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Opinion Piece

What does mobile really mean for research?

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Abstract

Mobile is creating both new approaches and new insights for researchers. This paper explores the impact of the growing importance of the mobile channel and the proliferation of mobile devices, identifying the benefits and opportunities it brings to research. The paper is focused on using mobile to conduct research, not on research about the use of mobile. *Journal of Direct, Data and Digital Marketing Practice* (2015) **17**, 14–19. doi:10.1057/dddmp.2015.34

What is mobile market research and why would brands use it?

It can be argued that mobile is both causing and enabling irrevocable change in consumer behaviour. Mobile devices have become ever-present and ‘always-on’ companions in consumers’ lives. They function like our second brain (sometimes referred to as the ‘exobrain’), allowing access to vast amounts of information in an instant. This awareness that, at arms’ length, there is a device that allows consumers to click-and-know, click-and-find, click-and-buy anything at any time has changed their mind set.

It is important to consider that the mobile landscape of today is subject to constant change. The Internet of Things (IoT) will seemingly connect every object in our lives and it is most likely that a mobile device will sit at the centre of this, acting as a remote control. As the IoT expands, Cisco predicts there to be more than 50 billion connected devices in the world by 2020. By then, what those devices look like and how they function will have completely changed.

In market research today, we define mobile as ‘any device with a mobile operating system (OS), such as feature phones, smartphones and tablets’. But that is already being expanded to include any connected device that allows us to capture data, such as a smartwatch, a fitness tracking band or even a coffee machine. This will lead to further opportunities to collect and analyse not only survey data from different devices, but also behavioural data.

The mobile era is bringing us unprecedented ability to connect with individual consumers all over the world and with it our opportunity to capture data and insight.

Mobile devices bring with them a new paradigm when it comes to data — the previous decentralized model of our information being stored and

Mobility mind set	accessed in multiple locations is being replaced by a centralized one with mobile at its heart. What seems certain is that our mind set is now one of mobility.
Mobile market research	Research companies acknowledge that consumers are already taking online surveys on their mobile devices, whether they are asked to or not, and so, to a certain extent, the shift towards mobile is already happening. If they want to continue to understand consumer behaviour, then they need to be where consumers are — on their mobile devices. Mobile marketing research can be described as engaging, measuring and understanding consumers with and through mobile.
New methods of interaction	There are a host of differences and advantages in using mobile over previous paper or desktop-based research approaches:
Mobile capabilities	1. Mobile devices have different capabilities — mobile is not just about one device or technology. Mobile devices come in many forms and their functional capabilities are expanding all the time. For example, through today's average smartphone it is possible to engage with respondents using audio, messaging, email, the mobile web, apps, video and more. Adding in other enabling technologies, like near field communication or augmented reality will provide a huge increase in the possible ways to capture consumer actions or opinions.
Smartphone and feature phones	2. They allow for real-time interaction — Ericsson has reported that global mobile phone penetration has reached 92 per cent, with this number split between smartphones and features phones. Smartphones are more like mini-computers with large colour touch screens, a camera, apps and much more functionality. Feature phones have more basic functionality and are a lot cheaper.
Contextual data	3. They capture greater contextual awareness — the additional capabilities of smartphones mean that researchers can capture different kinds of interactions. They no longer just rely on asking respondents to tick a box or follow a link — instead they can capture a respondent's location or ask them to scan barcodes or take some other action.
Personal interaction	4. They capture how consumers use devices — the way consumers interact with mobile devices varies. They are increasingly used to touch screen devices, rather than using a mouse, and this, in turn, changes the way that surveys work and should look. In addition, consumers are used to the fact that mobile interaction is two-way and in near real-time. Any interaction takes place on a highly personal device and feels like it is one-to-one. In other words, mobile offers immediacy and intimacy.
Moments of truth	5. They can be used to prompt action — because we have our mobile devices always-on and always with us, it means that, most likely, using the mobile channel is the first and fastest way anyone can react, either prompted or unprompted. This means the responses researchers get from respondents can be closer to the point of the experience (the 'moment of truth') that they want to talk to them about. There is no need to wait for someone to be sitting in front of a computer or to enter a store. Because mobile is a two-way channel, respondents can be prompted to take an action and then monitored.
Population penetration	6. Increased reach — the penetration of mobile devices can connect brands with hard-to-reach segments of the population. The penetration of

mobile phones in many parts of the world is at 100 per cent of the population or more, and in the United States and European markets it is likely that more than 60 per cent of all adults over the age of 16 will have a smartphone.

Audience reach

7. Increased audience size — that mobile penetration figure also means that the potential audience size can be larger. In many developing economies, mobile is the first screen in consumers' lives. Reaching a larger audience through a more personal channel will offer researchers the possibility of capturing qualitative data on a quantitative scale.

Closer connection

8. Closer to the point of experience — as has already been noted, mobile can connect with respondents closer to the point of brand experience.

New insights

9. Collecting new types of data — such as the health data from wearable devices and mobile behavioural data to understand what people are doing on their device where and when. This generates new insight into consumer behaviour.

There are some limitations that should be recognized though, namely:

Size, length and time limitations

1. The screen size and format — a smaller screen affects everything from survey design to content types.
2. The survey length and functionality — for instance, there is mounting evidence that consumers want to do shorter surveys on mobile devices.
3. The time that respondents will allocate to surveys — because of the nature of the devices and the way we behave with them, researchers must remember that respondents consume all mobile content in a different way. This shorter-term usage means that respondents are time-poor and lack focus. We will not hold their attention for as long as we might through other channels.

Behavioural insight

But mobile is not just about surveys. If mobile devices contain more information, they can provide more insight into consumer behaviour. Mobile behavioural data could be the biggest win for research. One of the greatest challenges in research is capturing what consumers actually do at any given moment, rather than what they say they do or can recall doing.

Evidence-based insights

Research companies have the opportunity to collect device usage data from opted-in panellists who consent to sharing their behavioural data with them. The panellist simply downloads an app and accepts the terms and conditions to start sharing. This provides accurate, powerful and highly detailed evidence-based insights for which there are many use cases.

Passive measurement

This behavioural tracking is very different to survey data collection through any other channel and, as consumers get more connected devices, even greater possibilities are opened up. Through use of passive measurement technology, it is possible to collect and analyse a respondent's mobile behaviour. This includes device performance, web and app usage, device and feature usage, and location. This could provide insight into where consumers shop, products they search for and buy, media and ad exposure, and much more.

Path to purchase

For example, consider what could be learned from being able to monitor passively a consumer's grocery shopping habits — tracking the

time and day they visit the supermarket most often, which store they go to, their journey there, the time they spend in-store and so on. The data and insight could well be more relevant, more accurate and of a higher quality. Behavioural data collection can provide insight into consumers' path to purchase and help to understand the role mobile plays in the consumer's journey. Mobile allows brands near real-time, two-way conversations and feedback on brand experiences and encounters. Mobile can be used to capture attitudes, opinions, moods, sentiment, thoughts and ideas.

Personal identifiable information

Behavioural data collection adds great insight to the real lives and behaviours of the respondent and can reduce the need for survey questions. The collection of this data through an app requires the explicit consent of the respondent and strict data processing controls to ensure scrubbing of personal identifiable information before analysis can happen in order to comply with privacy and security laws and regulations. Using advanced taxonomies to code the behavioural data, a meaningless URL can be turned into meaningful data.

Deep coding

While some of the behavioural data that can be captured may appear to be meaningless, such as obscure URLs containing just numbers and letters, this can be turned into very meaningful data by applying deep coding techniques, such as taxonomy classifications and contextual information.

Trigger-based surveys

Event-triggered surveys are an option too, where a survey is triggered based on behaviour observed from a panellist. For example, if you see that a panellist has browsed for cooking recipes at 08:45 and then clicked on an ad for financial savings products, we can ask, 'Why did you click on that ad?' If subsequently we see the panellist visit a financial website or an actual bricks-and-mortar bank in their High Street, we can ask, 'How was your experience?'

Using location for surveys

A second major way that mobile will transform research is through the use of location data. Location-based surveys are surveys that require the respondent to enter a pre-defined geographical zone or geo-fence in order to take part in a study. Upon entering, exiting or by simply spending a pre-determined amount of time in a defined zone, a trigger is activated and a survey deployed to a respondent's device. Kantar refers to this method as 'location-triggered surveys'.

Location terms

There are many different terms being used for the use of location in surveys, including:

- Geo-location
- Location-triggered surveys
- Location tracking
- Geo-tracking
- Geo-triggering
- Location awareness
- Geo-fencing
- Geo-zones.

Recognising proximity

A geo-fenced location is determined by using a specific latitude and longitude co-ordinate in conjunction with a radius that determines a proximity boundary. Once someone enters that area with a mobile device,

their presence can be recognized. This enables researchers to capture consumers' activity/engagement in a particular geographical area of interest in the moment.

Location options

Location-triggered research has a number of different uses, including:

- Experience measurement — measuring the experience of a store visit. By setting up tight geo-fences based on store locations, a survey can be triggered when someone leaves a zone and their experience can be captured.
- Advertisement effectiveness — Measure the impact of street advertising. By setting up tight geo-fences based on ad locations, a survey can be triggered when someone leaves a zone.
- Store promotion — promoting a store/brand. By setting up loose geo-fences based on their store locations, a survey can be triggered when someone enters a zone, with a promotion to spend in-store as a reward.

Defining best practice

Location- and event-triggered surveys are currently used in three categories: in-store test, shopper experience and store comparisons. The technology is in place to use these types of studies and various use cases have already been successfully deployed. As it is still relatively new and a fast-moving area in terms of technology, feasibility and approaches need to be carefully assessed for each study in order to get to speak to a specific person, in a specific location at a specific time. It is important for those researchers who work with this capability to further define best practice in this area, as well as continuing to explore possible technical and sample developments.

Coding media data

With mobile comes new data, through images and video from respondents. This media data can come from various places, such as wearable camera devices (qualitative studies), from respondents who upload images or video as part of their survey tasks, as well as from other data sources. To use this data, research companies will need to be able to process this additional data and at scale. Previously, coding up this data was too expensive or simply not possible. Market research companies now have the opportunity not only to use the advances of technology, but also to overlay research expertise on top.

Socially derived brand metrics

Coding teams who used to focus on coding text can now be trained to code images and quality check what software and crowd solutions produce. Researchers can now cluster images for themes, trends and context. Through this new capability, valuable insights can be obtained that would not be available from surveys alone. Brands, products, containers, location, people, actions and sentiment can all be coded to gain context of the experience and path to purchase. 'Socially derived' brand metrics can be augmented with the information contained in images, as increasingly they contain insight not reflected by the text alone. Coding media data is not just about quantifying visual data, but making it easy to find the stories which bring it to life.

Combining data sources

As mobile is fast-paced and ever-changing, we will, of course, continue to learn and explore new opportunities, like behavioural data collection and coding of media data that mobile brings. Mobile offers researchers

opportunities beyond surveys and, in the future, it is likely that research companies will combine the data and insight from surveys and behavioural data collection from multiple connected devices. These new combinations of methods will provide a 360-degree view of the consumer and much deeper insight into their thoughts, opinions, feelings and motivations. The challenge for brands will be using this insight in a meaningful way while at the same time respecting consumer privacy.