Mobilizing Market Research:
The state-of-the-art, future evolution and implications of mobile data collection methods in the field of market research

by Carrie Robbins

www.greenbookblog.org/mobile-research
Market Research in the Mobile World
2nd International Conference

Presented by:
GREENBook®
Merlien Institute

The future of Market Research is here!
Are you ready for the challenge?

www.merlien.org/mobileresearch

Thank you to our sponsors:
Mobilizing Market Research: The state-of-the-art, future evolution and implications of mobile data collection methods in the field of market research

By Carrie Robbins
ABOUT

Earlier this year myself and several others involved with mobile research were approached to be interviewed by Carrie Robbins, a brilliant Grad Student doing her thesis on Mobilizing Market Research: The state-of-the-art, future evolution and implications of mobile data collection methods in the field of market research. I was so impressed with the results of her work that GreenBook and I agreed to publish her paper. Since GreenBook is also a Co-Sponsor of the Market Research in the Mobile World Conference, it seemed fitting to publish it as a weekly series on the GreenBook Blog as a run up to that event. We also decided that it deserved to be published in whole and made available via download. This is that complete version.

EXECUTIVE SUMMARY

This white paper provides an overview of mobile data collection methods in the field of market research. Industry reports on these methods offer an insightful quantitative representation of what the industry thinks about mobile methods. This paper augments that data by offering a qualitative overview of what industry experts have to say on the topic. It also aggregates the information on mobile research methods that is currently available in many individual reports and opinion pieces, providing a single collective overview of the subject.

Fifteen experts from across the market research field were asked about the state of mobile research methods, where they are headed, and the implications of a shift towards mobile. This study found proponents of mobile methods are excited about the possibilities introduced by mobile. They are encouraged by the development of a new consumer-focused relationship between researchers and participants in which an ongoing flow of dialogue replaces traditional monolithic relationships. In the past, market researchers had acquired feedback from consumers, but had not engaged them in a reciprocal relationship. With the onset of mobile, this relationship seems to be developing into a more dynamic and democratic one. The study also finds that firms are wary of a convergence of market research with other fields such as marketing, advertising and gaming. The face of market research is changing. It increasingly assumes the role of strategic business adviser, focusing less on scientific concepts of methodological purity and more on actionable insight into real-world consumer behavior.

Warm Regards,
Leonard Murphy
Editor in Chief, GreenBook Blog
http://www.greenbookblog.org
lmurphy@greenbook.org

This truly is a comprehensive review of the current state of the industry, the views of many industry thought leaders on what the future holds, and of current best practices being used. It should serve as a great resource for anyone interested in or actively engaged in utilizing mobile technologies for research-based initiatives. I think you’ll be as impressed as I was upon reading it. Enjoy!
2. INTRODUCTION

Traditional market research methodologies, such as mall intercepts, mailed or online questionnaires, and telephone surveys have been modernized. Mobile devices now aid mall intercepts, questionnaires can be sent directly to participants’ cell phones, and mobile ‘ethnographies’ are developing, which allow researchers to collect user generated content (UGC) such as images and videos directly from participants’ mobile phones as they go about their daily lives.

There is considerable interest in mobile research methods in the field of market research. The literature and expert interviews cited in this white paper as well as upcoming conferences intended to join practitioners, academics and industry leaders to discuss the topic\(^4\) attest to this increasing awareness of mobile.

This white paper uncovers the state of mobile data collection methods and where they are headed, and describes the implications to the field of market research due to this shift towards mobile. Whether the interest in mobile technology indicates a revolution or merely an evolution\(^2\) in market research methodology, there is much being written on the topic as firms consider whether and to what extent they will pursue new methods of data collection. This paper will guide such decisions and help market research firms select mobile solutions based on their unique market research needs. While I have found ample written evidence of a shift towards mobile methods, a collective overview of the many disparate reports and opinion pieces is necessary. This paper represents such an overview, offering a unique contribution to the field of market research.

3. WHY GO MOBILE?

Market research firms seem increasingly interested in pursuing mobile methods. The 2010 Globalpark industry survey predicts self-completion using mobile devices to be the fastest growing methodology in 2011, which is the first time since 2004 that the study has not predicted the web to be the fastest growing methodology (Macer & Wilson, 2011). The recently published 2011 GRIT\(^3\) report supports this, predicting an increase in the use of mobile methods over the next year. 54% of those surveyed reported they would conduct mobile surveys, 31% would conduct mobile qualitative research and 29% would conduct mobile ethnographic research over the next year (Murphy, 2011: 26). In a predictive market exercise, mobile surveys ranked 2nd after social media analytics among emerging methods that will gain the most market share over the next year (Murphy, 2011: 28). These figures are quite promising for the future of mobile.

The benefits of mobile research are reported to be convenience for participants, improved participation rates, getting closer to the ‘moment of truth,’ reaching more of the population, obtaining faster turnaround time, capturing geolocation data, increasing accuracy of data collected, reducing costs, and allowing for more personal ways of reaching participants (Macer & Wilson, 2009b). Interestingly, the most popular benefits of mobile research have to do with increasing the quality of research and are based on the respondents’ point of view, rather than focusing on the needs of the market research firms. A respondents’ positive experience during a research project is now the main concern.

---


\(^2\) Reference to mobility as revolution versus evolution inspired by (Hoffman, 2011)

\(^3\) GreenBook Research Industry Trends [http://www.greenbookblog.org/GRIT]
Mobile devices allow researchers to gather qualitative information, which simulates ethnography, in that the practitioner collects data from the participant while in his or her natural habitat rather than bringing the participant into an artificial environment to conduct research. The mobile 'ethnography' allows the researcher to view and understand how products and services are integrated into consumer’s daily lives and homes, without the presence of a researcher, which can influence results (Reitsma, 2009a; Stork, 2010; Schwitzer, et al. 2011).

Location or event-based surveying and self-administered ethnographic studies appear to be the most original mobile methods (Reitsma, 2009a). Mobile methods allow the researcher to collect data from a participant over the course of consecutive ‘slivers of time’ and then analyze that information to understand how consumer behavior changes or remains consistent over time. This type of data is known as ecological momentary assessment (EMA) in the field of healthcare, substance abuse studies, organizational research, and other fields (Beal and Weiss, 2003; Collins et al., 2003; Maddock, 2009). In the past this type of research may have been done in person through observation, in constructed environments, or with mall intercepts and similar methods, but the ability to capture such data while intruding less into participants’ lives and over a longer period of time increases the relevance of mobile methods. For a more extensive overview of these methods, see Appendix C.

Incorporating mobile methodologies can help differentiate a market research firm in a field where 94% of firms offer online services, but few have gone mobile (Confirmit, 2010). Firms should seriously consider incorporating mobile capabilities into their portfolios if they want to get ahead of emerging trends in the industry and differentiate themselves from the competition.

However, the benefits of mobile data collection are by no means unilateral. A Globalpark report found that among the challenges mobile research presents, market research firms were most discouraged by its small format which limits questions, followed by issues with access to samples, a lack of support for different devices, the complex cost structures of networks, a lack of support in software, safety, difficulty delivering SMS messages, and confidentiality (Macer & Wilson, 2009b).

Although there is still much to learn about the ins and outs of mobile research, market research firms would seem to be well advised to consider incorporating mobile methods into their toolboxes sooner rather than later. In the near future penetration levels will rise and the process behind mobile methods will become increasingly seamless and standardized.
The background research on mobile methods, detailing the benefits and uses as well as the limitations, give a good indication of why proponents of mobile research urge others to adopt it. Surveys of market research firms have quantified what the industry thinks of this new method (Macer & Wilson, 2009a; 2009b; 2011 and Murphy 2011), but a more in-depth, qualitative understanding of what leading experts think about the topic could be useful to supplement these numbers. This qualitative approach offers insight into when and how mobile methods can best be leveraged, going beyond the numbers to take an in-depth look into the mobile market research landscape.

Further, many industry leaders and firms have published case studies individually; therefore an overview of what mobile proponents think of these methods is opportune. The Industry Insights section of this white paper aims to offer just that – a summary of what some of the industry experts currently say about mobile research methods. In speaking with these thought-leaders, themes emerge regarding the convergence of market research with other industry sectors and a shifting relationship between researchers and consumers. The interviewees provide a thorough look at the state-of-the-art of the market research industry as it pertains to mobile methods.

Fifteen industry leaders were interviewed during March and April 2011 to determine their opinion of the state of mobile methods, the future of these methods as well as the implications of a shift towards mobile to the field of market research. The interviewees consisted of both professionals from market research firms who use mobile methods for data collection, and those whose organizations’ create the technology used for such research. Firms that provide samples for the specific purpose of mobile research were also included in the interviews. The interviewees are listed on this page, and the following is an overview of the collective opinions of these industry experts.

4 See their individual bios in Appendix A.
4.1. The Current State of Mobile Methods

When asked how they define mobile data collection methods, most experts mention mobile devices including smartphones, feature phones, basic cell phones as well as tablet devices. Leonard Murphy, CEO of market research firm BrandScan360, defines mobile methods as

An approach that’s optimized to engage consumers in real time at the point of their experience to give feedback on that experience via a mobile device. And a mobile device would primarily be a mobile phone or tablet.

Some of the experts did not consider tablet devices in this definition, arguing that they are too similar in size and format to laptops and desktops to be considered a separate mobile category. Kristin Luck, President of market research firm Decipher, makes an argument for tablets as a mobile research tool, explaining, “it is different...It’s kind of like a hybrid between a mobile device and a laptop...It is inherently more portable just because of its design.” Vivek Bhaskaran, President and CEO of software provider Survey Analytics, describes mobile as both a research-facing and consumer-facing tool, as it can be used to aid researchers in the field in addition to being a means of connecting with participants through their personal mobile devices.

In general, the interviewees noted that mobile methods have existed for a while, but in a much more basic form – mainly through SMS polling. This generally consists of sending a text message to a consumers’ mobile phone and having them reply with a numbered response option. Both Luck and Bhaskaran consider this method to have limited capabilities and a fundamentally weak consumer interaction. Mobile methods recently have taken on a much more interesting and dynamic role, thanks to an explosion in connected mobile devices with online capabilities. Although Michael McCary (Managing Director of market research firm Cint, AB) considers this method to be in its third iteration (text being the first, web-based the second and app-based the third), he and the other interviewees described mobile methods as emerging and in a state of exploration and experimentation.

When asked about the state of mobile methods, Jim Whaley (VP at Globalpark USA) was careful to make a distinction between different actors involved in the methodology, including end-user clients, respondents, and market research agencies as well as those actors who provide the technology and the best practices needed to use it. Whaley’s insightful distinction between actors allows him to point out that the state of mobile methods is different depending on the point of view of the various actors. He states,

From a technology standpoint there are really no limitations at this point in time...from an agency standpoint...they still are...struggling with the idea of...their sampling methodology.

Some interviewees compared the current stage of mobile methods to the emergence of online methods. Some interviewees, such as Luck, believe people need time to catch up and get used to the idea of mobile methods before embracing them. However, Bhaskaran thinks there is actually less resistance to mobile from the market research community than there was to online methods because people do not want to be behind the trend. He states,

...I've been through these kinds of paradigm shifts...in 2003 and 2005 the paradigm really shifted...online...The difference that I see right now is that during that time there was enormous resistance from the entire market research community to go online...I think this time around I have not seen that much resistance...So I think that's good news.

Palanivel Kuppusamy, Founder of mobile survey provider iPinion Surveys describes the move towards mobile as being driven by an increase in smartphone users, while Murphy describes a sort of ‘perfect storm’ of distinct elements, stating,

...Social media was this explosion in terms of the ability to get unstructured, unasked feedback...At the same time...was the smartphone revolution...So there are these two converging technology drivers that really kind of changed the equation. And at the same time, there was the recession...research became very commoditized...They all kind of converged where mobile becomes this ideal delivery system.

The interviewees emphasize the importance of mobile methods, explaining that they are imperative in order to combat drop-off in traditional online surveys. Luck states,
“We did a big study for a client of ours and we found that almost 40% of the people coming into the survey...were actually accessing it from their mobile device.” Mobile is also considered an effective way to generate an increase in participation, which is currently seen as a serious problem in the field of market research. Bhaskaran explains, “...The fundamental key...is engagement really...It’s got to be fun, it’s got to be engaging, it’s got to really be something the users want to do rather than they are forced to do.” Mobile is considered a useful way to engage younger participants, and a shift in paradigm to a participant-centered model, in which the researcher goes to the participant, rather than the participant coming to the researcher.

A desire to stay ahead of the curve of emerging methods also is cited as an important consideration. In Bhaskaran’s words, “We want to get a head start over everybody else... It’s better to start a little bit early than come into the party a little bit late.”

4.2. Benefits

The experts believe that the benefits of mobile research include further engaging participants, as well as providing them with increased convenience. Sabine Stork, Senior Partner and Owner of market research firm Thinktank, explains, “One of the big upsides of mobile is that you get...unmediated insight into people’s lives...you’re handing over the tools and its kind of empowering I suppose to some extent.” Stork describes it as ‘democratizing marketing’, and Murphy agrees that it enhances consumers’ control over their relationship with a brand.

Gathering in-the-moment data is, however, the most significant benefit of mobile. According to Elaine B. Coleman, Chief Research Officer and Co-Founder of Resolve Market Research, mobile can improve the quality of data. Coleman describes how retrospective protocols suffer from natural degradation of memory over time, decreasing the likelihood of an accurate recollection of an experience. Mobility offers real-time cognition and access to a person’s thoughts and intentions, undoubtedly augmenting the quality of the data. Mike Clarke, Senior Vice President and General Manager at Lieberman Research Worldwide, submits, “I think the potential advantage of getting consumer reaction to an experience more immediately after it occurred is towards the top of the list...it’s a benefit that... has the potential to be truly unique."

Because the mobile device is so personal, some interviewees point out that this often leads to more authentic, intimate, and truthful information. Qualitative market research consultant Kristin Schwitzer of Beacon Research states, “...It gives us another tool...that allows us as researchers to go into the moment with our target audience. And be there oftentimes when we’re not allowed or it’s not convenient.” Stork brings the intimacy of mobile to life, recalling, “...We asked people...how and where they like to read their magazines...and one of these readers uploaded a video of her getting into a bathtub with her magazine...fantastic! There’s absolutely no way, no way you would have got that through anything else.”

Close relationships with consumers can be built through mobile, and the interviewees note it increases participant engagement. McCray explains that people who cannot be reached online can be accessed via mobile and subjects do not need to be tied to a single location. Senior Field Director Cris Sunada and Senior Vice President and General Manager Joanne Robbibauro (both of Lieberman) add that demographics such as youth and ethnicities that are not well represented in the online sphere tend to be accessible with mobile. Greg Bovitz, President of Bovitz Research Group, concludes that mobile increases the reach of a study. Stork specifically refers to the ability to identify the location of the respondent through their devices’ geolocation data as a benefit of mobile.

An interesting benefit of mobile research is the fact that most of the information gathered is user-generated, which lends it increased authenticity, according to Stork. She details a study that was conducted by collecting user-generated content (UGC) from mobile devices to use in a sales presentation to advertisers. This brought the readers to life and was considered more credible to the advertisers, as the images came directly from the consumers.

4.3. Current Uses of Mobile Research

Interviewees gave first-hand accounts of how mobile research currently is being used across the industry. They report that it is implemented for in-field data collection during intercepts (such as movie exits) or for short surveys prior to focus groups (Luck). Mobile seems to be best suited for gaining POP and ‘in the moment’ data directly from consumers while they are on their personal devices in the real world. Murphy deconstructs the underlining theory of mobile research by explaining, “we’re combining social media monitoring around brand sentiment with a real-time mobile feedback system...So, it’s primarily taking those streams of data and wrapping that around the idea of brand engagement and brand sentiment.”

Mobile research is often conducted by sending surveys to consumers’ mobile devices, either through a mobile web browser or a downloaded application. While surveys sent through applications are more powerful and tailored than those sent via web browsers, Kuppusamy encourages companies to offer both types in order to reach a wider range of devices and participants in a variety of contexts. Kuppusamy stresses that offering both types of mobile solutions provides a more holistic way to engage consumers “at multiple touch points with high relevance.”

Luck and Bhaskaran assert that one benefit of apps is that new surveys can be sent to a phone behind the scenes and appear automatically on the phone without any effort on the part of the participant. Bovitz and Schwitzer point out that mobile is great
for targeting mobile users or evaluating apps. Schwitzer observes that mobile is less well suited to older participants who tend not to be used to mobile devices, or when heavy video capabilities are needed.

Due to the physical size and technological constraints of mobile devices, these methods are employed when short sound bites will suffice and lengthy in-depth information is unnecessary. This has led to the use of mobile devices to gain small bits of data from consumers, which are built up over time, creating a longer-term relationship with consumers and establishing a profile of these consumers across a succession of interactions. Due to this new form of continued relationship with participants, mobile would seem to be well suited for panels.

Interestingly, mobile devices are particularly practical for capturing data from emerging markets, and are used to connect brands to consumers in the developing world (Hobson and Stork). Chris Hobson, Chief Operating Officer of Txteagle (a sample provider and market research firm specializing in emerging markets) explains,

> What people don’t realize is that most people on earth, their first experience with the thing called ‘the Internet’… is on a mobile phone…So if you are a global organization looking to reach consumers in the developing world, trying to find them online - you’re only going to find the top of the pyramid…But when you go to the mobile phone, you have a way to reach deeper into the demographic base, deeper down the pyramid…

It is clear that companies are still figuring out when mobile devices can and cannot be used, and best practices are in the process of being developed (Clarke, Luck and Murphy). The Best Practices section of this paper will touch on those mentioned by the interviewees.

### 4.4. Limitations

The main limitation of mobile research is the short length of mobile surveys. Hobson explains, “The promise of immediacy is somewhat balanced by the challenge of the small screen and the fact that somebody doesn’t want to be sitting with their mobile phone for two hours answering a survey.” However, Luck sees the short nature of mobile questionnaires as an opportunity for more thoughtful research. She states, “There’s been a lot of industry discussion about survey length and how it impacts data quality and respondent satisfaction…You just have to do much shorter surveys on mobile, you don’t really have a choice.” Luck considers this aspect of mobile surveys to be an improvement over longer, traditional versions.

Many interviewees note penetration as a limitation of mobile methods (including President of BrainJuicer North America Ari Popper, as well as Coleman, Luck, Sunada and Robbibaro). Although this should become a non-issue in the future as smartphone penetration deepens, a representative sample is currently difficult to obtain through smartphones alone, unless of course the population of interest is smartphone users. In addition to limitations on penetration, mobile methods can lack depth, and due to their self-reported nature are not as open to examination as other methods. The inability to dig deep and obtain detailed information is a shortcoming mentioned by Robbibaro and others. Stork similarly explains that it is difficult to get at the inconsistencies that usually emerge when data is self-reported, as it tends to be with mobile.

Other more minor limitations of mobile are that participants can experience technical difficulties (Schwitzer), app-based research is impacted if people do not wish to download the app (Popper), and Stork warns that in emerging markets affluence can affect entry into a study rather than age, as tends to be the case in developed countries where mobiles are generally used more frequently by a younger population.

At the same time, Murphy suggests that rather than focus on the limitations of mobile, one should consider mobile to be a shift towards building stronger relationships with participants. Bhaskaran also refers to it as a paradigm shift rather than allowing the limitations to deter him. He champions the idea of reframing how research is done, insisting one must reach participants through their preferred channel, which appears to be mobile.

### 4.5. The Mobile Future

Though not currently a widespread method, an increase in mobile research is predicted in the near future. As previously mentioned, Murphy’s 2011 GRIT report shows that firms foresee an increase in its use in the next year. Interviewees believe this will occur much more quickly than the uptake in online research did, citing the exponential acceleration in technological advancement and adoption described by Moore’s Law (Murphy, Coleman), as well as a rush to stay ahead of the curve (Bhaskaran). As smartphone adoption increases and mobile research becomes more popular, mobile methods will become normalized and may cease to be referred to as a separate technique, becoming integrated with other methods (Stork).

Many agree that integration across mobile methods as well as between the back and front ends of mobile research systems will occur in the future (McCray, Popper, Coleman, Murphy). In this way, mobile will become increasingly
agile, or 'smart' (Murphy). A few experts suggest that the personal mobile device itself might change, becoming something between a mobile phone and a tablet device in terms of size and capabilities (Murphy, Coleman). Mobile devices could allow finger movements to be tracked on touchpad screens, which may lead to a better understanding of how consumers explore advertisements and other web components (Murphy).

While Clarke and others admit that the future of mobile is unclear, most interviewees are in agreement that there is a need to establish best practices and to gain a better understanding of the ideal contexts for mobile methods. Popper points out that like any new method, it will solve some problems while creating new ones.

Most interviewees agree that app-based research is the future of mobile. Bhaskaran explains that this is because companies like Apple “have invested very, very heavily in each of these [app] systems...and obviously all these are a great revenue generator for them. So...they will...not let it die.” Coleman goes a step further and speculates that apps will continue to become increasingly sophisticated and more richly embedded into the actual hardware of the device itself as mobile browsers become a thing of the past.

However unclear the future of mobile may be, most interviewees agree that the technology has brought about a shift in the relationship between researchers and participants that amounts to a type of continual conversation. Hobson refers to it as a shift away from “monolithic questions and answers” towards an “ongoing dialogue.” Interviewees also expect social media to become increasingly interconnected with mobile research (Murphy, Bhaskaran, Stork, Popper, Whaley, Luck). Whaley predicts the integration of social media will incite a shift away from the use of panels and towards the use of communities where participation takes on a more social aspect for members. Luck anticipates that geolocation data also may be combined with psychographic information culled from social media. The result could be used to profile participants for segmentation purposes, to perform network analysis, to map influence and to understand how word-of-mouth travels in the real world.

Another evolution expected by the interviewees is that the overlap between market research and marketing on mobile devices will expand. Bhaskaran offers as an example of this the flow of coupons and discounts to participants’ mobile devices upon the completion of a mobile study. McCrary also predicts that measuring the effectiveness of mobile marketing will emerge as a new field, and more customer satisfaction and relationship management will be conducted through mobile methods. These changes would fundamentally alter the market research landscape, leading to the convergence of the market research field with marketing, advertising, and other industries.

4.6. Going Forward: The Mobile To-Do List

The experts note that pricing has not yet been standardized for mobile methods. McCrary wonders

What is one question per person worth? Can you do 20 questions at a time every day for five days so that you can collect 100 data points...chunking it up? Does it matter if the same person answers all 100 questions or is any 18-year-old male from the Midwest, from a statistical perspective, just at good answering twenty-one through forty as the 18-year-old-male who answered questions one through twenty?

Whaley and Coleman point out that the question of whether mobile is cheaper than other methods has not yet been answered. Murphy and Schwitzer believe mobile to be cheaper, however Luck and Robbibaro note that it is only cheaper because the research tends to be shorter, and clients pay for the amount of information obtained. Pricing will have to be standardized as more market research firms offer mobile solutions. Murphy notes that some firms have difficulty accepting mobile because the price point is markedly different from other methods, but he warns that those who resist entirely will be left behind, as a rise in mobile research is inevitable.

The implications and nuances of mobile must be studied. Coleman, Sunada and Robbibaro all mention that it is necessary to explore how the physical and contextual aspects of mobile devices affect research outcomes. Coleman suggests creating an index to account for the differences between research outcomes when conducted on different platforms (for example, a ten in an online survey is equivalent to X in a mobile survey).

Murphy points out that avoiding mobile for fear of non-representative samples is a waste of an opportunity, explaining that the same fear kept many from adopting online methods at the outset. He states,

It’s kind of the same to me as...five years ago when everyone was decrying the shift, online research is not representative...but the reality is that research doesn’t deal with representative samples anymore anyway... So that whole idea is kind of out the window. It’s all convenience samples...you have to weight the data.

Rather than being deterred by the shortcomings of mobile methods, Murphy and other proponents suggest delving in, studying the implications and figuring out how to solve any innate problems.
Another issue that must be considered is how best to incentivise participants. McCrary, Hobson and others suggest compensation (in the form of discounts or coupons, small amounts of money, or phone airtime, for example). Others, such as Kuppusamy, Murphy and Popper, propose adding a gaming component to mobile research. Incentives would then be points or badges and participants would join in to have fun and compete with one another.

Privacy issues, particularly in connection with detecting a person’s location through the GPS on his or her phone and collecting other passively monitored information, will need to be examined (Robbibaro). Market researchers must put themselves in the shoes of consumers and understand what their concerns may be. App fatigue is another problem that Luck mentions. She jokingly suggests an industry app be developed, through which all market research firms might deliver their apps to participants to avoid such a problem.

4.7. Best Practices

<table>
<thead>
<tr>
<th>Do</th>
<th>Don’t</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detect platform &amp; optimize accordingly</td>
<td>Repeat online layout</td>
</tr>
<tr>
<td>Keep it short</td>
<td>Use same length as online</td>
</tr>
<tr>
<td>Use to supplement other methods</td>
<td>Use alone</td>
</tr>
<tr>
<td>Offer both web &amp; app based surveys</td>
<td>Offer one and not the other</td>
</tr>
<tr>
<td>Assure participant is not incurring cost</td>
<td>Assume it is free for participant</td>
</tr>
<tr>
<td>Base decision to use mobile on client needs</td>
<td>Use the tool for its own sake</td>
</tr>
<tr>
<td>Use video judiciously</td>
<td>Load up on video</td>
</tr>
<tr>
<td>Consider sample issues</td>
<td>Assume smartphone users tell whole story</td>
</tr>
</tbody>
</table>

It is important to realize that mobile is a very different platform from online, and the context for mobile methods must be taken into consideration when designing a study. Luck laments, “It’s sort of like when we first started doing online research as an industry...people were basically trying to take a phone survey and slap it up online and call it online research...You can’t really just migrate one to the other.”

The experts stress that mobile surveys must be kept short. Luck champions five to ten questions as the ideal survey length. Participants should be able to do one while waiting in line at the grocery store, or during other “in between” moments. Bhaskaran even reinforces best practices by having his system flag any survey over 10 questions long and by preventing surveys over 15 questions long from being sent out through his system. He does this to avoid degrading the participant’s experience.

Stork and Schwitzer caution that mobile should be used alongside other methods rather than alone. Stork suggests using it to supplement face-to-face studies, and Schwitzer prefers it as the first phase of a hybrid qualitative research study, with in-person, online or both used as follow-up research phases to dig deeper into the mobile posts and further explore related topics. The decision to go mobile, whether alone or in conjunction with another method should certainly be based on the aims of the study and the client needs, rather than on a desire to use the method for its own sake (Schwitzer, Stork, Bovitz, Luck). Bhaskaran suggests linking the decision to use mobile to the audience base, as certain demographics are easier to reach via mobile than any other method.
Kuppusamy stresses the need for both app and web based surveys, explaining that apps are best for regular users such as panel members, while web based is best for one-time participants. Luck suggests using “sniffers” to detect where participants come from and automatically reroute them to the optimal format for their platform of choice.

Other best practices proposed include ensuring the consumer will not incur any cost for participating (i.e., they have an unlimited data plan), avoiding heavy use of video which can still be cumbersome for many mobile devices, and considering the sample needs as smartphone penetration has not reached the entire population. Implicit in all of these best practices is the idea that the participant’s experience should come first – it should be as enjoyable, easy, and convenient as possible. With an overall decline in participation rates, this is more important now than it ever was.

### 4.8. So What?

Why does a shift towards mobile methods matter, and what are the direct implications of this emerging new methodology? Luck explains that it challenges researchers to think harder and more creatively about how they gather information. The way in which sampling is addressed may become more flexible (Murphy). While an increase in participation and improved data quality may occur (McCary), more direct interaction between consumers and companies could potentially threaten the field of market research (Whaley). The face of market research will surely shift, as it becomes increasingly integrated with marketing (Bhaskaran), advertising, gaming and other industries and as the business model changes and it must compete with new sectors (Murphy). Market research will have to work across new industries (Murphy) and will potentially gain a more global scope and insight (Whaley, Schwitzer). These methods will allow us to tie behavior and activity to attitudes, an exciting prospect for the future of market research (Whaley).

### 4.9. Guidelines to Mobile Method Selection

The following is a quick synopsis to guide the selection of a mobile method, based on a series of common research aims and assembled from the interviews and background research:

<table>
<thead>
<tr>
<th>Desired Outcome</th>
<th>Mobile Research Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintain an ongoing dialogue over time through frequent short spurts of information</td>
<td>Mobile panel or community</td>
</tr>
<tr>
<td>Understand how a consumer relates to a brand or product in his or her home or in the “real world”</td>
<td>Mobile diary or ethnographic study</td>
</tr>
<tr>
<td>Understand event-based behavior</td>
<td>Mobile diary or ethnographic study</td>
</tr>
<tr>
<td>Map respondents while quantifying behavior</td>
<td>Mobile survey with geolocation data or QR code[^5]</td>
</tr>
<tr>
<td>Map respondents while obtaining qualitative insight</td>
<td>Mobile diary or ethnographic study with geolocation data or QR code</td>
</tr>
<tr>
<td>Quantify something in field (ex. prior to focus group, for mall intercept or movie exit)</td>
<td>Mobile tablet survey</td>
</tr>
<tr>
<td>Understand momentary/one time locational attitude or behavior across individuals</td>
<td>Mobile survey or polling with individuals based on geolocation data (from panel or community members) or as identified by QR code</td>
</tr>
</tbody>
</table>

[^5]: Quick Response code (a two-dimensional bar code)
5. Conclusion

The advent of social media and the convergence of methods of communication and media on mobile devices have altered the way in which people communicate and the devices they use. This has caused rapid and considerable change in the field of consumer research. A shift in market research towards the consumer experience seems to be taking place, as is a merging of market research with other fields of business such as marketing, advertising, and gaming. As Hobson observes, “There’s less focus on the methodology and more focus on being a strategic partner and business adviser,” or gaining actionable insight in innovative ways, such as via mobile research. Mobile is not ideal for one-time users as it is difficult to gather enough information from one interaction with a single consumer to say anything relevant or representative of a group. However, a move towards ongoing dialogue with consumers means mobile will be an effective tool for gaining contextual, in-the-moment feedback and a productive way to build a relationship with consumers over time.

Applications used by communities or panels are the best way to create ongoing dialogue, and if they can be transformed into entertainment or social experience through location-based game-like platforms, users will be more likely to embrace and use them repeatedly. In this way, mobile market research can change the face of market research to be more enjoyable and engaging. This will guarantee a high level of participant satisfaction while also obtaining insightful and actionable data.

About Carrie Robbins

Carrie Robbins recently joined Lieberman Research Worldwide in Los Angeles after completing a dual masters degree in Global Media & Communications from the London School of Economics and the Annenberg School for Communication and Journalism at the University of Southern California. She completed her Bachelor’s Degree at Wesleyan University, graduating with Honors in Romance Languages and Literatures. She is from Boston and has lived in Spain, Argentina, Italy and the United Kingdom and speaks Spanish and Italian. Her experience working for a software start-up in Buenos Aires sparked her interest in issues of the digital divide between Latin America and the U.S., which led her to pursue the dual masters degree.

Carrie will be attending the 2nd International Conference on Market Research in the Mobile World in Atlanta as a panelist in July, 2011. She has been a member of the International Communication Association (ICA) since February, 2011 and the Business Marketing Association (BMA) since January, 2011. For more information on Carrie, find her online at http://carrierobbins.com/
Choosing among today’s qualitative options

Understand new qualitative research methods
Learn how to choose an appropriate method for a project

DIRECTORY

New qualitative research PLATFORMS and PROVIDERS

www.NewQualitative.org
REFERENCES


ESOMAR. Conducting Survey Research Via Mobile Phone, 2010.


Goon, E. "How and when to conduct mobile research appropriately " Quirk’s Marketing Research Review June 2010.


Macer, T., and Quirk’s Staff. "Mobile research: too much excitement or not enough? “ Quirk’s Marketing Research Review May 2010(b).


Pferdekaemper, T. "Mobile research offers speed, immediacy " Quirk’s Marketing Research Review June 2010.


Rydholm, J. "How Marriott International tapped mobile research to get feedback on enhancements to its mobile site " Quirk’s Marketing Research Review June 2010.


APPENDIX A

Industry Expert Bios

Vivek Bhaskaran (President and CEO, Survey Analytics)

Vivek Bhaskaran is the founding member and CEO of Survey Analytics, one of the industry’s leading providers of web-based research technologies. As Chief Executive Officer, he plays a key role in defining the company strategy and using technology and innovation continuously to maintain its leadership in the industry. He has played a pivotal role in the Survey Analytics journey. In 2008, Survey Analytics made Inc. magazine’s list of the fastest-growing private companies, ranking 172nd overall and 25th among business-service providers. Puget Sound Business Journal recognized Survey Analytics as one of the 100 fastest-growing private companies in Washington State. Vivek completed his primary education in India before moving to Russia and then US. He holds a Bachelor’s Degree in Computer Science from Brigham Young University, Utah.

Greg Bovitz (President, Bovitz Research Group)

Greg is the founder and president of Bovitz Research Group. His expertise in survey research design and analysis has attracted a diverse client list including GE, Sony, and Target. Prior to founding Bovitz Research Group, Greg was with Lieberman Research Worldwide.

He previously served on the faculty at Michigan State University’s Institute for Public Policy and Social Research. His research has been published in such leading social scientific journals as Public Choice and Political Research Quarterly.

After earning a BA at UCLA, Greg completed his Ph.D. in Political Science at the University of California, San Diego with an emphasis on quantitative methods.

Mike Clarke (SVP/GM, Lieberman Research Worldwide)

Mike Clarke has extensive experience with a variety of research and analytic techniques, including segmentation, choice modeling, c-sat, alternative qualitative research methods, and a variety of new product development approaches. Over the past 18 years in research his experience includes a wide range of industries, including retail, CPG, financial services, entertainment, and technology. Mike began his career doing political research/consulting and is a graduate of the University of California, Berkeley.

Elaine B. Coleman (Chief Research Officer and Co-Founder, Resolve Market Research)

Elaine holds a Ph.D. in Cognitive Science from the University of Toronto and was awarded a McDonnell Post-Doctoral Fellowship, which was held at UC Berkeley. Coleman has been an executive of consumer research and product design for over 15 years. Her expertise in designing actionable research has attracted clients from wireless, games, technology, sports marketing and home entertainment. Before co-founding Resolve, Coleman served as Managing Director of the Mobile | Tech Division at Interpret. Prior to that she directed custom research for entertainment and advertising clients at MarketCast and led product design research for the Java Division at Sun Microsystems. She has worked in academia, technology think tanks, and product design consultancies. Coleman is a prolific speaker and has been invited as a Keynote at several business and academic conferences. She has authored numerous papers and book chapters. Her research has been funded by private companies, foundations, non-profits and government. Coleman’s specialties include product innovation, advertising effectiveness across multiple screens, brand equity, digital media strategy and personal technologies research.

Chris Hobson (Chief Operating Officer, txteagle)

Chris Hobson leads txteagle’s efforts to create value for our customers and partners. He brings to txteagle over fifteen years of leadership experience in sales, marketing, business development and general management. Mr. Hobson began his career as a Brand Manager at Procter & Gamble and prior to joining txteagle he was VP Operations at eCredit (now Cortera), which was acquired by Fidelity Ventures in 2006. He is currently an advisor to several Boston-area technology start-ups.

Mr. Hobson is a graduate of McGill University and received his MBA from Harvard Business School.
**Palanivel Kuppusamy (Founder, iPinion Surveys)**

Kuppusamy founded Dexterity in 1999 and led the company for nine years as the CEO, making it a leader in Marketing and Customer Informatics space.

He founded iPinion in 2010 and has built a high performance team to make it a leader in the space it operates. iPinion is a venture that has developed patent pending Market research data collection solutions, providing surveys-on-the-go capabilities for the smartphone world. iPinion runs on iOS, Android, Blackberry and will be available for Symbian from mid 2011.

Dexterity pioneered the global sourcing (onsite-offshore) for the data and analytics driven insights for demand side business processes (marketing, sales and customer mgmt), bringing in a phenomenal value proposition to these functions. Prior to Dexterity, handled assignments with MR Industry leaders like ACNielsen and NMR and worked with Dun & Bradstreet Satyam Software (later known as Cognizant Technology Solutions). He did Engineering in Govt College of Technology, Coimbatore and Management Post Graduation in Indian Institute of Management, Indore.

**Michael McCrary (Managing Director, Cint, AB)**

Michael has over fifteen years of experience in marketing, advertising, and research. In 2003, he joined Greenfield Online and played a significant role in the growth of the company into the leading online data collection provider. After Greenfield’s successful public offering in 2004 (Nasdaq: SRVY) Michael moved from Greenfield’s Wilton Connecticut headquarters to California to run the west coast division out of Encino. When Michael departed Greenfield in 2009, after the sale of the business to Microsoft for $486 mm, he was the company’s SVP responsible for North America sales and marketing with a team of 30 sales professionals and a total revenue budget of $65 million.

Michael served as the Managing Director for Cint AB after over the past year where he built a solid sales, marketing, and operational strategy. Michael also served on the firm’s management team and technology steering committee. In October 2010, Cint licensed Federated Sample’s Fulcrum platform which brought tremendous efficiency and operational power and helped grow Cint’s presence in North America and Europe.

Michael is passionate about Federated Sample technology and knows first hand the positive impact that Federated’s products can deliver to the market research industry.

**Kristin Luck (President Qualitative Research Consultant, Decipher)**

As President of Decipher, a market research services firm, Kristin Luck serves as Decipher’s brand evangelist.

Kristin was one of the original pioneers of the multi-media online research business over 12 years ago when she joined ACNielsen to assist in the development of proprietary capabilities for testing full screen video and other multi-media materials securely online. As the Co-Founder of OTX (Online Testing Exchange), Kristin Luck built and managed the operational and client management infrastructure for a start-up online market research firm that became the fastest growing research company in the US in 2002 and 2003. In 2006, Kristin started Forefront Consulting Group, a research services consulting firm. Forefront was acquired in June 2007 by Decipher.

Kristin has over 15 years of management experience in both domestic and international custom market and social science research and is a regular speaker at industry conferences and a columnist for Research Business Report where she explores emerging research methods. She’s a 2010 recipient of the American Marketing Association’s 4 Under 40 Award and was recently named to Oregon’s 40 Under 40.

**Leonard Murphy (CEO, BrandScan360)**

Lenny is a seasoned and respected industry leader with an entrepreneurial drive. He has been called a visionary and is renowned as an innovator. He has successfully established several companies in the MR space including Rockhopper Research, a leading full service global research firm and MDM Associates, a MR consulting firm, before founding his current companies: BrandScan 360 and his consulting practice LMC group (www.asklmcg.com).

Mr. Murphy is a key consultant and adviser to numerous market research agencies, and works across the industry to drive the development of innovative research practices by developing strategic alliances with multiple “best in class” providers. Lenny serves on the Board of The Market Research Global Alliance, the premier social network for the global MR profession. He is the Founder and Executive Director of the Research Industry Trends Monitoring Group & Publisher of the GreenBook Research Industry Trends Study, the oldest study in the industry devoted to tracking changing trends in MR. He is on the Advisory Boards of the Festival of NewMR and The Merlien Institute. He is also the Chairman of the IIR Technology Driven Market Research conference.

Rounding out his busy professional life, he is the Editor in Chief of the GreenBook Blog.
Ari Popper (President, North America, BrainJuicer)

Ari is a highly experienced and respected marketing consultant who has worked closely with some of the world’s greatest brands. Ari has been a trusted advisor for CEOs and CMOs world-wide including Robert Redford and his Sundance brand. Armed with a graduate degree in Psychology, Ari began his career as a Marketing Analyst at The Limited Inc and then moved to the agency side in 1999 to join Millward Brown. An expert on branding, marketing communications and new product innovation, Ari has been leading BrainJuicer North America since 2006 where he has helped to reinvent the market research industry by successfully bringing to the US market some of the most innovative and game changing research solutions available. Ari is a frequent speaker at conferences and industry events and has been on industry panels at the American Marketing Association, Advertising Research Foundation, CASRO and the Institute for International Research, and was the Chairman of the ESOMAR Innovate conference in Copenhagen in 2008. He enjoys watching and playing soccer and spending time in the California sunshine with his wife, daughter and three pets.

Joanne Robbibaro (SVP, General Manager, Lieberman Research Worldwide)

Joanne has been a member of the LRW team for almost 15 years and is a member of LRW’s Senior Management Group. She has over 30 years of field data collection experience starting her career at the M/A/R/C Group located in Dallas TX. Joanne has expertise in all data collection methods including the most state-of-the-art automated approaches. She is actively involved in key industry issues and is a Past President of the Marketing Research Association (MRA), which specializes in data collection standards, respondent cooperation and industry affairs.

Kristin Schwitzer (President & Qualitative Research Consultant, Beacon Research)

Kristin Schwitzer is considered a pioneer and expert in online qualitative, with one of her peers dubbing her the “Queen of Cool Research.” Her firm, Beacon Research, specializes in current and emerging qualitative methods and hybrid designs in the U.S. and abroad. Previously, Kristin worked both client-side in brand management at P&G and agency-side in strategic planning and market research. She is a past Vice President of QRCA (Qualitative Research Consultants Association), the founder and Co-Chair of QRCA’s Online Special Interest Group, a RIVA-trained moderator and RIVA trainer, and a frequent industry speaker. Kristin is also the founding Editor in Chief of Greenbook’s NewQual Blog.

Sabine Stork (Senior Partner & Owner, Thinktank)

Sabine Stork is a Founding Partner of Thinktank, a London-based qualitative research agency. Originally from Germany she has spent the whole of her career in the UK. In 2004 she set up Thinktank with Geoff Payne with the mission to bring inspiration to qualitative research. Sabine strongly believes that integrating mobile with face-to-face methods helps generate real excitement around research, breaking down barriers between marketers and consumers. Sabine specializes in international brand and comms research for clients including Nokia, Johnson & Johnson and Expedia. She has a particular interest in the dynamics around creative new forms of consumer engagement in the social media, digital and experiential spaces.

Cris Sunada (Senior Field Director, Lieberman Research Worldwide)

Jim Whaley (VP & Social Media Consultant, Globalpark USA)
APPENDIX B
Extended Mobile Research Toolbox

Surveys and Polling

Surveys and polling are conducted with participants on their mobile phones via a mobile web browser or an application. They also can be conducted by text message (SMS) or by keyword and short code, whereby a text message prompts the mobile phone user to reply with a keyword to an abbreviated phone number (for example, text MOBILE to 55555) (Decipher, 2011).

Mobile surveys and polls can be used to gain instant POP (point-of-purchase) feedback, and to drive purchases with tailored coupons sent directly to a consumer’s device based on his or her self-reported behavior and preferences (Decipher, 2011). They also can be used to gauge customer satisfaction immediately following a transaction or experience. This represents a decided advantage over online surveys, which depend on consumer’s recall of an experience at a later time. Surveys on tablet devices such as the iPad or Android Tablet also are beginning to be used in conjunction with other methods. For example, market research firm “Mind The Gap” uses iPad surveys to augment qualitative research. Surveys are conducted prior to a focus group in order to quantify individual preferences and gain real-time insight. These findings are then used to drive group discussions (Decipher, 2011).

Mobile Ethnographies

MMS (multimedia messaging service) allows for images and video to be integrated into mobile research methods. Innovative market research firms are capitalizing on this capability for projects that resemble ethnographic studies, in that they allow the researcher to obtain interactive user generated content that shows consumers in their natural habitats. MMS is also very useful for diary studies, where participants are asked to log in entries over a period of time regarding their habits, preferences, and consumption behavior (Beacon Research, 2011).

Mobile MROC’s and Panels

MROC’s (market research online communities) are “a solution for market research to create a more enhanced qualitative research process that leverage[s] the social nature of Web 2.0” (Barber 2011: 1). MROC’s and panels have recently gone mobile. Communities and panels fulfill similar functions in market research, although it should be noted that there are distinctions between them. The main distinction between communities and panels is that communities tend to participate in qualitative research whereas panels participate in quantitative research. In addition, communities provide a forum for participants to interact, whereas panels normally do not (PluggedIn, 2008). The extension of online communities and panels to mobile devices allows researchers to harness the power of a large group of reliable participants while permitting participants to contribute to the conversation without being tethered to their laptops or desktops.

Location-Based Mobile Research

Identifying and mapping the location of participants based on geolocation data embedded in their mobile devices adds value to mobile market research methods. This information can be used to map and analyze consumer attitudes, perceptions, and behavior using GIS (geographical or geospatial information systems). Currently geolocation data is put to use for social media and location-based games such as Foursquare, Gowalla and Facebook Places (Hari, 2011). Participants can virtually ‘check in’ to different locations and are awarded badges based on the frequency of their visits. It is also used for location-based marketing, whereby a consumer’s location is identified in order to send them tailored advertising or drive purchases with customized coupons. Increasingly, market research firms engaged in mobile research are adding location identification capabilities to their mobile research toolboxes.

Mobile In the Field

Mobile devices have long been used to aid researchers in the field. Now, inexpensive apps, plugged into a mobile device allow organizations to incorporate them into areas previously ruled by pen and paper. These devices can be used for mall intercepts, interviews, focus groups, and surveys and polls. As more business applications are created, market research firms will have increasing flexibility to select cheap, customizable solutions that fit the needs of their field researchers.