

nielsen
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MXIT ROMITRACK 2014



AGENDA

Background & Objectives

Research Design

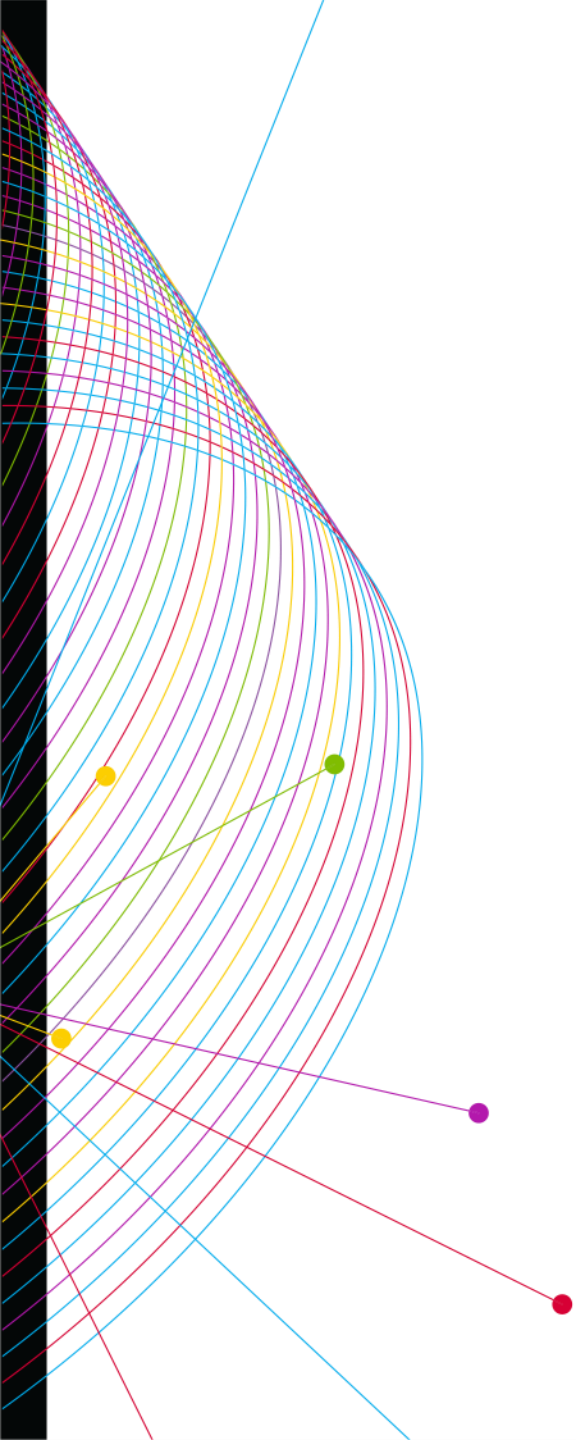
Points to remember

Details of the Sample

Executive Summary

Detailed Findings





BACKGROUND & OBJECTIVES

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- Continental Outdoor Media offers brands the opportunity to advertise out of home – on billboards, on street furniture, digitally in malls etc. , mirroring and complementing the constantly evolving marketplace across a host of local and international brands.
- Provided is a one-stop advertising service for marketers across South Africa and Sub-Saharan Africa, from the design and printing of artwork, to the display of outdoor advertising.
- In support of sales activities, Client wished to measure the impact of a current Mxit billboard campaign, by understanding pre-and post-awareness via a matched control and test design survey
- Client commissioned Nielsen to conduct the research, the details of which are contained in this document
- The findings reflect responses to the advertising across two sites in Gauteng – Atteridgeville and Shoshanguve

An abstract graphic on the left side of the slide. It features a vertical black bar on the far left. From this bar, a series of thin, curved lines in various colors (blue, green, yellow, orange, red, purple) fan out towards the right. Some of these lines terminate in small colored dots. Additionally, several straight lines of different colors (blue, green, purple, red) extend from the curved lines towards the right, ending in larger colored dots. The overall effect is a complex, multi-colored web of lines and points.

RESEARCH DESIGN

RESEARCH DESIGN

Nielsen conducted on-site intercept interviews using our Software On Demand Application (SODA).

Methodology

- Intercept surveys in commuter areas, such as taxi ranks and shopping areas, close to 2 selected billboard locations
- Structured surveys using SODA technology on tablets – maximum 5 minutes duration

Sample


- Total n=200 (n=100 per location)
- All male and female commuters aged 16-30 years
- Stratified by location (n=100) and loosely quota controlled by gender, age

Coverage

- 2 selected locations in Gauteng:
 - Kwaggasrant - Atteridgeville
 - Shoshanguve
- Fieldwork was conducted from 12th to the 22nd of July 2014

POINTS TO KEEP IN MIND

- Sample was quota controlled - Quotas were placed on exposed users – those who have seen the ad and not exposed users – those who have not seen the ad
- All results are in % unless otherwise specified
- Brands/responses with unstable bases <50 are not included
- Statistically significant differences between demographic responses and the overall average have been specified in the following way:

 = Significantly higher at a 95% level of confidence

 = Significantly lower at a 95% level of confidence

- Norms referred to are sourced from Nielsen's data base of ads evaluated via our EPIC (*Empathy Persuasion, Impact, Communication*) model, which includes data from over 19 countries, over 400 cases and a wide variety of categories and industries

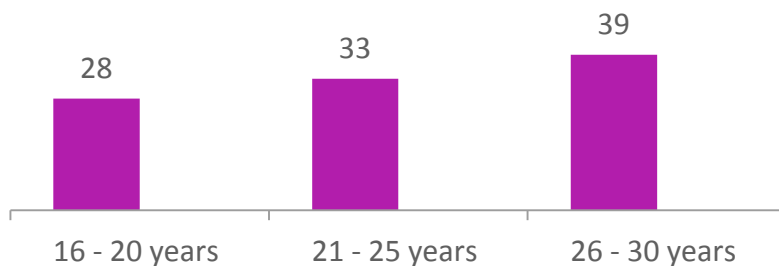
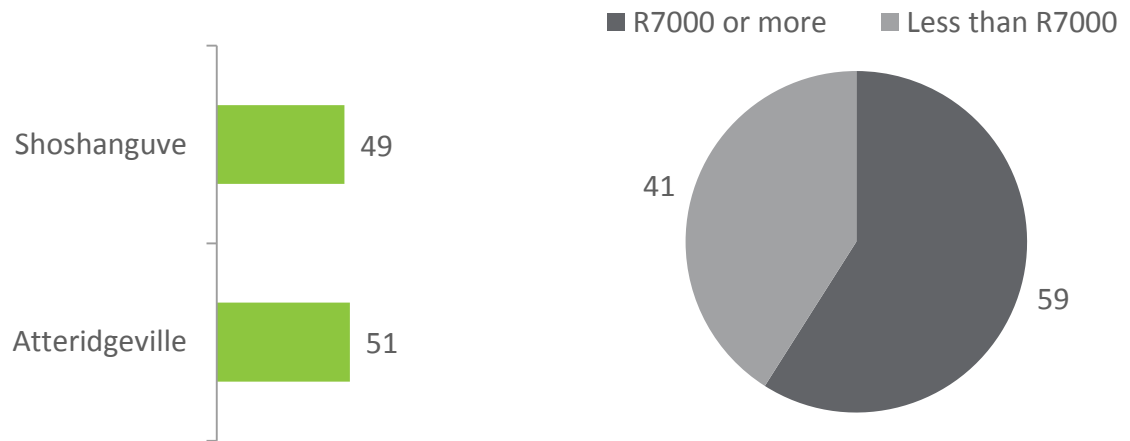
Study was conducted in 2 locations amongst black respondents between the ages of 16 and 30 years;
Matching quotas were set among respondents who have seen the ad before, and those who haven't



50%



50%



50%

Respondents have been exposed to the ad

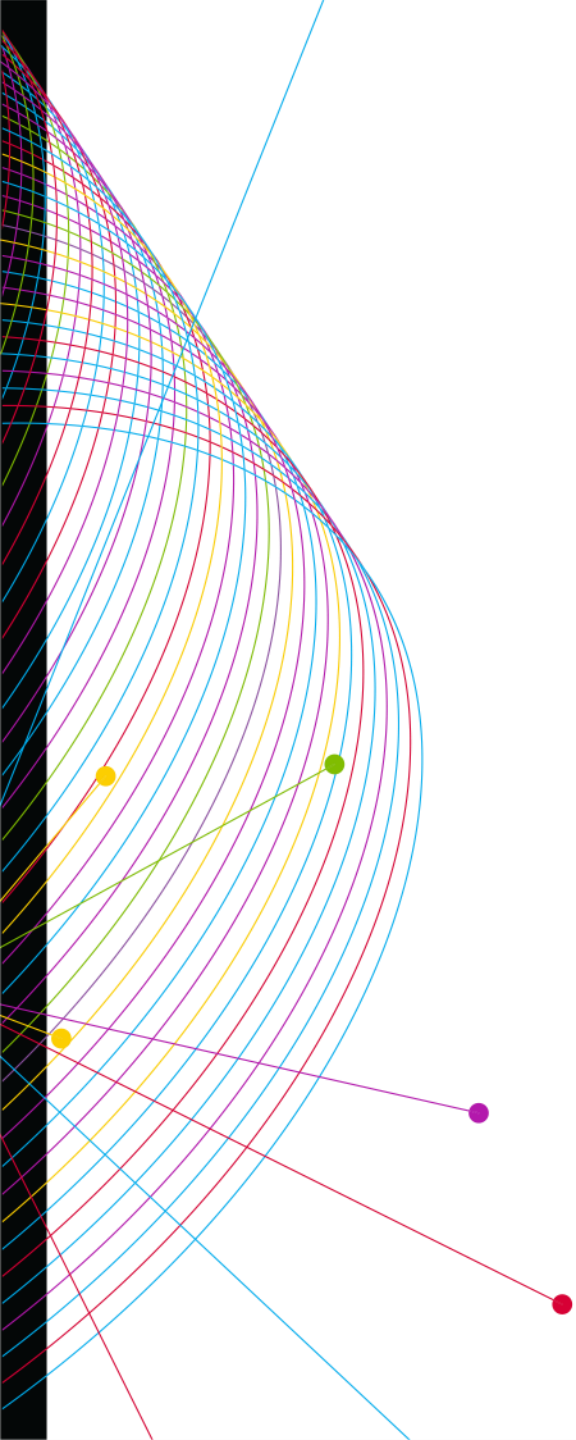
Respondents who haven't been exposed to the ad

50%

QUESTION AREAS

A list of questions answering objectives was **designed and finalised in liaison with Client** – questions had to be brief and easy to respond to, as interview should not exceed 5 minutes.

- Screen for age and record gender
 1. Have you heard of Mixit? *Yes/No*
 2. If yes in Q1 - Did you grow up with Mixit? *Yes/No*
 3. If Yes in Q1 - Are you still a Mixit user? *Yes/No*
 4. If No in Q3 - What other messenger apps do you use? (*WhatsApp, WeChat, BBM, Facebook Messenger*)
 5. Ask All - Did you see the new Mixit ad on billboards? *Yes/No*
 6. If No in Q5 – Have you seen this ad on billboards? *Show visual of the creative. Yes/No*
 7. If Yes in Q5/6 – After seeing the ad, would you consider registering for the new Mixit? *Would definitely consider, Would probably consider, Might or might not consider, Would probably not consider, Would definitely not consider*
 8. Did you register for the new Mixit? *Yes/No*
 9. Whether Yes or No in Q8 – Why is that? *Open ended*



EXECUTIVE SUMMARY

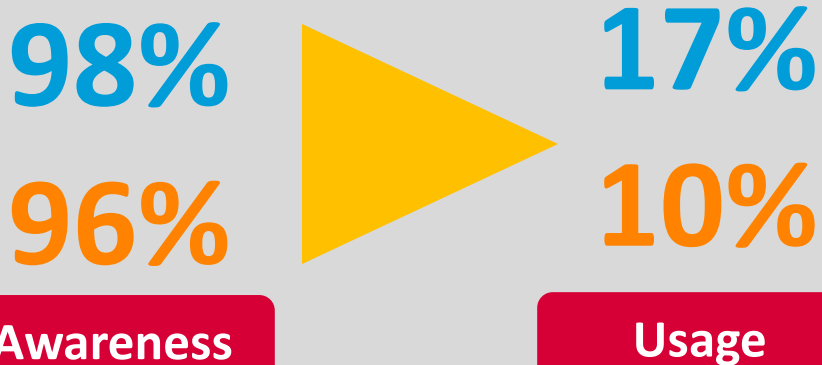
The creative tested is impactful, enjoyable & performs well on brand registration and communication of the existence of the New Mxit, in a way that is congruent to the Mxit brand

Persuasion to register is however somewhat polarised as a result of pre-existing negative perceptions of Mxit, a limited user base, a lack of perceived personal relevance, & erroneous beliefs about poor Mxit access & performance not specifically, or not sufficiently, addressed in this advert

The creative is however well positioned to continue to attract attention to additional information about Mxit feature & function updates, should these be included going forward



HIGH AWARENESS But low usage!



The majority have been with MXIT for more than 1 year

10% 4%

Between 1 and 5 years

Did they grow up with MXIT?

Did they recall the ad?

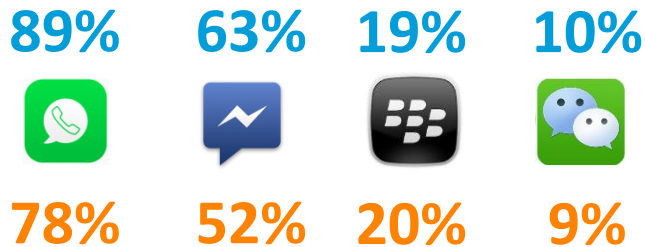
86%

I have recall Mxit advertising

15%

76%
Billboards

How do people communicate?



WhatsApp and Facebook messenger are the favored apps for chatting

What do they remember from the ad?

62% recalled Zakes Bantwini

18% recalled the new version of Mxit

New features, smartphones, music downloads

Are they registered?

YES

'I am registered with the new Mxit'

=

15%

10%

Mxit is easy / fun to use

Mxit is cheaper / affordable

I still use other messenger apps

NO - why not?

All of my friends are using WhatsApp

I don't have a smart phone / phone with internet

Mxit is very slow - if you send a message it takes time to be delivered

Mxit is not private

How did the ad make you feel about Mxit?

'The ad reminded me of the brand'

73%

60%

What did they think of the ad?

Impactful
Engaging
Persuasive
Visually appealing
Informative



Would they register?

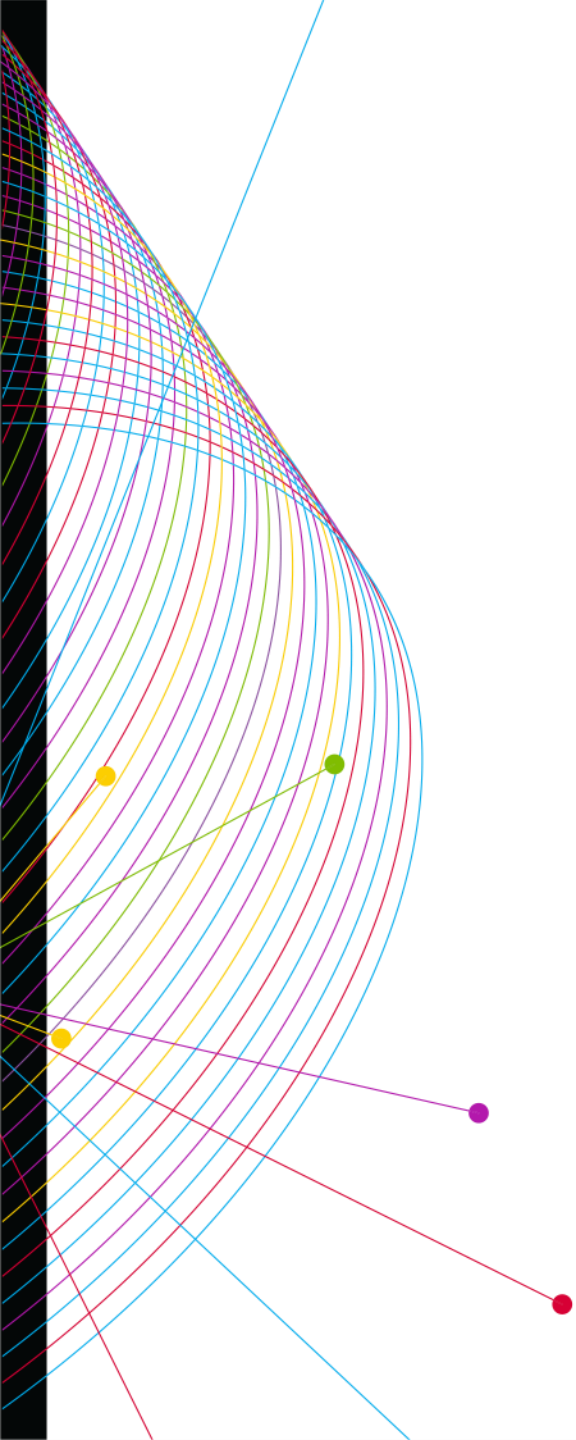
39%

Would consider it!

After seeing the ad

35%

Still unsure



DETAILED FINDINGS

Awareness of Mxit is already high and saturated, especially among the youth - 16-25 years

Awareness

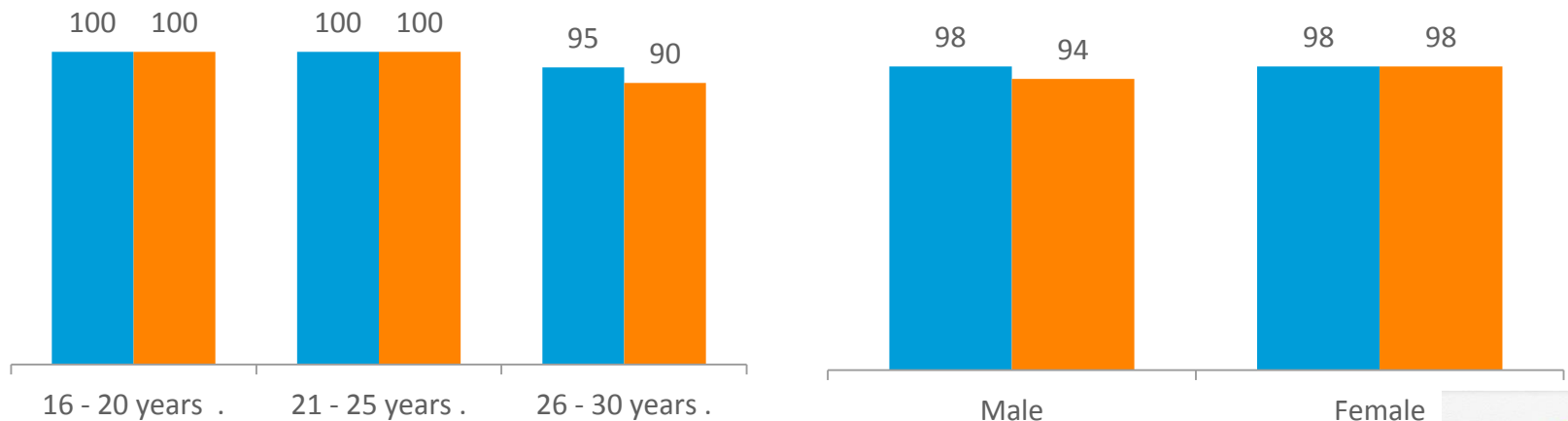
98%

Exposed respondents
that have heard of Mxit

Not Exposed respondents
that have heard of Mxit

96%

Exposed respondents have a higher
awareness amongst males and 26-30
year olds than those who were not
exposed to the ad



In spite of high awareness, **current usage is limited;**
Usage however increases with exposure to the campaign,
 particularly among the youngest consumers

Usage

17%

Exposed respondents
that use Mxit

Not Exposed respondents
that use Mxit

10%

Exposure may have improved uptake
among the youngest adults

Exposure may have improved uptake
among females



Those exposed to the campaign are more likely to have registered more recently – within 1-5 years, with over a third within the last year & close to another third within 1-2 years ago

First registration

83%

Exposed respondents that are not registered

Not Exposed respondents that are not registered

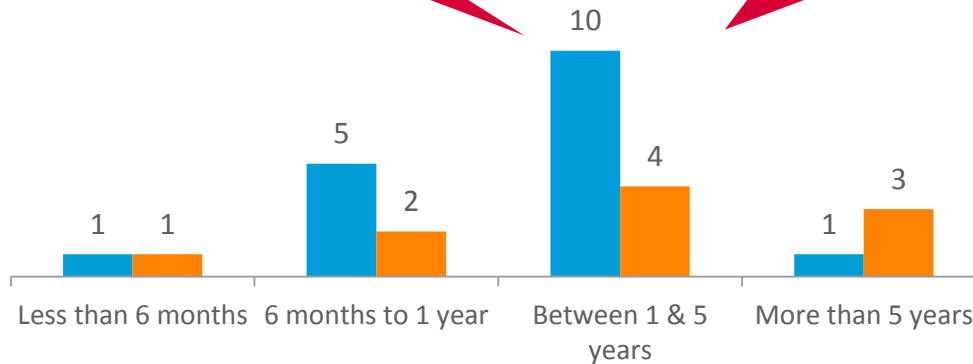
90%

Exposed users

Not exposed users

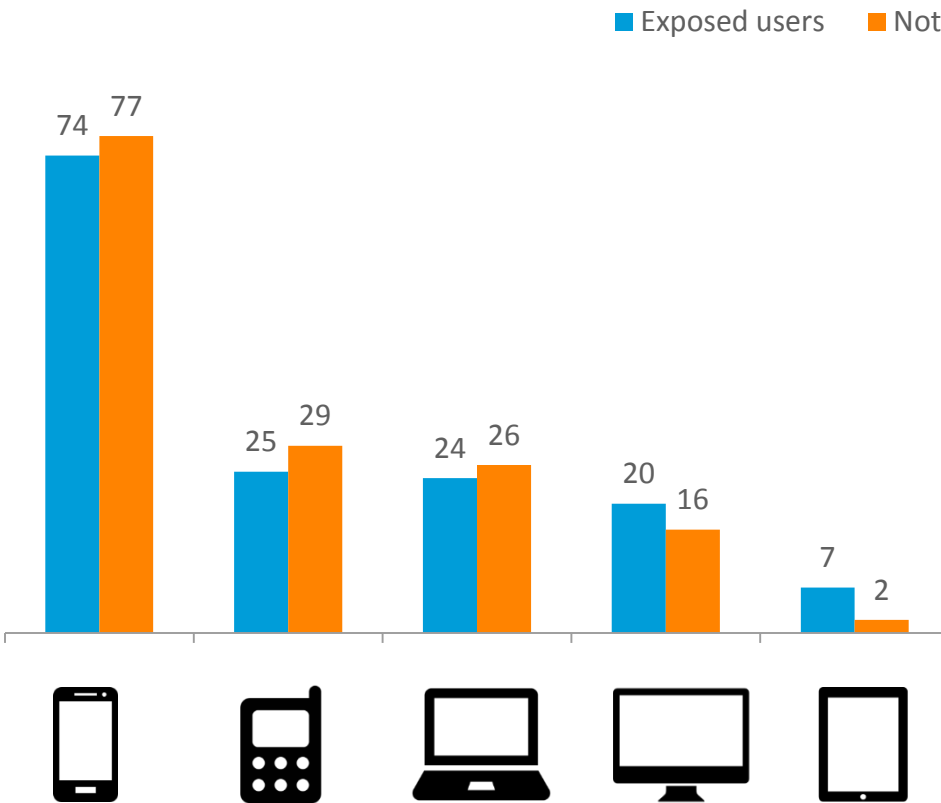
Exposed consumers who are current users have a higher incidence amongst females and 16-20 year olds

Not exposed users are skewed towards 21-25 year olds

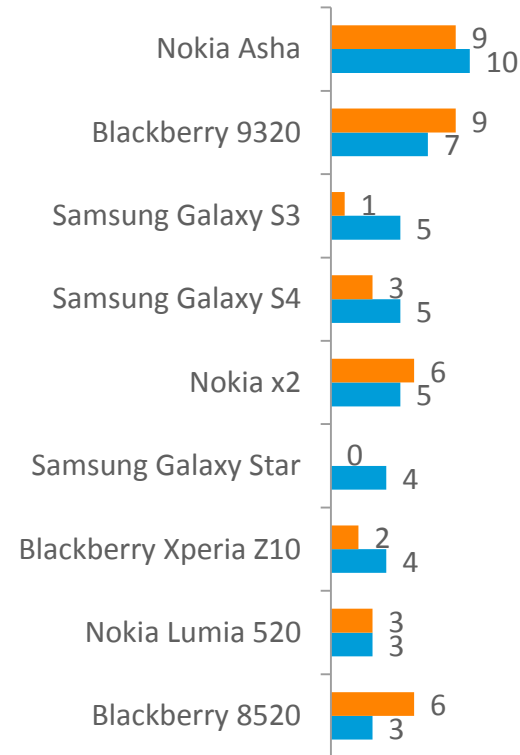


3 in every 4 use a smart phone – mainly Nokia, Blackberry or Samsung, so access to messenger apps is wide

Access to devices



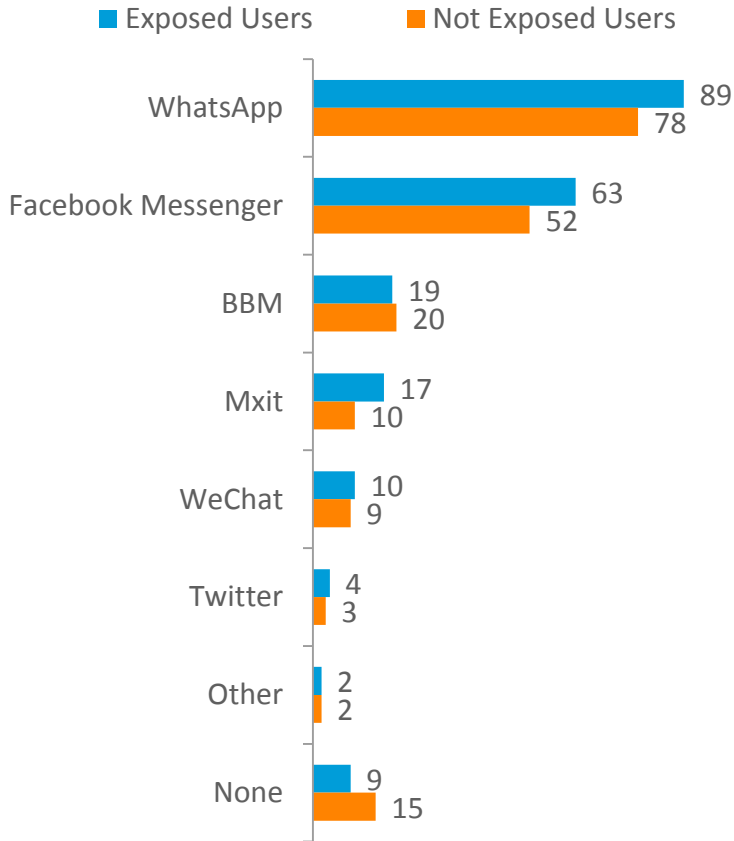
Make and Model







Base: Exposed users n=100, Not exposed users n=102 Q25. Which of the following, if any, do you own or have personal access to? [MA] Q26. Please tell me the make and model of the mobile phone you use most often?

Respondents use a variety of apps – typically 2 apps - mainly WhatsApp and Facebook Messenger

Other app users



Cross usage - Total

				
Base	27	39	116	169
	100	8	17	13
	11	100	26	23
	74	77	100	64
	81	100	94	100

Current Mxit registration is limited, and more likely among the youth and among males, and among those already exposed to the ad – chiefly due to Mxit being perceived as fun and as cheaper

Current Registration

Base = Yes, I am registered*

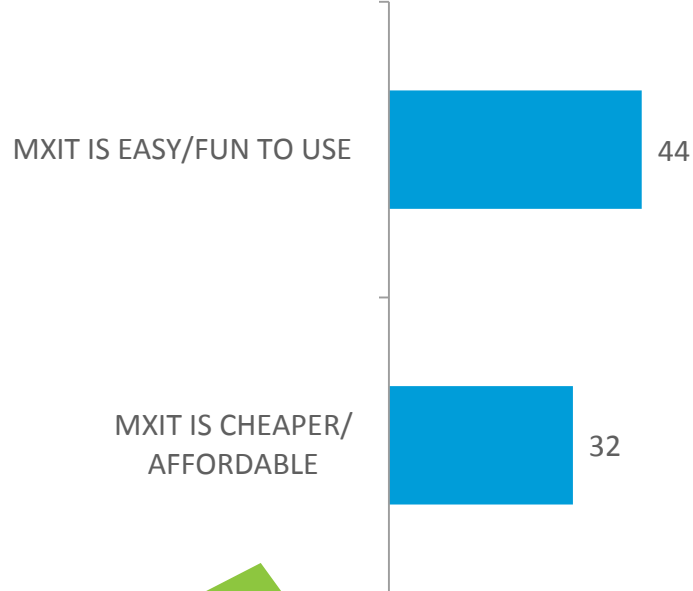
In total, only 12% of the sample are currently registered

15%

Exposed respondents that are registered

Not Exposed respondents that are registered

10%



There are still users who prefer other messenger apps, in particular WhatsApp, even though they are registered with Mxit

*Small Base: n=25; Q20. Are you currently registered for the new Mxit, or not? [SA]
Q21. Why is that? [OE]

Impact of the advert is strong, with high spontaneous recall of the ad on a billboard and brand registration among those exposed (76% vs global norm of 49%)

Spontaneous awareness

Recall of any Mxit advertising amongst exposed respondents is significantly higher than among those who have not seen the ad before

86%

Exposed respondents that have seen advertising

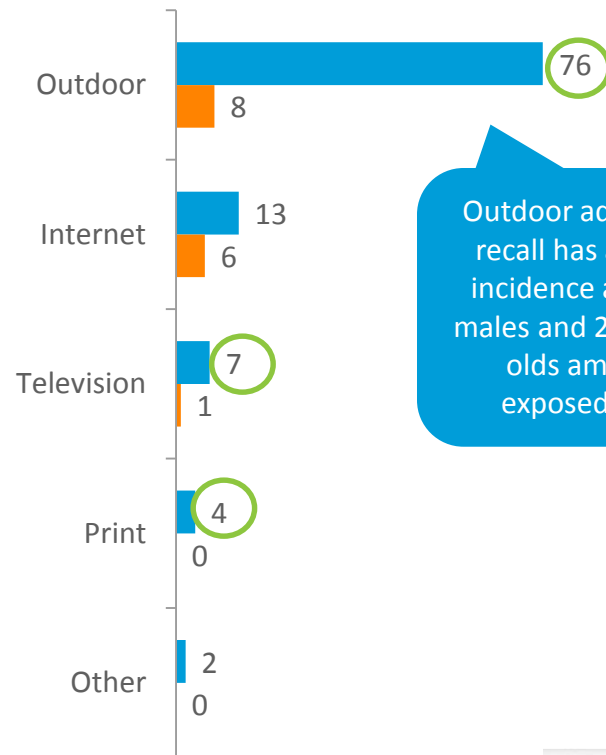
Not Exposed respondents that have seen advertising

15%

Those who recall the advertising are more likely to be male, between the ages of 16 - 20

Point of advertising

■ Exposed users ■ Not exposed users



Outdoor advertising recall has a higher incidence amongst males and 21-25 year olds amongst exposed users

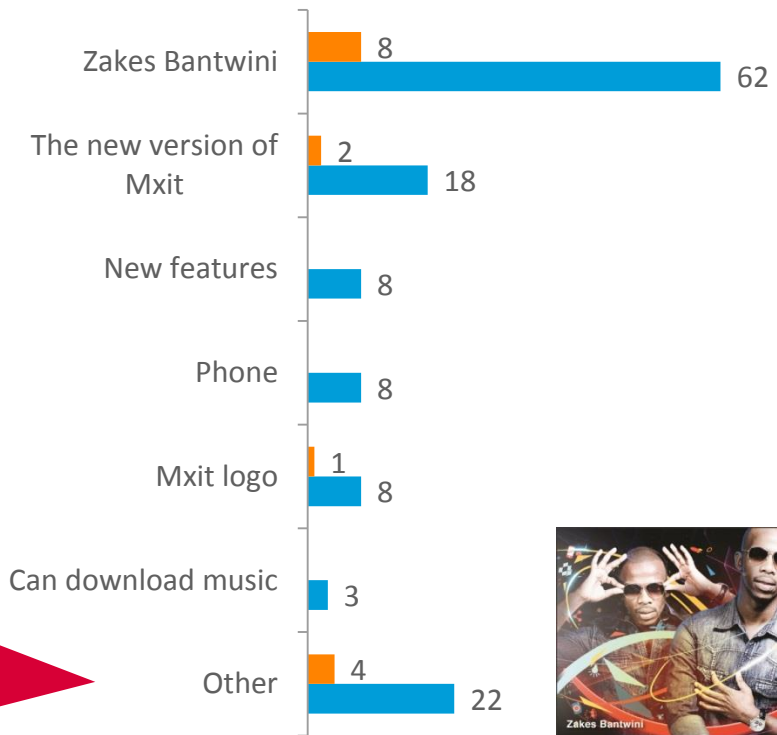
○ □ Significance testing (5% risk level)

Base: Exposed users n=100, Not exposed users n=102 Q16. Do you recall seeing or hearing any advertising for Mxit recently, or not? [SA] Q17. Where do you recall seeing or hearing the advertising? [MA]

Elements of the advert are well-remembered – the artist in the advert and being about the New Mxit Enjoying the highest spontaneous recall

Spontaneous recall

Not exposed Exposed



Respondents who have seen the ad before recalled the artist dancing, wearing sunglasses and holding a smart phone

Other comments are around the look and the feel of the new Mxit ad

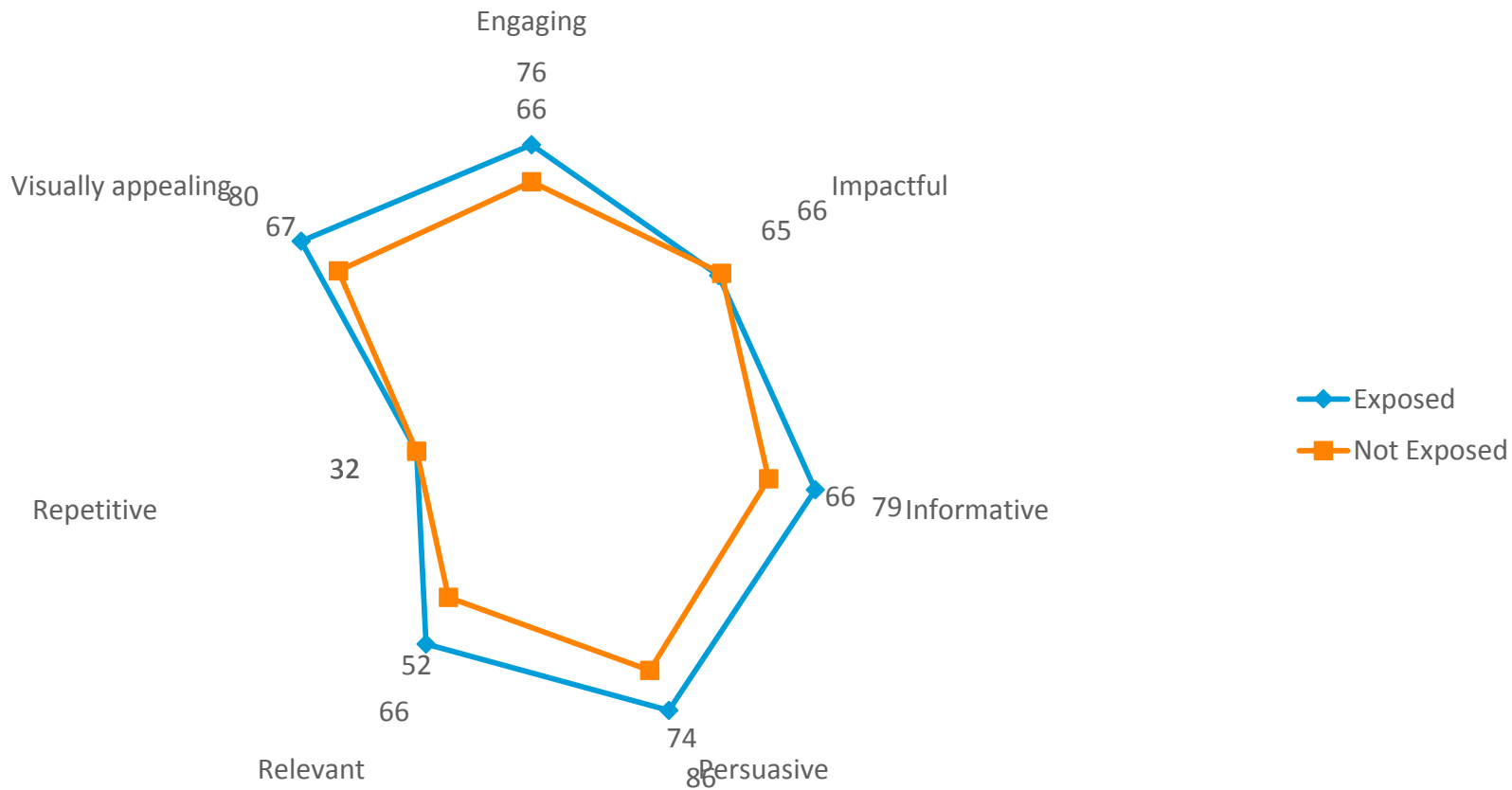


Base: Exposed users n=100, Not exposed users n=102 Q18. What do you remember about the ad? (OE)

The ad is impactful at first exposure and is strongly positively perceived, with positive associations increasing with repeated exposure

Top 2 box

Campaign Associations

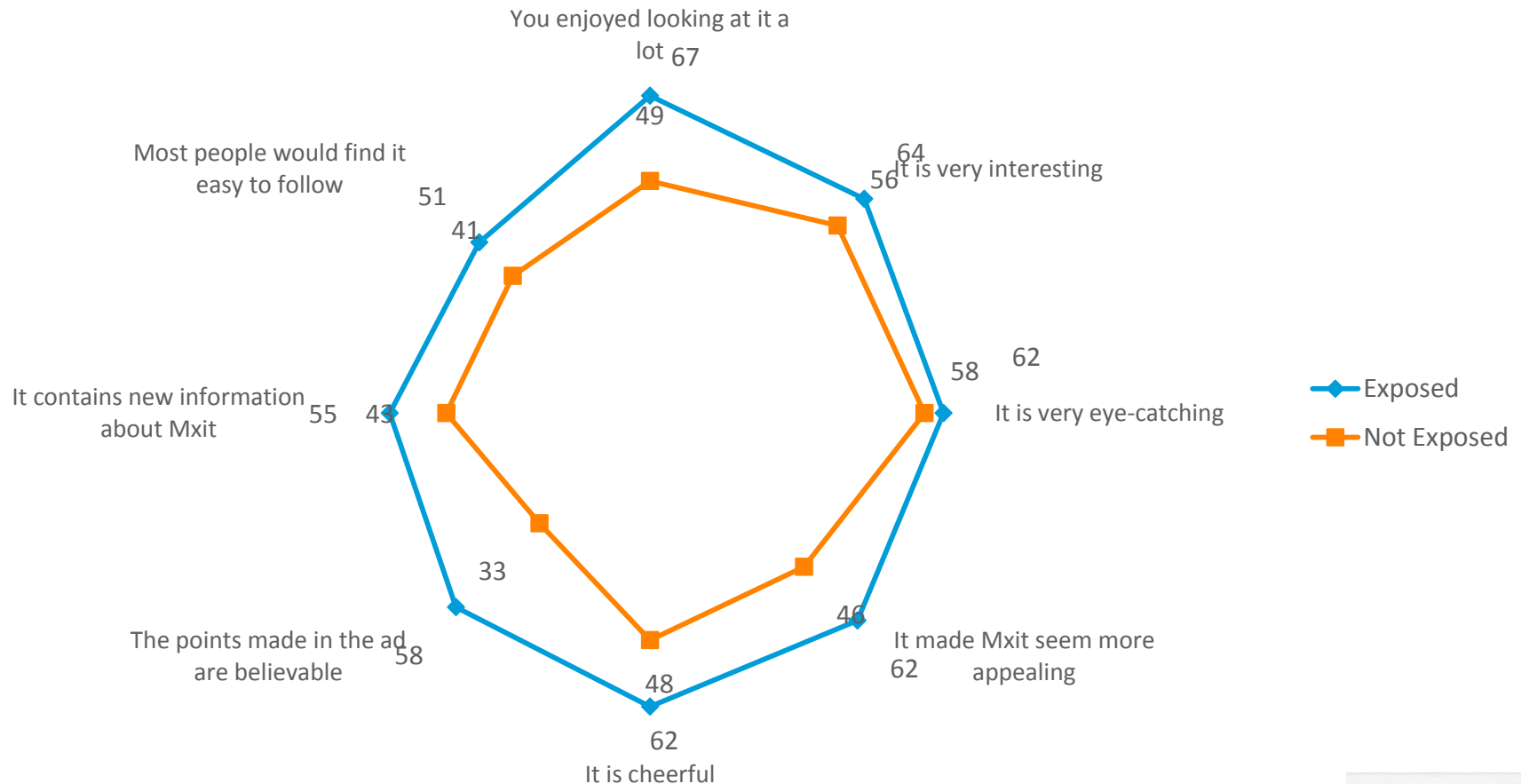


Base: Exposed users n=100, Not exposed users n=102 Q23. Now I will read out some statements related to the advert, and would like you to tell me how strongly you agree or disagree with these statements, using this scale from 1 to 5, where 1 means the statement Does Not Apply at All and 5 means the statement applies Very Strongly indeed. [SA]

The creative performs - visually appealing, clear, believable, enjoyable and interesting

Top 2 box

Campaign Associations



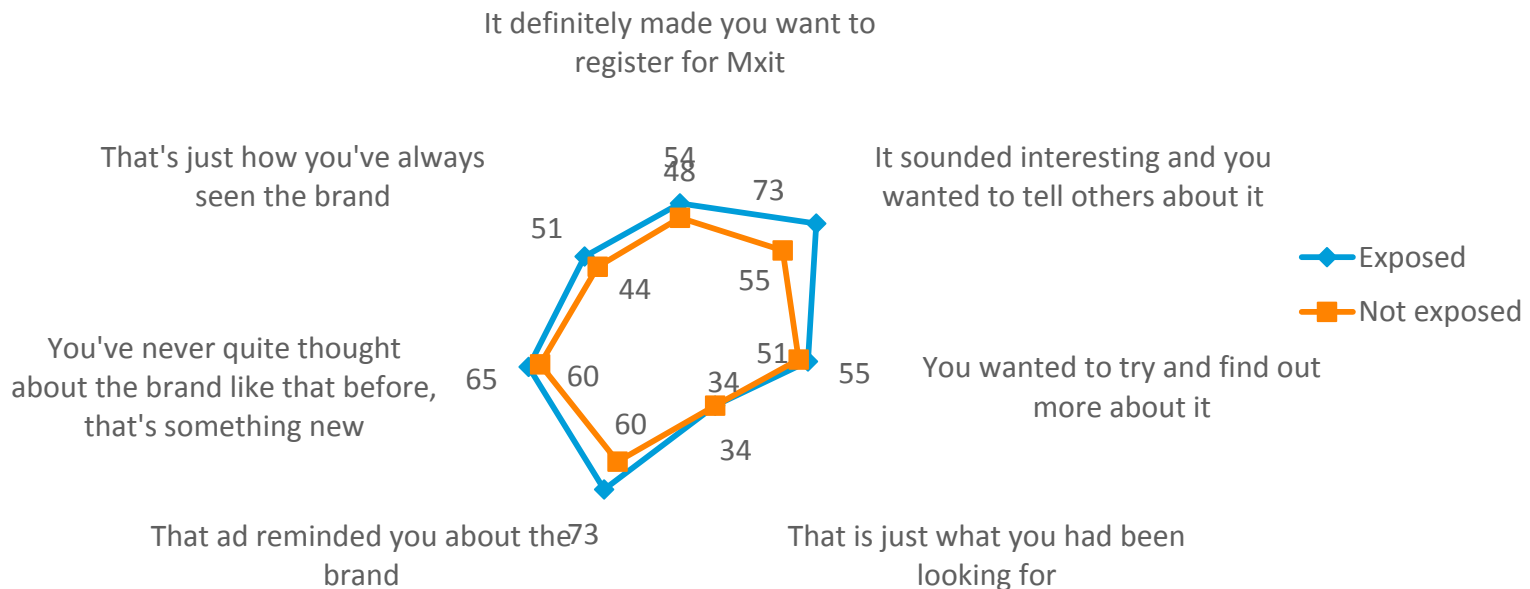
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However,

although relevant for Mxit & intriguing, the ad lags on personal relevance & perhaps on directly conveying key upgrades - address curiosity by including the key differences between new & old Mxit, which respondents will likely then promote via Word-of-Mouth

Top 2 box

Impression left by advertising



Base: Exposed users n=100, Not exposed users n=102; Q24. And which of these statements comes closest to the way the ad left you feeling about Mxit? Please choose all that apply. [SA]



- After seeing the ad, **just over a third** of respondents exposed to the ad **would consider registering for the new Mxit** (mean of 3.1 – slightly lower than global norm of 3.6), and a further third could be persuaded

Respondents who have seen the ad but are not currently registered

	Definitely would [5]	Probably would [4]	Might or might not [3]	Probably would not [2]	Definitely would not [1]
Exposed users	13	26	35	13	13

Top 2 box
(score of 4 or 5)
39%

Registration is more likely than average among males and the younger respondents, especially 21-25 year olds

Non-consideration is more likely than average among mobile phone users (vs smart phone users)

Main barriers to registration are the preference for other apps & Mxit performance/access issues; also a general dislike & pre-existing negative impression of Mxit

Base - No, I am not registered

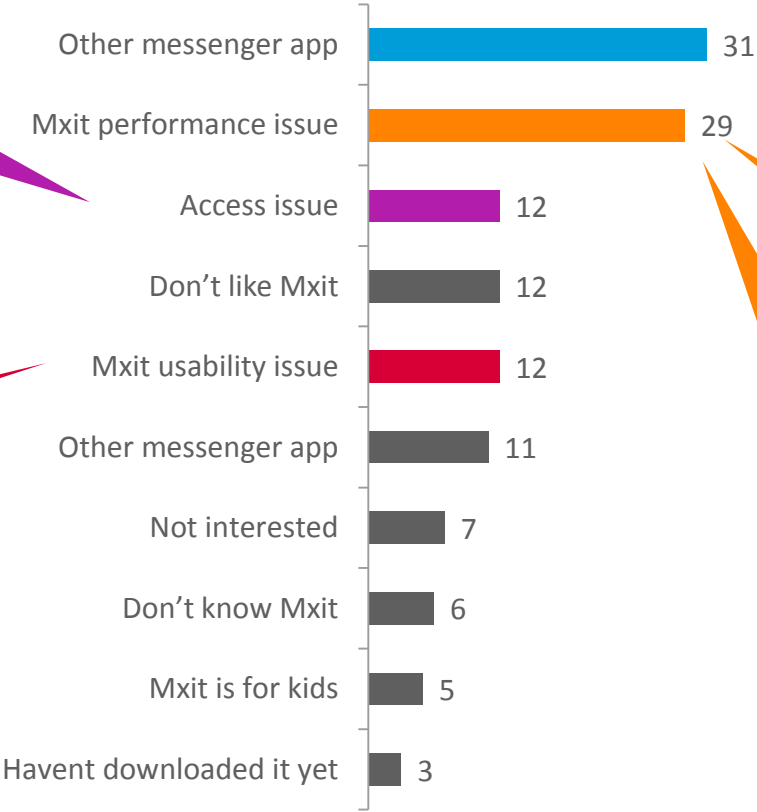
I don't have a smart phone / phone with internet

Mxit is not private

Most of the respondents who are using other messenger apps are using WhatsApp

Mxit is old fashioned/ outdated/boring

Mxit is very slow if you send message it takes time to delivered



Base: n=177; Q20. Are you currently registered for the new Mxit, or not? [SA]
 Q21. Why is that? [OE]

