



Research Goes Mobile

MOBILE RESEARCH GOES TO THE GAME - IS IT A
BATTLE OF THE STATES OR A BATTLE OF THE BRANDS?

by Sally Joubert , CEO, Luma Research
James Burge, MD, Research Now



INTRODUCTION

The past decade has seen substantial changes in the way we interact within society, particularly in Australia. A recent Google study showed that 65% of the population owns a smartphone, which is nine percentage points ahead of the United States and also ahead of Britain, France and Germany. This rapid advance in technology has not only had an impact on our personal communications but has also dramatically shifted the interaction consumers expect from brands. This, in turn, has implications for how we approach research.

Already, click-through rates, or CTRs, on paid search ads in Australia are higher on smartphones and tablets than they are on PCs. Perhaps more importantly, cost-per-click (CPC) is much higher in Australia than it is in the US. Mobile needs our attention, it's now not a 'nice to have' but a 'must have'.

The environment for brand engagement has changed in so many ways – advertising is everywhere but as consumers we have even shorter attention spans. More and more data is potentially available and business decision-makers need it faster. Gone are the days when businesses could afford to spend half of the research budget on long, cumbersome tracking studies which might yield some

interesting findings weeks after the event. Businesses are telling us that there is a real need for quick, in-depth research to facilitate advertising and media spend decisions to be implemented quickly and ahead of the competition.

We are fortunate that in the last few years there have been some incredible developments in technology and advertising research to make this a reality. Both Luma Research and Research Now have found this challenge to be a gateway to opportunity. Luma has listened to the concerns of their clients and is re-inventing advertising research to meet the needs of business managers in this new environment. Research Now has lead the way in mobile research technology by building and perfecting a best in class mobile platform, enabling researchers and advertisers to better tap into the mobile audience.

This paper aims to share the story of mobile research evolution within the Australian market research world. It will offer a view from the early stages and challenges through to the current state of play and opportunities it presents to the industry. The preliminary findings reflect the basic trials we began with, before focussing on a truly local study that combines two of Australia's greatest passions – our love of our smartphones with our love for rugby league's biggest annual competition, the State of Origin. Here we hope to present the findings as well as sparking questions and ideas within the industry of how mobile research can deliver richer and more relevant insights for the future.

PHASE 1

Given the compelling rationale for including mobile as a data collection point, Luma approached Research Now in 2011, to conduct a pilot study on the first-to-launch smartphone platform in the Australian market, Research Now's smartphone app. Specifically, Luma looked to explore whether their online ad testing methodology add+impact® could be successfully adapted to a mobile platform. The main goal of this study was to explore the feasibility, practicality, reliability and value of mobile ad testing and to find out whether data collection for ad testing is as effective and reliable on mobile as it is in the standard online format.

This was the kindergarten era for app-based surveys and as such, the study aimed to:

- Compare the results of traditional online ad testing data collection with mobile data collection on key advertising research effectiveness measures.
- Investigate first-hand the issues in moving from online to mobile ad testing. Does screen size influence responses? Does location/time of day influence responses? What else should be considered?

Method

Luma selected a print ad for Listerine for the first project utilising Research Now's mobile platform. Respondents were shown the ad and then asked a series of questions relating to how they feel about the brand and the ad.

The sample population in Australia and the UK was limited to iPhone users for consistency. Panellists in each country were invited to participate in the study. N=200 completed the survey via a single mode (see Table 1). The samples within each country were quota-controlled for gender and age to reflect respective national representation

Within each country there were two matched cells:

- The smartphone cell (N=100) completed the five-minute add+impact® survey on their smartphone.
- The online cell (N=100) were a matched control group that completed the same five-minute survey on/via their desktop or laptop.

TABLE 1

	United Kingdom	Australia	Total
Smartphone (5 minutes)	100	100	200
Online (5 minutes)	100	100	200
Total	200	200	400

Sample for Listerine Research Goes Mobile Study
Luma 2011

In light of the discoveries of previous mobile data collection research (Ferneyhough, Ryan and Zahariev, 2009), some of the add+impact® statements were adapted to optimise their readability and usability for the smaller, mobile phone screen. For example, superfluous words were edited to get straight to the point, to be more concise and to keep the 'Next' button above the fold. The survey was also deliberately shortened to ensure respondent engagement was maximised.

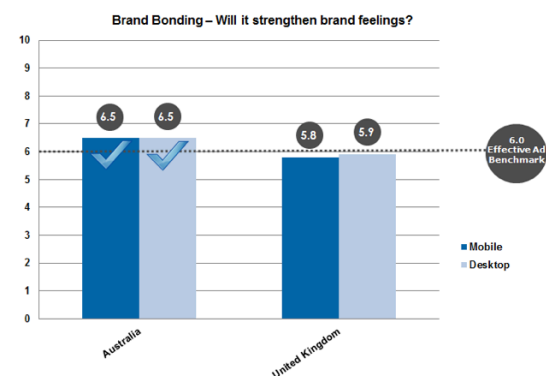
The Results

Whilst the mobile and online cells were matched for gender and age, there was a difference in the time of day the interviews were completed. 56% of the mobile responses were completed out of working hours compared to 21% online. This suggested that mobile research would be able to reach people during a variety of activities throughout the day and night.

Brand Bonding measures

The outcomes from the two different collection methods were remarkably consistent across all the Brand Bonding measures, which evaluate how people feel about the brand after exposure to the advertising campaign (see Figure 6).

FIGURE 6



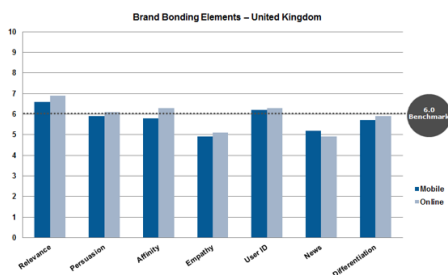
Source: Listerine Research Goes Mobile Luma 2011 (N=400)





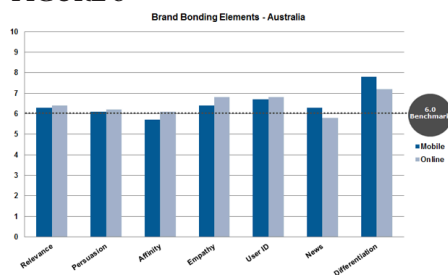
When we drilled down to look at the seven elements that make up Brand Bonding, the results were also consistent across online and mobile (see Figures 7 and 8).

FIGURE 7



Source: Listerine Research Goes Mobile Luma 2011 (N=400)

FIGURE 8



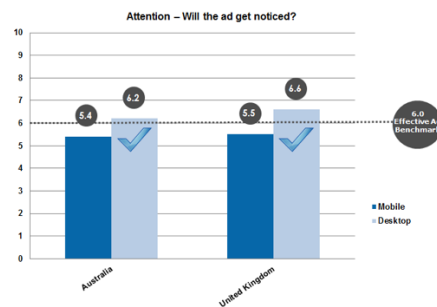
Source: Listerine Research Goes Mobile Luma 2011 (N=400)

These results were very encouraging and suggested that utilising smartphone as a data collection platform does not have a direct impact on brand feelings measured and can therefore be used alongside traditional online surveys. This opened up an enormous opportunity to capitalise on the advantages of mobile whilst still ensuring continuity with traditional measures.

Creative Attention measures

The third key (and probably not surprising) finding showed one area of inconsistency. The scores on Attention to the print ad across both countries were lower on mobile than they were on traditional online (see Figure 9).

FIGURE 9



Source: Listerine Research Goes Mobile Luma 2011 (N=400)

These lower ratings could have been a result of the smaller screen, which is particularly important when looking at static advertising, or the additional distractions of respondents on the move, or just the reality that consumers may be viewing mobile ads with less attention than online or TV. This warranted further investigation to fully understand the precise reason behind the variance in order to develop methodologies to take account of this.

Phase 2

Following the promising results of the Listerine study and rapid developments of the mobile platform and technology, Luma collaborated with Research Now on a second study – this time using video ads and including a passive data element that would further identify mobile as an appropriate platform to conduct and enhance market research.

Method

Luma selected two video ads: McDonald's 'Staying Up' and Kleenex Cottonelle's 'Grippler' ad. The interviews were conducted in the same way as Phase 1 – respondents were shown the ad and asked a series of questions relating to their familiarity with, and feelings toward the ad and the brand.

The five-minute questionnaire was administered to a sample population consisting of users of the iPhone, Android and 'other' handheld devices.

The study was limited to panellists in Australia, residing in either Melbourne or Sydney, and the samples within each city were quota-controlled for gender and age. N=104 and N=107 completed the survey via single mode (see Table 2).

As with the previous study, the two cells were matched:

- The Smartphone cell (N=104) completed the five-minute add+impact® survey on their smartphone.
- The Online cell (N=107) were a matched control group that completed the same five-minute survey on/via their desktop or laptop.

TABLE 2

	Kleenex	McDonald's
Smartphone (5 minutes)	104	104
Online (5 minutes)	107	107

Sample for Research Goes Mobile Study Luma 2012

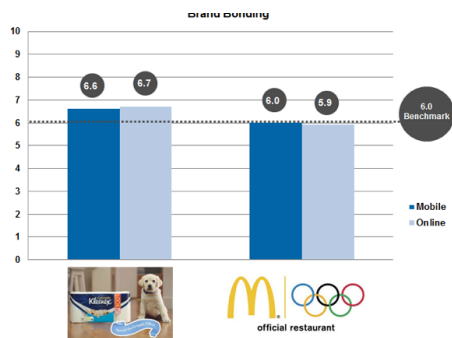
The Results

As with Phase 1, there was a difference in the time of day the interviews were completed. Just over 90% of the mobile responses were completed out of working hours compared to 60% online; once more confirming that mobile research will be able to reach people during a variety of activities throughout the day and night.

Brand Bonding measures

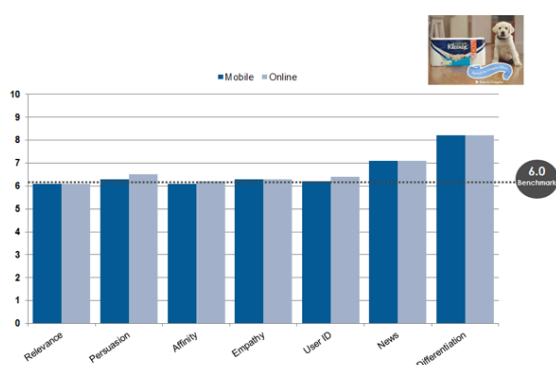
The outcomes from the two different collection methods were, again, highly consistent across all of the Brand Bonding measures (see Figure 10).

FIGURE 10



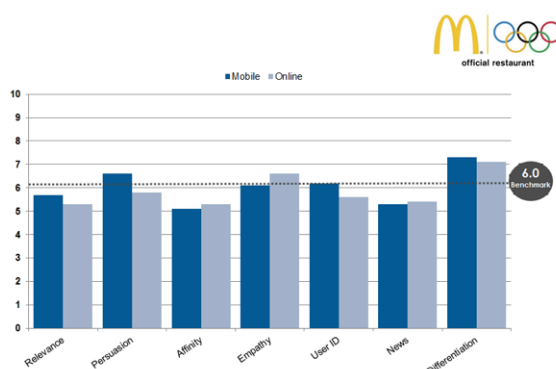
Source: Sample for Research Goes Mobile Study Luma 2012

When we took a further look into the seven elements that make up Brand Bonding, the results remained consistent across online and mobile (see Figures 11 and 12).



Source: Sample for Research Goes Mobile Study Luma 2012

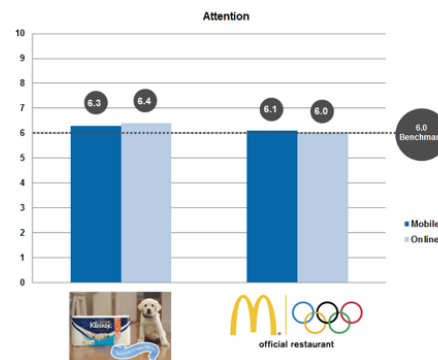
FIGURE 12



Source: Sample for Research Goes Mobile Study Luma 2012

One of the most interesting findings from Phase 2 was that, unlike the results from the 2011 study, the scores on Attention to the ads were now almost identical for mobile and traditional online (see Figure 13).

FIGURE 13



Source: Sample for Research Goes Mobile Study Luma 2012

Preliminary passive data collection

31 out of 208 respondents from the ad study agreed to take part in the passive data collection portion taking place two weeks after the study. Passive data was collected using Research Now Mobile's app-based, mobile behavioural data collection platform. We were specifically interested in URLs visited, apps used and music played on respondents' smartphones. We included this experimental phase to explore how the technology could be used to track post-advertising exposure (i.e. did the Kleenex ad result in visits to gripple.com? Or were those who saw the McDonald's ad more likely to participate in fast food or Olympic related activities?). Whilst neither of those things happened in our limited sample, we did find that:

- More males (64%) agreed to take part in this part of the study than females (36%), although there was equal participation across age groups;
- The most popular websites visited via mobile were Facebook, Google and Wikipedia;
- The music listened to was diverse and ranged from 'Build Me Up Buttercup' to 'Adele's Greatest Hits';
- The most popular apps included Angry Birds, Play Store and the browser; and
- Within the two weeks that the passive data was collected, six of our panellists checked the clock 2511 times!

Phase 3

This year we took it a step further. We could already see the opportunities that mobile offered in terms of providing faster and potentially more cost-effective advertising research, but we really wanted to explore how to make it even better. We suspected that making ad research faster, better and cheaper would not only make the research process more effective, but also make business managers happy.

So this brings us to the State of Origin game where the stakes are not only high for the Maroons and the Blues but for sponsors as well. Sponsors invest a significant spend and they need to know whether it is worth it. As researchers we wanted to see what mobile could offer. Could you really interview rugby fans 'in-the-moment'? What could mobile add to traditional research? How would response rates vary across each of the three games? How engaged would respondents be? How willing

would they be to upload photos/videos whilst in-the-moment? Could we use mobile technology to improve the respondents' experience and hence engagement? Could mobile provide us with a way to get closer to the audience? Could we replace questions with observations? A lot of questions to be answered.

Method

Luma and Research Now undertook a five-part study. We utilised a traditional pre and post online survey and a short mobile survey during each game to track any changes in brand feelings and perceptions. We recruited N=431 respondents who were considering watching or attending the State of Origin series.

The composition of the sample surveyed remained reasonably consistent across the three games in terms of location, age, team supporting and passion for Rugby League, meaning there was very minimal sample skew when we moved from the traditional PC-based survey to the mobile-based survey (see Tables 3, 4 and 5).

TABLE 3

Gender Location

	Gender		Location					
	Male	Female	NSW	VIC	QLD	SA	WA	Other
Pre-survey	47%	53%	42%	26%	19%	7%	4%	2%
Game 1	46%	54%	41%	22%	21%	10%	4%	3%
Game 2	46%	54%	44%	17%	23%	11%	3%	3%
Game 3	50%	50%	41%	23%	20%	11%	2%	2%
Post-survey	48%	49%	42%	25%	18%	9%	4%	2%

TABLE 4

Age

	Age					
	18-24	25-34	35-44	45-54	55-64	65+
Pre-survey	7%	42%	32%	13%	4%	1%
Game 1	4%	44%	31%	15%	3%	2%
Game 2	3%	42%	32%	15%	6%	2%
Game 3	4%	42%	32%	16%	5%	2%
Post-survey	6%	39%	33%	16%	4%	2%

TABLE 5

Team & Passion for league

	Team		Passion for league		
	NSW	QLD	High	Medium	Low
Pre-survey	52%	35%	54%	29%	16%
Game 1	54%	39%	58%	26%	16%
Game 2	56%	36%	59%	24%	17%
Game 3	56%	35%	54%	27%	19%
Post-survey	52%	36%	44%	31%	25%

The Results

Respondent engagement

We learned in phases 1 and 2 that panellists were mainly completing mobile surveys after hours, and this was considerably higher than people completing surveys via a more traditional approach at home on/via a PC or laptop. This insight, when coupled with the fact that in 2012 smartphone penetration in Australia doubled, with take up soaring to over 104% in 2012, suggested to us that mobile research could add significant depth to our current research methods.

Our findings confirmed this. Participation rates and respondent engagement were high. 69% who undertook the initial online survey participated in at least one of the

mobile surveys. This is higher than we would expect for a standard repeat survey.

What is even more encouraging is that 69% of respondents who participated in Game One also participated in Game Two and 76% in Game Three.

We are also encouraged by the level and depth of these mobile respondents' engagement – 38% uploaded a photo in game one and 34% in game two. Given that these were fans watching the game they love, this level of participation is astonishing. Just look at the variety and quality of the pictures we received:

FIGURE 14

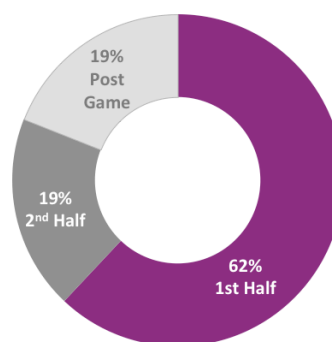


Source: State of Origin 2013, Mobile Research Goes to the Game, Research Now & Luma Research 2013

Response time – speedy

The next interesting finding relates to speed. Across the three games an average of over 60% of interviews were completed by the end of the first half of the game. Again, this is faster than traditional online surveys (see Figure 15).

FIGURE 15



Source: State of Origin 2013, Mobile Research Goes to the Game, Research Now & Luma Research 2013

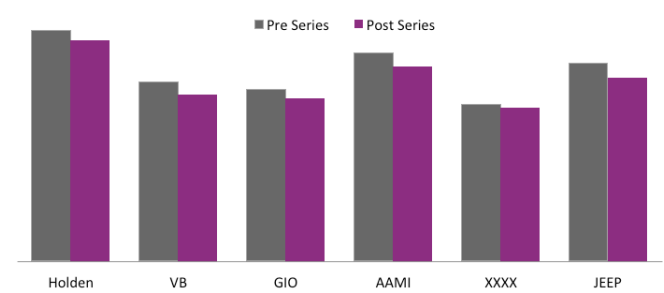
Depth of response

To investigate the depth of response we could obtain from our mobile surveys in-the-moment we looked at whether 'brand love' for the sponsors differed at the game via immediate mobile feedback or if it was consistent with the traditional pre-post shifts used so often in the last century. Could mobile provide us with a way to get closer to the audience?



Our findings suggest the answer is “yes”! The two traditional pre-post surveys yield very little clue as to how fans are feeling about the brands and whether or not sponsorship brought positive return on investment (see Figure 16).

FIGURE 16

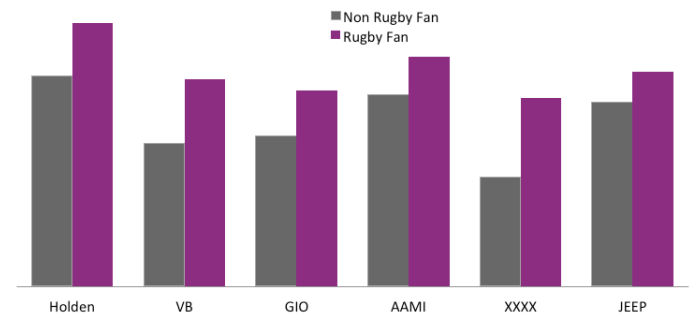


Source: State of Origin 2013, Mobile Research Goes to the Game, Research Now & Luma Research 2013

Looking at this, one could have been excused for thinking that sponsorship does little for the brands, but this is not the whole story. The standard approach was useful in identifying differences in feelings toward the sponsors, for example our strong rugby league fans are much more positive towards all the State of Origin sponsors than the non-fans. This is consistent with cross-category studies; we wanted to know if we were missing something. Were there any further findings out there?

The answer was “yes”. Whilst we saw an overall decline in brand love when comparing pre and post results, when we compare the mobile game data, we find the real insight that would have been missed with a standard approach. Mobile armed us with a detailed, close-up view from the palms of the audience, no longer a view from the sidelines of a traditional online survey approach (see Figure 17).

FIGURE 17



Source: State of Origin 2013, Mobile Research Goes to the Game, Research Now & Luma Research 2013

For instance, we found that the brand love for Holden remained consistent before, during and after the series. However, both GIO and AAMI was generally lower during play itself (see Figure 18).

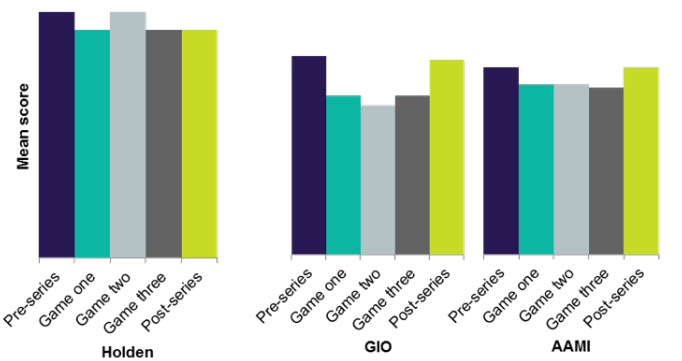
Our ‘QLD’ supporters loved XXXX so much more than those from ‘NSW’ during Games 2 & 3, notably when they were winning.

Even overall State of Origin sponsor association was influenced by the stadium itself. Across all the games VB, XXXX and Holden had the strongest State of Origin associations however, VB and XXXX both increased substantially for Game 2 which was held at Brisbane’s Suncorp stadium.

This suggests there is even more these brands could have explored in terms of the specifics of sponsor placement and coverage within the stadium itself. Or was it due to a specific incident on field where one of the logos featured for longer in the coverage?

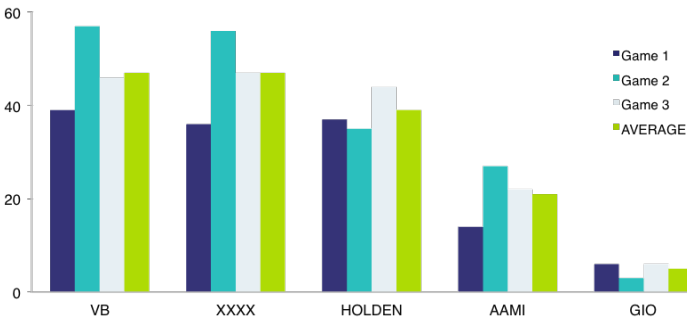
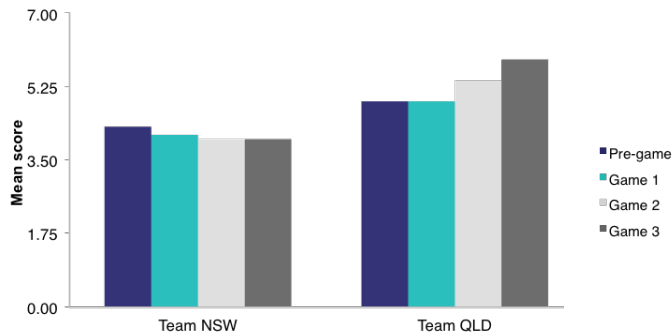
The level of initial data that mobile was able to deliver opened up a wealth of valuable further research that could have been explored in any manner of ways to ascertain the exact reasons for these significant findings. But the key takeaway is, simply put, we would not have known any of this if we had just stuck the traditional survey method.

FIGURE 18



Source: State of Origin 2013, Mobile Research Goes to the Game, Research Now & Luma Research 2013

FIGURE 19



Source: State of Origin 2013, Mobile Research Goes to the Game, Research Now & Luma Research 2013

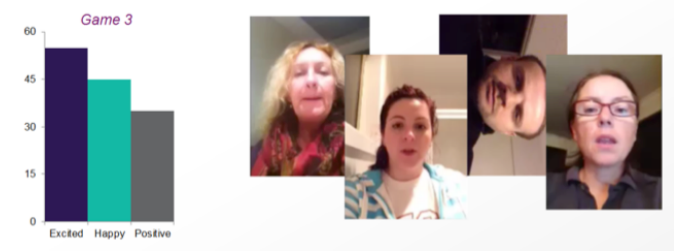
These findings continue but the key takeout is, simply put, we would not have known any of this if we had just stuck the traditional survey method.

A picture is worth 1000 words (or at least five questions in a survey).

Last but by no means least we wanted to investigate whether we could replace traditional questions with image analysis. Specifically we looked at whether common 'feelings' questions could be replaced with a simple image analysis from the photo uploads. We know the limitations of these questions as people often cannot express how they feel or their answers reflect only a considered and rational response.

Not surprisingly, our rugby fans generally claimed they were happy, excited and positive. And yet we could have removed these questions from the survey and come to the same conclusions by quickly observing the images. The video uploads also added another layer of analysis and depth to the findings. We asked them to upload a video of themselves talking about sponsorship. The depth and diversity of the clips was incredible. One of the key themes was finding a sponsor who promoted healthy eating. Many felt that alcohol sponsors would be better balanced or replaced with something that linked to sport and health, be it healthy food, exercise services or sports brands. Even those drinking a beer shared this same sentiment!

FIGURE 20



Source: State of Origin 2013, Mobile Research Goes to the Game, Research Now & Luma Research 2013

To sum up....

Thank you for listening to our story. While there are so many more things we can find out we hope this inspires you with the doors mobile can open. With sufficient groundwork on the technological capabilities and now Australia's high smartphone penetration, mobile data collection offers a relevant and convenient means of participation for respondents. Furthermore, the affinity people feel with their mobile device demonstrates a clear opportunity for more detailed feedback and involvement in survey responses. People are willing to share even when they are in the middle of a major 'sporting moment'.

By daring to combine this with the advertising research process, brands and businesses can benefit from faster, better and cheaper way of harnessing their audiences' perceptions and motivations. Everyone's a winner (apart from the Blues, that is!)