Tide Laundry Detergent: Brand Measurement and Tracker Results

A Social Media Research Case Study
• Social media research requires extreme care during data collection because brand names often have multiple uses

• Tide Data Collection
  – Data were collected only if they contained the word “Tide” in association with at least one relevant concept
    • E.g., wash, laundry, detergent, powder, clean, soap, dirty, bleach, ultra, procter, gamble, coldwater, high efficiency, dryer, smell, rinse, prewash

• Tide Data Rejection
  – More than two hundred other criteria were still used to discard data which met the inclusion criteria but were not relevant
    • E.g., rip tide, stem the tide, turn the tide, tubes tide, ride the tide, tide sports, tide me over, afternoon tide, English tide

• Competitive brands required similar care
  – ‘Gain’ and ‘Cheer’ are common verbs that also required diligent data quality work
• The sentiment system was fine-tuned for the laundry category to ensure that the brand names being researched did not inadvertently improve or worsen the sentiment scores

• Tide Stain Release: The word ‘stain’ could erroneously lower the sentiment towards this SKU even if consumers are satisfied with it. (e.g., Tide Stain Release works great on all kinds of stains!)

• Tide Free & Gentle: The words ‘free’ and ‘gentle’ are positive words which could improve the sentiment towards this SKU even if consumers are dissatisfied with it. (e.g., Tide Free & Gentle ruined my shirt.)
Key Market Research Measures

Top 2 Box Opinions of Tide (Jan 1 - June 30 2011)

- Positive opinions towards Purchasing showed the least movement during the time frame generating a min/max range of 3.8 points
- Different (flat), New (decrease), and Recommend (decrease) showed more volatility in the percentage of opinions which were classified as positive with min/max ranges of 7 to 9 points
- The Trial measure showed the most volatility increasing from a low of 25% positive in January to a high of 46% positive in March. This change will be considered in the following slides.
- Definitions: Variables reflect a collection of verbatims that discuss a specific topic
  - Purchasing – Buying, purchasing, or spending money on items; Different – Discussions of unique, different, dissimilar items; New – New, debuting products; Recommend – Recommending, advocating, or endorsing products; Trial – Trying or sampling products

Caution: Non-Zero Scale

Tide N=13 581
Key Emotion Measures

Top 2 Box Opinions of Tide (Jan 2011 to June 2011)

- Specific emotions towards the Tide brand remained fairly stable over the same time period
- Appreciation showed a slight increase in February from 35% to 41%.
- The percentage of positive opinions related to Trust showed a slight decline from 29% in January to 20% in February, which subsequently rebounded to the normal trend
- Definitions: Variables reflect a collection of verbatims that discuss a specific topic
  - Anger – Expressions of rage, argumentativeness, or complaints about products; Anticipation – looking forward to or aspiring products; Trust – believing and feeling confident about products; Appreciation – expressions of liking, loving, enjoying a product

<table>
<thead>
<tr>
<th></th>
<th>Jan-11</th>
<th>Feb-11</th>
<th>Mar-11</th>
<th>Apr-11</th>
<th>May-11</th>
<th>Jun-11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anger</td>
<td>9.56</td>
<td>9.76</td>
<td>8.21</td>
<td>6.23</td>
<td>8.82</td>
<td>8.47</td>
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<tr>
<td>Anticipation</td>
<td>34.65</td>
<td>40.97</td>
<td>38.92</td>
<td>47.06</td>
<td>36.12</td>
<td>33.33</td>
</tr>
<tr>
<td>Trust</td>
<td>28.8</td>
<td>19.75</td>
<td>27.52</td>
<td>31</td>
<td>26.79</td>
<td>29.89</td>
</tr>
<tr>
<td>Appreciation</td>
<td>41.99</td>
<td>52.25</td>
<td>44.31</td>
<td>42.55</td>
<td>46.02</td>
<td>47.98</td>
</tr>
</tbody>
</table>

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The Purchase Cycle

<table>
<thead>
<tr>
<th>Variable</th>
<th>Volume</th>
<th>Top 2 Box</th>
<th>Volume</th>
<th>Top 2 Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awareness</td>
<td>62,208</td>
<td>32.78</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interest</td>
<td>19,734</td>
<td>42.79</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Desire</td>
<td>9,760</td>
<td>33.56</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Action</td>
<td>7,877</td>
<td>43.54</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Satisfaction</td>
<td>29,155</td>
<td>38.06</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recommend</td>
<td>2,520</td>
<td>34.88</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Similar to the traditional purchase funnel measured by elicitation research (e.g., surveys), the purchase cycle as measured by social media research outlines the volume and sentiment of conversations related to various purchasing stages. Measurement of each component of the cycle is dependant on whether consumers wish to discuss those particular stages.
- The nature of the internet is such that awareness is indicated by the mere mention of a brand name.
- Sentiment
  - Highest among people sharing their interest in Tide (Like or dislike of the brand)
  - Lowest among people discussing their need or desire for Tide
- Conversation volume
  - Highest among people expressing their satisfaction with Tide (Aggregate Emotions)
  - Lowest among people recommending Tide
Tide SKU Satisfaction

- As a high-level brand, about 37% of verbatims about Tide were positive
- However, Tide Ultra generated the most positive mentions (58% were positive) while Tide Free & Clear generated the fewest positive mentions (28% were positive)
Tide vs Laundry Category Norms

% of Verbatims in Bottom 2 Box

\[
\begin{array}{c|c|c}
\text{Tide} & 9.92 & \text{Norm} & 9.88 \\
\end{array}
\]

% of Verbatims in Neutral Box

\[
\begin{array}{c|c|c}
\text{Tide} & 48.56 & \text{Norm} & 45.25 \\
\end{array}
\]

% of Verbatims in Top 2 Box

\[
\begin{array}{c|c|c}
\text{Tide} & 41.52 & \text{Norm} & 44.87 \\
\end{array}
\]

Tide N=13 581 Laundry Category Norm N=27 832, Jan 1 – June 30, 2011

- Compared to laundry category norms in the online space, Tide generated a greater percentage of complacent viewpoints
  - Tide products generated similar B2B scores, but 3.3% more neutral scores, and 3.3% fewer T2B scores.
In February 2011, sentiment for Tide deviated from trend
- Sentiment shifted to be more in line with category norms
- Sentiment became more positive

However, trends returned to normal in March
February Promotion

- The increase in positive sentiment during February was the result of a promotional campaign which gave away thousands of full size bottles of Tide Stain Release Spray.
- Sentiment increased as much as 12 points from January to February.
• During the 6 month time frame of January to June of 2011, Gain detergent owned the scent proposition, a highly touted feature in their marketing campaigns

• The percentage of Tide verbatims that were positive towards the scent was ten points lower (Gain=45% vs Tide=34%)
• During the 6 month time frame of January to June of 2011, All detergent owned the coldwater proposition
• The percentage of Tide verbatims that were positive towards this feature was nine points lower (All=39% vs Tide=30%)
### Cleanliness Ownership

<table>
<thead>
<tr>
<th></th>
<th>Cheer</th>
<th>Gain</th>
<th>Tide</th>
<th>All</th>
<th>Rockin' Green</th>
<th>Dreft</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cleanliness</td>
<td>54.38</td>
<td>51.92</td>
<td>43.42</td>
<td>39.16</td>
<td>36.39</td>
<td>28.4</td>
</tr>
</tbody>
</table>

- During the 6 month time frame of January to June of 2011, Cheer detergent owned the cleanliness proposition.
- The percentage of Tide verbatims that were positive towards this feature was eleven points lower (Cheer=54% vs Tide=43%).
• Though Tide benefits from the highest volume of social media conversations, it does not differentiate from various other laundry brands

• Purex and Gain generate the most positive conversations related to recommendations and purchasing
Co-branding Opportunities

- Co-branding opportunities should first consider brands for which Tide consumers have positive sentiment.
- Home care brands that are most relevant to Tide consumers include Charmin, Cascade, and Duracell.
- Personal care brands that Tide consumers have positive emotions towards include Old Spice, Tampax, and Pantene.

June 26 – June 30 2011
Located Based Strategies

- People join social networks based on their needs and interests. This results in localized trends in opinions towards products.

- Discussions about Tide were more positive on the DiaperSwappers forum
  - Tide was seen as an excellent product for cleaning diapers and eradicating odours

- Discussions were far more negative on Facebook
  - A hoax about samples of Tide containing anthrax poison was widely shared on Facebook between January 4 and 10th and subsequently was forgotten

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Summary and Conclusions

• Results
  – Trial increased from a low of 25% positive in January to a high of 46% positive in March
  – Tide Ultra generated the most positive mentions (58%) while Tide Free & Clear generated the fewest positive mentions (28%)
  – Compared to norms, Tide generated more complacent viewpoints
  – Important laundry features owned by competitors included Scent (Gain), Coldwater (All), and Cleanliness (Cheer)
  – Tide remains undifferentiated from other laundry brands

• Conclusions
  – Though Tide is generally considered to be the leading brand, it is not apparent in the online space
  – Promotions do improve sentiment, but afterwards, sentiment reverts to below norms
  – Tide does not own several important claims including scent, coldwater effectiveness, and cleanliness
  – Tide may have become a complacent brand, one which consumers expect to work well. Therefore, they may not be surprised or motivated when it does work well.
Thank You

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