

Half the battle

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Small but mighty

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Marketing News

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A THOUSAND WORDS



Across two continents and five time zones, photographs of kitchens in Sweden (left), India (center) and Russia (right) document cultural nuances and consumer preferences in ways that speak louder than words.

TEN THOUSAND MILES, PAGE 15

MARKETING RESEARCH

Tech affects MR ... Tap emotions to get at behavior ... Plus, our annual Marketing Research Services Directory.

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Cover story

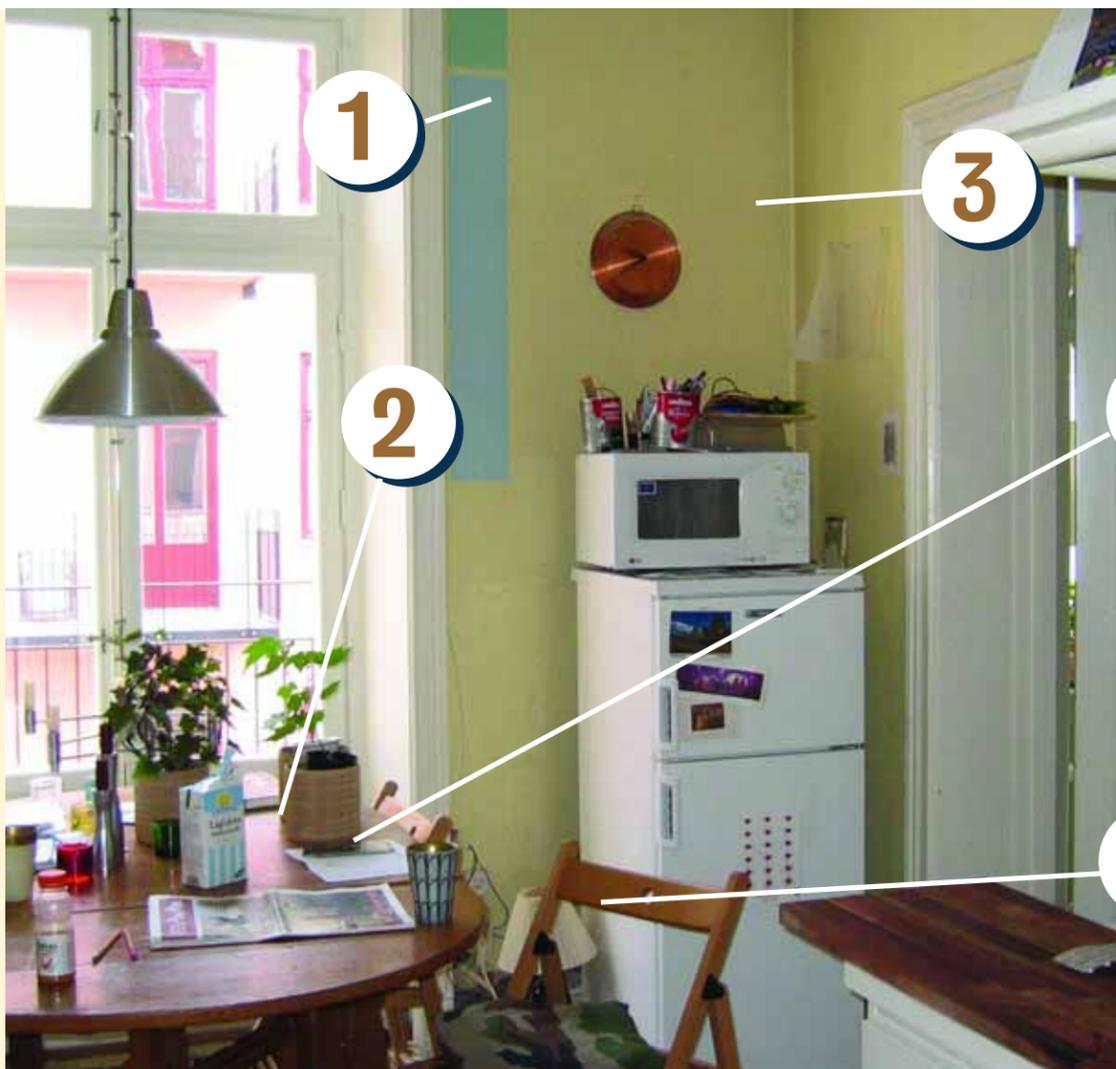
Marketing research

Verbatim:

The implications of a photograph of a home are countless. For a marketer, an image is worth several hours spent in focus groups or interviews.

A kitchen done Swedish style

1) Muted yellow walls and pastel accents of green and periwinkle throughout the room indicate that it is undeniably Scandinavian, and more than likely Swedish. 2) A subtle visual clue of the kitchen table near the window is typical of Swedish kitchens. While it's not unique to Swedes, it is characteristic of their design preference. 3) Minimal décor in this apartment suggest that it may be a temporary home, probably a rental unit. 4) The seemingly hodgepodge nature of everyday items (newspapers, pencils and dishes) indicates that this occupant spends quite a bit of time in this room. 5) Since the chairs and the table don't match—suggesting that it was acquired not as a set but separately—the apartment likely is occupied by a young person.



IN ONE'S ELEMENT

Global household pix yield consumer insights

By MICHAEL FIELDING
Staff Writer

Tom Andersson knows the heart of Swedish home life when he sees it. It's all in the photograph of a kitchen.

In one from Stockholm, the table, which has been placed against an immense window, is also near the stove, typical of Swedish hospitality: Together they encourage conversation between host and guest while dinner is prepared, in the one place that all Swedes consider the heart of social life. Elsewhere, the walls are a muted yellow and pastel accents of green and periwinkle—undeniably Scandinavian, if not outright Swedish—border the window. And, since a good host always makes his guests feel at home, several small plants and candles cozy up the room.

Each a single visual element among hundreds of

visual elements, they all tell a story of cultural values, weaving together family history, cultural background and consumer preference.

Once he's pinpointed the likely cultural background of the occupant, Andersson can make a variety of deductions about the demographics. Sparse walls and minimal décor in the Stockholm apartment, for example, suggest it's a temporary home, probably a rental unit. Two chairs are a mismatched pair with the table, suggesting they were acquired separately, likely by a young person. Every available surface is cluttered with newspapers, pencils, dishes and other remnants of everyday life, telling Andersson that the occupant spends quite a bit of time here.

All that from a photograph.

Andersson, a social anthropologist, is one of a dozen social scientists around the world who spent more than a year photographing household interi-

ors from Stockholm to Mumbai, documenting the nuances of the living spaces of consumers from all backgrounds for arguably the most comprehensive market research project of its kind.

From spring 2004 to summer 2005, New York-based market research giant GfK NOP and Half Moon Bay, Calif.-based research firm Social Solutions Inc., worked to create a massive visual database with the goal of understanding global consumers better. The "Visual Survey of Domestic Space" pairs nearly 13,000 photographs, snapped by Social Solutions' ethnographers worldwide, with consumers' responses to related questions from Roper Reports Worldwide, an annual survey delivered to 30,000 consumers in 30 countries.

The implications of a photograph of home are countless. For a marketer, the smart analysis of such

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Toys everywhere mean kids reign

an image is worth several hours spent in focus groups or in-depth interviews. It whispers the secrets of a family's financial means, radiates the warmth of a busy living room and offers a whiff of the dinner simmering on the stove.

A photograph reveals the true heart of the home.

"People ... seem to use the kitchen as the living room more than the living room itself," explains Andersson, who, in April and May 2005, documented nearly two dozen households throughout Sweden. "Usually (Swedes) talk about the kitchen table as somewhere where friends and relatives are waiting while the host is doing the dinner.

"As a good citizen you do your homework every morning (at the kitchen table): You listen to the radio, read your newspaper and drink your coffee," he says.

... Small radio joins well-read edition of daily paper on table. (Kitchen, older couple, small house, rural area near Stockholm)

Andersson's photos reveal kitchens that are spacious, open and bright—inviting, even in a student's studio apartment.

Indeed, "The size of the kitchen is a symbol of our social success," Andersson explains.

'The size of the kitchen is a symbol of our social success.'

The socioeconomic clues extend beyond the size of the room. For example, utensils are a popular gift in Sweden, and people show them off. "The aesthetic part is almost as important as the functional part," Andersson says.

Not so elsewhere, explains Indian researcher Dina Mehta, even if the pictures contain parallels.

... Large pots stacked next to a kerosene gas tank. Platters, bowls, pots, cups and dozens of metal utensils hang above the stove. (Kitchen, lower-middle-income family of six, three-room apartment, Mumbai)

"That's the way houses are built," Mehta says. "They don't have cabinets. People don't see the value in hiding these things that are used too often."

The Indian kitchen is little more than a functional place. "It is decorated a little, but otherwise it is very, very functional. It is where the woman's identity exists," says Mehta, the former research director with IMRB International, India's largest market research agency.

In another photograph, a laundry machine in the kitchen indicates a middle-income family with enough money to afford the machine—but not enough to afford a house large enough to place the machine in a separate room, she explains.

Most urban Indians are often in the market for space-saving items that are both simple and practical. "There is no concept of

beautifying your house," she says. What little decorating there is, is restricted to pictures of Hindu gods on the walls or idols placed in shelves; even the window to the street is left unmasked by curtains or blinds.

... Literal and figurative center of home: living room. Television set, dining area, sleeping area share space here. (Living room, middle-income family of five, one-bedroom apartment, Mumbai)

In urban India the typical household lacks enough storage to separate parents' belongings from children's belongings. Consequently, the five people of the small household in one of Mehta's photographs share common items such as the television and the books on the shelves.

Alexey Danilin can relate. Danilin, who photographed households in Moscow and St. Petersburg for the project, notes that that sofa bed in one photograph is likely used by night by the grandmother, who lives with the family, and by day by the children, who use the room as a play area.

In several of Danilin's photographs, stuffed animals can be found throughout the room. "If a family has kids, you always can find toys in the bedroom. It doesn't matter if it is the parents' bedroom or the kids' bedroom." To an ethnographer, that key element prompts further questions about the status of children in the typical Russian home: "Children can play wherever they want," Danilin explains.

... Stuffed animals arranged in single file on bed. Bed spread, pillow cases, head board, wallpaper, curtains coordinated in beige and gold hues. (Bedroom, high-income family of four, three-bedroom apartment, St. Petersburg)

"In Russia it is very fashionable to decorate your flat (since) Russia (is) becoming more and more rich. There is more money not just for surviving but for decoration," Danilin explains.

Danilin draws attention to canvas portraits on the wall of an upper-income couple. "After 40 or 50, all parents want to have their portraits in the bedroom—not photos

but canvas portraits. It's like a symbol of their prosperity," he explains. For middle-income Russians, though, rather than hang portraits of themselves, "some people have two TV sets in one room or DVD players," he

explains. "Some have two refrigerators—one for (everyday) purposes and the other just in case."



Indian kitchens are a practical matter

1) The walls are sparse, with little décor except a large shelving unit. In India, where this photo was taken, there is no concept for beautifying a home. The little decorating and design that Indians do engage in is limited to pictures of Hindu gods. **2)** Utensils, platters, dishes and other basic kitchen items hang exposed in a large shelf near the stove—something commonly found in Indian kitchens, as Indians see little value on hiding items that are used often. **3)** A kerosene gas tank suggests that the occupants are likely a lower-income family (gas stoves are typically found in houses of higher-income residents in India).

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Visual survey marks new trend in research

The idea for the “Visual Survey of Domestic Space”—believed to be the most comprehensive database of its kind—arose from a practical problem faced by a client of New York-based market research giant GfK NOP.

In the summer of 2004, a European furniture manufacturer wanted to test its segmentation by analyzing the interiors of consumers’ houses. “They had to make correct assumptions of their living spaces,” says Jerry Lombardi, vice president and North American director for observational and ethnographic research at GfK NOP.

Faced with a potential seven-digit price tag for such a cumbersome observational research project, GfK NOP decided to create a standardized database comprised of photographs of household interiors and tie it in with data that GfK already had.

“We want to give people a decent substitute for on-the-ground research ... without wandering around cluelessly (once they arrive),” Lombardi says. So GfK NOP joined with Half Moon Bay, Calif.-based research firm Social Solutions Inc., to create a database to help understand global consumers better.

Co-designed by Lombardi and GfK colleagues Rick Robinson and Simon Pulman-Jones, the resulting survey is a massive database of nearly 13,000 photographs paired with responses from the Roper Reports Worldwide, an annual survey delivered to 30,000 consumers in 30 countries.

“We decided to visit homes of a selected number of people who had responded to the Roper survey and take a standardized set of high-res digital photos inside each house,” Lombardi explains.

GfK NOP hired Social Solutions, a global research consultancy that conducts internal organizational development research. Social Solutions then charged one researcher in each of 12 countries globally to visually document the interiors of the houses of those who responded to the annual Roper survey. The pilot study began in autumn 2004 in the United Kingdom, United States, Brazil and Spain and continued worldwide through the summer of 2005, when the database was completed.

With an average of 20 households in each of the 12 countries and 45 to 50 photos from each household, “we realized that the photos had to be structured in such a



Photo by GfK Americas

If it's true that a picture speaks a thousand words, then marketers can surely benefit from the subtle insights into consumers' behavior provided by photos of their living spaces.

way that you could get comparable photos in Sweden or Egypt,” Lombardi adds.

After all, the living arrangements in a two-room apartment in Beijing that may not even have a bedroom can't be justifiably compared with a four-bedroom house in Barcelona. So the team organized the photographs according to function—that is, where household members prepare food, sleep, wash clothes and so on.

The researchers—all trained anthropologists and sociologists who are part of the Social Solutions international

analyzes several data points and is much more than a simple group of photographs, it offers insight into the value of visual data when paired with quantitative data.

“We're building it this way because we are interested in having deep local knowledge from the trained eye,” Sachs adds. “The researchers took the photographs with an ethnographic eye—what is interesting to look at.”

And the goal of this lengthy, comprehensive endeavor? “Not to answer questions,” Lombardi says, “but to generate questions.” ■

—M.F.

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HOUSEHOLD / From page 16

Smaller is better—but not in U.S.

As for the lack of color on the walls in his photographs, a trained anthropologist and sociologist such as Danilin may easily identify its location as that of Russia. “We have gray and white colors on walls. It is not so popular to have pink or red walls,” such as the Indians do, he says, owing what he calls “cultural collectivism” to the lingering effects of Communism. “To be very individual ... is not ‘cool’. As Lenin said: ‘If you are not with us, you are against us,’ so maybe it is better to be in one color (scheme).”

... A pair of shelves frame a neatly arranged sofa bed. Books are uniform in size and stacked tightly. Sharp lines help create visual symmetry. (Living room, low-income family of three, two-bedroom apartment, St. Petersburg)

For marketers, the visual data make all sorts of suggestions: Swedes prefer decorative utensils; Indians do not. Bigger is better only in the United States; in nearly every other country, compactness is prized. A Russian who can afford it enjoys indulging in decorative flourishes, but not so his Indian counterpart. Indians clamor for storage space; Russians are deeply systematic in the way they organize their living spaces. And so on. And so on.

All that from a photograph. ■

NATION ● Tax lien

False ad charges come vs. Intuit

H&R Block Inc. claims in a federal lawsuit that the maker of the popular competitor tax-preparation software TurboTax made misleading statements in a new \$25 million advertising campaign.

The suit, which was filed in mid-January in U.S. District Court in Kansas City, Mo., seeks to put a stop to radio and television ads that have been airing nationwide since Jan. 9. It also seeks unspecified actual and punitive damages for false advertising and unfair competition.

Kansas City-based H&R Block, which makes the tax preparation software TaxCut, alleges that Intuit falsely stated in the television ad that “more returns were prepared with TurboTax last year than at all the H&R Block stores combined.” ■

—The Associated Press



It's all systematic in Russian kitchens

1) Some aspects of Russian home life retain the habits of the Communist era still lingering throughout Russia. In this photo, both the shelving unit and the wallpaper—simple and unassuming—illustrate that point. 2) Plates of similar sizes and bowls of similar uses are stacked accordingly; the bottom two shelves are reserved for pots and containers. The placement of the items suggests that Russians are deeply systematic in the way they organize their households. 3) As a whole, Russians don't prefer to display their kitchenware. The opposite is true in Sweden, where decorative utensils are a popular gift.

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