THE TASTING PANEL

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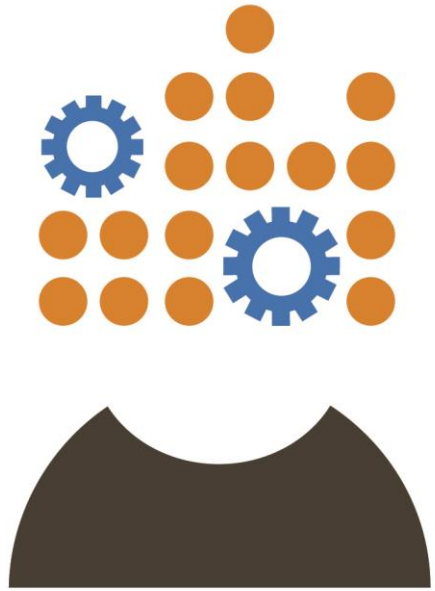
VIBRAND
RESEARCH

Contents



About Us:

Vibrand

About Us

Experienced, Innovative & Adaptable to your Needs & Budget

Vibrand was ***founded twelve years ago*** by Stuart Jones & Richard Katz .

Today, we're a ***Full Service Strategic Agency*** with integrated Quant, Qual & a range of specialist, online & tech driven products.

The Vibrand Collective ensures budget-competitive, ***director-level involvement on all projects***: a hub for independent insight specialists trained in the Vibrand way.

At Vibrand, we place strong emphasis on ***modernity, innovation, insight generation***… BUT, with a total commitment to ***useful & useable outcomes***.

Our reach spans far beyond South Africa's borders. Between us, we have experience on every continent, across various categories.

Vibrand Research is a certified Level 4 B-BBEE contributor, with a 100% procurement recognition level.

About Us

What we do…

Vibrand Reach: networks of field teams and high tech combine to offer short form surveys quickly and affordably in all 9 provinces and in 53 other developing markets.

Vibrand Qual: qualitative research across all the various methods, with the best in house staff and out-of-house partners across all disciplines.

Vibrand Quant: tailored quantitative research in SA and 36 other developing markets.

Vibrand Opinion: deep social media research; partners with Crimson Hexagon. Mining and analysing 900 billion pieces of data for consumer, category & behavioural information.

Vibrand Social: now housed in our sister company, the **Citizen Research Centre.**

CITIZEN RESEARCH CENTRE

INTRODUCING:

Vibrand Taste Testing: now housed in our sister company, **The Tasting Panel.**

THE TASTING PANEL

Vibrand Core Values

We are committed to developing ongoing, mutually beneficial relationships with all our Clients.

We offer research of high calibre across all major methodologies, **with an emphasis on creative and modern approaches**; for every project commissioned, we handpick from the many methods at our disposal to address your research needs with concern and precision.

We are driven to provide the best Client service in the industry; every member of every team is committed to meet your needs with expertise, professionalism, attentiveness and care.

Where projects require a more strategic touch, **we have high level capabilities in creative ideation and workshopping**; our goal is always to bring you the best collaborative solutions.

Our Clients

Business, Social & Agency


parmalat


Levi's


SABC


W


PIONEER
FOODS


ABInBev


KraftHeinz


M
MILPARK
BUSINESS SCHOOL


ITHUBA
EQUALITY IN OPPORTUNITY


RCL
FOODS


Nestlé


METROPOLITAN
Together we can


YOU PAY LESS
CLICKS


FAST MOVING
FORWARD THINKING
IMPERIAL™


MITSUBISHI


telecom
namibia


PHILIPS


Inco labs
CREATING BEAUTY AND VITALITY

Save the Children

THE GLOBAL INITIATIVE AGAINST TRANSNATIONAL ORGANIZED CRIME

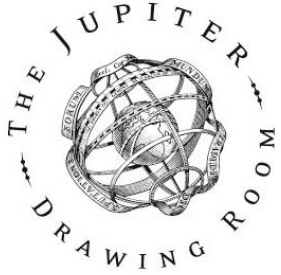
The Network for Religious and Traditional Peacemakers

UNODC
United Nations Office on Drugs and Crime

THE WORLD BANK


HAVAS


DRAFTFCB


THE JUPITER DRAWING ROOM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SAATCHI & SAATCHI


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MOVINGBRANDS. MOVINGPEOPLE.


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THE TASTING PANEL

About Us:

The Tasting Panel

Conducting Tasting Panels for our clients led us to realise that there was an opportunity to pursue…

- We realised there was a need for **consumer** tasting panels, convened in a natural, **informal environment**.
- We also knew that this needed to be combined with:
  - A level of **rigour in recruiting** that was client/product/category specific. We use recruiters we have trusted for over a decade to do this. We offer recruiting from the specific to the general, and panels from the episodic to the recurring.
  - **Organisational capacity**: provided by Vibrand staff and associates
  - **Statistical tools specific to sensory research** and of the highest standard: The Tasting Panel's quantitative head has undergone rigorous training, and imparted knowledge to other members of staff. We use the latest techniques and software to provide the best possible stats analysis available.

A year on and we are expanding the offering

- We soon realised that the statistical tools that are at the heart of the Tasting Panel's success can also be used for **non food product testing**. So while we test all food products – hot and cold, liquid and solid, we also test non food products.
- The key to all product testing is defining Key Performance Indicators and polarities (eg: not enough fruit vs too much fruit; not sweet enough vs too sweet; does not clean fat well vs cleans fat very well; does not foam enough vs foams too much)
- We also realised that **we can test packaging and concepts with the same tools**. Again, identifying KPIs and polarities is ideal, but with concept and pack not essential. Here we work with CATA (Check All That Apply) image banks, liking scores, (where possible) JAR and penalty drop analysis to determine the best performing packs and concepts.
- See our tool box and case studies towards the end of this document for more details.

How does it work?

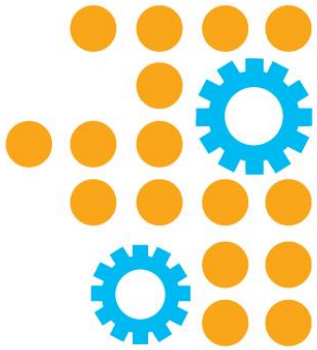
- Our process is very customised, though all parties benefit from an **ongoing series of panels.**
- We CAN recruit anyone, we PREFER to **recruit the same people** on an ongoing basis (with periodic refreshment), on a category basis.
- We PREFER a **home environment** for tasting: it is more realistic, more cost effective, more relaxed and results in a higher return rate for a relatively low incentive. However, in markets outside SA we tend to use central venues. We also test some products In Home (HUT) over a 10 day period.
- Client PREFERABLY **incentivises** through voucher or relevant PRODUCT. Again, outside SA this is often not practical and we incentivise ourselves.
- The process takes **10-15 minutes.**
- No more than **40 respondents** per home venue per session. Home venues are set up in relevant areas and respondents are recruited to live/work near the home venues.

How does it work?

- Product is delivered by Client and at Client cost to the home venues on the morning of the sessions. Where competitor product is easily available, we can arrange for our team to purchase it.
- Our staff prepare the product for tasting in the afternoon and the session is held in the early evening (5-7pm is typical).
- Consumers arrive as and when they are able through the session – and are instructed in what to taste and given their (pen and paper) questionnaires. CAPI is not practically possible.
- Data is then captured and uploaded onto our software.
- Our analysts then clean and process the data, using a blend of proprietary and specialised statistical software.

We offer fully customisable statistical analysis

- Statistical analysis is dependent the nature of the project, client need (both practical and strategic), and the number of products tasted in each flight.
- Each form of analysis requires specialised questioning protocols. While client input on questionnaire design is welcomed, we must have final say on the structure of questioning so as to extract maximum output.
- Needless to say, QQ design is fundamental, and must be finalised at least 2 days before panels are run to allow for printing and coding.
- We work with client closely in QQ set up. Key considerations are:
  - The set to be tasted
  - The key attributes of the product to be tested
  - The measures of success – these range from simple preference (where a 60/40 preference score is aimed for) to more complicated market positioning work.



THE
TASTING
PANEL

About Us:

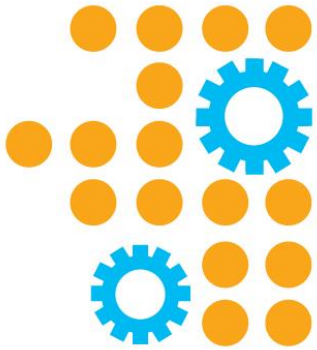
Why Us???

The Tasting Panel: Why Us???

- We like to think that the following factors differentiate us from our competitors:
  - Partnership: we want to establish mutually beneficial, long term, open, honest and fruitful relationships with our clients. This stabilises our business, and also benefits us personally and professionally. And it allows us to build capacity to properly service our clients needs.
  - Exceptional Client service, organisational skills and communication
  - Hard work: the field and analysis and reporting on Tasting Panel projects are hard work. We relish hard work.
  - Customisation: from sample to geography to questionnaire to analysis, we tailor each panel to the needs of both the project and the client
  - Flexibility: if you need quick results or need some compromises on budget, talk to us and we'll make a plan. We don't like losing projects based on budget or timings!
  - Advice: we draw on our own experience, existing literature and our access to experts in the various fields of sensory research to recommend the ideal approach for each component of each panel.

The Tasting Panel: Why Us???

- We like to think that the following factors differentiate us from our competitors:
  - Method: while we do most of our work in respondents' homes, we also run central venue panels; Home Usage Testing (over a space of 1-2 weeks) and online options (pack testing).
  - Reach: we run panels not only in South Africa, but in most African markets.
  - Value: we extract all that we can from each panel. Give that we can test product, pack, and concepts, if there is 'space' in a panel we will recommend that client use it. So if we are conducting a single triangle test with consumers, we will recommend that we also conduct testing on another product, pack or concept. It is usually fairly easy to recruit 'cross over' respondents, as long as there is consistency in LSM, gender, age, geography and race.



THE TASTING PANEL

About Us:

Our Tool Box

Our Tool Box

- Some or all of the following **statistical tools** will be made use of depending on the project (more detail follows):
  - Significance Testing
  - Mean Scores
  - Standard Deviation
  - Covariance
  - Jar (Just About Right) Scales
  - Correlation Analysis
  - Regression Analysis
  - Preference Mapping
  - Cata (Check All That Apply) Penalty Analysis
  - Cluster Analysis
  - Principal Component Analysis

Our Tool Box

Once the data has been collected, it is run through our 'best in class' statistical software programme.

- The Tasting Panel uses a wide array of sensory analysis techniques and methodologies, with a range of statistical tools to draw on - and we customise the tools we use depending on the job at hand.
- We aim to combat respondent fatigue through questionnaires that are as simple as possible, while still allowing for the necessary post-panel statistical analysis.

There are three key types of testing we offer:

- **Difference:** (Sensory discrimination) to determine whether there are detectable differences between products
- **Descriptive:** to provide information on selected characteristics
- **Affective:** to assess subjective attitude to a product, acceptability or preference. (Follows discriminative or descriptive testing).

Our Tool Box

TRIANGLE TEST

- Determines whether or not a perceivable difference exists between 2 products, and can be used when a change has been made to the product intrinsics, storage or production methods. This test is quick and simple but is limited to a yes or no answer – combining it with a descriptive test can identify which product is preferred and why.

PAIRED COMPARISON

- Determines differences between 2 products on specified variables. This can be used when introducing a new formulation - where the control sample is tested against the new - or to assess your product against your competitors'.

RANKING

- Determines which products are best liked and most preferred over others. This is useful when deciding which new flavour, fragrance or formulation to launch, or to assess consumers' preference for your product versus you competitors'.

Our Tool Box

COVARIANCE

- Shows us how related the sensory measures are - do they vary together or do they vary in a related but opposite direction.

CATA (CHECK ALL THAT APPLY)

- Determines the main drivers of liking and preference and which attributes negatively or positively influence liking and preference. This would be added to a ranking test to understand which elements of your product, pack or concept might benefit from tweaking.

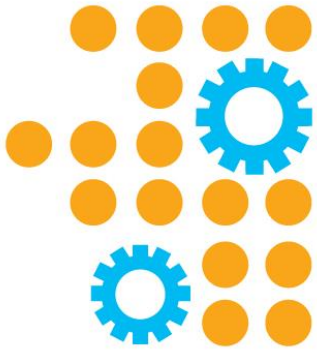
JAR (JUST ABOUT RIGHT)

- Determines exactly what effect specific attributes have on overall liking. A 5 point scale ranging from “too little” to “too much”, with “Just about right” in the middle, is applied to specific attributes. This allows us to do a **penalty drop analysis** where we look at ‘too little’ and ‘too much’ mentions to find significant influences of these on overall liking and identify potential problem areas and areas of possible improvement.

Our Tool Box

PCA (PRINCIPAL COMPONENT ANALYSIS)

- Identifies the correlations between variables / attributes. The basic question it would answer is "Which of these products have similar profiles and which attributes correlate most strongly with which products?" modelling methods such as linear regression, logistic regression or discriminant analysis are used to help us visualise observations in a 2- or 3-dimensional space in order to identify profiles of attributes and match these with products.



THE TASTING PANEL

About Us:

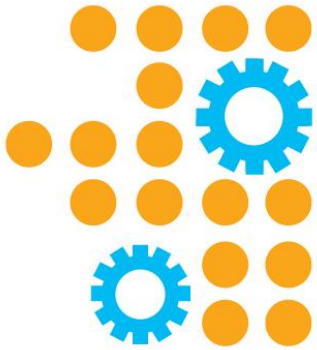
Associated Products

THE TASTING PANEL

Associated Products

We offer a range of associated products that leverage either the sensory tools available to The Tasting Panel or the existing Tasting Panel Infrastructure

- Home Usage Testing: we place test product in consumers homes for use over a period of 1-2 weeks. We then administer QQs using sensory analysis techniques to evaluate these products on their KPIs. So for a washing powder it may be foam, efficacy, residue etc. We use PCA, JAR and penalty drop analysis to provide a holistic overview of product performance.
  - This is done on a monadic, protomonadic or sequential monadic basis depending on the nature of the project.
- Focus Groups: leveraging Vibrand Research's (www.vibrand.co.za) capacity and skill in qualitative research, we use existing Tasting Panel infrastructure to run qualitative research (focus groups), at around 2/3rds of the price of 'traditional' focus groups. Ewe use two methods here:
  - Where we have a standing category panel, we invite our panellists to 1 hour long groups in the central location home environments we use for taste tests OR
  - When we run a panel we typically 'see' 25-30 consumers in an evening. We then recruit the last wave of consumers to stay on and participate in a 1-hour focus group after the taste test is done. Using this method we have been able to lower the costs of groups by about 1/3rd.



THE TASTING PANEL

About Us:

Why Buy a Bank of Them?

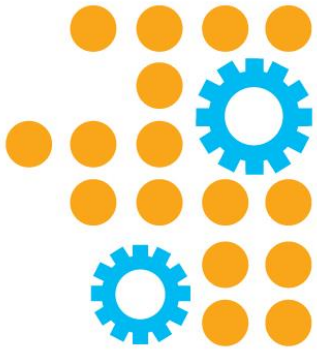
The Benefits of using a bank of panels over the year

With the introduction of pack, concept and (non food) product testing, carefully organised panels can be used very effectively to answer a number of research, business and strategic questions.

Here is a hypothetical to show how it can work: you have products A, B, C and D in the pipeline for the year – maybe in one category, or maybe across the whole business. They are in various stages of readiness. You have bought 6 panels for the year.

- In Panel 1, you test product A and evaluate the concepts for product C
- In Panel 2, you have now developed packaging for product A so you test that, along with product B. You also test the concepts for product D. You find that the concept test for D has shown opportunity to develop product E, so that goes into process.
- In Panel 3 you test product C, but you developed an additional variant to product B, which you put into testing as well.
- In Panel 4 you test the packaging for products B and C, and the concept for product E
- In panel 5 you test product D and E
- In Panel 6 you test the packaging for product D and E

And that is 2017 – 5 new product lines, with concept, pack and product all optimized for your consumers according to rigorous statistical analysis…



THE TASTING PANEL

About Us:

Case Studies

Case Studies

CASE STUDY ONE: <u>Difference testing:</u>

Our client needed to decide whether it would be advisable to go ahead with a **new (cheaper to produce) formulation** to replace an existing, very successful formulation that they had developed. They needed to answer the central question: *Is our new formulation perceptibly different from our current formulation?*

We applied a TRIANGLE TEST which determines if a perceptible difference would be detected if the new formulation were to be launched.

- Analysis was conducted using
    1. A statistical sensory analysis program and…
    2. An ISO standards tables which compare results to chance – this analysis ensures that the difference was real and not because people chose the correct sample by luck/chance
- Advantage - Quick and simple
- Can be combined with preference methodologies.

The results showed, at a 99% confidence level, that although the new formulation was selected slightly more often as the sample that was different, it would not be noticed in the overall target market if they were to move ahead.

We could confidently advise our client to proceed with the new formulation.

Note: we have also successfully applied triangle testing to multiple new formulations.

CASE STUDY TWO: *Affective – Preference testing:*

- Our client needed to determine whether their existing recipe of a certain product, when tested against their closest competitor, achieved a 60/40 preference level from consumers.
- We ran ANOVA on liking scores and employed a preference test to achieve this end.
- This enabled us to determine the following:
- On which aspects the two products differed most: appearance, colour, creaminess and taste.
- The analysis showed that the aim of a 60/40 acceptance of their current recipe was achieved (71% of consumers preferred our client's product).
- We were also able to inform them that the key drivers of overall liking of their current recipe were: taste, appearance and creaminess.

Not only did our client choose to continue with their current formulation – they were able to claim in communication that 70% of category users preferred their brand to the market leading brand.

CASE STUDY THREE: ***Amalgamated: Concept, pack and product testing***

- Note that in this case study our client had purchased a set of panels – in all the examples below, other material and products were tested alongside the products in question.
- Our client had developed 12 conceptual variants for a new range of hot food. They needed it narrowed down to 8.

We tested the 12 concepts and advised on which 8 to take to development.

- Once developed, we tested the 8 variants as our client had to choose 5 variants to take to market
- We used our software to ascribe a detailed rotation order to tasting, as each consumer could only taste 5 variants without fatigue setting in. An incomplete block design was used to ensure that all 8 variants were tasted 'fairly'.

We advised our client on which 5 variants to take to market, as well as advise on potential improvements that could be made to each variant.

- Meanwhile, packaging was developed: 3 iterations of each pack were then tested, and we advised client on the most impactful pack design based on their KPIs. We used CATA, ANOVA and JAR analysis to achieve this end.

We had now advised our client on choosing 8 of 12 concepts, 5 of 8 formulations and 1 of 3 pack designs.

CASE STUDY FOUR: *Home Usage Testing:*

- Our client had developed 2 new formulations of a household cleaning product
- We applied a phased methodology:
  - In sequential monadic fashion, each new formulation was placed in home with 100 consumers for a period of 10 days
  - Each respondent was then taken through our questionnaire, using ANOVA, JAR and CATA analysis. Penalty drop analysis was applied to JAR and CATA.
  - The preferred formula was identified, based on comparison between the 2 'cells' of respondents.
  - We then convened a different set of 100 consumers to test the winning formulation against the market leader (blind).
  - A comparative usage test was conducted and a questionnaire administered.
- We were able to advise Client on how their formulation compared to the market leader across 5 KPIs and on a total liking level.

While our clients' product was preferred, some improvements were suggested and implemented.

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EMAIL :
info@thetastingpanel.co.za

WWW :
www.thetastingpanel.co.za

CONTACT US