



The Mobile Survey Landscape - Today and Tomorrow

Impacts of mobile device usage on current and future market research practices

Kinesis Survey Technologies

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Introduction

People love their mobile phones. Use of – and dependence on – these small, self-contained devices is steadily growing along with the mobile technology that powers them. As mobile phones, and in particular smartphones, get faster, smaller and more capable, mobile Internet traffic is also steadily increasing as an alternative to the traditionally PC-based web. U.S. smartphone penetration was at 23 percent in 2Q 2010¹, and U.S. mobile Internet users have grown from 50.9 million (16.7 percent of the population) in 2008 to 85.5 million (27.6 percent) this year².

From a market research standpoint, taking online surveys and participating in online research panels historically has been confined to laptops, desktops, or tablets. But with the rise of the smartphone and accelerated mobile Internet usage, the industry is presented with an additional, potentially powerful avenue to conduct market research. The market research community has voiced many objections to what is a natural evolutionary process, chief among them device limitations. Most people think of screen size and usability aspects as the primary limitations to completing surveys on a mobile device, and these are certainly key considerations. But several additional issues exist as well:

- Most older devices cannot support multiple questions per page, including the use of an *Other, specify:* field on the same page as the original question
- Flash-based question types will not render on the majority devices
- Table structures will not render on the majority of devices
- Most of the processes used today do not authenticate mobile respondents

With the rise of the smartphone and accelerated mobile Internet usage, the future of market research will include a sizeable mobile component.

While these limitations maintain a necessity for interfacing with the web on a larger and more capable PC in some instances, many research actions can be accomplished with proficiency on both smartphones and even feature phones, and thus mobile market research is burgeoning.

To address the growing need to connect with survey respondents and panelists via the mobile web, some market research software providers have introduced wireless / mobile survey software solutions. Kinesis Survey Technologies was at the forefront of this development and introduced the first mobile survey software solution in 2003. Kinesis went on to develop comprehensive “multimode” research solutions — those that can be utilized seamlessly and simultaneously regardless of the device type – since market researchers cannot definitively control what type of device respondents will use to complete surveys and access panel tools. These solutions include multimode surveys with device detection and multimode community portals.

¹ The Nielsen Company, [Retail 2015 Forecast](http://en-us.nielsen.com/content/nielsen/en_us/news/news_releases/2010/june/nielsen_unveils_retail.html). (Nielsen Press Release, June 15, 2010: http://en-us.nielsen.com/content/nielsen/en_us/news/news_releases/2010/june/nielsen_unveils_retail.html).

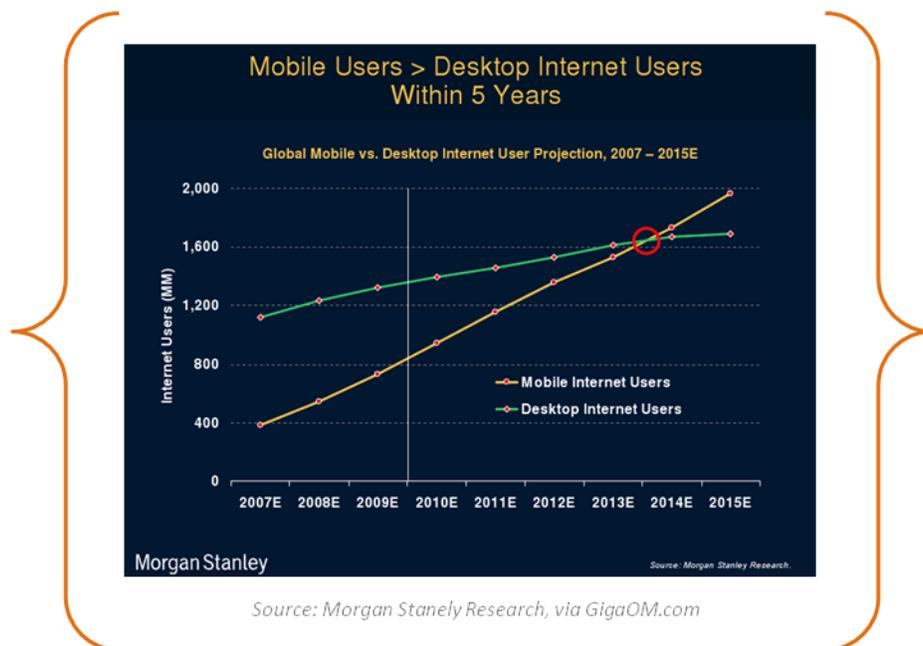
² Noah Elkin, [Seven Key Trends in Mobile](#). (eMarketer Report, September 2010).

Current Trends

Given the increasing possibility of respondents accessing surveys from a variety of devices (PCs, mobile phones, Netbooks, gaming consoles, etc.), the need arises to analyze traffic patterns so market researchers have a better understanding of current and future survey compatibility issues. As a leading online, mobile and multimode survey software solution provider, Kinesis extracted some key metrics from its own databases.

First, looking at surveys designed expressly for PC users, data was compared from 1300 random surveys. This group of surveys contained over 3.2 million responses collected between June of 2009 and June of 2010. Surveys designed for desktop and laptop usage contained an average of 220 unique question variables (not all of which were necessarily shown to each respondent), ultimately resulting in an average survey time per respondent of 10 minutes. While all of these surveys were intended for PC access, 2.0 percent of the survey sessions were created by non-standard desktop browsers (including mobile devices and other miscellaneous web-enabled electronics).

Although 98 percent of these survey sessions were generated on a PC-based device as intended, it is noteworthy that 2.0 percent were not. Mobile Internet usage is projected to increase to 101.1 million users (32.3 percent of the population) in 2011³, thus continuing the rapid growth trend seen in the last few years. In fact, more users will connect to the Internet over mobile devices than desktop PCs in as few as five years⁴. It is a certainty that the number of respondents accessing surveys intended for PCs from mobile devices will also continue to grow.



³ Noah Elkin, [Seven Key Trends in Mobile](#). (eMarketer Report, September 2010).

⁴ Mathew Ingram, [Mary Meeker: Mobile Internet will Overtake Fixed Internet](#). (GigaOm, April 12, 2010: <http://gigaom.com/2010/04/12/mary-meeker-mobile-internet-will-soon-overtake-fixed-internet/>).

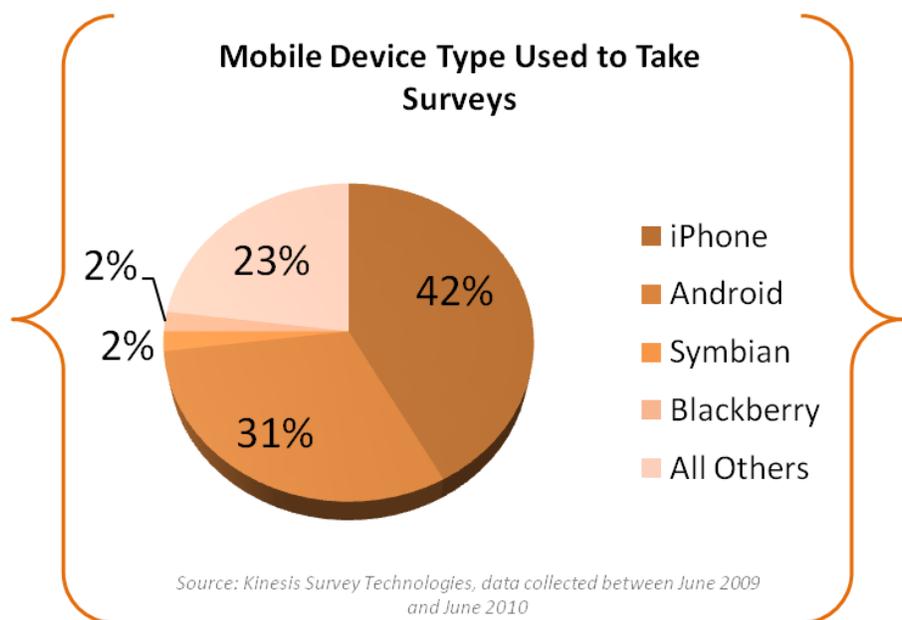
Kinesis' sampled mobile surveys contained 4.2 million responses and averaged 13 unique question variables in length, yielding an average survey completion time of just over 6 minutes.

Today there are also a significant number of surveys being developed explicitly for mobile devices. Kinesis compared mobile-specific survey traffic patterns and analyzed 144 random, large sample surveys. Surveys in this category contained over 4.2 million responses collected between June 2009 and June 2010 and averaged 13 unique question variables in length, yielding an average survey completion time of just over 6 minutes.

Drilling down deeper into mobile survey traffic, Kinesis discovered that the highest percentage of respondents accessed surveys using iPhone and Android-based devices; 42 percent and 31 percent respectively. Blackberry and Symbian users had significantly lower rates of access at 2 percent each, and all other mobile devices accounted for the remaining 23 percent of mobile survey access. While this data does not necessarily mirror mobile device market share in general, it does somewhat reflect recent market trends and supports the common assumption that it is smartphone usage that is driving growth in mobile survey-taking. BlackBerry currently has the largest U.S. smartphone market share (35 percent in 2Q 2010), but it is steadily dropping while the iPhone (28 percent) and Android (13 percent) are rapidly gaining⁵.

Certainly smartphones, and in particular touchscreen smartphones, are better suited for survey taking than feature phones. Their larger screens allow for increased visibility of survey questions and corresponding images, and result in less scrolling. Touchscreen smartphones allow for touch-click answering, and therefore offer greater survey speed than their keypad counterparts.

Still, even with discernable limitations, feature phones remain a very viable mobile device type for survey taking. While Kinesis' sampled mobile survey traffic was dominated by smartphones, feature phone users were not found to have any significant problems completing surveys. Among surveys accessed by members of mobile research panels who were using an array of mobile devices including a variety feature phones, completion rates were very high (80-90 percent) – clearly indicating successful mobile survey deployment across a broad range of device types.



⁵ Noah Elkin, *Seven Key Trends in Mobile*. (eMarketer Report, September 2010).

Future Implications

Given the steady growth of mobile Internet usage, it is encouraging that Kinesis' findings indicate a lack of any major problems with user experience while completing mobile surveys. Mobile phones are predicted to surpass PCs as the most commonly used web access device in as early as 2013⁶, and since a preponderance of market research is conducted via the Internet, it is inescapable that the online research environment expands to include the mobile web.

The integration of mobile offers a key benefit in terms of sampling. The utilization of mobile research provides an excellent mechanism to reach respondents on a broader level. Many individuals prefer their mobile phones to their computers as their primary web browser, and these people are more likely to take a survey that is delivered via their mobile device. Additionally, building a mobile research panel or expanding an existing research panel to support mobile interfacing enables panelists to be recruited across a wider demographic.

The migration to mobile devices also brings new advancements in the field of market research. These advancements include the ability to capture location-based information as a form of metadata, the immediate availability of a bar code scanner for every survey respondent, and the ability to capture responses while purchase and consumption decisions are being made. Moreover, mobile applications will enable researchers to design new collection devices for both panel and project use that further their research objectives in ways not possible when confined to PCs.

As more respondents and researchers become aware of multimode surveys, the demand will increase further because of the inherent flexibility offered to both.

The primary challenge will be control - or lack of control - as to what device respondents use to complete surveys. As Kinesis' data indicated, only a small percentage of PC-intended survey respondents utilized an alternative device. However, it seems highly likely that the rapid adoption of both smartphones and the mobile Internet will drive up this percentage in the coming years. The implementation of multimode surveys that can execute successfully on both PCs and mobile devices is the best solution to this issue. In addition, as more respondents and researchers become aware of multimode surveys, the demand will increase further because of the inherent flexibility offered to both.

Successful implementation of multimode surveys requires that the survey software include comprehensive device detection functionality. Device detection is needed to automatically identify the type and brand of each respondent's device, and then display the survey according to that device's specifications. Device detection is especially critical for mobile phones since smartphones (both touchscreen and keypad models) and the wide array of feature phones have vastly differing screen sizes and capabilities.

⁶ Brian Gammage, Daryl C. Plummer, Ed Thompson, Leslie Fiering, Hung LeHong, Frances Karamouzis, Claudio Da Rold, Kimberly Collins, William Clark, Nick Jones, Charles Smulders, Meike Escherich, Martin Reynolds, Monica Basso, [Gartner's Top Predictions for IT Organizations and Users, 2010 and Beyond: A New Balance](#). (Gartner, December 29, 2009).

Conclusion

Smartphones and mobile Internet usage are impacting virtually every industry in every corner of the world. How we communicate, send and receive information, conduct business, and entertain ourselves is evolving because of these new technologies. The market research industry cannot afford to ignore the growing implications of mobile.

As the data from Kinesis clearly shows, whether market research firms plan for it or not, millions of respondents are already accessing and successfully taking surveys from a wide variety of mobile devices. Successful researchers will embrace this growing trend – not only to offer a broader array of services to their clientele, but also to protect their ability to offer high quality results in a changing landscape of data collection methods and technologies.