



CASE STUDY

THE POWER OF PARTNERSHIP

Voice of Market (VoM) program delivers meaningful outcomes for people in Canada

Maru, an insights software and advisory services company, has worked with ParticipACTION, a non-profit charitable organization since the early 2000's. The following case study showcases the insights and tangible successes ParticipACTION achieved while using Maru's Voice of Market software. VoM is a software and services package that allows companies to work across a platform in all capacities. This subscription enables companies to execute a series of ad hoc or repeating projects all in one place. The software allows users to take on as much work as they would like in-house while having additional help, advice, and expertise on tap when needed.

Context

Established in 1971, ParticipACTION is a national non-profit charitable organization that inspires and supports people in Canada to make physical activity a vital part of their everyday life. ParticipACTION works with its partners, which include organizations in the sport, physical activity, and recreation sectors, alongside government and corporate sponsors, to help people in Canada move more through innovative initiatives like their free app, public education campaigns, and thought leadership, such as the Children and Youth Report Card.



In the early 2000s, ParticipACTION sought a market research partner who could help them better understand people in Canada's attitudes toward healthy living and physical activity to become more impactful in their daily lives. ParticipACTION was also looking to understand better how people in Canada perceive them among their peer group, other health organizations, and non-profits. Finally, a data-driven partner who could provide insights and advisory services was needed to support campaign development and tracking.

As a world-leading customer experience and insights firm, Maru Group aligned well with ParticipACTION's ongoing research needs. Maru's fully flexible service model, integrated software ecosystem, and deep advisory expertise matched what ParticipACTION required to advance their understanding in the market. Maru's proven enterprise software platform has the broadest available capability, enabling deep insights and resulting in actionable data-driven decision-making. In addition, Maru's Feel, Behave and Think approach is rooted in the belief that understanding the intersection between behavior and emotion is critical to establishing the strongest possible connections to drive better business results. Maru's software is the only platform with System 1 research tools that help measure emotion in decision-making to break through the say/do gap. System 1 taps into the implicit or subconscious beliefs, while System 2 thinking is the rational or consciously held belief. By evaluating research issues through System 1 and System 2 lenses, we provide a connected and holistic view of consumer response.

VoM APPROACH #1

Brand health tracking & campaign assessment

ParticipACTION has been measuring its brand annually and has often included measurement of the recall and impact of its campaigns. The introduction of the “Everything Gets Better” campaign brought a renewed focus and regular cadence to measuring the effectiveness of that campaign. The “Everything Gets Better” campaign was introduced to the public in early 2018 and had been running since. To match the innovative campaign, Maru leveraged its System 1 tools at strategic intervals to help bring additional insights into the complex physical activity space.

This was not the only way to bring fresh insights to ParticipACTION. With the development and introduction of Maru’s Agile software subscription, ParticipACTION was able to augment its brand health and campaign assessments.

Example: brand health tracking & campaign assessment

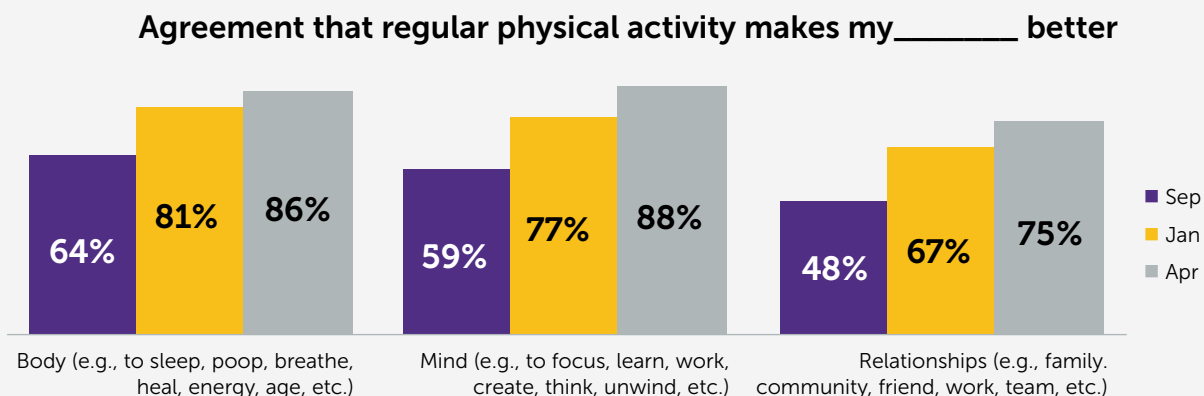
In building on ParticipACTION’s years of campaign assessments, we worked together to utilize an Implicit Association Test (IAT) to evaluate the System 1 associations with several benefits of physical activity. Maru worked closely with the ParticipACTION team to design and execute an IAT. The IAT was not performed in isolation; rather, incorporated into a broader campaign evaluation study. This allows for additional metrics to be measured and layered in as needed.

A key component of brand health tracking has been understanding and awareness of ParticipACTION’s partnership and measuring brand fit with current and potential partners. This knowledge, paired with a deep understanding of brand perceptions, allows ParticipACTION to properly position itself when entering new and renewal partnership discussions.

Impact:

While the research provided a clear evaluation of ParticipACTION’s media campaign to inform the marketing and communications strategy moving forward, the IAT allowed us to move beyond the typical measures. In understanding the implicit benefits, a plan was developed for messaging and tailoring communications for future phases of the campaign and support materials.

The tracking of ParticipACTION’s media campaigns was evaluated against crucial brand metrics to inform their marketing and communications strategy. Corporate reputation data assisted in defining brand fit with potential funding partners. The launch of ParticipACTION’s “Everything Gets Better” campaign in October 2018 focused on the idea that everything gets better when you get active, from better sleep to improved energy and mental health and beyond. This campaign won Shopper Innovation & Marketing awards, and the immediate impact on the attitudes of people in Canada was noticeable.



VoM APPROACH #2

Thought leadership

Maru and ParticipACTION determined that a thought leadership piece of research would be an ideal complement to ParticipACTION's position at the forefront of health organizations. Therefore, Maru first conducted online discussion boards using a precursor of Maru's HUB platform among people in Canada with different levels of physical activity and sedentary behaviors to gather a nuanced understanding of their beliefs and attitudes toward physical activity. These findings helped inform the questionnaire design for the second phase of research, which quantified the opinions and attitudes among people in Canada of all backgrounds and activity levels.

WHAT DO CANADIANS THINK ABOUT PHYSICAL ACTIVITY?

WE KNOW WE NEED TO BE ACTIVE. WE KNOW WE'RE NOT ACTIVE ENOUGH, AND, WE THINK OTHER PEOPLE FEEL THE SAME WAY.

Canadians are aware there is a problem. Approximately 87% of Canadians agree that people know they need to be more physically active.

When asked to estimate what percentage of Canadians their age is active, most people have a pretty accurate idea. On average, Canadians think 34% of people their age meet the physical activity guidelines of 150 minutes of MVPA each week, though the actual figure is a bit lower (18% according to Statistics Canada).

Not surprisingly, this proportion tends to decline with age, with millennials thinking 41% of people their age are meeting the physical activity guidelines, and Baby Boomers

estimating a more modest 32%. Interestingly, this is in-line with current evidence which suggests that physical activity decreases with age.

Percent of Canadians who think people their age meet the physical activity guidelines

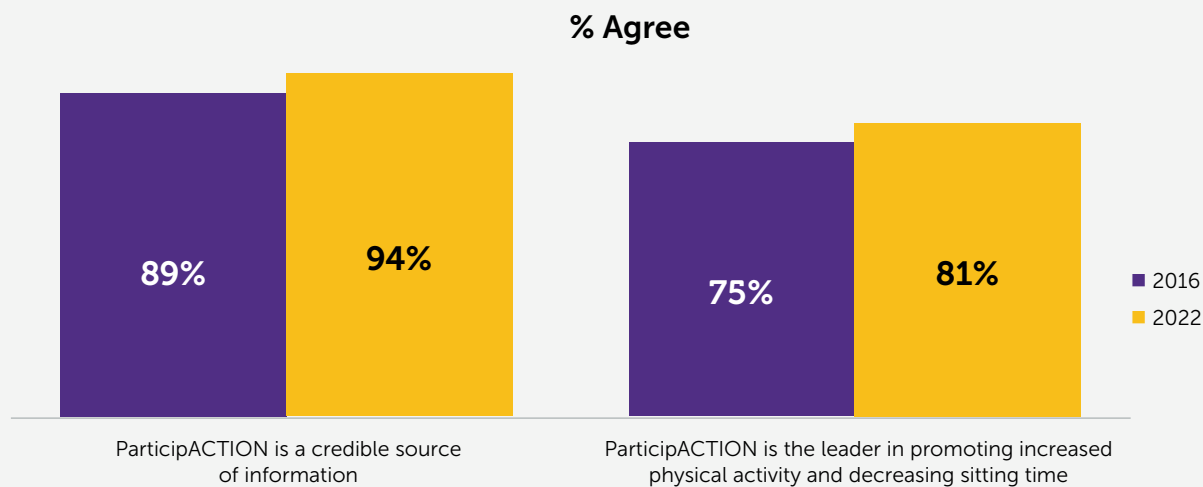
41%	34%
MILLENNIALS (18-36 YEARS)	GENERATION X (37-52 YEARS)
32%	30%
BABY BOOMERS (53-71 YEARS)	TRADITIONALISTS (72+ YEARS)

PARTICIPACTION PULSE REPORT 2018 4

Example: the Pulse Report

Impact:

The findings from these surveys helped produce a flagship thought leadership piece: The Pulse Report. It assessed the social climate of physical activity in Canada. As well it has successfully contributed to ParticipACTION's brand positioning activities. The report has successfully positioned ParticipACTION as a thought leader in the physical activity space.



VoM APPROACH #3

Agile Insights

Over time, ParticipACTION and Maru built a Voice of Market (VoM) program to continually test various thought leadership topics, brand relevance, engagement strategies, and sponsorship evaluations. VoM is a software and services package that allows companies to work across a platform in all capacities. This subscription to HUB, Maru's industry-leading Experience and Insights Platform, enables companies to execute a series of ad hoc or repeating projects in one place. It provides an efficient programmatic way of performing custom or ad hoc research. It offers flexible service options by allowing access to agile, DIY surveys, quantitative and qualitative research, access to panel communities, advanced text analytics, and analysis and reporting functionality.

The DIY Agile Polls and Surveys (Agile) product is used to engage with ParticipACTION app users and newsletter subscribers regularly to understand in real-time how consumers are engaging with programs, campaigns, and events and the overall impact the app has on the brand and relationship with ParticipACTION. Additionally, when using Agile in a self-serve capacity, ParticipACTION can leverage HUB's powerful analysis and reporting, which minimizes the need for population data and allows the ParticipACTION team to spend more time analyzing and understanding the data.

Example: app development

As a result of the ongoing VoM market research, ParticipACTION determined a fitness app experience would have the most impact in encouraging people in Canada to become more active in their daily lives. In 2019, ParticipACTION launched its app, which provides resources like physical activity tracking, articles, and videos to help people in Canada get physically active; and offers prizes for doing so along the way.

To further evolve the app, in 2020, ParticipACTION introduced challenges where app users are given fun physical activity tasks to complete over a period of time for a chance to win additional prizes. Initially, these challenges were constructed as team-based



activities where users team up with others to be eligible to participate. During the "Great Big Move" app challenge in October 2021, through agile and real-time in-app surveys, ParticipACTION discovered that team-based challenges were not what most of their audience wanted. ParticipACTION quickly pivoted and realigned its app to allow users to participate in challenges individually. For the subsequent app challenge in April 2022, "Step It Up to Spring," users were not required to be on a team to participate.

Impact:

In less than a year, ParticipACTION discovered an 8% increase in app users who signed up to participate in the in-app challenges. Move-minutes per user per day increased by 24%, with 79% of active participants using the app daily. Overall, active users increased average move-minutes per day by 14%. Comparing participation of in-app challenges between 2021 and 2022, there was an 18% increase year-over-year. The opportunity to sponsor challenges enabled ParticipACTION to partner with organizations that align with their mission too. The increased level of engagement with app users through these challenges helped renew ParticipACTION's existing partnerships and recruit new partners to work with in the future.

Summarizing impact

Partnership benefits

Since 2009 ParticipACTION and Maru have worked together, discovering insights about people in Canada's attitudes towards healthy living and physical activities and learning how to support people in Canada in adopting a healthier lifestyle. Maru helped realize what topics people in Canada cared most about and helped ParticipACTION undergo a digital transformation. As a result, the ParticipACTION app has been ranked #1 in the App Store and consistently featured as one of Canada's top health & fitness apps. Maru's agile software capabilities and the ability for ParticipACTION to leverage both self-serve and assisted serve on Maru's platform allowed for accurate data-driven decision-making to occur in real-time. This resulted in a greater understanding of the brand, leading to a 100% increase in sponsorship revenue for ParticipACTION from the first to the second year of running the "Great Big Move," which, in turn, allowed for increased investment in the app to create a more engaging experience for app users.

Brand health tracking and campaign assessment

Through Maru's enterprise software platform, ParticipACTION accessed market research and System 1 tools to accurately understand and track their brand performance and impact. While keeping an eye on industry trends, ParticipACTION tested various marketing strategies to develop effective materials to have the most significant impact on reaching people in Canada and breaking through the say/do gap. ParticipACTION has become a relevant and innovative brand that encourages people in Canada to live healthier and physically active lives.

The Brand health tracker helps organizations:

- 1** Make better commercial decisions by accurately linking brand health metrics with marketing and sales performance in a single end-to-end platform for all stakeholders.
- 2** Accurately understand brand health by identifying and measuring the right metrics for each brand.
- 3** Drive efficiencies using Maru's flexible self-serve access with a fully customizable analysis and reporting environment.



Voice of Market (VoM) benefits

Historically, it could take weeks or months of design and execution to complete research studies and gain thoughtful insights. The ability to execute research faster has enabled ParticipACTION's insight teams to inform more business decisions by ensuring relevant understanding is available when decisions are being made.

1

Flexibility

The Maru/HUB ecosystem enables our flexible service model, which means clients choose the optimal blend of software-based insight capabilities or advisory services depending on research needs. We offer self-serve, assisted-serve, and full-service models on a project-by-project basis to help maximize budgets.

2

Efficiency

Every project is housed in a single tenancy for aggregated learning streams/cross-analysis and real-time exposure to project progress. Clients reap significant cost savings by consolidating activities in a single platform.

3

Speed and Depth

Some projects setup include access to Maru's extensive range of question types and capabilities (such as Instant Qualitative Environment, System 1 tools, etc.), making it suitable for any research project, from a concept development ad hoc study through to global CX trackers. By evaluating research issues through both System 1 and System 2 lenses, clients get a connected and holistic view of consumer response.

4

Partnership

By uncovering a more holistic understanding of consumer response, Maru supports clients to influence customer decision-making proactively. Behavioral science has proven that how a person feels has just as much influence on how they behave and what they think. However, most of market research projects are still focused on attitudes and opinions. It is resulting in a consumer say-do gap, and why Maru has prioritized the development of behavioral and emotional metrics in one insights platform. Maru's software platform is the only software ecosystem to combine System 1 and System 2 research methodologies across Maru's entire range of capabilities and solutions.

About Maru Group

THE EXPERIENCE & INSIGHTS PLATFORM

Maru is a world-leading CX and insights software and advisory services company. The firm was founded to disrupt the data and insight delivery industry with a combination of software and advisory services delivering data in real time via a unique service model. Maru helps its clients make informed decisions in near real time by combining proprietary software, deep industry experience and access to the best minds in research. Visit marugroup.net.

About ParticipACTION

ParticipACTION is a national non-profit charitable organization that inspires and supports people in Canada to make physical activity a vital part of their everyday life. As Canada's leading physical activity brand, ParticipACTION works with its partners, which include organizations in the sport, physical activity, and recreation sectors, alongside government and corporate sponsors, to help people in Canada reduce sedentary time and move more through innovative engagement initiatives and thought leadership. ParticipACTION is generously supported by the Government of Canada. Learn how ParticipACTION has been moving people in Canada for over 50 years at ParticipACTION.com and download the free ParticipACTION app to access a fun, evidence-informed tool that empowers you on your physical activity journey.