

*Panel insights*

*April 2013*

## Enhanced engagement - technology and research review



*As with many other industry sectors, market researchers are being both challenged and aided by technological development. Engaging panel members in new and relevant ways, not only promotes increased opportunity, it also enhances real time communication techniques that were not considered possible just a few years ago.*

In an article discussing changing market research practices in 2010 a Forrester Research spokesperson was quoted as saying that 'online panels have grown to be used for almost 50% of quantitative data in the United States'. In the same article, the benefits of technological development were also highlighted by an industry professional who said that 'online panels are reshaping the way that market research is conducted'.<sup>1</sup>

Stable Research continues to develop new and innovative panel engagement methods that utilise new communication methods to enhance survey outcomes. A Technology and Research Review conducted by Stable Research Online in 2012 reveals some interesting trends in terms of panel engagement and technology use. The aim of the research was to gather relevant information that would shape and refine future research methods.

It is relevant to note that the trends highlighted throughout the research closely mirror technological

take-up developments that have recently been reported by Government organisations like the Australian Bureau of Statistics (ABS) and the Australian Communications and Media Authority (ACMA).

### **Methodology and Key Statistics**

Stable Research posed 13 questions related to technology engagement and preference to a random sample of males/females 18-60 years old. The aggregate time taken to complete the survey was 4.2 minutes. 72,000 people were invited to participate with 29.81% of people opening the online survey, 19.24% starting and 17.13% completing the survey.

The panel was skewed to the East Coast of Australia but it still had national reach. Only 41% of the participants had previously participated in online surveys.

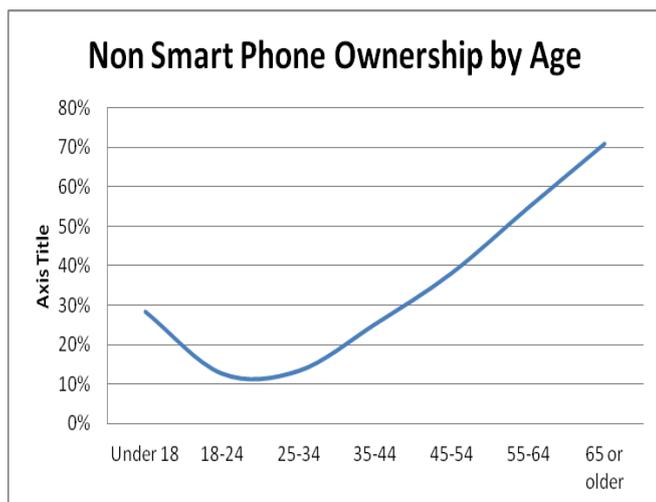
The survey specifically looked at, not only the take-up of technology, but how, when and where people access and respond to surveys. It also explored how and where respondents access news and information across multiple devices like smartphones, computers, laptops and tablets. Key findings of the research include:

### **The proliferation of smartphones**

In February 2013 the ACMA reported that almost half of Australia’s adult population now own a smartphone with take-up soaring by 104 per cent to 8.67 million units over the 12 months to May 2012.<sup>ii</sup>

In terms of smartphone usage, the Stable Research Technology and Research Review revealed:

- Smartphone ownership was highest amongst 18 to 34 year olds in the panel.
- Over 40% of young people (18-34) in the panel use mobile phones to complete online surveys.
- Over 75% of people over 65 in the panel do not have a smartphone but only 3% do not own a mobile phone.



- 62% of 18-24 year old panel respondents owned an iPhone in comparison to Android, Windows 7 and Symbian phones at 21%.

- Smartphone usage percentages for answering online surveys were: under 18 (20%), 18-24 (44%), 25-34 (41%), 35-44 (27%), 45-54 (14%), 55-64 (8%) and 65 or older (7%).

### **Technology: How and where people are responding to surveys**

There is no doubt that technology is changing the way that people respond to surveys. Over the past few years computer ownership in the home has continued to grow. The latest ABS figures indicate that the proportion of Australian households with access to a computer at home was 83% in 2010-11. Computer access at home is more common for households in the highest income quintile (96%); with children under 15 years of age (95%); and in State and Territory capitals (85%).

Household access to a computer at home by State or Territory ranged from 91% for the Australian Capital Territory to 76% for Tasmania.<sup>iii</sup> These figures and demographic variables closely mirror internet take-up in the home.

Findings of the Stable Research Online Technology and Research Review highlight that computers continue to be the most popular way that panel members engage with surveys. 58% of people completed surveys on personal computers at home or at work and 54% completed surveys using a laptop computer at home or work.

While computer use can be highlighted as relevant it is interesting to note that over 40% of young panel members (18-34) used mobile phones to complete online surveys.

The majority of online surveys continued to be completed at home (76%) with the next highest category being completed during downtime at work, university or TAFE.

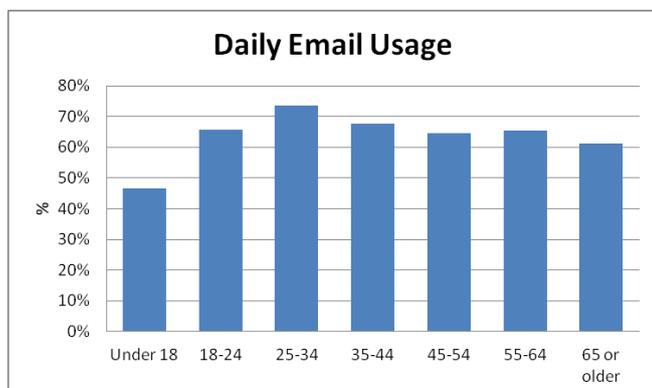
According to the ABS the speed of internet connections also continues to grow. In 2010-11, 6.2 million Australian households had broadband internet access. This was an increase of over one million households since 2008-09 and almost three quarters (73%) of all households now have broadband<sup>iv</sup>.

The majority of Stable Research panel members who participated in the survey now have high speed internet connections. The majority of respondents who completed surveys were connected to wireless broadband, followed by ADSL broadband and cable broadband. It was also relevant to note that 3G and Wifi connections on smart phones were used by nearly 20% of respondents when they were completing surveys.

### ***How respondents communicate online***

Analysing how survey respondents communicate across other online platforms is also relevant in terms of shaping research projects that take advantage of these communication methods.

It's interesting to note that regardless of the take-up of new social media platforms the majority of respondents still use email and SMS as their primary communication method daily.



Social media use varies according to age group with research showing that while nearly 70% of 35-44 year olds in the panel use email daily, their daily Facebook use sits at just over 40%. In contrast daily Facebook use by 18-24 year olds sits at just over 80%. Daily use of SMS is also highest amongst 18-24 year olds followed by 25-34 year olds. It also relevant to highlight that over 50% of 45-54 year olds also SMS daily.

Generally, Australians continue to engage with social media in increasing numbers. Adcorp statistics released in January 2013 indicate that Australian Facebook membership sits at 11,748,450. It's also interesting to note that there was a drop of over 100,000 active users in Australia over the past few months. Yet, at the same time Facebook's revenue has grown by 40% in the last financial quarter and mobile phone Facebook users have overtaken those accessing the social networking site via computer.<sup>v</sup>

### ***News and Information Sources***

In 2012 Nielsen reported that the television screen still dominates in Australian households with 96% of all video still viewed on the conventional TV set. Nielsen also highlighted that regardless of the proliferation of multiple screens television viewership increased by 1.2% on the previous year.<sup>vi</sup>

The findings of the Stable Research Online Technology and Research review reveal that while the panel are using free to air and Pay TV to view content, free to air television remains the most popular with over 80% of respondents.

While traditional television viewing remains strong results also indicate that there is a growing use of Internet TV (over 25%) by people under the age of 34 with Internet TV usage proving more popular for male rather than female panel members.

In general there are growing opportunities for people to source traditional television content online in Australia. This can be seen through the development and introduction of Internet TV services including Telstra's T-Box, Fetch TV, TiVo, Play TV, Foxtel on Xbox Live, Foxtel Go, Apple TV and Google TV.

So, what about newspapers? In February this year the Audit Bureau of Circulations released figures that highlighted circulation decreased for nearly every Australian newspaper and magazine over 2012. The Stable Research Online Technology and Research Review revealed that most panel members surveyed under the age of 55 use online newspapers as their primary source for reading news.

Regardless of technological development, the news cycle is still a very important and relevant part of shaping opinions and the mood of the general public. Consumer confidence is closely tied to reports in the news media and this can ultimately affect purchase decisions, brand reputation and loyalty. It's interesting to note that the Online Technology and Research review highlighted that over 80% of the panel still access news on television. While online news readership is growing, online news viewing still remains relatively low at 12%.

Also, while the age of respondents was relevant in highlighting differences in traditional and online news readership accessing news via the television remained popular across all age groups.

The ongoing popularity of television was recently highlighted by FreeTV Australia who noted that Australians watch more than 3 hours of television a day – a habit that has barely changed over the past decade with around 95% of all television viewing still done live.<sup>vii</sup>

### ***What does this mean for the market research industry and clients?***

The findings of the Stable Research Online Technology and Research Review are relevant because effective communication techniques ultimately shape purchase decisions and enhance brand reputation.

Engaging panel members in a relevant and meaningful way is crucial to gauging accurate responses that meet the needs of clients.

Demographic variables can also be successfully addressed by recognising how and where people like to respond to survey questions. While there has been an increase in panel members undertaking surveys out of home and on mobile devices, the findings reveal that this is not the case for panel members in the more senior age groups.

*'market research is at an inflection point. Transformational tools and approaches are available – and companies must take advantage of them or risk losing out'*  
**McKinsey & Company,  
Consumer and Shopper Insights,  
December 2010**

Online research methods provide a number of benefits for clients because they can be tailored to suit brand image and be customised for maximum response rates.

Technology not only increases the speed of news and information, it also facilitates faster access to panel members. The ability to monitor raw data in near real time is also an effective tool for many businesses, including those that may be developing crisis management strategies.

To continue an analysis of panel members Stable Research Online will be conducting a further Technology and Research Review in 2013 to gauge and analyse changes that have occurred throughout the year.

### **About Stable Research Online**

Stable Research Online is a service that was developed at the request of Stable Research clients who were looking for research methods that engage changing consumers preferences and practices.

Online surveys can be tailored to suit brand images and customised for maximum response rates.

Online surveys can also be combined with traditional market research methods.

Services include scripting surveys, programming surveys, hosting surveys, management of sampling processes, data collection and data analysis.

### **References:**

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<sup>i</sup> Consumers' Voice is Transforming Market Research via Online Panels, Social Media and Technology, Online Panel Leader uSamp says, Business Wire, New York, 15 March 2010

<sup>ii</sup> ACMA Smartphone use doubles in 2012, [http://www.acma.gov.au/WEB/STANDARD/pc=PC\\_600160](http://www.acma.gov.au/WEB/STANDARD/pc=PC_600160)

<sup>iii</sup> Australian Bureau of Statistics, 8146.0 - Household Use of Information Technology, Australia, 2010-11, <http://www.abs.gov.au/ausstats/abs@.nsf/Latestproducts/4E4D83E02F39FC32CA25796600152BF4?opendocument>

<sup>iv</sup> Australian Bureau of Statistics, 8146.0 - Household Use of Information Technology, Australia, 2010-11, <http://www.abs.gov.au/ausstats/abs@.nsf/Latestproducts/8146.0Media%20Release12010-11?opendocument&tabname=Summary&prodno=8146.0&issue=2010-11&num=&view=>

<sup>v</sup> Social Media Statistics January 2013, Australia and New Zealand, 1 February 2013, [www.adcorp.com.au](http://www.adcorp.com.au)

<sup>vi</sup> Australia's Multi Screen report for Q1, 2012 shows television viewing strong, as new devices and technologies create new opportunities to view, <http://www.nielsen.com/au/en/news-insights/press-room/2012/australia-s-multi-screen-report-for-q1--2012-shows-television-vi.html>

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vii Free TV Australia, [http://www.freetv.com.au/Media/News-Media\\_Release/Julie\\_Flynn\\_FreeTV\\_Speech\\_Aust\\_Broadcasting\\_Summit\\_Feb13.pdf](http://www.freetv.com.au/Media/News-Media_Release/Julie_Flynn_FreeTV_Speech_Aust_Broadcasting_Summit_Feb13.pdf)