

In-The-Moment Mobile Research— Informing Marketing Strategy Like Research Never Has Before

How in-the-moment mobile research has informed and
helped share URC's marketing initiatives

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Introduction

As a human insights-driven organisation, URC requires accurate and robust consumer information to inform marketing strategy and the innovation pipeline. Historically this was achieved via large category specific U&A studies, which would then inform marketing planning for a prescribed period. Like many multinational client insight departments, URC CMI (consumer marketing insights) questioned the validity, accuracy and predictability of claim-based U&A studies anchored in long and cumbersome questionnaires. This paper details how URC and MDI collaborated to develop and implement an approach which not only addressed these issues, but also, importantly, provided unparalleled depth of data across all of URC's food and beverage categories. In addition, whilst not anticipated when the project was commissioned in 2019, this research proved pivotal in ensuring URC maintained product innovation and marketing momentum throughout the pandemic in its home market, the Philippines, which was coincidentally one of the most disrupted markets due to the government's rigid COVID-19 policies. By sheer luck, fieldwork was completed just weeks before COVID-19 impacted the Philippines. As a result, URC stakeholders were armed with an enormous amount of data to mine (through tools provided by MDI), whilst confined to their homes for more than two years. This thereby facilitated marketing and innovation initiatives through to product launches, and ensured that URC did not take a backward step during the pandemic.

For a company that dabbles in multiple categories, having one available study to inform strategic and tactical decision-making ensured a common language across the organisation—a real benefit where previously categories had typically acted independently. This unity of data proved critical in ensuring a fluid and effective shift from 100% in-office working to 100% virtual and/or remote. Pivotal to this was how the data was delivered: virtual workshops, interactive dashboards, manipulative databases and a sortable digital image library. These tools ensured accessibility for cross-functional teams whilst working remotely to ensure the continuation of effective marketing decision-making and strategising throughout the pandemic. This paper details the innovative research and results delivery approach that facilitated these significant URC business outcomes.

The research challenge

The value of market research is often undermined by three fundamental pitfalls of the industry:

1. Reliance on claimed and often unreliable data;
2. Unfair burden of excessively long questionnaires;
3. Repetitiveness of needing to answer the same questions.

Unfortunately, these weaknesses are often most prevalent in the high investment studies upon which client organisations rely most—in particular U&A studies. U&A studies are relied on to inform strategy for a period of several years, but often the consumer data that such studies rely on is fundamentally flawed. Long, extensive questionnaires result in diminishing consideration and more nonsense responses. Furthermore, asking people to recall multiple occasions within the one questionnaire leads to tune-out and confusion, due to repetitiveness of occasions. This brings us to arguably the biggest pitfall in our industry—the over reliance on claimed data based on recall and memory-based methods.

Recall and memory is a topic that could form the basis of a paper in its own right. It is irrefutable that there is much evidence to question people's ability to accurately remember and recall their behaviour, feelings and actions. This is particularly true when considering food and beverage consumption across a multitude of categories and multiple times a day. For example, off the top of your head try to not only recall every beverage you consumed yesterday between getting up and going to bed, but also the five Ws associated with each occasion:

- What you drank, down to the SKU level;
- Who you were with;
- Where you were and what you were doing;
- When it was consumed—at what specific time of the day;
- Why you selected that particular beverage.

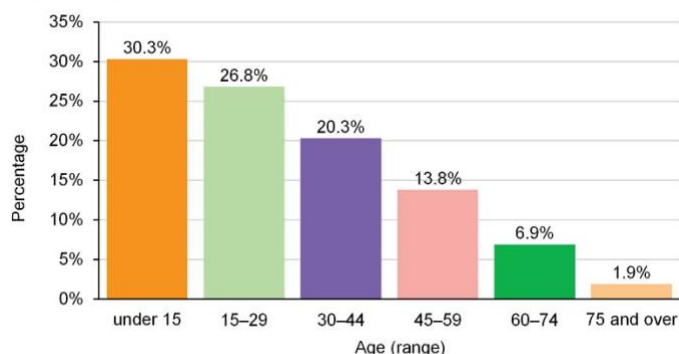
For most people, it is not possible to do this accurately. Yet for many large organisations, this is the typical research design of an FMCG U&A upon which several years marketing strategy is based.

URC identified a need to overcome these pitfalls, with the added challenge of covering all their food and beverage categories. MDI responded to this challenge, bringing us to the essence of this paper. In designing an approach to meet URC's needs, MDI was cognisant of a fine line that exists when considering mobile research—one which isn't too intrusive, but one that is still intuitive and integrated enough to meet expectations set with regard to mobile functionality. When this is achieved, in-the-moment mobile market research is a game changer that overcomes the above drawbacks of traditional style U&A research, measuring behaviour as it happens as opposed to relying on questionable memory recall.

The solution

MDI's ethos is based on the premise that market research should be aligned with the way in which consumers interact with each other, with brands, how they shop and how they access information. In line with global shifts, the primary manner in which consumers from the Asia Pacific region interact with each other, brands and service providers is via their mobile phone. This is particularly true in the Philippines, which has 70 million smartphone users out of a population of 117 million.

Philippines age breakdown (2020)



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Figure 1

When we consider that 30.3% of the Philippines' population is aged under 15, smart phone penetration of Filipinos aged 15 and over is approximately 85% and rapidly approaching saturation. A current study has shown that Filipinos have the highest average screen time spent on phones. The study was conducted by the Electronics Hub website and looked at average screen times of almost 50 countries and was released in DataReportal's Digital 2023: Global Overview Report. This study showed that Filipinos spend nearly a third of their day (32.53%) on their smartphones. Besides being a straightforward communication tool, the mobile phone has become a conduit to express oneself, provide feedback, check facts, read books, order products, listen to music, watch videos, take pictures, videos and more. Conducting market research via mobile devices, when and where it suits the consumer, therefore, is not only a natural progression, but also a smart one. The key benefit being that the mobile device allows corporations to get much closer to their consumers than possible with previous research techniques, and obtain an in-the-moment view of how people actually use and interact with products and brands. This, therefore, allows measurement of actual behaviour and eliminates the compromising reliance on claimed behaviour. An intuitive app that feels native to consumers provides a strong foundation for effective in-the-moment research and this is where we started, with MDI creating the "Eat Drink Diary" app for URC (see Figure 2).

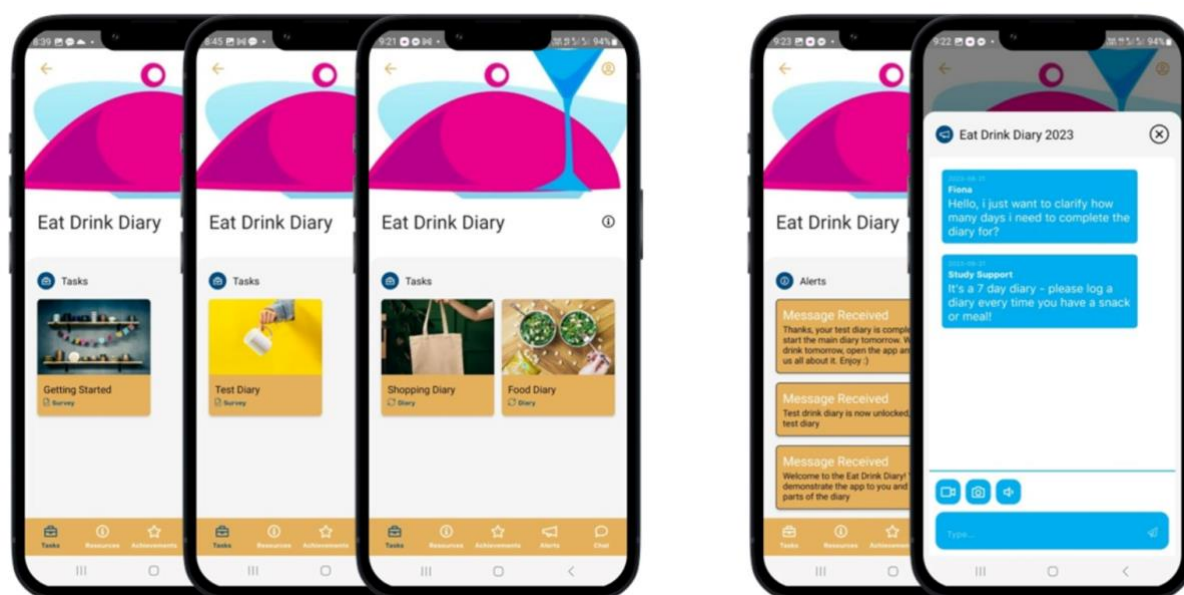


Figure 2

A key feature of MDI apps is that they are centred around chat functionality, with similar usability to WhatsApp, WeChat and the like. This environment feels familiar to consumers, mimicking the platforms where they communicate most and, in doing so, driving respondent engagement and retention during diary-based studies. This chat functionality facilitates the ability to use the app for qualitative drill downs, along with quantitative data collection. The app is structured to allow for repeated in-the-moment measurement of consumption occasions, and so effectively creates a longitudinal data-set for each individual research participant. This ensures that all data points for each individual can be connected, reducing the pressure to ask all questions in one go. Beyond this benefit of shorter surveys, it also means that questions—particularly static, profiling questions—don't need to be asked more than once. Above all, this app-based approach overcomes the achilles heel of market research: the unreliability of claimed data. Being on a mobile app means being in a pocket, in a hand, in front of a face and—importantly—in the consumption and shopper moments that matter to URC; thus, replacing claimed measurement with in-the-moment of occasions.

Data collection

MDI used a combination of online and face-to-face recruitment to screen, recruit a representative and onboard a sample of n=2,000 Filipino consumers onto our mobile research platform and URC tailored app. This included further over-recruitment of 25% to ensure a complete data file at the conclusion of fieldwork. These consumers then completed a “getting started” survey, which captured their meta data, claimed category repertoire and relevant attitudinal data. From here, participants completed a per-occasion “drink diary” for four days, followed by a per-occasion “food diary” for five days. At the conclusion of these consumption diary tasks, participants completed a “wrap up” survey, which explored category substitution and topical issues such as health and well-being in order to further interpret occasion-based data. At this point, a sub-sample of n=1,000 was taken to complete a seven-day shopper diary looking at the shopper repertoire across modern, traditional and eCommerce trade.

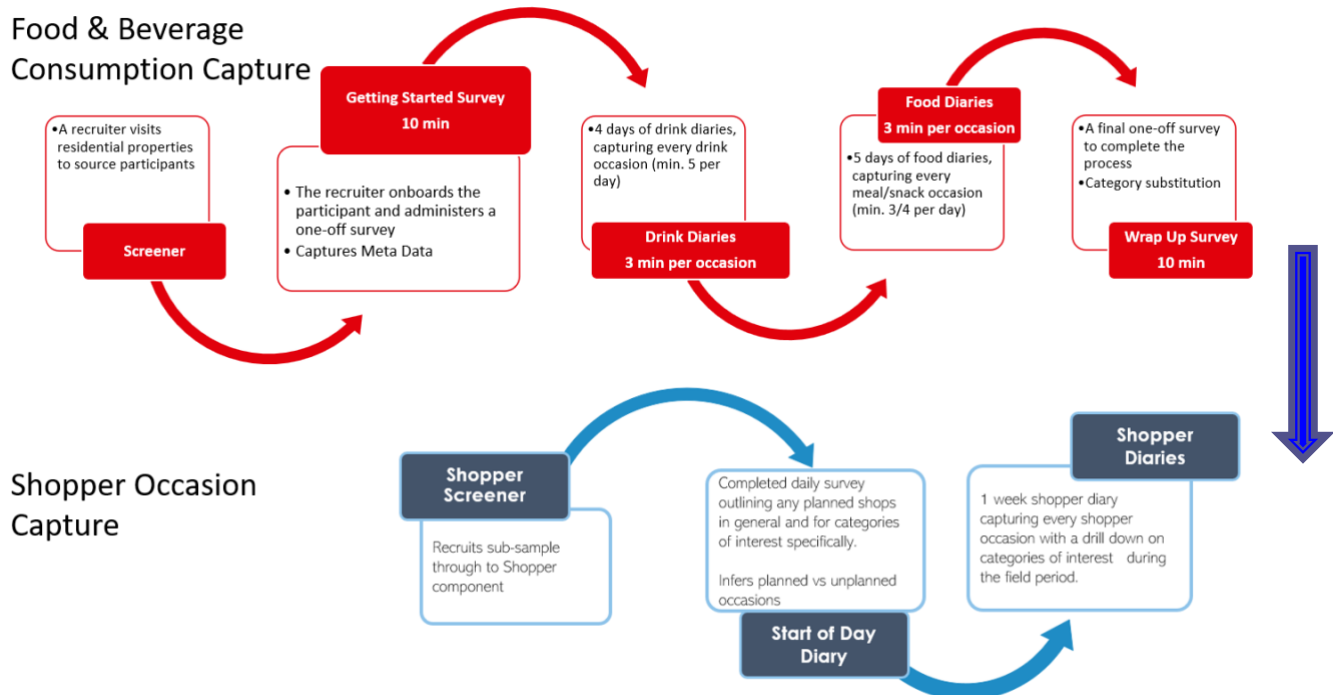


Figure 3

This design yielded an extremely robust n=80,000+ combined consumption and shopper occasions, and in excess of n=150,000 consumption and shopper product and context images. These images not only provided significant value to data interpretation and reporting, but also a means of validating data accuracy and eliminating cheaters. As such, the project delivered a rich and sometimes daunting data-set unlike that typically seen in market research, translating to direct benefits for URC. The level of insight into different occasions, context subgroups, categories, brands, etc., was immense. From a methodological perspective, this approach not only eliminates the three previously identified key market research pitfalls, but also provides far greater robustness, accuracy, context and actionability within the price range of a traditional U&A.

Reporting

Reporting was multidimensional and went well beyond a traditional U&A, incorporating:

- Food and beverage landscape overviews covering the five Ws (see Figure 4);
- Utilising the proven Heylen Model to understand consumption motivations for specific products, while also mapping URC and competitor products to identify and understand the size of potential whitespace (see Figure 5).



Figure 4

NEEDS – MOTIVATIONS

(Illustrative Example)



Figure 5

Using a combination of analyses—primarily cluster and factor analysis, along with regression-based decision tree analysis—mutually exclusive targetable key eating moments (KEMs) and key drinking moments (KDMs) were created, along with “shopper missions” based on the shoppers’ entire shopping repertoire (not just one or two shop-a-longs). These moments are in fact targetable consumption and shopper mission-based segments.

THE KEY EATING MOMENTS (KEMs)

Key Eating Moments are created through statistical modelling of the intersection of reasons for eating (motivations) and what was being done at that time (occasion); the outcome is 7 'At Home' and 5 'Out of Home' Eating Moments.

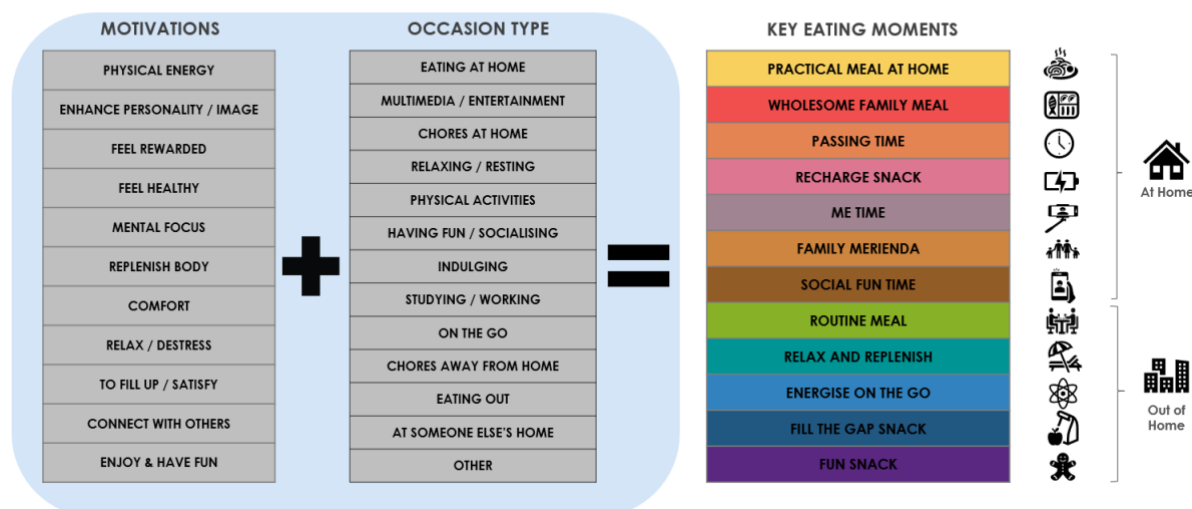


Figure 6

Initially these moments and missions were sized on an occasion basis. From here, MDI and URC were able to project these in terms of volume and value by cross referencing and extrapolating secondary data sources, such as household panel data and URC internal sales data. These moments were then profiled to facilitate active targeting.

FAMILY MERIENDA – WHAT IT LOOKS LIKE

This Moment constitutes 16% of At Home eating occasions

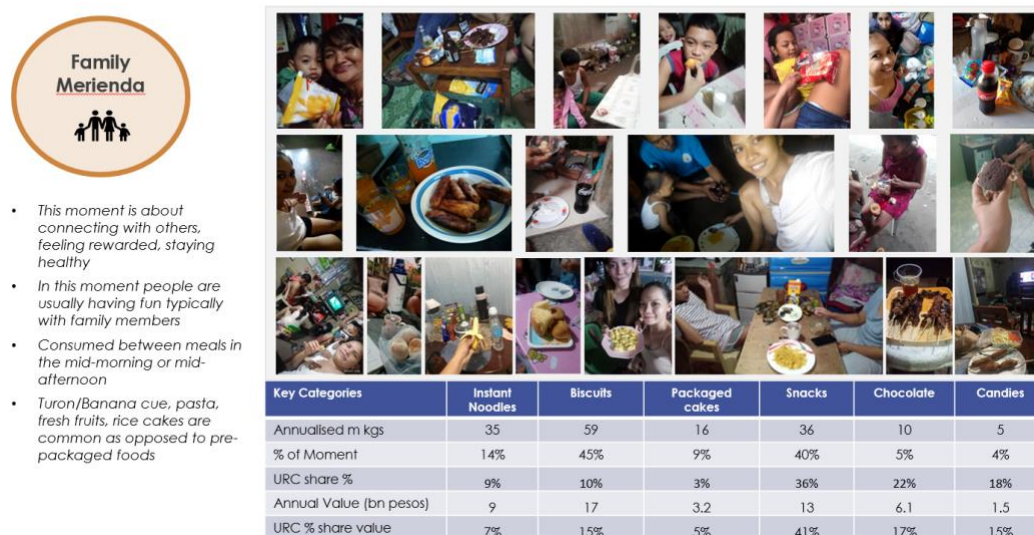


Figure 7

For actionability, the KEMs, KDMs and shopper missions were then mapped on a multidimensional view with motivations (as per Heylen), day parts and activities undertaken were overlaid on this view, then allowing placement of existing URC products for targeting purposes and identification of sizeable white space opportunities. This output proved pivotal in informing marketing targeting and communications and the product innovation pipeline.

Moment specific videos were produced to bring this occasion-based segmentation to life for marketing and innovation stakeholders. To assist in decision-making, a virtual image library was developed, linking each image captured to occasion specific information (five Ws) and consumers meta data (see Figure 8). This proved to be an extremely useful resource for URC stakeholders during the prolonged COVID-19 work-from-home edicts.

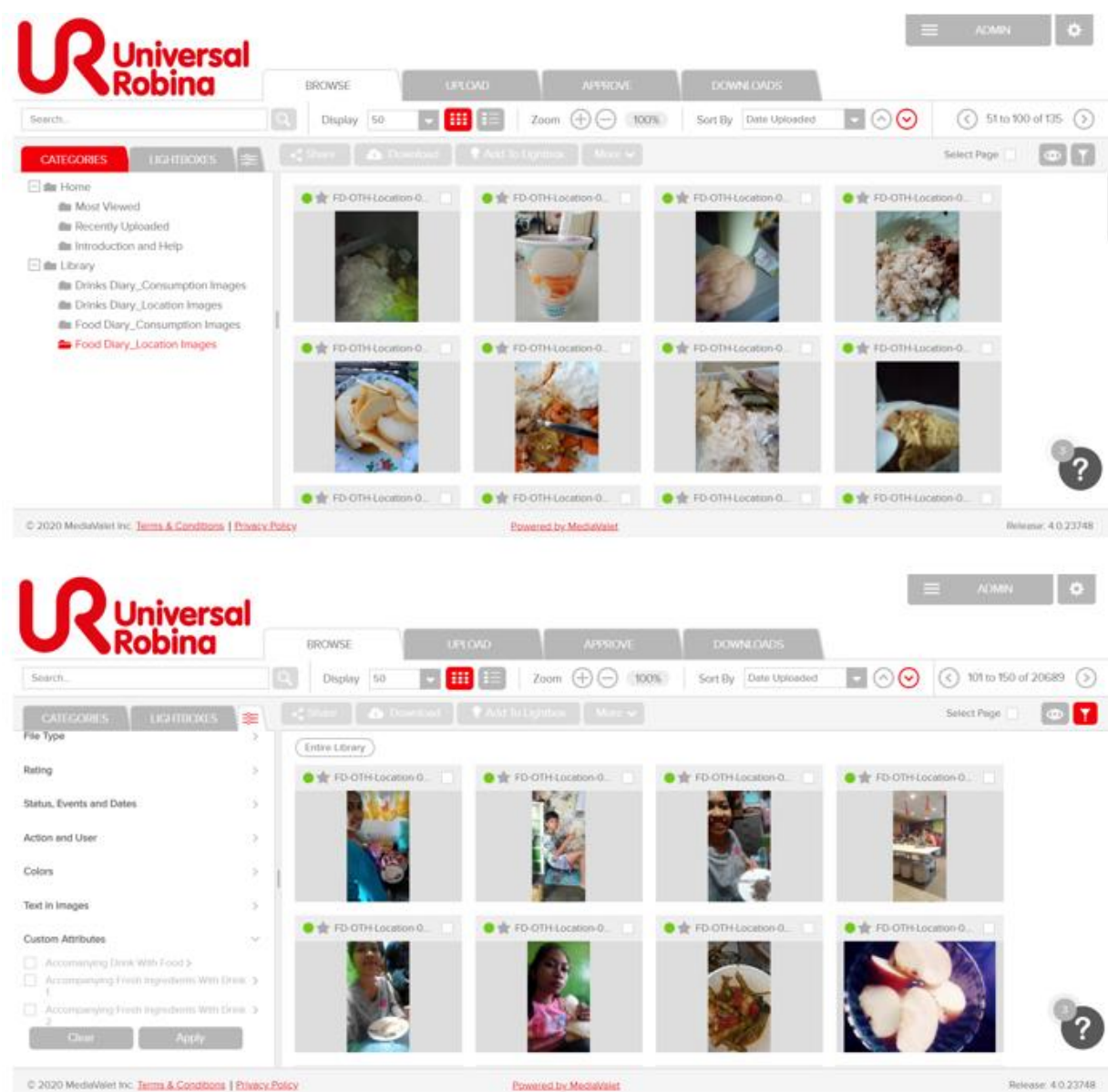


Figure 8

From URC's perspective, this image library created a visual bank providing insights akin to a "huge" qualitative study (qual @scale), as it provided consumption context well beyond what was consumed and proved invaluable. The final reporting element was an interactive data-base and dashboarding tool, which facilitated user-friendly data-mining by URC category stakeholders throughout the COVID-19-impacted period.

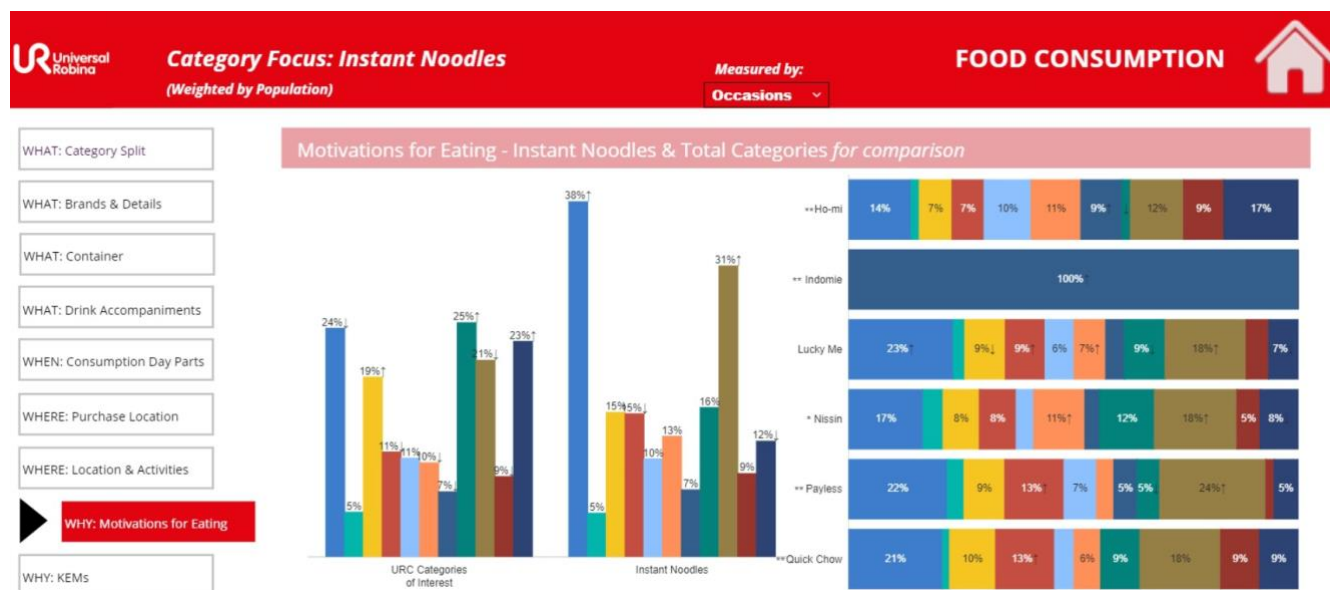


Figure 9

These reporting elements were then brought together in a virtual workshop which ran over three days including presentation elements, exercises to ensure stakeholders understood the data and opportunities for category teams to work with the reporting tools outlined above, in order to familiarise themselves with these tools and the data at their fingertips. Of note, these virtual category working sessions resulted in potential product renovation and innovation opportunities—highlighting and reinforcing the actionability of the reporting tools and data dissemination tools provided.

Business impact

The benefits of the data collection and reporting approach of this project ensured that the research was not only far more consumer-friendly, but also overcame longstanding market research industry pitfalls. Being in-the-moment and on a mobile app allowed the flexibility of consumer-led occasion-based research, causing dramatic increases in the volume, format and actionability of data collected. Taking advantage of the mobile phone camera sounds simple, but it is somewhat of a game-changer providing n=150,000 product, basket and contextual images directly linked to both an individual occasion as well as respondent-level data. This proved particularly crucial in informing marketing during the pandemic where other means of observational research were not possible.

As with all market research engagements, regardless of the methodological innovations, the proof is in the pudding. Here the pudding is the tangible impact that both the resultant insights and the means of data delivery had on URC's marketing strategies, tactical initiatives and innovation pipeline throughout the COVID-19 pandemic, when many organisations struggled to maintain such positive momentum. Specific examples of how URC utilised the research data, reporting tools and resultant insights include:

- Category portfolio strategy planning—Respective portfolio strategies were developed for foods and beverage, respectively, in 2020 using the occasion-based data and moment modelling from this study. Opportunities identified became the foundation for URC's category strategy plan for the 2021 to 2023 three-year period.

- Brand strategy—The findings validated and informed brand positioning in need spaces and/or consumption moments. While most established brands leveraged their positioning strengths, some brands adjusted and pivoted to cover “open” white spaces and/or to differentiate themselves.
- Marketing communications—With the depth of information resulting from the 80,000+ consumption and shopper occasions captured, brands were able to focus and be specific with their propositions and offerings to drive a clearer message to consumers. This was further enhanced by the ability to drill down to more actionable sub-motivations, enabling marketing communications to be more specific. This is a key benefit of occasion-focused, in-the-moment diary approaches overall.
- Product innovation/new product development—Existing brands used the Heylen interpreted motivational data (reasons for consumption) to expand the offerings of their portfolio. For example: GT Supreme was built using this data to identify space for a new sub-brand, and then attributes and /or reasons for consumption informed product design.

Consumer-centric innovations in the pandemic period

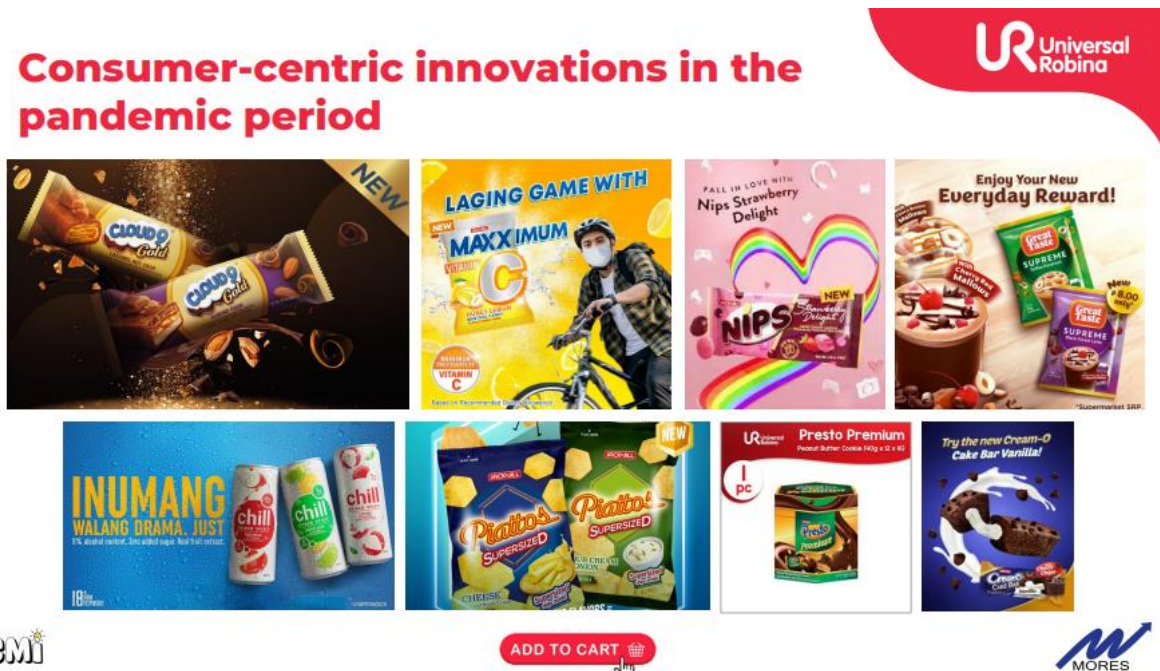


Figure 10

- Product innovation/new product development—By analysing consumption moments across all categories and URC and competitor brands, URC was able to get data that helped inform entry into new categories. One such product launched was Chill, URC’s first foray into alcoholic beverages.
- Informing product development pipeline—The image library with extensive filtering capabilities by occasion level information (five Ws) and consumer level meta data became a heavily utilised resource by URC R&D, to generate and develop new product ideas.
- Informing shopper and/or channel strategy—Linkage of purchase channel information in consumption diaries with in-the-moment shopper diary data helped inform URC’s shopper and channel strategy, particularly with respect to optimising eCommerce channels.

This level and breadth of business impact would not have been possible from a traditional claim-based U&A. The actionability comes from strong agency and client collaboration, a well thought out multifaceted occasion

based on in-the-moment design taking advantage of the smartphone's functionality to engage research participants, ensure validity and capture consumer generated images, brought together by tailored reporting and analysis tools to extend the study's usability and value. Both URC CMI and MDI are proud of the impact this study has had on URC's business.

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