

## White Paper

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## Mobile Research Poised to Create a Tipping Point for the Industry

In Physics, a “tipping point” can be defined as “the point at which an object is displaced from a state of stable equilibrium into a new, different state”. A tipping point suggests that if enough energy is provided (in the form of heat or a catalyst, for example) an object may develop into a new state, but if that energy is insufficient or removed; the object may remain in its current state.

The same could be said for the market research industry, following the introduction of the mobile phone as a communication medium. This emerging 5th research methodology has the potential to create a new and different state, thanks to the opportunities it generates around reaching people “In the moment” (or real-time). However, mobile research is a disruptive technological change and could become the greatest missed opportunity for the Market Research industry, if not handled appropriately.

This paper uses our experiences to date to assist those seeking to develop this methodology. It is based on knowledge consolidated from around 2,000 OnePoint supported mobile projects, accumulated over three years and across 47 countries.

The insight gained is provided as four different perspectives (commercial, technological, global telecommunications infrastructure and methodological). These perspectives, in turn, have led to the development of six guiding principles – designed to give some clarity around the practicalities, opportunities and the challenges ahead with regards the acceptance and implementation of mobile research.

The starting point of this paper therefore, is the following statement:

**“FOR MOBILE RESEARCH TO BE SUCCESSFUL, PARTICIPANTS MUST BE PRESENTED WITH THE OPPORTUNITY TO TAKE PART IN THE WAY THAT THEY WANT TO, NOT THE WAY WE BELIEVE THEY SHOULD.”**

We believe the point this statement makes is central to the success of mobile research and is the driver behind the proposed key perspectives and principles.

### The Emergence of Mobile Research

The 4.1 billion mobile phone contracts world-wide illustrate one key unavoidable fact – whatever the reason, people like to use their mobile phone to communicate. In fact, they like it so much that according to the ITU World Telecommunication / ICT Indicators Database, 2007 the penetration rates are around 45% for the developing world and 97% for the developed world. Furthermore, since the trend for having a mobile phone shows no indication of slowing down, we can expect the penetration levels to increase above the current 49% global average.

What this means for mobile research is that the potential respondent pool is also continually growing. As a result, the time has come for the mobile phone to be recognised as a valuable channel for market research. Indeed, despite the low current numbers, Rockhopper Research’s RIT Report 2009 highlighted that 66% of US research agencies said they anticipate doing more mobile research in 2010 compared to 2009.

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This emergence is further supported by industry recognition through events such as the 2<sup>nd</sup> Annual Mobile Research Conference held in London in March this year. In fact, this conference seemed to be the tipping point – a critical juncture which will go on to affect the future shape, understanding, and most importantly the implementation of mobile research.

The Conference highlighted several positive aspects, including the increasing level of interest in terms of number of attendees, and the variety of global mobile projects underway. However, there is also a worrying precedent emerging, whereby mobile research is being defined in a somewhat limited way. For example, to pigeonhole it as a method for sending an online survey link to a Smartphone would be to miss much of its potential. It is tempting to regard mobile as an extension of online research, especially for those who have considerable existing investments in it both financially and methodologically. However, we should also continue to be mindful of what other opportunities it can deliver for us.

This concern is echoed by Reineke Reitsma, Vice President and Research Director of Forrester Research, in her 2009 report 'The Opportunities and Challenges of Mobile Research', where she states:

**“MOBILE RESEARCH WILL REVAMP THE WAY RESEARCH IS DONE. THE INDUSTRY SHOULDN'T MAKE THE SAME MISTAKE WITH MOBILE RESEARCH THAT IT DID WITH ONLINE RESEARCH FOR THE FIRST 10 YEARS — COPYING LONG PEN-AND-PAPER SURVEYS INTO A NEW CHANNEL.”**

Therefore, we would suggest that mobile research is viewed more as a disruptive technological change than an extension to existing methods. As a result, it offers its own unique opportunities and those organisations with foresight are likely to be the first to identify and benefit from them.

### Communication Methods for Mobile Research

Today, a mobile phone allows the user access to a wide variety of ways to communicate and access information, and opens up many new options for research:

- SMS (Short Message Service) – commonly known as “texting”, this has become the most globally accepted and utilised channel. In the USA, over 1 trillion messages were sent in 2009, an increase of circa 300% on 2008 (CTIA, 2009). And in the UK, 265 million texts are sent on average every day, which equates to 11 million per hour, with an annual growth of 23% (MDA, 2010).

Researchers were testing simple SMS message surveys as long ago as 1999. Although the potential reach and opportunity was identified early on, it was restricted by the lack of a dedicated mobile research software platform. As a result, only multiple choice and open text responses were possible, which at the time made researchers feel it was more trouble than it was worth. However, the picture is now very different. Today, businesses such as O2 Telefonica run thousands of customer surveys over SMS on a daily basis and get 50% completion rates – all with no incentive! This clearly demonstrates that there is potential for others to follow in their footsteps.

- MMS (Multimedia Messaging Services) - this extends the core capability of the SMS by enabling longer messages and the sending of photographs and videos from camera equipped handsets (the most popular use).

In terms of research, MMS seems to have promised more than it delivered to date. Perhaps this is due to the cost, fragmentation and inconsistent delivery approaches across telecoms territories, which have meant it is difficult to deliver cross-territory multimedia campaigns. Fortunately, mobile research software vendors have solved these challenges.

- WAP (Wireless Application Protocol) – A WAP browser provides all of the basic services of a computer-based web browser but is simplified to operate within the restrictions of a mobile phone, such as using a smaller view screen. It allows people with a WAP enabled mobile phone or PDA to access the mobile web while on the move.

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SMS and WAP-based functionality enable researchers to conduct surveys. To date, we have found that there is a consistent trend towards 80% via SMS and 20% via WAP. Although this ratio can vary across territory, SMS messaging is most popular as operators have made it more cost accessible compared to the cost of data contracts. We anticipate this will evolve over time, although the majority of participants are selecting SMS, when given the choice.

- **Web** - As for WAP, people will choose how they want to use their web services and the content they will access. Advanced web services with flash animation will undoubtedly achieve greater adoption as the penetration of Smartphones and the speed of data transfer increases, and the cost of data packages decreases.

The use of the web is limited for the time being to those who have the technology, the capability and the desire to use it for research. However, this is likely to change as it is widely agreed that there will ultimately be convergence of services delivered over the mobile web. As such, global mobile marketing revenues are predicted to jump from \$1.8 (2007) to \$24 billion in 2013, (ABI Research, 2008).

- **Applications** - The launch of the iPhone has both popularised and made mainstream, the development of specialist applications for people to download on to their mobile. Although the iPhone is not the most widespread Smartphone, the take-up rate for applications has been impressive. For example, 65 million of the 350 million Facebook users now access their account via an iPhone application or through the internet on their mobile phone (dotnet, 2010). We also know that users on mobile Facebook are 50% more active than those online with some remarkable numbers (20 million monthly iPhone Facebook users and 12 million Blackberry Facebook users).

To date, the success of downloading applications for research has been limited by the challenge of encouraging people to download and install to their phone. This is a combination of overcoming usability (technical capability of phone and user) and acceptability (willingness) issues.

- **Email** – The extension of email to mobile phones and devices has provided an enormous opportunity to engage with people on the move via their business or personal accounts.

Mobile email is often termed “push” email as it allows researchers to send invitations to online surveys on the mobile.

- **CAMI** (Computer Assisted Mobile Interviewing) - Many US research agencies currently define mobile research as an extension of the RDD approach to fixed line telephones – namely researchers call mobile (cell) phones to conduct an interview via voice.

We would caution this approach. Receiving a call out of the blue on such a personal device could cause much dissatisfaction with the respondent, which in turn could increase resistance to participation.

- **GPS** (Global Positioning System) – although not technically a channel, it is worth including here. Because there is a GPS function within advanced mobile phones, it also provides the opportunity to locate people geographically enabling a rich research triangulation of “Where are you? What are you doing? How do you feel about it?” and “Why don’t you send us a picture or a video of that experience as well?”

From a research perspective this has some very exciting possibilities, affording even greater access to respondents’ daily lives by including location (with the appropriate permissions of course).

In summary, all of these channels present an opportunity to communicate with the mobile phone user “In the moment”. However, this doesn’t necessarily mean that deploying one or a combination of them is a good idea, just because we can.

The process of engagement is more important than the technology to ensure that high quality research is achieved – and the acceptability of mobile research is likely to develop through word of mouth and experience. This is also recognised by Malcolm Gladwell (author of “the Tipping Point”), who states:

## **“IDEAS AND PRODUCTS AND MESSAGES AND BEHAVIOURS SPREAD LIKE VIRUSES DO.”**

Therefore, we have considered a number of critical success factors or principles for mobile research that will support its acceptance and help it to spread, the first of which is:

### **PRINCIPLE 1: CONSIDER THE RESPONDENT - “WOULD I WELCOME THIS APPROACH?”**

The remainder of this paper examines a further five principles, taking into account four main perspectives (in this order of priority):

1. Commercial – will the market for mobile research be driven by supply or client demand?
2. Technology – what mobile communication channels work best and who gets to choose?
3. Global telecoms infrastructure – what is the optimum way to conduct mobile research within each specific territory based on what the operators enable?
4. Methodology – What effect does “In the moment” insight have on responses, and the full array of question types?

#### **The Commercial Perspective**

The adoption and development of any new product or service depends on supply (how much it is promoted to customers) and demand (how much customers ask for it). The same is true for mobile research and many organisations are now asking themselves “should we be adopting mobile research as a valuable addition to our research toolkit?”

From a commercial perspective, the questions which will need to be answered focus on ROI (will the new revenue streams generated warrant the investment in time and resources?). From a mobile software provider’s perspective, we have experienced two emergent and somewhat contradictory schools of thought:

1. Agencies agree that mobile research provides an exciting opportunity but state that their clients are not asking for it yet, and
2. Clients who are seeking mobile research and insight capabilities but find that their roster agencies are not offering it.

This contradiction would suggest a “chicken and egg type” situation. Does one promote this 5<sup>th</sup> methodology as a new tool capable of providing “In the moment” consumer research services or wait until clients ask for it? Our experience shows that forward-thinking clients are indeed interested in this method of research. However, they do not currently necessarily consider an agency as the primary provider and will even come direct (following an internet search on the topic). We would therefore recommend that agencies take the opportunity to stay ahead of the curve and invest time and effort in getting to understand what mobile research can offer them and their clients. Each agency therefore needs to consider where it sees itself with regards to its views on the use of mobile research. For example, does your organisation:

- believe that mobile research will be an important channel for communicating with the world at large?
- want to be at the forefront in understanding and implementation of this methodology in order to advise and guide clients effectively?

Those who answered “yes” to either or both questions are organisations more likely to take a proactive approach towards developing and adapting this new methodology – possibly acting in a consultative capacity as well as working with more innovative customers, willing to try something new. It is a well established fact amongst marketing circles that companies who are the first to enter a new market benefit from “first mover advantage”, which leads to our second principle:

## **PRINCIPLE 2: BE A LEADER NOT A FOLLOWER**

This is well articulated by Paul Berney of the Mobile Marketing Association (MRC, 2010) who states:

**“IT’S NOT A QUESTION OF WHEN OR IF MOBILE, IT’S HOW BIG IT WILL BE AND HOW WE WILL DELIVER IT.”**

It applies as equally to research organisations as to customers.

### **The Technology Perspective**

As summarised earlier, the mobile phone offers a wealth of communication channels through which researchers can deliver questions and receive insight “In the moment”. However, technology can bring its own issues, as its capabilities can often blind us to what is possible and what we should do.

From a technical perspective, there are two primary methods for running a mobile survey:

1) Mobile originated (Keyword) – where a participant opts in by texting a keyword to a number which triggers the question and answer session to the handset, or

2) Mobile terminated (Push) - when a list of participants is uploaded and the invitation is sent to their handsets. In both cases permission is gained and granted from the participant. There are several critical factors that should guide a decision over channel choice to conduct mobile research. These include, in priority order:

1. The participant’s channel preference (SMS, WAP, WEB, Applications, etc)
2. The pricing model of the local operators who provide the handset contracts. This determines the cost to the participant of those channels. For example do they have free text, flat rate data contracts and the like?
3. The quality of the local telecoms infrastructure. This is critical - at the very least, a message needs to deliver the survey link to the phone. However, success depends on knowing the infrastructure and local market issues: does the territory have the coverage to enable a smooth web session? Using an international long number may be simple and cost effective for the researcher, but is it 100% guaranteed to be delivered into that country? If the participant sees it coming from abroad, will they prefer to ignore the link (if they have to pay for web access) or suspect there may be a cost for receiving the inbound SMS?

A successful survey must be capable of multiple deliveries of messages to multiple handsets without any delivery interruption and taking these issues into account will certainly improve the efficacy.

4. The commercial model of the local telecoms operators (how do they make money from the research?) We have learned that it is important to understand the participant and local operator reaction to using local short codes or long numbers. For example, if the local operator does not make money from international numbers, the surveys may not be supported consistently, meaning that the surveys don’t reach the target respondent at all. In all cases where quality is required, local short codes or long numbers should be put in place. This not only increases the likelihood that the survey will get through, but also that the respondent will see that it is from within their country. We will discuss this further in the global telecoms infrastructure perspective.

Whilst general principles are emerging, it is always best to treat each mobile project independently in order to consider challenges, engage learning and optimise the quality.

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However, taking these factors into account and recognising that the key influence on successful mobile research is the end user, has led us to produce the following table. This provides a generalised global view of how each channel performs in terms of:

- cost to the end user
- the reach onto phones
- the effort required of the user to engage the channel if they have it on their handset
- the speed of question delivery which is affected by local infrastructure quality

It summarises these four key success factors and their current relative ease of uptake at this time.

	COST	REACH	EFFORT	SPEED
SMS	Green	Green	Green	Green
WAP	Amber	Amber	Green	Green
WEB	Red	Amber	Green	Amber
APPLICATIONS	Amber	Red	Red	Amber
MMS	Amber	Red	Amber	Amber
CAMI	Green	Red	Amber	Amber

**Key: Green is a positive, Amber is medium, and Red identifies a challenge to mobile research at this time.**

Despite the fact that only one third of the table is denoted in green, this does not mean that mobile research is not well developed enough to be of value, rather that we should use the channels that provide optimum opportunities for quality mobile research today.

Tomas Goetz of Wired magazine speaking in February 2010 identified a pattern regarding the emergence and utilisation of popular technologies throughout history - technologies that are successful don't always have to be the most functional; rather, that the majority of people adopt technologies that are "good enough". He cited the example of Pure Digital Technologies, a company whose "flip phone cameras" enabled the automatic uploading of pictures and videos to social networking sites. Started in 2002, they accounted for 20% of the camcorder market by 2008, with \$150 million in revenue. Goetz's point was that although these cameras had limited functionality compared to the high specification Japanese and Korean camcorders, they fulfilled the one simple function people wanted – recording and uploading.

What this suggests is that for many people, access to adequate technology at the right time and place is more important than perfection – an equally useful lesson for research methods, where SMS and cut down WAP appears to be "good enough" for the masses. This brings us to our third principle:

### **PRINCIPLE 3: THE LOWEST COMMON DENOMINATOR CHANNEL IS "GOOD ENOUGH"**

#### **The Global Telecoms Infrastructure Perspective**

Effective mobile research will only be possible if the industry both accepts the preferences of our potential participants and acknowledges the capabilities and subtleties of the local telecoms markets in which they live. This understanding will allow us to successfully deliver a survey onto any handset, in any country, and in any language.

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As with any new technique, the mobile research experience learning curve is exponential and there is still much to learn. One critical learning point relates to the importance of cultural awareness. The local culture, market conditions, regulations, technology capacity and the network operator's commercial models will all help to determine which channel options can be promoted. Failure to understand this will lead to failure in the mobile research project delivery. It is therefore important that local market issues are recognised, as they can affect the quality of the data, mobile survey experience and ultimately completion rates - far more than a methodological concern for (say) the effect of a scale question that renders differently on each mobile phone screen.

In terms of examples, let's first examine the impact of the use of short codes in a local market context:

- In the USA – short codes are typically used to reverse the bill, such as sending a text to register a vote on American Idol, or contribute money to charity events. However, some businesses use reverse billing to deliver high cost messages to phones such as, ring tones, wallpapers, music, etc (with or without permission). This means that some phone contracts prevent the phone sending to or receiving from short codes. The impact or cost this “hidden” issue may have on any mobile research will manifest for example, through panel participants complaining that they didn't receive their survey. It is the understanding of this and other subtleties in local market infrastructures that allow us to address these in research design and leads to the development of best practice research processes and enable a greater understanding of just how to define mobile research in each local market moving forward.
- In China - it will be critical to find ways to overcome cultural reserve, where replying via SMS or clicking on a WAP/WEB link opens the participant's handset to a data stream at an unknown cost. This brings us back to Principle 1 (would I welcome this approach?) and puts the researcher in the participant's shoes. China has only one short code that is trusted to be FREE to text to (because of the nature of the public service it provides). Therefore our experience has shown that irrespective of actually having a FREE text short code in place (for participants) the front loading of a token payment onto the participant's phone is a better way to build trust, demonstrate integrity, and allow the channel for mobile research to flourish. The fact that they then find that their texts were indeed free, builds trust and protects the mobile channel for future research.

Data protection is handled differently by countries. For example:

- In India - mobile phone users can choose to opt out of unsolicited text messages at the point of mobile contract purchase. This means that panel/customer data lists need to be cleaned, otherwise organisations must accept lower response rates as messages will remain undelivered to the customers who opted out. Alternatively, ask the mobile research software provider to provide a list of those affected by recognising the appropriate error code that indicates when a phone is on the list. The next step could be to approach these individuals through the panel (if appropriate) to see if they would like to opt back in through the national “do not contact database” webpage.
- In France - Network operators “mask” the respondent's mobile phone number with a random 16 digit ID, making it difficult to navigate multiple SMS questions. There is also a “Red Flag” list or “do not contact database”. However, neither of these data protection issues is insurmountable with local knowledge, operator relations and agreements, a dedicated local short code and specialists working to evolve the mobile research platform to accommodate local requirements.

All of these examples demonstrate the importance of our next point, especially for cross-territory surveys.

## PRINCIPLE 4: THINK GLOBAL, ACT LOCAL

### The Methodology Perspective

Methodology is positioned as the final perspective because until the other perspectives are accounted for and the delivery is guaranteed, the actual survey structure is of limited importance.

As illustrated earlier, when new technology becomes available, one needs to be mindful as to whether it is simply an extension of existing products or services or more disruptive, and requires a very different approach. We believe that mobile research falls into this latter category. To view it solely as such an extension to online or fixed line telephone research tools would be to limit what it can offer. Simply "tweaking" existing methodologies will give results without utilising the full scope of its capabilities and will limit exploring its opportunities fully. Therefore, organisations (both research and customers) need to:

- recognise that mobile is a distinctly different channel that needs to be understood in its own right, and
- ask themselves how they can take advantage of learning acquired from the emergence of other methods such as online.

The well developed and mature questions the industry has developed, answered and learnt from might still be the right questions - but equally they might not - which brings us to the next principle:

## PRINCIPLE 5: RECOGNISE THAT WE DON'T KNOW WHAT WE DON'T KNOW

Mobile research is at a very early stage in its lifecycle and no one knows enough to state with any confidence that they understand what the best approach is. Unless organisations invest in furthering their understanding by conducting sufficient research on research, then how can they expect to be able to sell the benefits of "In the moment" mobile research to clients? This leads us to the final principle:

## PRINCIPLE 6: YOU CAN'T SELL IT IF YOU DON'T KNOW WHAT IT IS

### Conclusion

Whilst highlighting the critical importance of the four perspectives and the six supporting principles to effective mobile research, we wish to make it clear that mobile research is not blighted by complexity and challenges. We believe that it has distinct and identifiable opportunities and challenges that need to be recognised, and by doing so, mobile research becomes a practical and valuable tool.

For mobile research to take its place as the 5<sup>th</sup> global research methodology, it needs to be seen as:

- more than online research on a smart phone
- an excellent complement or alternative to other research methods, not a replacement or a panacea
- a field of enquiry in its own right, which will take time to build experience and expertise
- possessing distinct success factors: simplicity, cost, convenience and choice for the participant
- "In the moment" thanks to surveys being issued in real-time (ideally asking 4-6 questions and lasting between 1- 3 minutes in total)
- reliant on the preferences and capabilities of the user and the local telecoms infrastructure. Information needs to be delivered quickly to reduce cost and limit the potential for frustration. While it would be great to deliver flash animation and have the same matrix scales to which researchers have become accustomed, it needs to be practical. For example, how long will a respondent's attention last waiting for a screen to refresh while standing in the street? 5-10 seconds? Or less?
- an opportunity to reach global communities and populations, not a limited niche panel or type of handset

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Dedication to understanding the mobile channel in its own right, recognition of the key principles that will influence its success (and having the courage to learn and update those principles as technology changes), will allow organisations to be able to take advantage of this unprecedented opportunity.

To date, these principles are:

**PRINCIPLE 1: CONSIDER THE RESPONDENT – “WOULD I WELCOME THIS APPROACH”**

**PRINCIPLE 2: BE A LEADER NOT A FOLLOWER**

**PRINCIPLE 3: THE LOWEST COMMON DENOMINATOR CHANNEL IS “GOOD ENOUGH”**

**PRINCIPLE 4: THINK GLOBAL, ACT LOCAL**

**PRINCIPLE 5: RECOGNISE THAT WE DON’T KNOW WHAT WE DON’T KNOW**

**PRINCIPLE 6: YOU CAN’T SELL IT IF YOU DON’T KNOW WHAT IT IS**

We expect these to change and extend as more is known about this exciting new methodology, as there is still much to learn. For example, we have yet to define the key metrics that will indicate when a successful web survey has been completed, or fully engage appropriate applications-based tools.

However, we do believe that mobile research has created a tipping point and that the current technology is “good enough” for many organisations to start to work with it – as proven by its success with O2 Telefonica.

Finally, the organisations who fully embrace mobile research will indeed be amongst those who gain first mover advantage in this emerging market sector.

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