who had the time to make it and who wanted to provide a wholesome meal for her family, which would also bring them together around the table to catch up on the day.
- Participants reminisced on these times as fond family memories, where the evening meal brought families together, although discussions clearly demonstrated how some of these meals were unappetising due to overcooking, but the sentiment was that binding families was one of the main aims of the evening meal.
- Contributing to the meals being “unappetising” was the fact that the meat and vegetables included in the evening meal each week were very similar. The lack of variety of foods in the supermarket, the limited knowledge in cooking techniques and a lack of recipes and inspiration from sources beyond family and friends were the main reasons for this. Participants talked of recipes being passed down the family, but photos of recipe books uploaded in the MROC show the interesting, but limited sources of inspiration people were using for new ideas.



Today, the flavours and cooking techniques of the world are part of the mix

- Today is a different story. People are sourcing ideas, preparing, cooking and eating food very differently and there are many reasons for this.
- One major reason is immigration. The increase of different cultures in Australia has brought the world to our plates. We have new cuisines, new ingredients and new cooking techniques, which have brought a food revolution and reignited our love of food.
- Advances in communication technology have had a huge impact on the power that consumers have now. The internet has opened a world of inspiration. At a couple of clicks recipes can be accessed from all over the world. Partnering this with the increase in food related shows in the media has meant that consumer's appetite for cooking well has skyrocketed. Internet links and pages posted on the MROC (below) show where participants were getting their sources of inspiration from. Note the themes amongst these sources, were 'fast', 'fabulous food', 'life' and cookbooks from authors overseas demonstrate the passion for food that Mavens resonate with and therefore seek when looking for inspiration. A common theme also bringing participants together in our MROC was 'Mum's home-cooked food'. Many sought the meals that Mum used to make well and that appeared to be effortless to make, demonstrating that these Mavens are looking for ways of making great tasting, nutritional food that can also fit around their busy lives.



- The MROC mobile app enabled us to get an excellent insight into how participants were cooking, preparing and eating their food in real time. Below is a collage of small number of the photos uploaded onto the MROC by participants. These show the array of different cuisines and cooking techniques used today. Also note the variety of different vegetables, meat and fish. It is also evident that presentation is important when food is served. Pleasing family and friends was a reward that most sought through both taste and appearance.



- The media has also had a huge impact on (especially amongst Mavens) what consumers want from their food. They have had many years of being cautious about food brands and what ingredients are in their products. They have heard 'fat free', 'low salt', 'low sugar' too many times and have become jaded with the terminology that brands are using to tempt them to buy their products.
- Positive words like 'fresh', 'healthy' and 'tasty' food are resonating better. They want to know that the food they are eating is good for them, in particular, it is locally sourced, not frozen or thawed (Coles are currently using this in their TV ad communications).
- The MROC let us into our Maven's kitchens for 3 weeks. They were able to show us videos they uploaded of them sourcing ideas, preparing, cooking, serving and eating their meals. We were able to see the thought process and behaviours from beginning to end. Overleaf are some stills from videos uploaded onto the MROC. Within these videos it is clear that participants are trying to eat fresh food where possible, also having to balance the time they have available after getting in from work and needing to do other chores in the evening.



- The MROC was extremely valuable in providing ‘warts and all’ unedited video footage from participants too. Below is a selection of stills from an entertaining video uploaded on the MROC. It shows a participant filming himself from start to finish when sourcing a soup recipe to serving the soup on the table. An instruction in the recipe made a wrong assumption about the knowledge of the cook, which resulted in the soup spraying all over the kitchen when the blender was switched on – thankfully to the amusement of the participant too. This also demonstrates the openness and engagement the participants had with the MROC in still wanting to share such videos.



- In an ideal world, the preference for these consumers would be to buy everything fresh and have the time cook from scratch. However, today's world is a busy one. Many families have two working parents and singles and couples are mainly working too, so there is very little time in the week to shop for fresh ingredients each day, then prepare and cook food for themselves/their family once they are at home. On top of this, many are tired, they seek to complete their meals within 30 minutes. This either gives them time to relax afterwards or have time to carry on with other chores. Photos uploaded in the MROC of the evening meal being eaten, demonstrated that many were eating in front of the TV or taking time out to relax after having a busy week. The photo below shows just this when a couple are relaxing separately after a long week.



Looking ahead, the feel-good factor will play a key role

- The MROC enabled us to understand attitudes towards food in many different guises of conversations including the moderator asking questions, using projective techniques and observing unsolicited conversations between participants in the Lounges. The word cloud below gives an overview of these conversations and the words used when food is discussed. This shows the language that will resonate well when trying to engage with these types of consumers.



- Of course, we know there is always going to be a need for pre-packaged food. Images of pantries and fridges on the MROC clearly demonstrate that they are used lots and we know the reasons why they are important. What is interesting now is what the needs and expectations are of them, how this is changing and what it means for brands going forward.



Key brand learnings from 'Come Dine With Me' Australia MROC

As previously stated, the Australian FMCG marketplace is extremely challenging. Retailers are looking for growth with limited scope for price increases or ability to steal share from competitors. Brands are challenged to generate category growth by the grocery heavyweights, whilst facing the looming threat of private label.

Companies are looking to innovation to help them break out of the cycle of price reductions and declining margins. This research was a highly valuable source of inspiration and insight into the consumer world to help Campbell's move forward and meet consumer needs. There are three themes we can share:

Giving customers less is really giving them more

Consumers want to feel good about what they are eating. For many, this means that their food has fresh ingredients, it is tasty, has authentic flavours, no hidden 'nasties' and that it is good for them. This meets their need for nourishment to promote a healthier lifestyle, but at the same time it delivers on the sensory expectations. By combining healthy and tasty together is extremely important for brands and products to meet consumer needs. Consumers are becoming tired of having to trade off tasty for healthy, and vice versa, demanding that brands deliver both.

Pre-packaged foods that allow consumers to cut corners in their busy lifestyles, still allowing them to add their own style will become increasingly popular. An example of this is a pasta sauce with vegetables in a jar vs. a basic pasta sauce with tomato, garlic and onion in a jar. Although the pasta sauce with vegetables meets the convenience needs of many consumers now, the need for fresh food is increasing, so consumers are preferring to add them themselves, meaning the base sauces will become more popular. Adding value to authentic base sauces will become the focus here.

In addition to this, products like base sauces also give control back to the consumer as to what they are eating. Some brands have managed this extremely well in that their ingredients are transparent, there are no ingredients to concern consumers and they have achieved an authentic profile. Brands across many FMCG categories could consider this strategy. The fewer added ingredients like added salt, processed vegetables, sugar etc, the better. If these ingredients are needed then consumers want to be in control and add them themselves. This helps with transparency of ingredients, building consumer trust and brand credibility.

Brands can help make everyday special

Cooking, eating and the meal sharing occasion is talked of very emotionally and passionately by our respondents. Many consumers have fond memories of their childhood when sharing a meal together. This feeling is sought after in every day evening meal occasions now. Mums/partners and singles want the meal occasion to be relaxed, special, they want to enjoy it and they want to have a positive experience. One of the reasons why food programmes like MasterChef/My Kitchen Rules have been successful is that they have made special occasion food more accessible to the everyday occasion. They have shown how versatile food can be, how achievable some dishes are to make and have wet peoples appetites to try new things. All this makes the everyday evening meal can be special. An example of this is Spaghetti Bolognese, once this was a meal that was considered as different and exotic in Australia. Today it is a very common dish that has become a standard evening meal for many households. It's versatile, has easy and accessible ingredients, can be made quickly (convenience base sauces have made it even quicker to make), it's healthy and above all it's a family pleaser.

This is an FMCG example of yesterday's exotic and special meal becoming today's necessities and brands will do well if they build on this. Bringing special meals to the everyday can be achieved in a number of ways. Consumers are more likely to try new ingredients/techniques and recipes at special occasions and on weekends when they have time to experiment. Making brands and products more visible in this search process will increase the likelihood of consideration and purchase. This includes online recipes, cookbooks, supermarket recipes etc. Once these products have been used a number of times, they are more easily adopted into the repertoire (the ingredients are now on the shopping list and in the pantry), this facilitates a move from special occasions and more to the everyday, meaning the brands can move towards mainstream usage and (assuming cost isn't an issue) bought more frequently.

Another way in which brands can build on this is within their communication strategy. By communicating the experience that consumers (especially families) can have whilst eating their food can also bring that 'special occasion' to the everyday occasion. It brings another dimension to the experience when eating at home. An ad campaign that used a similar analogy was for the brand Chicken Tonight. By involving the whole family in the ad, communicating fun times and enjoyment and producing a series of memorable ads worked very well for the brand.



Emotive language can play a big role

As mentioned, consumers communicate in a very emotive way on the subject of food. The words they use and their body language clearly show they are very passionate about what they cook and eat. Their feelings at the time of shopping, preparing, cooking and eating can also decide how much they want or like certain foods. The investment an individual makes when they plan, shop, prepare and cook a meal is a very personal one, and one that frequently moves to emotional in their descriptions:

"I wanted warming up so I made some comfort food"

"I felt a bit ill so I made a soup"

"I'd had a bad day and I felt miserable, so chocolate was the only answer"

"It was Friday, party time, so wine all the way!"

This way of communicating is a social currency, many recognise the foods that people are after when they are feeling a certain way. It is this type of emotive language that is going to appeal most to consumers when brands are communicating their products to them.

The current problem is that many brands do not do this. Consumers are worn out by packaging claims and communication that work only in a functional way linear manner. Packaging claims are an example of this: '99% fat free' 'Low salt' 'Low in fat' etc, where, rather than feeding the emotional need, they just raise negative questions like:

"Well how much is in there?"

'Do I need to be worried?'

"I didn't realise I had to be worried about the salt in there?"

Consumers can therefore be left flat when reading packaging claims. This is increased when they are shopping in a supermarket, surrounded by similar claims, similar product descriptions and also reading functional signposting in aisles. All of this combined, leaves no surprises as to why consumers are getting worn out with some claims and confused by brands and what they read.

Brands may learn more about how to communicate to their consumers by delving deep to understand the language they are using, the experience they want when eating their food, what mood they are in, how they want to feel when they have eaten their food and use this type of language in comms and packaging claims to increase appeal.

A brand that has headed this way is Emma & Tom's smoothie range below. Using words like 'Life' 'Green Power' 'Look after yourself'. Each flavour is also named aptly to fit the different occasions and the needs of its consumers.

Finally, the opportunity for Campbell's now is to take the deep insights from the MROC and overlay them onto their strategic plans for NPD and the brand communication that will support the brand and their consumers into the future.

Key learnings for researchers using an MROC

The latest GRIT report states that 66% of research buyers want to start up an MROC in the near future. We believe there are three key reasons for this:

MROCs allow you to do more with less

In times of economic hardship there is a need to bundle ad hoc research and to collaborate structurally with consumers, allowing companies to be agile whilst being cost-efficient. An MROC will help employees to make decisions more rapidly, by involving consumers in their product development cycle. In order to make maximum use of the automational advantages of communities, it is important to not involve more participants than necessary. To guarantee optimal social interaction – which results in a sufficiently large number of arguments for a thorough qualitative analysis – it is recommended to gather a group of 50 to 150 consumers in an MROC.

The ability to get more out of the same

Most research provides a snapshot of a given market or subject. In MROCs, the asynchronous and longitudinal connection with consumers builds mutual trust and provides a true understanding of their habits, emotions and perceptions, free from biases of day to day influences. The creation of an engaging participant experience results in informational benefits; discussions excel in the number of comments, length of stories and richness by multimedia integration. The participant experience is enforced by applying multiple methods - story-telling, projective techniques, short questionnaires, ethnography and integrating a mobile MROC application. Furthermore participants are motivated to think harder, different and in a given context by linking levels and badges to their efforts, making it fun to participate in research and increasing the richness of the data up to 7 times. On the flip side of this, it is important to remember that participants are part of an MROC because they want to be part of a collaboration process. This means that communication is two-way and feedback from moderator and client to participants is very important and will affect the amount and depth of information that is received back from them.

Making a difference

A methodology's distinguishing elements are often transformational and they lead to results where other methods are less effective or do not succeed. By connecting for a longer time span with consumers in an MROC, knowledge which is gained in a first stage can be applied immediately, which automatically gives the discussions more depth. As not only the consumers, but the client and their internal stakeholders also have access to the MROC whilst it's live. This helps the boundaries of departments in their organisation fade, an internal collaboration can emerge and teams are able to make decisions faster and with more confidence. This co-creation approach stimulates the development of new concepts and reinforces the activities between the brand and their customer's needs. Openness and collaboration with consumers have proven to be great ingredients for commercial success.

Finally, we fully recognise that MROCs aren't the right approach for all research projects. They are however, for the right project an exciting and very effective strategic approach that is now available when looking at meeting our client's business and research objectives. MROCs have the power to delve deep into the consumer world, bringing innovation opportunities and deeper strategic insights closer to clients.

References

Alioto M. (2011) in Mobile research, great hope or false dawn? A debate for the soul of the future of mobile research, <http://newmr.org/events/2011-events/mobile-research/>

Barber T. (2010) MROC: now we're telling you what it is, NewMR Festival 2010, <http://newmr.org/videos-slides/festival-2010/tamara-barber>

Blades F. & Brown R. (2009) More , more , more - How respondents are demanding more and co-creating the research process, ESOMAR congress 2009

Bortner B., Daley E., Shey H., Ashour M. (2008) Will Web 2.0 Transform Market Research? – A Social Computing Report, *Forrester*, April 24, 2008

Cappuccio R., and Kenny P. (2011) Coffee mavens and the global search for the ultimate experience - Understanding the usage and attitudes towards coffee in culturally diverse populations around the globe, ESOMAR APAC conference 2011

Communispace brief report (2008a) Hispanic and Latino Participation in Private Online Communities,

http://www.communispace.com/uploadedFiles/ResearchInsights/Members_as_Brand_Advocates/MembersMotives_HispanicLatinoParticipation.pdf;

Communispace brief report (2008b) What Companies Gain from Listening?,

http://www.communispace.com/uploadedFiles/ResearchInsights/Members_as_Brand_Advocates/MembersMotives_WhatCompaniesGain.pdf

De Ruyck T. & Veris E. (2011) Play, interpret together, play again and create a win-win-win,

http://www.insites.eu/media/62353/10_play,%20interpret%20together,%20play%20again%20and%20create%20a%20win-win-win.pdf

De Ruyck T., Schillewaert N., Caudron J. (2008), Together we build the future, ESOMAR Qualitative

De Ruyck, T., Knoops, S., Schillewaert, N., Coenen, G. & Rodrigues, S., (2011) Engage, Inspire, Act. Three step stones towards developing more impactful products

http://www.insites.eu/media/62345/07_engage,%20inspire,%20act.pdf

Dunbar, R.I.M. (1993), Coevolution of neocortical size, group size and language in humans, *Behavioral and Brain Sciences* 16 (4): 681–735)

Feick L.F., and Price L.L. (1987) The Market Maven: a Diffuser of marketplace Information, *Journal of Marketing*, 51, 83-97

Foley M. (2011) Social networks becoming smaller ... Will MROC follow?
<http://pluggedinco.com/social-networks-becoming-smaller-will-mrocs-follow>

Gladwell M. (2000) The Tipping Point: How Little Things Can Make a Big Difference, Little Brown

Kennedy J., and Verard L. (2009) Online Community Platforms, ESOMAR 2009

Kozinets R.V. (2010), Nethnography: Doing ethnographic research online, Sage Publications

Ludwig S., De Ruyck T., Schillewaert N. (2010) In search for the ideal mix, MOA Yearbook 2010

Muniz A.M. & O'Guinn T.C. (2001), Brand Community, *Journal of Consumer Research* 27: 412-432

Murphy L. (2012) GRIT Sneak Peek: What Emerging Research Techniques Will Be Used In 2012?
<http://www.greenbookblog.org/2012/02/20/grit-sneak-peek-what-emerging-research-techniques-will-be-used-in-2012/>

Puleston J. (2012a), Gamification 101 - from theory to practice - part I,
<https://www.quirks.com/articles/2012/20120126-1.aspx>

Puleston (2012b), Gamification 101 - from theory to practice - part II,
<http://www.quirks.com/articles/2012/20120225-2.aspx>

Schillewaert N., De Ruyck T., Ludwig T., Mann M. (2011) The Darkside to Crowdsourcing in Online Research Communities, CASRO Technology Conference June 2011

Tarran B. (2011) <http://www.research-live.com/features/and-the-mrx-tweeter-of-the-year-is/4006573.article>