

••• mobile research

Resistance is futile

10 reasons why you should go mobile right now

| By Bob Yazbeck and Susan Scarlet



snapshot

The authors offer a mobile research manifesto, addressing some common complaints against mobile and outlining the many factors in its favor.

Winston Churchill once said, “I never worry about action but only inaction.” It’s easy for us to sit at our computers or across from colleagues in conference rooms discussing how to cope with change. But in doing so, we may be missing out on the world outside our door. Step over the threshold and there it is: The mobile world awaits us. And while we thrive in this world as consumers, apprehension takes over as we wrestle with how we’ll thrive as researchers.

But why all the skepticism, particularly when the signs are evident? Online panel churn is increasing, participation rates are decreasing and respondents are more selective with their increasingly fragmented time. Is it because we’re historically slower to adapt as an industry? Is it that we’re stuck in the status quo of online data collection? Or, is it because we’re frozen in an “inquisition-first” mind-set?

We had front-row seats in the landline-to-PC revolution and one thing’s for sure: The mobile revolution stands to yield far more dramatic impact on how we learn from consumers. It’s time to let mobile permeate our world and push ourselves to reimagine our craft. Whether it’s snack-size surveys, mobile ethnography or app-based communities, here are 10 reasons you need to turn inertia into impact.

1. It’s not mobile research, it’s research in a mobile world. It’s important to know that mobile is not simply an iteration of research the way we’ve always done it. We are, in fact, in the business of market research and the market has changed. Today, one-quarter of survey respondents prefer to participate via their mobile devices. Millennials stand to abandon research altogether unless it’s mobile-friendly and device-agnostic – let’s not mess it up with them. Since this group incorporates mobile into their digital fluency, researchers need to be equally fluent in our survey design. With nearly 1.82 billion smartphones in use worldwide by the end of 2013, the numbers speak for themselves.

2. Nothing new is easy. The shift from mail and phone to the Internet had plenty of painful moments. We distinctly remember that sinking feeling when data went missing due



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to programming errors; or worse yet, having to prove to clients that respondents weren't just teenagers posing as adults. The phrase "no pain, no gain" applies here yet again. It's better to get our war wounds now. Write your next survey with mobile in mind – keep it under 10 minutes, use five-point scales and test the heck out of it with your internal posse. Or consider fielding an existing online survey with a small group of mobile respondents and you should find what we've found: similar results. Take small steps to build your mobile repertoire while you can still operate in skunk-works mode.

3. Consumers have the upper hand. There's a reason why Apple puts "i" in front of its products – you may think it's for "Internet" but "i" is really about the "me." From BMW Mini to Birchbox to Coca-Cola Freestyle, businesses are tailoring their products to buyers. And guess what? Now they're spoiled. They expect to provide feedback on their terms too. Mobile devices are now part of those terms because they are always within reach. With 70 percent of shoppers using smart devices in-store, research better be ready to step into the aisle. Marketers instinctively know this – researchers need to hone their instincts too.

4. Mobile breeds authenticity. How do we know respondents are reflecting an uncensored "version of self" when participating in research? Although neuroscience-based research may lead us to that answer, we have no way of knowing for sure. Yet, there is evidence that mobile holds promise. Through investigatory research conducted by our colleagues in 2011, we learned that respondents frequently self-censor in social networking environments. This occurs, in part, because they want to project the best version of themselves. Though their inclination is to suppress their true thoughts and admissions, the smartphone appears to change that. As a conduit of spontaneity, the smartphone catalyzes a more authentic version of self.

Not so surprisingly, our research also found that respondents in private online communities operate similarly. They are more willing to be forthright in a controlled, non-judgmental environment with like-minded folks who

aren't part of their social sphere. Add a layer of mobile onto that and neuroscience may not be worth the wait.

5. Mobile places us there. Mobile brings us full circle with the ability to both observe and inquire. We lost touch with the personal nature of in-person surveys due to more expedient methods brought about by technology. The computer distanced us even further from consumers. Instead of capturing real-time behavior, we ask consumers to recall their experiences. Ironically, smartphones are going to bring us back to consumers. They enable us to not only observe consumers' whereabouts and patterns through geolocation, geofencing and mobile analytics but also to ask them for feedback via mobile surveys. And with mobile ethnography, we'll be able to do both, albeit one consumer at a time. All the while, we can maximize the capture of "passive" data. Marketers are obsessed with point-of-sale. Isn't it time for researchers to be obsessed with point-of-experience?

6. It doesn't have to cost more. The Internet currently holds a tenuous price advantage over mobile on a cost-per-complete basis. This is a convenient argument for the holdouts unwilling to embrace mobile. A brief history lesson, and a look at market forces, should convince skeptics that mobile will ultimately become the dominant data collection method.

When the Internet began gaining momentum in the mid-1990s, it wasn't less expensive than mail or phone. Paper, printing and postage were cost-efficient at that time (stamps were 25 cents a pop) and call centers were a dime a dozen. Then came the Internet revolution. As connection speeds got faster, computers got friendly and people grew comfortable with e-mail, respondents migrated online. Savvy researchers took advantage by building online panels and survey software that made it convenient for respondents to share their opinions. Look what happened – they stopped answering the phone and replying to mail, relegating those methods to second-tier status.

Fast-forward to today and a similar pattern emerges, indicating the inevitable dominance of mobile's pricing power. Sales of mobile devices have

surpassed the PC. Text and instant-messaging prevail. Surveys are being taken on mobile devices whether we like it or not. Online panels lack diversity, skewing older white female, while mobile skews young and multicultural. Again, savvy researchers are on top of it – building mobile-only panels, connecting through push notifications and QR codes and modifying surveys to optimize the mobile experience.

Sure, cost-per-complete for online research is at an all-time low but does anyone believe it's sustainable?

7. It doesn't have to be 100-percent proven to be valuable. Rigorous research-on-research indicates that mobile provides valid results and yields comparable findings to online surveys. Of course, this is when utilizing reasonable survey length, simplified quant and ad hoc studies (no trackers). However, we know the purists out there still won't be convinced until everyone has a data plan.

We have to admit that market research has never been 100-percent accurate. The potential for bias is always there – with sample selection, poorly-written questions, fatiguing surveys, contextual factors and just plain lack of respondent recall. Knowing this, you think we'd cut mobile a bit of slack and get on with it. If you are truly concerned, start small and call it your beta phase. But continue to put rigor around it – analyze mobile responses to verify the similarity of your data. We're not asking you to give up the science of research, we're asking you to get with the times.

8. Mobile is pervasive and ubiquitous. Consumers spend 2.5 hours per day entrenched in their mobile device. Much of that time is spent filling small increments of downtime – scanning social media, quick-fix gaming, Instagramming a photo. Market research has a golden opportunity to insert itself into these moments by offering convenient and engaging research activities. Who wouldn't want to share their opinion if it was quick, painless and rewarding?

Because mobile plays out in so many layers of consumers' lives, it has the opportunity to bring variety and intrigue to the research process. Video diaries and live ethnography are two ways we've begun to do this.

The most fully-realized application of mobile, to date, has been with online communities. We build trusting and enduring relationships with respondents and offer them multiple ways to immerse with our objectives. For example, a pet-owner community encourages respondents to share experiences when they change their brand of pet food, board their pet, visit the vet or any other moment they deem significant. They often enhance their feedback through imagery and video. Judging by the popularity of pet videos on YouTube, you can bet our clients have lively show-and-tells when delivering the findings!

9. Mobile is global. Though per-capita smartphone sales in developed countries exceed the rest of the world, in some ways we trail in realizing mobile's application in our lives. Because of this, our mobile fluency has suffered, hampering researchers from taking advantage of our global potential.

High penetration of landlines and cable, and the ease of obtaining service, is holding us captive. Countries with high mobile IQs leapfrogged ports and cable due to bureaucratic gridlock and the high cost of PCs and went straight to wireless. Since most of us in the Westernized world have the luxury of home computers, mobile is less of a need when access to the Internet is readily available in the comfort of our homes.

Out of necessity, the smartphone has become a survival tool – the Swiss Army knife of the less-devel-

oped world. A primary example is the different comfort levels using the smartphone as a mobile wallet. What is slowly and carefully being rolled out in the U.S. has already been embraced for several years in developing countries.

Even within U.S. borders, smartphones are an important device among Hispanics and African-Americans, as these groups have higher adoption rates than the general population. According to Pew Research, the biggest driver of this spike among Hispanics is technology adoption among foreign-born Latinos and Spanish-dominant Latinos.

10. Smaller is better. There's a reason why this is the last point, as it will be the most difficult adjustment for researchers to make. Why? Because it requires a conscious decision to abandon lengthy surveys and in-person groups as we know them today. Flourishing in tomorrow's world means that long, monotonous questionnaires and drawn-out sessions will become a thing of the past.

The legacy for surveys will be in our ability to offer them up as snack-size servings. Today, we're calling them modular mobile surveys. In fact, in 2012 we worked hand-in-hand with SSI and a beverage manufacturer to redesign a previously-fielded 30-minute AA&U survey. Broken down into three 10-minute modules, we offered respondents the option to complete the second module and then the third. With over 70 percent of respondents

completing all three modules, we averted our concerns of serving up our questions in edible-sized chunks.

And, as we alluded to earlier, live mobile ethnography will replace the need to pull consumers into carefully orchestrated roundtable discussions. Faster streaming and dual cameras will allow researchers to effortlessly and instantly engage with consumers wherever they are.

The smaller and smarter mobile devices get, the more likely our research will be carried into consumers' worlds.

Get on the freeway

It's going to be a long road until we collectively feel secure about conducting research in a mobile world but the very notion of security should not be the thing holding us back. We're not asking you to go from zero to 60 today but we are asking you to get on the freeway with us. Join us and our industry colleagues who see opportunity to evolve our discipline – and our way of thinking.

To quote Churchill once again, "A pessimist sees the difficulty in every opportunity; an optimist sees the opportunity in every difficulty."

Don't let the inevitable roadblocks prevent you from the opportunity that lies ahead. Go ahead and step outside your office ... the mobile world awaits you! 📱

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