

DEVELOPING SECOND GENERATION MOBILE RESEARCH TECHNIQUES

HOW MOBILE RESEARCH CAN ENHANCE THE ENJOYMENT OF MEDIA CONSUMPTION

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INTRODUCTION: MOBILE RESEARCH 2.0 AND THE POWER OF IMMEDIATE AND CONSTANT ACCESS

Despite the anaemic growth that has characterized the Western world since the economic collapse of 2008, at least one market has not slowed for a moment – the mobile market.

The mobile phone has morphed into what Scott Adams, author of the Dilbert cartoon, describes as the human "*exobrain*".[1)] It is the one tool most people now keep at arm's reach from the moment they wake up until the moment they go to sleep.

This exobrain aka mobile device is not just an ordinary telephone. It is a super-power endowed multi-tasking tool that is customized by each user to enhance her day. The mobile will remind its owner to pay a bill, wish a mother-in-law happy birthday, call the dentist, take a vitamin, pick up the dog from the groomer. It will help research a restaurant, figure out what time the Tower of London closes, and how much it costs to ride the Staten Island Ferry (still free after all these years). It can allow the owner to check his bank account, check in for a flight to LA, and accept a meeting invite. With the growth of social networks, mobile devices provide the means for 24/7 communication with family, friends, and communities.

In fact, most of these tasks are now performed in parallel – witness people "tweeting" or chatting via Facebook or emailing or Blackberry Messaging while attending concerts, watching TV shows or enjoying sporting events. Driven by the innate strong desire to share their lives, to be in some form of relationship, to participate in an event or an experience with others, people now routinely interact with others who may be present not only physically but also virtually. Lady Gaga, American Idol, the Real Madrid game – each one of these events is enhanced when shared across a myriad networks. Hey, it's my mother in law's birthday – maybe she'd appreciate this clip of "Born This Way." The exobrain is now a key enabler of our memories and our engagement with the world.

In the past few years, mobile has moved even beyond the uses described above. It is no longer just a communications device. A mobile device now has the capability to hold a range of sensors and processors adept at capturing huge amounts of information about its "person." The phone is an intelligent extension of the physical body of the person, and if that person has given appropriate consent, the mobile can help researchers literally sense habits, interests, networks of relationships, and much more. The exobrain can lead to unusually rich consumer insight. The fact that people have their devices with them at all times and are ready and willing to comment, share, evaluate what they are experiencing, in real-time, provides us with the opportunity to enter into those discussions and get instant, direct feedback and thoughts from individuals.

As suggested in Scott Adam's humorous but totally accurate description of the exobrain – technologically we are already there – regardless of geography or socioeconomic position. As of 2010 there were over 5.2 billion cell phone subscribers, 4.1 billion active users of SMS, 3.4 camera phones, and 1.4 billion users of mobile Internet. Compare those numbers to the fact that there are only 4 billion FM radios, only 1.2 billion PCs, and 1.1 billion landlines in the world. The exobrain is essentially ubiquitous. Moreover it is equally habitual – with users in the UK looking at their mobile phone over a few hundred times a day and even the poorest users in Africa looking at their phones 82 times a day with the global average being around 150 times a day.[2)] No other piece of technology comes close to this volume and centrality to users' lives. And no other tool available to researchers approaches its functionality. The question is how best do we tap it for our research requirements?

This paper aims to describe how Mobile 2.0 Research is taking first steps to reach into and work with the mobile exobrain. We seek to share with you some of our most exciting early focuses on getting immediate feedback in live settings. We also will describe our experiences bringing together live and passive research. And we will show you some of the stars that are guiding our way ahead to Mobile 3.0 Research.

MOBILE RESEARCH 0.0 AND 1.0

Mobile research is not a new phenomenon; indeed, the Ipsos Group completed its first mobile SMS survey as early as 1999. But whereas mobile research has been talked about and executed and carried out throughout the last decade, this research has been done on a very small scale and with minimal complexity. According to the Meaning / Global Park Research Technology Survey of 2010,3) mobile research (including SMS) accounts for less than 1% of total research revenue whereas web-based research accounts for over 42% of research firms' revenues (but with essentially flat growth), good old fashioned paper-based research still accounts for 13% of revenues, and telephone based research still accounts for 27% of revenues.

During the previous decade some research experts continually predicted "next year will be the year of the mobile". However, the time was not yet right for mobile research, as the ecosystem just wasn't quite there. Most early examples of mobile research (SMS, WAP) involved simple survey technologies for which respondents had little patience. Consumers eventually warmed to the idea of mobile being used for more than just making calls. However it took affirmative action by the manufacturers to teach people that the mobile phone had broader uses. For example, to encourage adoption of the phone as a camera, SonyEricsson and others paid actors to go to tourist spots and coyly get consumers to use the actors' phones to take "touristy" snapshots and subtly demonstrate the idea of the "mobile phone as more" in action.

Still with respect to market research via mobile, the limitation of the technology meant that research completion was achieved only by the most committed individuals or the few that had the very highest end mobiles with capabilities resembling PC-type internet access. Mobile research was an early stage technology looking for an appropriate application.

Then came the iPhone and a big step in the development of the exobrain. The revolution of the iPhone had little to do with actual technology innovation: the pieces of the iPhone were available in other devices, and hundreds of thousands of apps were available for Nokia phones for a number of years. What the team at Apple did was create a very intuitive (i.e. user friendly) package for all of the pieces accessible to most anyone willing to pay an Apple premium. Mobile users started to use all of the features and "apps" on their phones: they developed an eagerness to share, to enter status updates on Facebook, direct message their crush on Twitter, and use the location-based features to check in on FourSquare at their local Starbucks to try to be the "mayor".

The arrival of Android the ecosystem took another step forward, lowering the cost of such a device, and thus substantially expanding the total market.

Mobile market research could now begin to take advantage of the unique benefits offered by a rich mobile experience. In fact, we posit that understanding the role of the mobile device as the exobrain where people draw on their mobile's rich functionality continually in a range of contexts is the key to success in mobile market research.

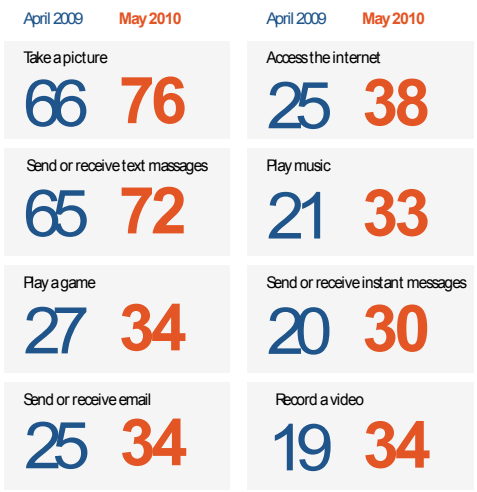
So why is the time right for mobile research?

1. *Mobile device coverage is essentially ubiquitous. Gaining access to research participants via their mobile phones is key.* The developed world now has mobile phone coverage of over 116%[4)] with the developing markets growing fast at 68%. Moreover, emerging nations are generation jumping PC access to the Internet by moving straight to mobile Internet. In Turkey, for example, 70%[5)] of those with mobile Internet access do not access the Internet via the PC. To engage with these people online, the mobile device is the only tool! Moreover, even in developed economies, adoption of mobile is far more ubiquitous than PC adoption – as the poorer and the older are adopting mobile web and other mobile services far faster due to the significantly lower cost.[6)]

2. *The mobile device is a multi-tasking machine and not just a telephone. Researchers must both understand and use these features to power impactful successful research projects.* The mobile device is a feature rich tool that enhances the lives of consumers in many ways. The device functions as a camera, music device, gaming machine, personal journal, web searching tool, and more. For example 56% of European mobile phone users now take and send photos on their mobile phones, 25% of US mobile phone users now connect to friends via social network sites and 34% download mobile applications[7)] with all of these figures growing at high rates month on month. Survey experiences must be designed to take advantage of these features. (See figure 1.)

FIGURE 1, USE OF MOBILE FOR NON-VOICE TASKS IS GROWING – MAKING THE CASE FOR METERING

The use of non-voice data applications has grown significantly over the last year The %of cell phone owners who use their phones to of the following:



African-Americans and Latinos lead whites in their use of mobile data applications

	All adults	White, non-Hispanic	Black, non-Hispanic	Hispanic (English-speaking)
Own a cell phone	82%	80%	87%	87%
% of cell owners within each group who do the following on their phones				
Take a picture	76	75	76	83*
Send/receive text messages	72	68	79*	83*
Access the internet	38	33	46*	51*
Send/receive email	34	30	41*	47*
Play a game	34	29	51*	46*
Record a video	34	29	48*	45*
Play music	33	26	52*	49*
Send/receive instant messages	30	23	44*	49*
Use a social networking site	23	19	33*	36*
Watch a video	20	15	27*	33*
Post a photo or video online	15	13	20*	25*
Purchase a product	11	10	13	18
Use a status update service	10	8	13	15
Mean number of cell activities	4.3	3.8	5.4	5.8

Source: Pew Research Center's Internet & American Life Project, april 29 May 30, 2010 Trackign Survey. N=2,252 adults 18 and older ; n=1,917 based on cell phone users * = statistically sig nificant difference compared with whites

Groups who have less access to PCs use mobiles even more.

Source: Pew Research Center's Internet & American Life Project, April 29/May 30, 2010 Tracking Survey. N=2,252 adults 18 and older. N=1,917 based on cell phone users, statistically significant difference with whites.

3. *Access to the mobile Internet is becoming cheaper, faster and more reliable. Unlimited or high limit data plans, increasing availability of Wi-Fi, and the possibility of zero-rated URLs, remove the need for respondents to pay for taking part in research.* These developments are essential for mobile research success. Our various research projects have shown that around 25% of research participants have concerns around data cost. Penetration of 3G handsets has grown to more than 35% in Western Europe.[8)] As the speed of data increases, completion of research on a mobile device becomes more feasible.

4. *Feature-rich mobile phones are being adopted by the mass market. Researchers can expect that nearly everyone can be a mobile participant.* When we look back ten years, we see how much phones have changed. In 2001 – a standard, mass-market mobile phone featured long talk-time, SMS, ringtones, and very simple games. Now the proposition is entirely different. A typical offer now provides a phone with email, GPS, Bluetooth, Camera, high speed web browsing, Wi-Fi and access to hundreds of thousands of apps. All of the above plus the phone without contract and for under $60 (and this price point is falling fast). The app revolution led by Apple's iPhone and driven to the mass market by the hypercompetitive technology industry has led the way for research to move into the rich mobile era.

Beyond the phone, mobile technology is insinuating itself into other realms. The advent of the tablet has created new layers of services. Car manufacturers are rolling out new in-vehicle entertainment systems powered by a version of mobile technology that feature their own type of "apps". Television manufacturers are connecting their sets to the Internet and enabling these large screen devices to run their own apps as well. All of these provide researchers with a new means to reach consumers and conduct research.

So what to do with these feature rich, ubiquitous devices?

As with all research methodologies, research via mobile devices has limitations but also a number of great strengths. The strengths first: Mobile enables us to both access and engage key research audiences across the globe. It is convenient, always at the fingertips of the consumer, and ideal for gaining insight right at the point of experience. And since it is always with us, the mobile device is the perfect passive measurement tool. Upon consent, this device, without effort or further action by the consumer, records when he wakes up and when he goes to sleep, when he uses the mobile internet or an application, when he makes a phone call and sends text messages, where he spends his time, and before very long, how he spends his money (as near-field communication enables mWallets) and how he is feeling (using biometric sensors that are being embedded in devices).

As such, mobile is not simply a successor to online or traditional surveys methods; it should be seen both as a complementary technique and one that brings added value. Research will compete with many other activities carried out on mobile phones, and it therefore must be fun and engaging enough to motivate a consumer to stay involved.

Consequently, mobile research will require the re-imagining of traditional survey approaches. Moreover, the economics of research, particularly the high cost of recruiting and retaining respondents, means that researchers need to find new ways to make the experience of sharing opinions and personal data rewarding. Limiting mobile research to basic survey completion tasks would fail to harness the exciting and unique capability of the mobile platform to provide rich consumer insights.

ENTERTAINMENT AS RESEARCH AND RESEARCH AS ENTERTAINMENT: A NEW MODEL

With these technologies, we have unprecedented reach into the lives of our respondents as well as the ability to make the survey process truly more dynamic and exciting. We have reached the crossroads of entertainment and research – where entertainment can provide research and research can provide entertainment. *Strategic recognition of this shift from dry research to vital research is essential for creating a successful Mobile Research 2.0 programme*.

THE EASE OF PROPERLY DESIGNED MOBILE RESEARCH: A FIRST FORAY INTO MOBILE ETHNOGRAPHY, "WHY NOT?"

The market research industry continues to report increasing problems finding participants to complete conventional surveys. Response rates continue to fall and panel attrition rates constantly increase. However, we suggest that respondents could be motivated to willingly give their opinions if research experiences were genuinely engaging and fit into their normal everyday patterns of behaviour. In fact, in our experience of mobile, the right mobile survey experience can thoroughly engage the respondent.

In 2010, Ipsos completed its first mobile ethnography study to understand what the people of the UK were doing during a nominated weekend. This simple task captured the imagination of UK online panel members who sent us a plethora of photos tagged with GPS location data, rich text descriptions and emotions. Not only were we able to build up a rich understanding of the lives behind the faces but we also received extremely positive feedback with regard to enjoyment. In fact everyone who took part stated that he or she would take part again in a similar study.

Any why not? The tasks fit nicely into what people were already doing on Facebook and Twitter and Foursquare – posting status updates about what they are doing, sharing pictures, letting people follow their location and more. Sharing personal details in the moment has become a normal behaviour and the execution mechanism for this sharing is our exobrain – already in the thick of all action, already connected to all our networks, already a trusted confidante and conduit for our thoughts, feelings, and actions. Why not share indeed? It's easy and we like to do it. The motto of 2011 - I text/tweet/post/insert any task on appropriate mobile device, therefore I am.

The success of our first mobile-based ethnography study motivated us to see how we could develop this engagement further and to explore taking it to a live environment. We believed that the ability to interact in real-time with research participants to probe deeper into their thoughts and emotion is the logical destination of mobile research.

NEXT FORAY: TAKING RESEARCH TO THE OSCARS

In March of 2011, Ipsos and Lumi Mobile partnered with the American broadcaster ABC to run a marathon mobile interactive TV event during the live broadcast of the Oscar ceremony across America. In designing the experience, we decided to combine mobile research with participation television in order to give participants a game-like social experience that was also a valuable research vehicle. Mobile devices (phones and tablets) are the ideal anywhere tools that can provide instant feedback on live TV broadcasts. After all, many people are already busy using their phones while watching television. Channelling these habits for research purposes created a powerful use of the "second" or "third" screen in a completely relevant way to the viewing experience.

The goals of this research project were ambitious:

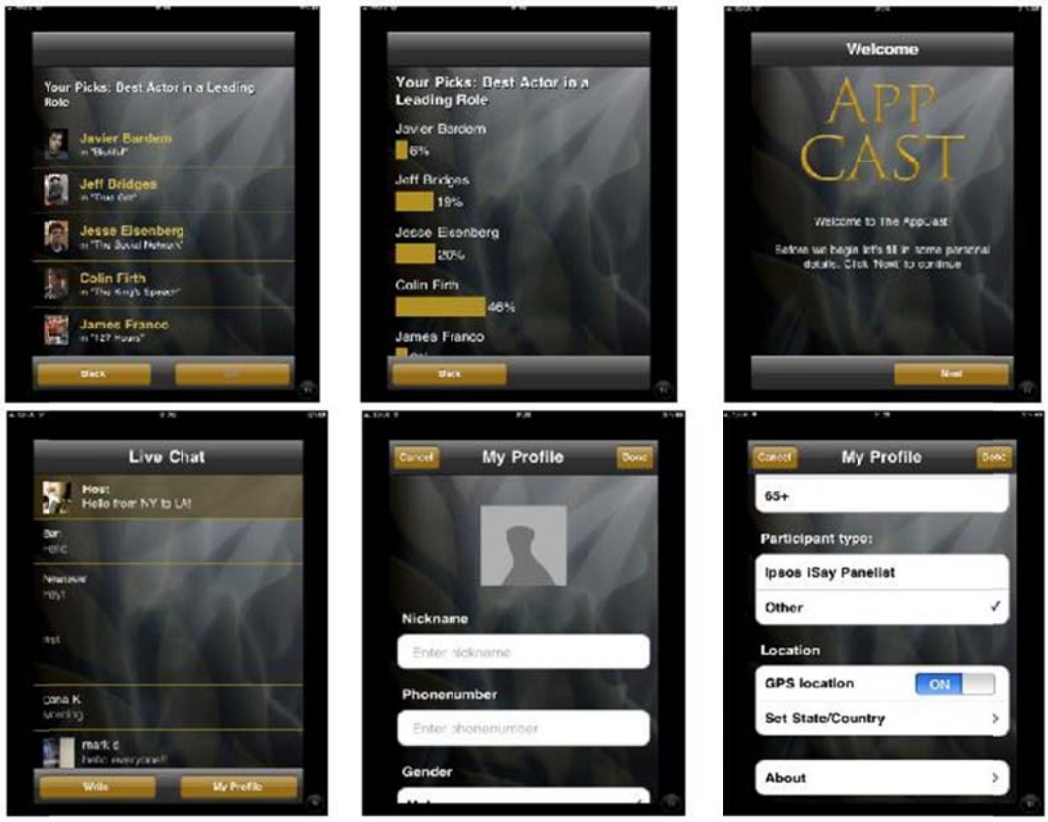
- Could we develop a research method that not only supplies clients with rich research insight but increases participants' enjoyment of watching the Oscars or another live broadcast?
- Could we design an event to take full advantage of the mobile phone as a research device but make it interesting and fun, leaving consumers wanting more?
- Could we create a real-time interactive application on the "second screen" that can really tap the exobrain and generate deeper, more accurate research insights from engaged viewers, at the point of experience?
- In addition, we were keen to try to explode the myth that mobile research could only be conducted via short surveys or research experiences. We posited that if research were designed to be fun, game-like and/or contained within another enjoyable experience, then engaged participants will willingly give their time (even three plus continuous hours of it), their opinions, and would be ready to come back for more.

The research event

The Lumi application deployed a mix of various traditional and innovative research features bundled into an intuitive package that would be familiar to anyone using a mobile device. These were combined with a toolkit of techniques to encourage continued engagement that included:

- Host commentary to build an entertaining and informative dialogue whilst probing for opinions on topics;
- Fun prediction and trivia questions that created a sense of convivial competition amongst viewers;
- Live chat feature allowing all participants to discuss the show and topics raised by the mobile event host;
- Other show-relevant questions scripted and pushed spontaneously based on what was happening on the Oscars and in the discussions forum as well as on the community activity on Facebook and Twitter;
- Instant feedback on results and winners of trivia polls – so respondents could instantly see what other people thought about a given question;
- An overall level of social engagement - providing the entire group of respondents with the opportunity to partake in a shared experience, (See figure 2.)

FIGURE 2



Integrated research and insight features included:

- Understanding the viewer: Building context around the where, how, and with whom the show was being watched through questions delivered through the mobile and by using passive tools such as GPS;
- Feedback across all aspects on the broadcast to assist with future programme making;
- Real-time enjoyment 'dial' rating throughout performances delivering aggregated 'worm' reporting and other continuous audience feedback streams;
- Recall and impression of sponsors, advertising and upcoming TV show pilots;
- Attitudes and behaviour towards new media technologies and changing media habits.

THE IMPACT OF THE LIVE RESEARCH

The experience proved extremely popular among those who participated. Despite the duration of the show being over three hours, over 75% of the 150 participants were still engaged at the end of the show. A follow-up survey revealed that over 85% enjoyed the experience, and most encouragingly over 75% said participating in the research event increased their enjoyment of the show. The participants were motivated by the participation experience itself – rather than by the

prizes. We designed the event to only include a few spot prizes during the show and one final prize at the end. Therefore, the external motivation was relatively small.

The volume of observations collected during the Oscars was impressive: over3,000 comments from participants and an average of 85% participating in each poll. Direct feedback from participants included "this app can do wonders", "made the experience much more exciting and enjoyable" and "I enjoyed interacting with other people while watching the awards show." Much of the live chat was spontaneous but it was also an excellent tool for the event host to probe into topics on the fly. "What do folks think of Reese Witherspoon's dress" and "That was a great point, what do others think about that?" were examples of how the host interacted with the event participants.

The live nature of data collection allowed us to be working on show analysis during the broadcast itself. The broadcaster team even dialled into the event to see how things were going and followed along live on their own devices! Initial results were turned around in hours enabling ABC to publish a press release within 24 hours of the show.

"We took the idea of our digital Oscar 'backstage pass' and applied it to research. Instead of going behind the velvet rope, we went in front of the living room couch to listen and interact with viewers in real time as they responded to the show," said Charles Kennedy, SVP, ABC Research.

This research technology has now been integrated into other ABC / Disney TV shows. In April the application was used during *Dancing with the Stars* to gain feedback during the live show. ABC was an observer at Ipsos' live event moderation hub.

By tapping the exobrain through this kind of approach, broadcasters and brands alike can gain a much more detailed understanding of TV audiences. Broadcasters and brands can learn of television audiences' viewing preferences, gage their reaction to specific programmes, level of engagement or awareness of advertising / sponsors. They can integrate research techniques such as concept evaluation, advertising testing, ideation opportunities, as well as general polling and critical feedback about the content of their media.

The potential for this new approach brings opportunities to interact with consumers via the "second screen" in combination with a TV show, a live event, or wherever the consumers are and moderate discussions on a plethora of topics. *This interactive mobile technology is effectively bringing the techniques of qualitative focus groups to mass audiences at the point of their experience.* It provides a real-time view into what an audience is thinking and feeling. And it does so in a way which suggests there is a powerful possible way to combine games / entertainment with research.

HOW DID WE MAKE THIS HAPPEN?

Creating and delivering these kinds of services requires a mix of technology and know-how.

The technology

This research experience was developed with Lumi's proprietary mobile platform. This platform enables researchers to create real-time, interactive experiences that operate across any mobile device with a data connection. The platform enables dynamic pushing and pulling of polls, diary data, rich passive tracking, social interaction, rich media collection, and more. The platform functions across all types of mobile devices be they Apple, Android, Blackberries, Symbian phones, iPads, or other such tools. This cross platform functionality means that we can reach any participant with essentially any device and provide an experience that adapts to what is happening on the Oscars.

Most importantly, the real-time, dynamic nature of the platform means that questions can be scripted and pushed out instantly depending on what is happening on the TV screen, or according to what the participants are discussing. It also means that the host can activate other features on-demand – pushing polls, the "worm" test, requesting users to take a photo, etc. all from the host's remote location – essentially reaching directly into the participants' living rooms and their devices to control things in a consistent, dynamic manner.

Game-style know-how

Furthermore, we created a dedicated application for the Oscars and other live research projects in a way designed to ensure our participants enjoyed the experience and were most likely to share their thoughts and feelings freely. We designed the experience based on an appreciation for some of the reasons that drive people to play games and adapting those lessons to the research experience.

A few key mechanics we built into the experience are the heart of making any game successful and are directly applicable to research. Game mechanics deployed in this case include:

- *The appointment dynamic*: by holding the research around a specific event, we create a sense of anticipation. A countdown timer and/or reminders sent to people remind them of the time to start. These tactics make the participation feel ephemeral and therefore special.
- *Communal discovery*: the fact that the experience is live brings people together around a single shared event. The instant community created allows each viewer to highlight issues in the watched event, flag points of interest, or problems – each person is an expert, a contributor, and a respondent. Because people are engaged in a moving, live event, they don't have time to overthink the items they are evaluating - they just act in the moment – giving very honest responses.
- *Progression dynamic*: we give people a sense of moving through an event, earning points, and receiving rewards for that progression. This progression keeps people wanting to play.
- *The enjoyment of the unexpected*: people love being surprised a little bit – and the unpredictable nature of the questions pushed in a live event keeps people involved. Participants want to share their opinions and to contribute to the conversation - just as at in real life social events.

Research know-how

Expertise is required to deliver effective results in what is a fairly unconventional research approach. Main challenges were:

- *Multiple research objectives*: The research team used both pre-defined and "on-the-fly" questions to capture feedback on a range of research topics delivering results to various show stakeholders around detailed show feedback and advertising and sponsorship effectiveness.
- *Event flow*: Questions needed to be expertly worded and appropriately timed as to not break up the flow of the event nor be a distraction to the TV broadcast itself.
- *Effective probing*: The live chat gave our expert event moderators the chance to steer conversation, probe deeper into discussion and raise new topics. Extracting rich text and emotion from participants provided powerful context to the results.

We combined these different tools subtly, all within the dynamic mobile application.

To help to understand the Oscars mobile app experience, follow-up surveys were sent to all those who agreed to take part in the TV show (including those who did not go on to participate in the mobile research part). As part of the research experiment we created a control group which completed a number of parallel follow-up questions about the Oscar TV broadcast but who did not have access to the mobile application; this enabled us to accurately compare experiences of those with and without the mobile application.

The difference in experience was significant. We found that participants involved in the research stayed tuned into the Oscars 42% longer than regular, Oscar-watching, non-participants. The participants also reported a 50% higher level of enjoyment watching the Oscars than did non-participants. Perhaps most intriguing is that 22% of the participants said that they would actually be willing to pay between $1 - $5 to participate in such an experience in the future, demonstrating how much they enjoyed it.

THIS LIVE RESEARCH APPROACH HAS BROAD APPLICATIONS BEYOND TV PROGRAMMING

Considerable excitement lies beyond TV to other 'events' as we integrate the technology into other live research opportunities. The live and highly interactive nature of the application translates the power of online focus group to the mobile platform, allowing deep insights to be captured anytime and anywhere.

We have already applied the technology to other markets, including live events such as music events (e.g. this year's Eurovision song contest), sporting events (e.g. STV's Sports Centre programme) and political events (e.g. a Leadership Debate during the recent Canadian election). At all these events, attendees with common interests come together to interact with the event and with one another facilitated via the mobile service. For example the application suite can include the ability to message and locate friends, find out latest event news and schedules and even to shape the content of the live event. In exchange the researcher can access those users who have opted in order to conduct active and/or passive research before, during, and/or after the event. The researcher, and her client, can for the first time get a very accurate view of who the audience members really are. This entertainment as research experience can also create the opportunity for longer-term interactions: our panellist-participants have enjoyed the experiences so much, they have emailed their panel providers asking to be a part of future research events – a first for the panel providers to get such email requests!

In fact, this isn't an isolated reaction. We have had consistently positive feedback that this entertaining, engaging research experience actually enhances being part of the given event. Rather than just being a spectator, the respondent feels a part of the event. A blended average of all our events in 2011 is as follows:

- 80%+ said it enhanced their enjoyment of the particular event.
- 90%+ said that they would participate again in such an activity.

It is possible to learn from respondents and have them enjoy themselves in the process.

In all these instances, we are merely providing a fun, engaging, relevant way for participants to share their thoughts and opinions. As a result, we get excellent data and outstanding levels of involvement. *We provide a value to the viewer or live event participant – an enhanced experience – and in return, we also create an atmosphere in which meaningful research can take place.*

TAPPING SHOPPERS FOR MOBILE INSIGHT IN REAL-TIME

Retail provides another prime opportunity to engage with consumers. Consumers are eager to take advantage of mobile technology for in-store price comparisons. A range of apps are enhancing shopper's activities. She can scan a barcode to see the best price for goods, or even if the price is right, a shopper may prefer to scan and order the item and have it shipped for the same price but without the hassle of carrying it home.

The live technology was adapted to tap shoppers' exobrains as well. Shopper research is about understanding consumers' shopping journeys. The greater understanding we have, the more effective we are at providing brands and retailers the information they need to be successful. The mobile phone is the ideal tool to access on this shopping journey and provides insights throughout. Mobile research tasks such as filming fridges and cupboards, store first impressions, and effectiveness of in store promotions, are already having a successful impact in shopper research. We are currently gathering data to report from this project.

SHOPPER LIVE PROJECT

Online focus groups are an established technique to gather deep insight from a group of participants PCs and laptops. "Shopper Live" takes the advantages of an online focus group and mobilise it giving us the added dimensions of:

1. the data that can be collected through a device passively (e.g. location); and
2. the layer of engagement-experience we created for Live events that provides immediate, direct perspective in the moment

With these benefits, our objectives of the Shopper Live pilot were to:

- Develop a mobile application that could passively follow actual shoppers during their normal activities;
- Engage with shoppers live, dynamically, in real stores at the point of experience, decision-making and purchase ;
- Facilitate live discussion where we could probe shoppers to a high level of detail and have the ability to set new tasks based on the input of on-looking clients;
- Enable clients to inject themselves in the research and explore issues and ideas in real-time with shoppers scattered out across the city.

What was different about the Shopper Live approach?

Current Shopper research already uses digital methods to collect consumer insight using online virtual shelves and supermarkets. We wanted to tap the new consumer norm of shoppers using their mobiles wherever they are to access and to share information. We believe this method would be superior to methods that typically rely more on different variations on simulation.

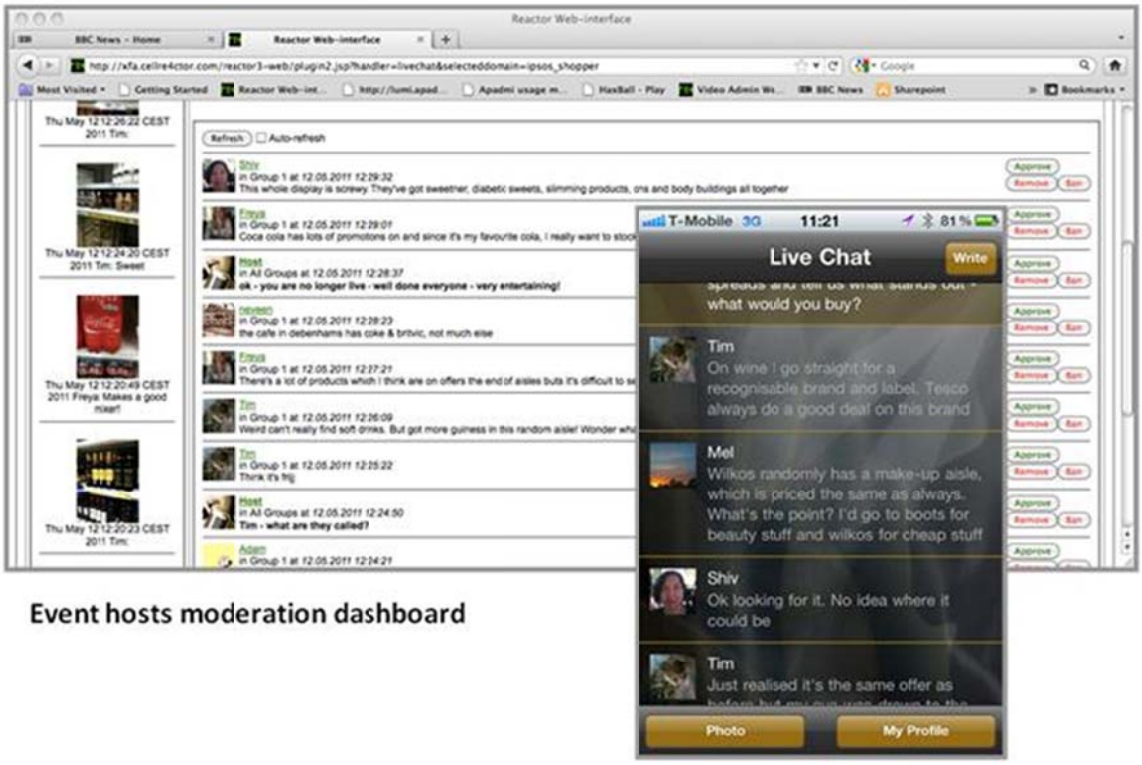
Shopper Live enables us to carry out research across different product categories, in multiple stores and across diverse geography in a single session. As we followed people by their location, one minute we were asking one shopper about store advertising effectiveness in Tesco, the next we were learning from another the shelf layout in Boots.

How 'Shopper Live' actually worked:

- Shopper downloaded the mobile application to his feature phone or smartphone (or even their tablet device – though carrying an iPad around a shop is less handy) in advance of the shopping event. Each participant set-up his profile, opted into location sharing, and added a personal photo.

- The event 'host' followed the participant's location, peering into their shopping locations.
- Host moderated discussion, posts questions, assigned tasks, pushed media to the devices and probed for deep insights.
- Participants returned comments, answered questions, posted images to add context to their responses, scanned barcodes of specific products, shared video or audio and more.
- On-looking clients fully participated in the event by observing the stream of data coming back from the shoppers, and directing the host to send new tasks.
- Transcript and all media were saved and exported for analysis and reporting. (See figure 3.)

FIGURE 3



Event hosts moderation dashboard

Shopper's mobile interface

Technology

The technology needed to support such an event required three crucial elements to be successful:

- The software tool worked across all types of mobile devices (feature phones, smartphones, and tablets) and across the range of operating systems (not just Apple's iOS, but Symbian, Blackberry, Android, Windows, etc.) to maximise the shopper pool and ensure it is fully representative.
- It allowed instant two-way interaction between mobile app users and research moderators where if the moderator pushes a comment, it appeared instantly on the screen of the shopper. The shoppers' comments were returned to the host instantly, and (as appropriate) were viewed by the other shoppers. Communication was both one-to-many and many-to-many.
- Software was designed to take full advantage of the mobile devices' features including the camera, GPS, etc. so that it could be taking passive data alongside the active dialog.

Shopper Live did make full use of the mobile device. For example, using the camera on the mobile phone we created the ability for the shopper to tag and send back photos. The ability to add a visual element is an extremely powerful way of both understanding the context and of providing pictorial evidence of exactly what the shopper is experiencing. Lumi's technology platform also made it possible to capture short video clips, scan barcodes to capture product information and send back to the event host, and follow the shoppers as they made their way from shop to shop. (See figure 4.)

FIGURE 4, COMBINING TEXT AND PICTURES

THE IMPACT OF THE SHOPPER LIVE RESEARCH – FEEDBACK FROM CLIENTS

Ipsos and Lumi Mobile recently conducted a 'Live Shopper' event with clients including Diageo, Colgate Palmolive and Reckitt Benckiser in attendance. From the moment our shoppers were in communication with our event host, clients requested tasks for them to carry out. These tasks included providing feedback on displays in the drinks aisle, finding certain products in the store and determining where people choose to go first in stores. Clients were immediately asking for photos captured to be sent to them!

Clients commented enthusiastically on the straight talking by the shoppers who were able to communicate their immediate and candid thoughts. This type of honesty is often constrained when in the presence of interviewers and clients or when consumers may have too much time to consider their answers. 'Shopper Live' proved to be an excellent tool at capturing emotion in the language sent back to uncover the immediate, unfiltered feelings of the shopper. Our event host was an expert at probing in such a way as to abstract the most insight from those participating.

The session ended with clients suggesting additional "love to have" features to the "Live Shopper" platform and looking forward to the next iteration of this mobile research product.

WITH SHOPPER LIVE – RETAILERS GAIN A NUMBER OF KEY INSIGHTS: WHAT ARE PEOPLE DOING IN A GIVEN SHOP? WHY DO THEY GO INTO A GIVEN SHOP? WHERE ELSE DO THEY SHOP?

We can gain a very precise view as respondents move within specific shops. Interior location tools allow us to see respondents move from aisle to aisle and to develop heat maps and other views of shopper behaviour. We can ask shoppers to make other active recordings such as scanning a barcode with their phone to record specific items they select or taking photos of magazine racks to note the quality of the display, its organisation and what caught their attention. We can also test the impact of specific offers and coupons in the stores to see which offers most affect shopping behaviours.

As we have mentioned, another rich component of Shopper Live is the ability to incorporate passive data collected from the respondents to further understand their shopping behaviour in general. Thus, using location-based services, we can see what shops they visit over the course of a day or a week and what shops they don't visit at all. Mobile-based research allows us to gather these layers upon layers of rich, actionable data.

SO IF THIS IS MOBILE RESEARCH 2.0 – WHAT WILL MOBILE 3.0 LOOK LIKE?

Live brings one important dimension to research that is made possible by mobile, but there are other legs to this new research platform, all of which harness the evolution of the exobrain.

The four aspects of data collection we see coming together through mobile devices are:

1. Live – as we have outlined above for TV, Shopping, or other occasions to get people's perspective in the moment;
2. Passive – gathering all of the activities that people undertake with their phones as well as learning where they are and what they are doing;
3. Biodata / neurodata – through sensors of various types gathering actual biodata from people letting us know how they are feeling at any moment;
4. Active – traditional polls, surveys, questionnaires but ones that may be triggered by other events including someone's activity, location, etc.

Mobile makes it possible to capture each of these different data streams through one device, potentially all at the same time.

And that leads us to the fifth key aspect of Mobile 3.0:

5. Data Analytics

Perhaps the biggest challenge for market research is how to identify and articulate the real insights amidst the increasing amount of rich participant generated content that mobile (and other digital techniques) produce. As the boundaries of qualitative and quantitative research blur, researchers are able to apply qualitative techniques to ever-greater numbers of respondents.

However, we believe that we must find new and more automated ways of searching this information or we risk drowning in the data we create. Of course this does not mean losing the vital skills of research experts, the skills of determining the true insight from research data and to bring the story to life. However, the increase in data quantity does necessitate a range of techniques and technologies to assist in the understanding and interpretation process. We see the solution arising in part from tagging and content management tools but also from the development of artificial intelligence to help identify key themes and help researchers learn from the content delivered.

We have already seen the power of the data we can capture and process instantly. Clients can already act on this data in the moment– changing the costume of an actor on a reality show, changing the talent, moving the location of a product. But the full potential of the insights and the ability to act on mobile device generated data can only grow.

CONCLUSION: GUIDING PRINCIPLES FOR MOBILE EVOLVED INSIGHT

This paper concludes how it starts, with the thesis that mobile research is not in total of control of its destiny but is instead in a state of constant technology affected evolution. As researchers and research technologists, we must continue to match appropriate research techniques to the opportunities made available to us through the development of mobile technology. Experts are predicting that the mobile phone and other mobile devices will play increasingly central roles in the lives of consumers.

We suggest that researchers need to follow a couple of very important rules if they are to successfully capture and mine the newly available flow of consumer information in the longer term:

1. Researchers must use the full set of features of the mobile device to create appropriate "Research as Entertainment" experiences that fit within people's mobile use habits.
2. Researchers must place the participants' interests at the centre of designing evolving mobile research experiences – when this is done properly you can tap and guide the stream of ideas and emotions that people are tending to share through other platforms

We posit that mobile, if leveraged appropriately, will become the ultimate insight tool as this technology becomes figuratively, and even potentially physically, wired into people's lives.

FOOTNOTES

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