GLOBAL RESEARCH BUSINESS NETWORK
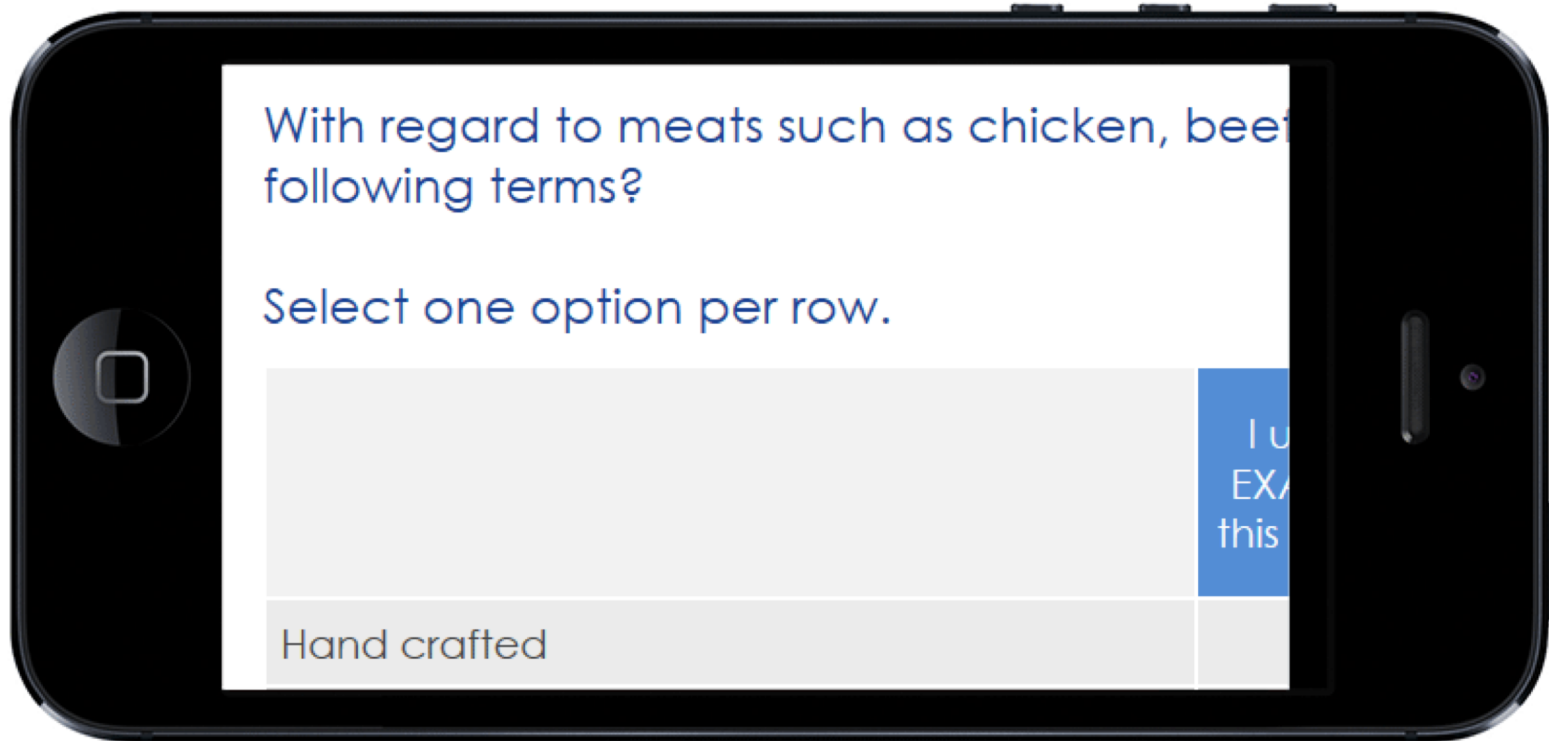
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A Course Correction for Conjoint Analysis: An Exploration on the Inclusion of Mobile Audiences and its Impact on Insights

Insights Association NEXT Conference
May 1, 2018

Agenda

- The GRBN Mission

- The Research Team

- ROR Considerations & Objectives

- Methodology

- Findings

- Key Takeaways

Our Motivation

Our Mission

More People Participating

Our Delivery

Driving change through a **handbook, metrics and Continued ROR**

The Research Team

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Innovate MR

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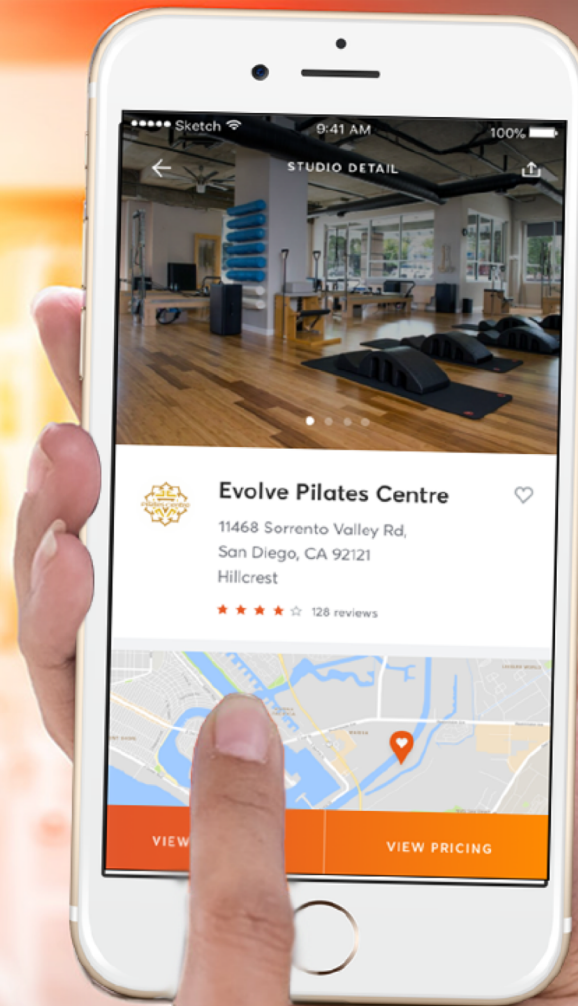UB Mobile

Andrew Cannon
GRBN

David Lau
MINDBODY

Bob Graff
MarketVision

Our RoR Partners

About MINDBODY

MINDBODY is the largest global provider of online business management software and online scheduling platforms for the beauty, health, and wellness industry.

Business Issue

Think about Uber surge pricing, it's designed to increase prices for car service when demand is high.

Similar to Uber, MINDBODY has a distinctly mobile audience of consumers and wanted to understand dynamic pricing.
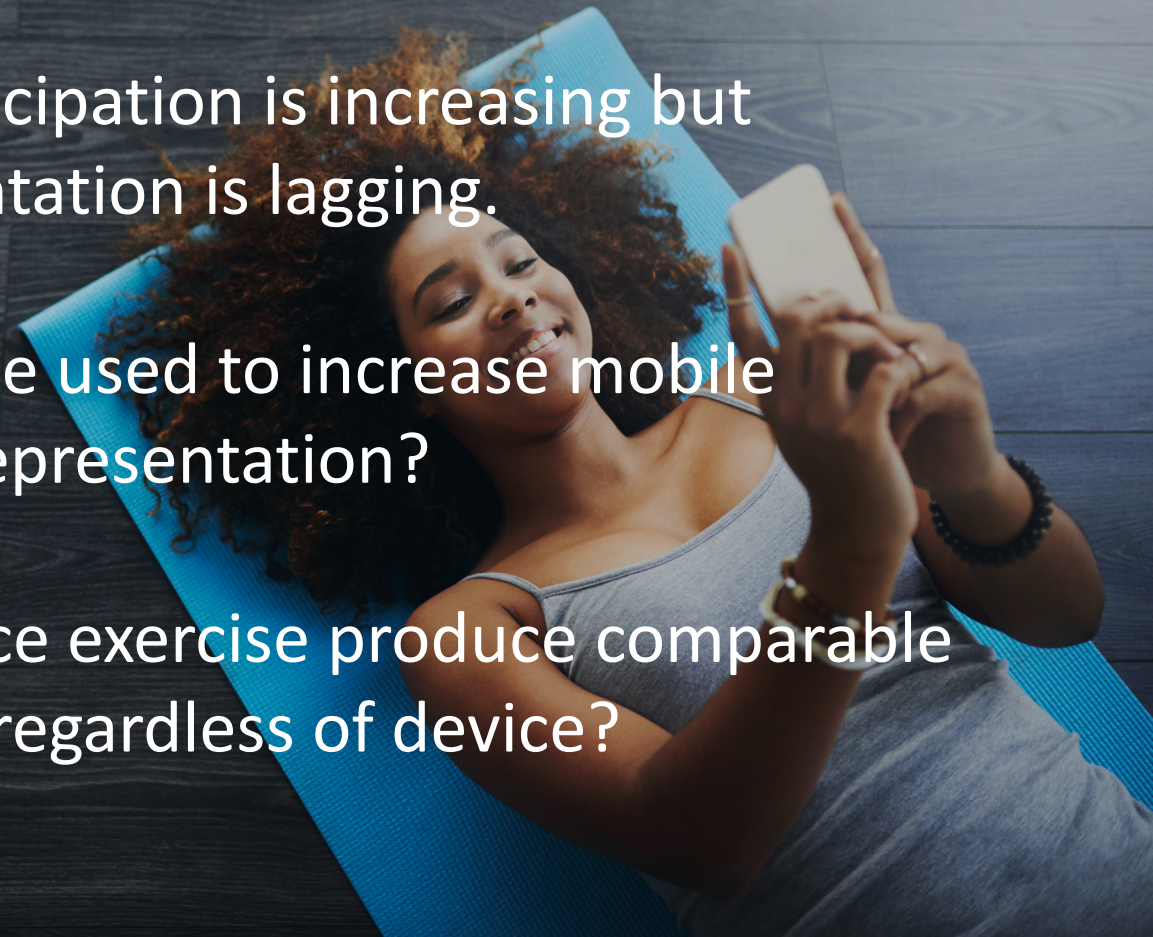
Research Questions

1. Did participants change their behavior based on price?

2. What variables influence participants willingness to sign-up for a yoga class – time of day, day of week, type of yoga, instructor, price?

3. Did results vary based on device – mobile or desktop?

Methodology

We designed a mobile conjoint to present consumers (N= 1,245 yoga enthusiasts) with several alternative yoga classes including different combinations of these 5 variables.

- *Type of yoga*
- *Day of week*
- *Time of day*
- *Instructor*
- *Price*

Considerations

- Mobile survey participation is increasing but consistent representation is lagging.

- Can better design be used to increase mobile participation and representation?

- Can a discrete choice exercise produce comparable results and quality regardless of device?

Our Questions

- How does the discrete choice exercise render on a smaller screen?

- What is the impact on data if we exclude mobile participants from sample?

Discrete Choice Example Tasks

DESKTOP/LAPTOP

Task 1 of 8

Which of the following yoga classes would you be most likely to sign up for?

Hatha	Hatha	Vinyasa	Bikram
Sunday	Thursday	Thursday	Sunday
12 noon	9am	6pm	7pm
Instructor I know and like	Instructor I don't know	Instructor I know and like	Instructor I know and like
$27.00	$13.00	$27.00	$30.00
◯	◯	◯	◯

◯ I would not choose any of these

CONTINUE >

MOBILE

Task 1 of 8

Which of the following yoga classes would you be most likely to sign up for?

Yin (Restorative)	Vinyasa	Yin (Restorative)	Vinyasa
Sunday	Thursday	Tuesday	Friday
2pm	12 noon	12 noon	2pm
Instructor I know and like	Instructor I know and don't like	Instructor I know and don't like	Instructor I know and like
$20.00	$10.00	$20.00	$30.00
◯	◯	◯	◯

◯ I would not choose any of these

CONTINUE >

Variables

MOBILE VS. LAPTOP/DESKTOP

Mobile

Smartphone or tablet

Laptop/Desktop

SAMPLE PROVIDER

Traditional Panels or Programmatic Sample

GROUP A VS. GROUP B

GROUP A

Age 25+, owns a smart phone, Provides income (any), attends group fitness classes 1+ times per month, exercises 1 or more times per week, goes to yoga classes at least once every two weeks.

GROUP B

Age 18-24, owns a smart phone, currently in school or provides an income (any), exercises 1 or more times per week and gives fitness some priority, somewhat/ very interested in attending fitness classes, goes to yoga classes at least once every two weeks.

DC Attribute Importance

- Findings consistent across mobile vs. laptop – the "non-negotiables" are most important (Do I know/like the instructor? Is the class offered at a time I'm available?).
- Price is relatively least influential variable.
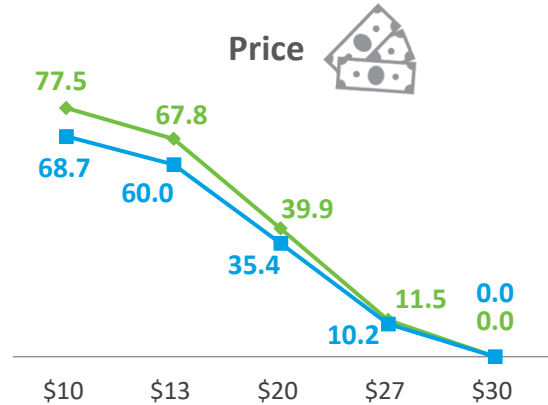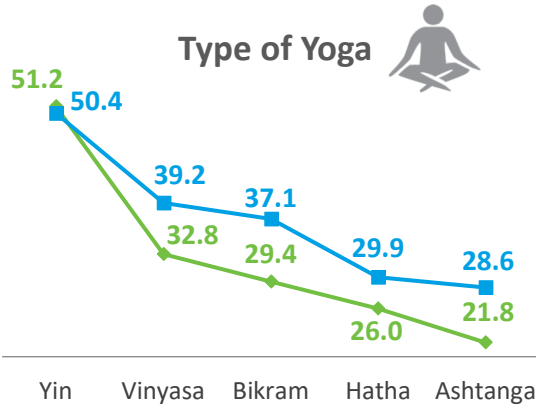
MOBILE VS. LAPTOP/DESKTOP

	Mobile	Laptop/Desktop
Instructor	30	26
Time	24	25
Day	16	18
Type	15	17
Price	15	14

GROUP A VS. GROUP B

	Group A	Group B
Instructor	27	31
Time	25	23
Day	18	15
Type	16	15
Price	14	16

Results | Attribute Preference

Legend: Mobile — Laptop/Desktop

Instructor

	Mobile	Laptop/Desktop
Know and like	144.7	117.4
Don't know	84.6	74.5
Know and don't like	6.6	11.6

Time

	Mobile	Laptop/Desktop
6PM	75.7	76.4
7PM	68.5	67.4
8AM	52.2	65.7
Noon	54.9	57.7
3PM	54.8	56.4
11AM	54.0	56.6
4PM	54.1	55.6
10AM	50.4	56.1
9AM	48.7	56.1
2PM	43.5	44.5
6AM	38.0	47.5

Day of Week

	Mobile	Laptop/Desktop
SAT	57.2	63.1
SUN	47.2	56.8
WED	37.2	40.7
FRI	33.4	35.3
THU	28.6	29.7
TUE	25.0	27.9
MON	19.6	22.4

Type of Yoga

	Mobile	Laptop/Desktop
Yin	51.2	50.4
Vinyasa	32.8	39.2
Bikram	29.4	37.1
Hatha	26.0	29.9
Ashtanga	21.8	28.6

Price

	Mobile	Laptop/Desktop
$10	77.5	68.7
$13	67.8	60.0
$20	39.9	35.4
$27	11.5	10.2
$30	0.0	0.0

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Results | Attribute Preference

Group A
Group B

Instructor

148.7
122.2
87.0
75.8
10.5
6.4

Know and like | Don't know | Know and don't like

Time

78.3 | 70.0 | 62.8 | 56.0 | 55.9 | 56.8 | 55.2 | 53.9 | 53.4 | 42.8 | 46.1
71.4 | 63.7 | 51.2 | 56.9 | 55.0 | 54.6 | 54.0 | 52.0 | 50.6 | 46.5 | 36.1

6PM | 7PM | 8AM | Noon | 3PM | 11AM | 4PM | 10AM | 9AM | 2PM | 6AM

Day of Week

63.5 | 55.5 | 39.8 | 34.9 | 29.7 | 27.6 | 21.6
53.5 | 45.0 | 37.4 | 33.4 | 28.1 | 24.0 | 19.9

SAT | SUN | WED | FRI | THU | TUE | MON

Type of Yoga

50.6 | 37.4 | 35.4 | 29.6 | 26.3
51.1 | 33.1 | 28.8 | 24.5 | 22.9

Yin | Vinyasa | Bikram | Hatha | Ashtanga

Price

82.2 | 72.0 | 42.1 | 11.5 | 0.0
68.6 | 59.9 | 35.5 | 10.5 | 0.0

$10 | $13 | $20 | $27 | $30

Results | DC Base Case Share of Preference

	Option 1	Option 2	Option 3	None
TOTAL	26%	48%	17%	9%
Mobile	26%	51%	14%	9%
Laptop/Desktop	26%	46%	20%	8%
Group A	25%	46%	19%	10%
Group B	26%	54%	13%	7%

Option 1	Option 2	Option 3
✓ Yin	✓ Vinyasa	✓ Hatha
✓ Thursday	✓ Tuesday	✓ Saturday
✓ 4pm	✓ 3pm	✓ 12pm
✓ Instructor I don't know	✓ Instructor I know and like	✓ Instructor I know, don't like
✓ $20	✓ $20	✓ $20

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Results | Category Growth During Price Change

MOBILE VS. LAPTOP/DESKTOP

- Mobile
- Ltop/Dtop

96.5%
95.5%
95.6%
94.7%
91.7%
90.9%
86.5%
84.1%
84.7%
82.2%

-50% -35% 0% +35% +50%

Percent Change in Price

GROUP A VS. GROUP B

- Group A
- Group B

97.2%
96.4%
95.4%
94.4%
93.3%
90.3%
87.3%
84.6%
84.8%
82.5%

-50% -35% 0% +35% +50%

Percent Change in Price
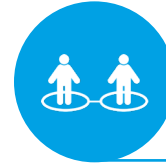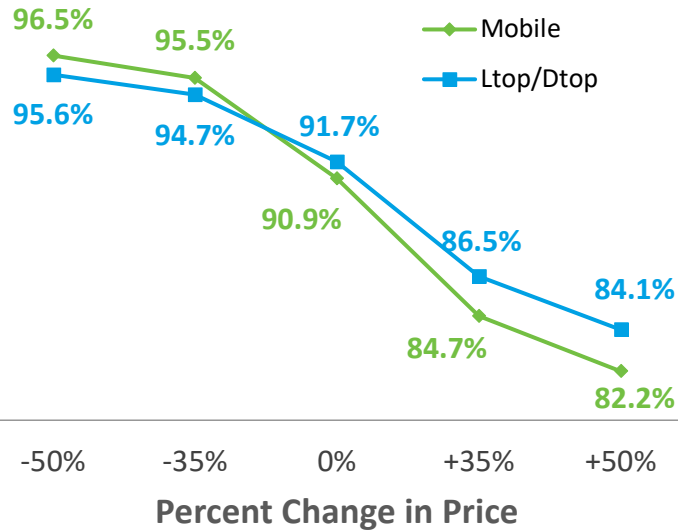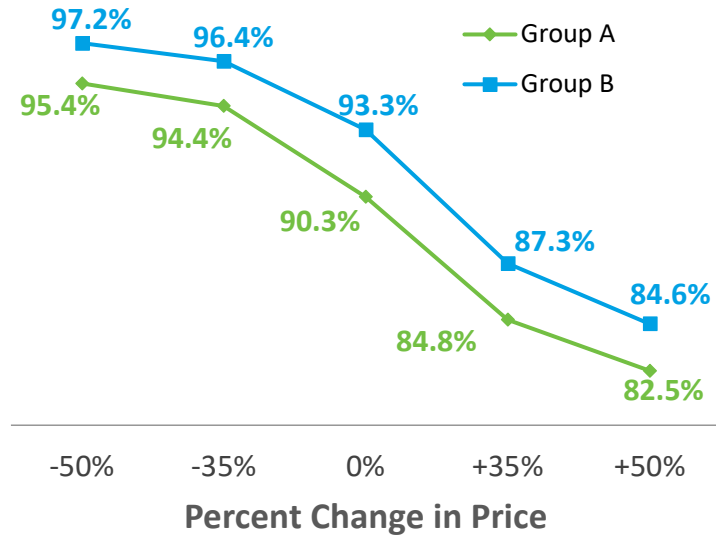
Price Sensitivity

Is there a group of consumers who are more price sensitive?

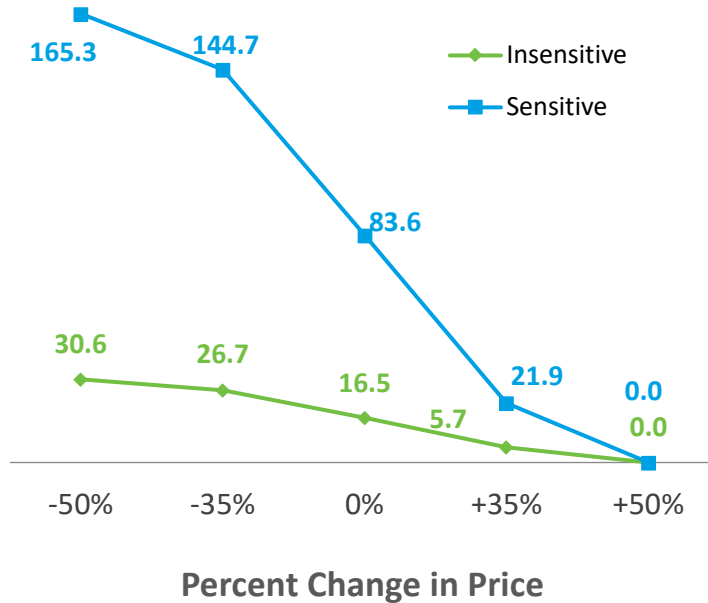|	Price Sensitive	Price Insensitive
Most important attribute	Price	Day/Type
Took survey via mobile	53%	48%
Millennials	40%	30%
Income <$60K	42%	27%
Exercise at least 4x/week	49%	61%
Group fitness class at least 4x/week	14%	36%
"Almost always" prioritize exercise	16%	31%
Group yoga class at least 4x/week	11%	28%
Prefer Level II or Level III yoga classes	45%	63%
"Very Interested" in new types of yoga	56%	73%

Lean toward mobile, younger, lower income, less physically engaged

Price Sensitive 31%

Price Insensitive 69%

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Results | Category Growth During Price Change

SENSITIVE VS. INSENSITIVE

Text text text
- Text
  - Text
    - Text

165.3

144.7

83.6

—◆— Insensitive

—■— Sensitive

30.6   26.7   16.5   21.9   0.0

5.7   0.0

-50%   -35%   0%   +35%   +50%

Percent Change in Price

Results | DC Base Case Share of Preference

	Option 1	Option 2	Option 3	None
TOTAL	**26%**	**48%**	**17%**	**9%**
Price Insensitive	**30%**	**45%**	**21%**	**5%**
Price Sensitive	**17%**	**56%**	**9%**	**18%**

Option 1	Option 2	Option 3
✔ Yin	✔ Vinyasa	✔ Hatha
✔ Thursday	✔ Tuesday	✔ Saturday
✔ 4pm	✔ 3pm	✔ 12pm
✔ Instructor I don't know	✔ Instructor I know and like	✔ Instructor I know, don't like
✔ $20	✔ $20	✔ $20

$

Results | Category Growth During Price Change

SENSITIVE VS. INSENSITIVE

96.3% 96.0% 95.3% 94.4% 93.8%
95.5%
93.1%
82.5%
66.5%
59.9%

Insensitive
Sensitive

-50%   -35%   0%   +35%   +50%
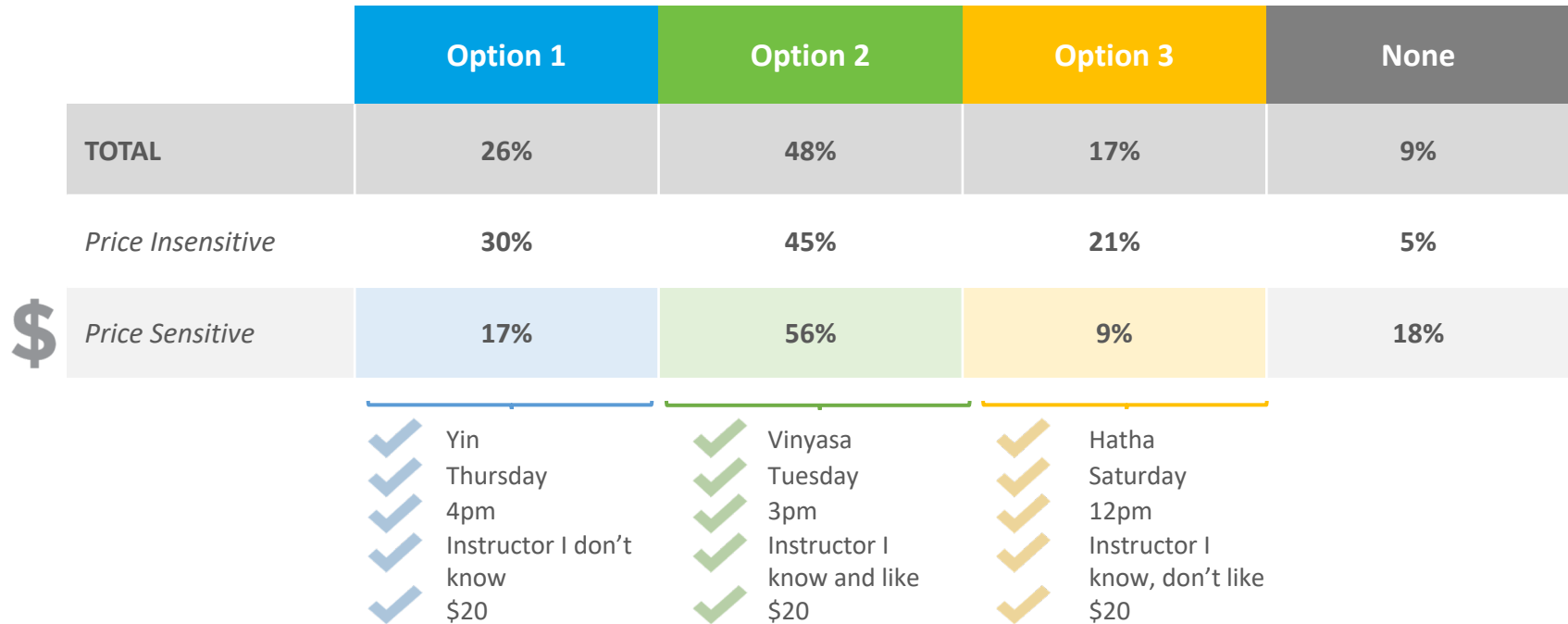
Percent Change in Price
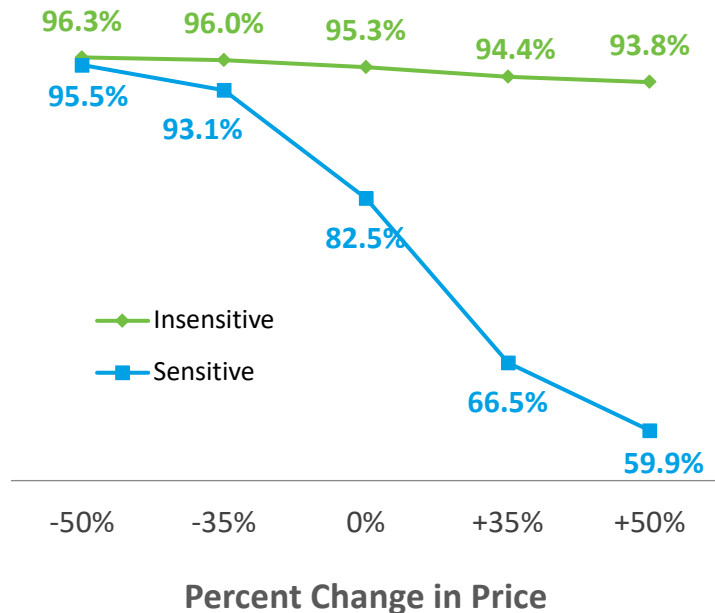
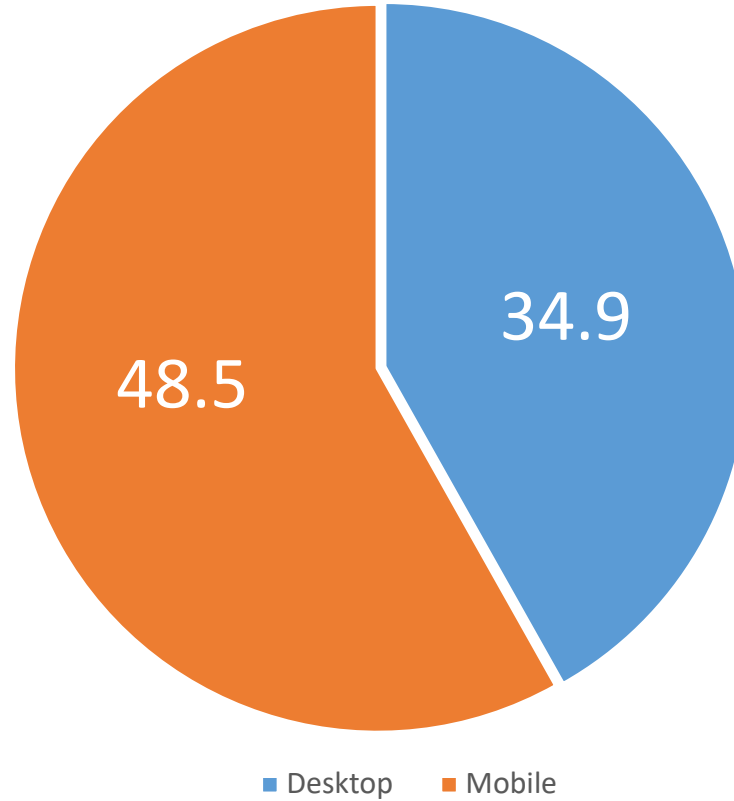## Impact of Pricing Change

- Within this context there is a group of consumers who are relatively insensitive to price changes

- Upward price movement could be considered with an eye on impact on sensitive group category participation

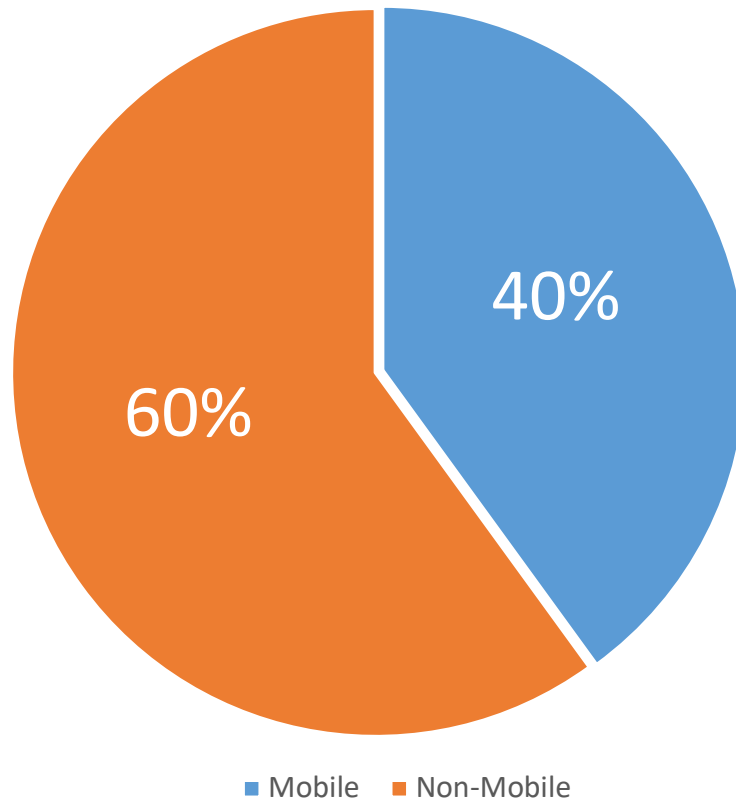**99%**

Results | Survey Satisfaction

1%

Results | Verbatim Response

Average Character Count

Key Takeaways

- At a high level (Mobile vs. Laptop/Desktop, Grp A vs. Grp B), consumers did not change their behavior based on price, although there is a group of consumers in this category that are price insensitive

- Discrete choice data provided a deeper look at opportunities, and worked quite well on mobile and laptop platforms

- Consistency of data across platforms and a focus on a good experience for participants opens doors for improved representation among mobile audiences

- Participants expect mobile opportunities for research and many choice based designs work well on smaller screens

Be Part Of The Solution

Driving change through **workshops and coaching**

THANK YOU