

# Research-to-go

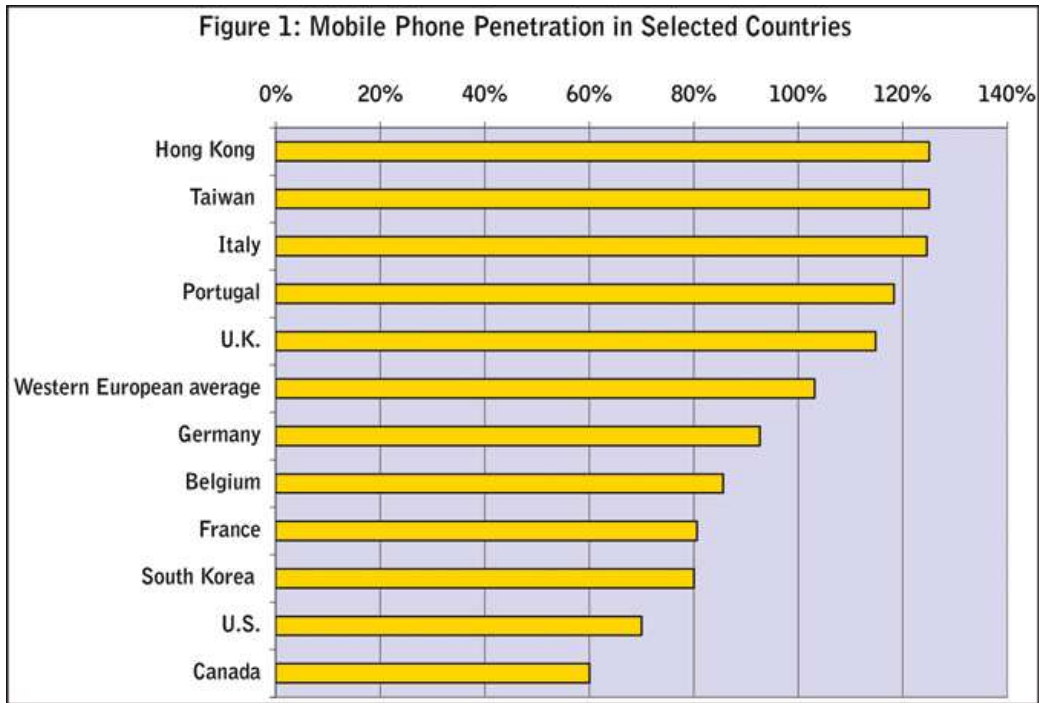
## Cell phone-based research offers speed, novelty

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Recently, there has been a growing global interest in mobile marketing coming from different stakeholders in various industries. Advertisers, market researchers, manufacturers and retailers recognize the increased fragmentation within the traditional channels and are seeking new ways to effectively reach consumers through online and mobile applications. Most believe that the utilization of mobile technologies will offer unique and powerful techniques to effectively target and interact with consumers. The market research industry, whose business models are evolving with the growth of the Internet, needs to experiment with mobile technologies and understand the current potential for research and the future directions in the industry.

Within the last five years there has been a significant increase in both the number of mobile phone users and households that have mobile phones but no landlines. In the United States, the percentage of adults in mobile phone-only homes increased from 7.7 percent to 11.8 percent between 2005 and 2006, according to the National Health Interview Survey. The rise is mostly driven by young people, with more than a quarter of those aged 18-29 going mobile phone-only. The increase in mobile-only homes poses a particular concern for researchers that rely largely on landline numbers to conduct phone surveys.

There is a growing number of mobile phone users in North America, Europe and Asia-Pacific as well as the developing countries as the infrastructure is being expanded throughout the world. As shown in Figure 1, according to a report by Informa Telecoms and Media (2006), 30 countries exceeded 100 percent mobile phone penetration, with some of them, such as the U.K. , Sweden and Italy , at a penetration of more than 110 percent. This indicates that a part of the population in these countries already carries two or more mobile phone subscriptions. According to the same report, mobile phone penetration in the U.S. is nearing 70 percent while the Asian leaders, Hong Kong and Taiwan , are in the 125 percent range. The 2004 Lemelson-MIT Invention Index study reported nearly one-third of adults in the U.S. claimed the mobile phone is the No. 1 invention they "can not live without," beating out other products such as alarm clocks, televisions and microwaves.



According to the IT research company Gartner, 70 percent of global voice connections will be wireless by 2009. Gartner further predicts that around a third of people in Europe and the U.S. will choose wireless and broadband telephones over fixed phone lines by 2009. In addition to increasing rates of global penetration, mobile telephony is characterized by rapid technological developments. A typical mobile phone today is not only used as a telephone but also may be used as a media player, camera and much more. According to the latest research of the Online Publishers Association, 76 percent of all consumers in the U.S. and Western Europe have Internet access on their mobile device, and about one-third use it. Among those with mobile access, the U.K. leads in usage (54 percent), followed by the U.S. at 41 percent.

In response to these facts and figures in the mobile and high-technology industries, coupled with the need to reach consumers on-demand, we are exploring mobile techniques as a new platform in which to develop research solutions to address a wide range of marketing needs.

## Measure the Willingness

During the past few months, Lightspeed Research has undertaken research studies in the U.S. , U.K. and Australia to measure the willingness of respondents to take part in mobile surveys. The primary objective of these studies was to uncover the potential of using mobile phones in interactive research and increase cooperation especially in hard-to-reach demographic groups. A three-phase research design was implemented to obtain comprehensive information on the respondents' mobile survey-taking experience. Participants to the mobile survey were recruited from Lightspeed's online consumer panels.

An online background survey was conducted to recruit panelists to participate in the mobile survey. A segment then completed a mobile survey using cell phones and another completed it using a computer. An online follow-up survey was conducted to learn more about the panelists' mobile survey experience.

These studies are among the first attempts to investigate the strengths and challenges of mobile research as a data collection methodology. They are intended to help the industry understand the impact of mobile research by identifying its benefits and limitations. Our findings support our

expectations that there could be significant benefits in using this approach for key target markets and applications.

## Health care matters

The survey used in the U.S. study focused on personal health care matters and the U.K. and Australia studies focused on media-related topics. Each survey included no more than 10 questions with different routes, in which varying types of questions (e.g., single- or multi-punch, open-ended) were tested. Each study was conducted with approximately 1,000 panelists, who received incentives for their participation in the survey.

In the U.S. , the overall response rate to the mobile survey was 28 percent. About one-third of the responses to the survey invitation message were received within the first hour (and 61 percent within the first 12 hours), suggesting that mobile surveys could potentially generate a quick response. The online version of the same survey was completed by a different group of respondents, with about 10 percent of the responses received in the first hour and 42 percent within the first 12 hours.

Examining the profile of the respondents, there were some differences in response rates by age. Response rates among 18-24- and 25-34-year-olds were 38 percent and 36 percent respectively. However, since there is a relative shortage of text messaging (SMS) and mobile Internet users aged 55+, the response rate among these older respondents (18 percent) was lower than those of the younger age groups.

Sixty-seven percent of the respondents said they use SMS and 28 percent said they access e-mails on their mobile phones. As expected, significantly higher percentages of 18-24- and 25-34-year-olds (96 percent and 89 percent respectively) are using SMS compared to all other age groups. Thirty-four percent said they access the Internet on their mobile phones at least once a week while 55 percent stated that they never use mobile phones to go online. The perceived high prices of the service and the convenience and ease of Internet access via personal computers were the main reasons stated for those who never access the Internet via mobile phone.

In the U.K. , the overall response rate to the mobile survey was 32 percent. About half of the responses were received within the first hour of the survey invitation and 65 percent within 12 hours. The survey yielded a high response rate among 16-24- and 25-34-year-olds (39 percent and 35 percent respectively) however the response rate decreased with age (17 percent among those age 55 and older) again, due to the lower use of the mobile Internet services. Ninety-four percent of the respondents said they were SMS users, 19 percent access e-mails on their mobile phones and 27 percent use the WAP services. Forty-nine percent of the respondents said they never access the Internet on their mobile phones while 32 percent said they go online at least once a week using their mobile phones.

In Australia , the overall response rate to the mobile survey was 37 percent. About 38 percent of surveys were completed within the first hour and 77 percent within the first 12 hours. Response rates were 38 percent among 18-24-year-olds, 46 percent among 25-34-year-olds and 22 percent among those 55+. Thirty-three percent of the respondents are SMS users, 7 percent access e-mails on their mobile phones and 7 percent use the WAP services. Fifty-four percent of the respondents said they never use the Internet via their mobile phones and 26 percent said they go online at least once a week using their mobile phones.

On average (U.S., U.K. and Australia combined), 94 percent of the respondents said they enjoyed taking part in the mobile survey; 88 percent of all who completed the survey said they would do it again; and 64 percent of those who dropped out of the mobile survey said they would try to take part next time. The main reasons people didn't complete the survey were due to some

specific issues in accessing surveys from their mobile phones and concerns about the cost of participating.

## Speed of response

Mobile technologies provide a platform in developing various research solutions to meet client needs. For specific applications, mobile research offers advantages over other survey methods. In particular, the speed of response is unique and provides the opportunity to conduct rapid-response research in a cost-effective way. Another advantage highlighted by these studies is that mobile research offers a promising alternative to elicit an overall higher level of survey participation. Below are some of the mobile research opportunities:

- an alternative way to conduct research with hard-to-reach groups;
- increased respondent cooperation from all demographic groups;
- immediate feedback on your research questions concerning marketing campaigns, ad testing, and more;
- cost savings - faster reply to surveys, shorter project completion time;
- it can be used as a mobile recruiting tool to direct respondents to online surveys;
- it is another way to reach people on the go.

While there are several ways and opportunities to utilize mobile research as an effective tool to reach on-the-go consumers, companies can also benefit from the combined benefits of an integrated consumer panel and mobile research solution. Consumer panels enable clients to reach consumers who have taken a particular mobile or online survey to conduct either mobile or online follow-up surveys.

As with all other research and data collection approaches, best practices are important to the success of this methodology. Some issues to consider when conducting mobile surveys:

- Questionnaires must be short.
- Questions types are limited as is the length of questions.
- Higher incentives must be offered to remove the financial burden of receiving and completing mobile surveys from the respondent.
- The profile of respondents able to take part in mobile surveys differs from that of the general consumer.

## Further research

Mobile technologies today present an exciting direction for all marketers, advertisers and market researchers to pursue. However, there is a need for further research from both the academic and practitioner perspectives in order to better understand the applicability and use of mobile research in the longer term as well as its impact on increasing respondent cooperation in research.

Today, many market research dollars are spent by marketers and advertisers to measure the performance of marketing programs and their impact on consumer behavior. As an emerging interactive research method, mobile research has the power to reach consumers anytime, anywhere. Our recent research-on-research studies have shown that mobile research offers opportunities for event- and time-based research. Mobile research presents a promising way to capture timely information and insight into consumers' behaviors, attitudes, experiences and actions.

Within the next few years, mobile research is predicted to become an important channel for market researchers and other stakeholders in the value chain. It certainly has the potential to play

an interesting role in the market research industry either as a supporting method or recruiting tool, or as a new platform for research solutions that address a range of marketing needs.