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# CELEBRATING 21 YEARS OF MrWeb



This Mobile Age supplement is the second of our special issues to celebrate 21 years as MrWeb - with the first, 'Communities' issue already approaching 3,000 opens and downloads. There's been a big gap between the issues, for a variety of reasons some of which will be apparent: we hope all our readers are staying safe and your businesses coping somehow or other with the fear, difficulty and uncertainty brought by Covid-19. Nevertheless we see many things to be positive about - which we hope you'll see reflected in the mood of these pages. Indeed, the other reasons we're late to press mostly concern new projects we've been working on, including the recently announced global jobs partnership with ESOMAR, for which we have high hopes once people are actually recruiting again...

'Mobile' is a much broader subject area (even) than Online Communities and this issue pulls in what may seem disparate threads from passive metering and app usage analytics to survey optimisation and mobile-assisted ethnography. However we think it's valid as a showcase for all the innovative ways data and insights people are adapting to and exploiting the ongoing mobile device revolution. Who better to help us glue it all together than RealityMine, whose strong belief in hybrid methods and the integration of these various new areas is detailed in Chris Havemann's upbeat Introduction, starting on the next page. Thanks to Chris and all our sponsors and advertisers - we hope readers won't hesitate to get in touch with them direct or via MrWeb - and that you'll enjoy reading!

Nick Thomas, MrWeb

I've been in the market research industry for nearly 20 years now, starting with Andrew Cooper to get Research Now off the ground, encouraging and cajoling the industry to take advantage of the possibilities opened up by 'online'. At that time 'online' mostly meant web-based surveys filled in on desktop PCs, although we did experiment, very successfully, with mobile polling our online panel via SMS as far back as 2002.



Roll the clock forward to today and while DRNO remains a nightly read, a lot has changed, with the ubiquitous smartphone at the centre of a surprising amount of that change. This is fundamental to market research in so many ways, as we all know. Measuring and observing what people today are buying and what they are reading, watching, and listening to? Fundamental. Sixty seconds of scarce attention to ask a few questions, or capture some photography or video? Seeing what physical and digital journeys your opted-in research participants are actually making and where they are in the mobile, connected world? Understanding the impact of the FAANGs - not least their multidimensional 'mobile' strategies - on your clients' businesses and sectors of the economy? The list goes on.

RealityMine is delighted to be the title sponsor of this second special issue. Our business provides 'passive metering' technology to market researchers and panel owners wanting to fully understand the mobile, connected consumer - whether that be in relation to media measurement, path to purchase journeys or integrating with mobile survey technology to facilitate digital event triggered surveys. Our business like many others has been driven by the smartphone revolution, with market researchers as ever keen to keep pace with the fast changing consumer landscape. Some of those leading edge researchers are contributors to this feature, which we hope you will find both stimulating and enjoyable.

At the time of writing the world is wracked by the Covid-19 pandemic. Stay safe, and good luck exploiting the exciting new frontiers of our research world.

Chris Havemann, CEO, RealityMine

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# I. INTRODUCTION



## YOU'VE MISSED THE BOAT - BUT THEY'RE EVERY 30 MINUTES

*By Chris Havemann*

### **MFour Rolls Out DisplayCheck In-Store Measure** *February 20 2019*

Mobile research specialist MFour has launched a service called DisplayCheck, to locate consumers who are in-store while a campaign is in flight and obtain their feedback on whether displays, signage and endcaps are being seen and driving product awareness, perception and purchases.

DRNO Timeline

## The mobile revolution and the changing world of consumers and media represent a vast and continuing opportunity for market researchers, says RealityMine CEO Chris Havemann

First, let me say that I understand the frustration of those leading-edge insights types who bemoan researchers' dragging of their feet when it comes to 'going mobile'. We have not been lightning fast in seizing the opportunity this new world presents, and a lot of mobile research so far has certainly been unimaginative - mere transposing of old methods onto a mobile platform. But I don't want to argue that it's too late; and as it happens, I don't particularly want to warn that it will soon be too late, controversial 'though I may be getting here. The opportunity for anyone with good research skills and habits remains, and will remain substantial.

### What's Changed

Smartphones and mobile devices have, of course, completely changed the way the majority of people live their lives: they have become the thing *through which* many people live their lives. Thinking about how consumers behave today, people meet through their phone - Tinder perhaps - and manage their relationships through their phone; they reinforce their political opinions through their phone; educate themselves through their phone; consume media that way

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Media which I don't traditionally consume or subscribe to... are now getting readership and giving me ad exposure because I've found my way to that platform. The silos have gone.

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- disproportionately for younger demographics who are living through the world of Netflix and YouTube; and they shop through their phone. I have an 18-year-old son and he doesn't watch a lot of TV. Sport is probably the exception, and even that, he's likely to find somewhere it's streaming and watch it on his laptop. Does he use email? Not that much - more likely he'll be on WhatsApp or iMessage.

Looking at media consumption specifically, we've come from a world of media silos - where print was distinct from TV which was different to radio; and where ad currencies were driven by those media silos. But think about how it works today: I will find myself getting an email from Twitter which has a story in it which I click through, and I find myself reading an article on the Wall Street Journal for example, or Fortune... media which I don't traditionally consume or subscribe to, and they're now getting readership and giving me ad exposure because I've found my way to that platform. The silos have gone.

The proliferation of streaming, in particular, and the power of connected mobile devices, mean that the individual is as or more likely to be consuming media on a mobile device as on a television. That sounds a bit strong, but if you look at media consumption of video in Asia for younger demographics, it's particularly acute. When I think of media in India, I think of someone watching IPL cricket on an Android phone or on their laptop.

This is just one aspect of it. Media business models are also changing, such that it's no longer (mostly) a war for the advertising dollar. Take for example how firms look to monetise video. If you're providing a free streaming media service as part of a bundle, your motive for doing that is to sell subscriptions and maintain loyalty for your traditional telco / mobile telco business. If you're Netflix, you're an advertising-free platform, and planning to maintain that. Netflix are driving subscriptions based on premium content

#### 'Duopoly' Grilled over Privacy Violations February 22 2019

Facebook must answer questions from Congress about failures over the data security of users of its 'closed' health groups; and has also withdrawn its controversial Onavo VPN app. Rival Google is under fire over a hidden microphone in its 'Nest' security devices.

February 2019

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## Yes the surveys are responsive, they work on mobile devices, but they don't really take advantage of all the possibilities of mobile

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and hoping that this is sufficient to keep their business model (very) healthy. Then there are walled garden players who are driving their own agenda – each of them slightly different, whether it's Google's agenda around YouTube, Apple's around the AppleTV platform within the Apple ecosystem, or Amazon's around Prime, which is bundled with a shopping delivery service. For the researcher, that's both a challenge and an opportunity.

### How does this affect research and measurement?

Here's where I must admit that those of us who are involved in measurement are a bit behind the curve. The ongoing process of fragmentation across media and device types poses challenges and demands creative answers. In some ways, we have been 'doing mobile' for a long time: at Research Now, we were using Java mobile surveys back in the mid-2000s. Companies have managed to persist with surveys using email invitations, and yes the surveys are responsive, they work on mobile devices, but they don't really take advantage of all the possibilities of mobile – by which I mean things

like location data, mapping data, photography, video, or devices' other native capabilities – and, of course, the vast goldmine of users' actual (as distinct from self-reported) digital behaviours.

Clearly there are exceptions to this rule - the likes of Streetbees and Voxpopme spring to mind - indeed there are lots of innovators - but in general there is still a huge amount of survey research that's simply desktop research that's been migrated. Somewhat reluctantly, I think! So, what's to be done?

We mustn't just think in silos - much of the opportunity comes from combinations of techniques. Given the increasing complexity of consumer behaviour, whether that's driven by demographics or otherwise, we have to cover all the bases. Survey research is

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### What's interesting, to me, is the combination of behavioural data and survey research as it affects mobile survey research.

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here to stay: behavioural data collection is not going to supersede it, in the same way that social media listening didn't (as forecast by some) spell the end of surveys in around 2007; or that when Google launched Google Consumer Surveys it didn't - as feared - wipe out traditional online panel models or the market for survey software. What's interesting, to me, is the combination of behavioural data and survey research as it affects mobile survey research.

Behavioural data has its own advantages. If users self-report on their behaviour, sampling becomes more of a potential bias, but so do inaccuracies in recall. Provided monitoring of actual behaviour is GDPR compliant, it's very powerful. Given clear and explicit panellist consent, nothing stops you from using passive behaviour to look at what people are actually doing, how many minutes they are spending on an email application as opposed to a messaging app, which social media they actually spend longest with, and so on.

There are many examples of how to successfully combine the two. A simple one is location-based surveys - sending respondents invites to discuss things appropriate to their location right now, perhaps relating to out-of-home advertising. Or, for example, when they exit a large retailer, sending a survey about that experience. But of course, the consumer is living in a multichannel world where they are also exhibiting digital behaviour, so a survey can be timed to coincide with or follow that. Rather than assuming someone is a heavy social media user because

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#### InMobi to Invest \$100m in New TruFactor Data Business

February 26 2019

Bengaluru-based mobile marketing and ad platform InMobi Group is investing \$100m over the next three years in its newly launched data management unit, TruFactor.



they've reported that, why not actually understand that behaviour? In each case, you can also append behavioural data profiles to your survey data to build a greater understanding of who is doing your survey, and what responses actually mean in the context of real life behaviour.

### *Why MR firms are fundamentally well-positioned*

Privacy and data protection are concerns for the mobile researcher, but they aren't problems so much as a golden opportunity. Market research already operates in a strict GDPR-compliant mode globally, so we are more than believers. It's an axiom to us that if you want to capture personal behavioural data, you must make sure that the consumer who's responded perfectly understands what they've opted into. What data you're collecting, how it's being stored and processed, and for what purpose - all of these considerations.

Because we take this as a given, that immediately creates an opportunity for the MR industry, versus the digital marketing industry. A digital marketer might think for example they can simply put an SDK or an app out there to millions of people, and with a tick box permission can soon gather a mass of data - and of course that has been going on, on an industrial scale, particularly around location data. That's not our approach: a researcher says, "No - let's start with much smaller

#### **UserTesting Launches Mobile Interview Feature**

March 4 2019

In the US, customer insights platform UserTesting has launched 'Live Conversation Mobile', a feature allowing users to interview customers on their mobile devices.

Feb - Mar 2019

but genuine opt-in GDPR-compliant panels and then let's capture very, very rich data on those people". That's a traditional MR approach (going back before online panels now) - you start with a representative sample and then extrapolate that to a population.

I've seen and heard researchers wringing their hands over the way big data and new entrants have muscled in on their world of insight, and as above, yes, it has been frustrating at times. But those tick box merchants who are fast and loose with data collection consents and consumer privacy are on the way out. GDPR has been followed by CCPA in the US. Cookie-based data as we know it is rapidly drying up, accelerated by the behaviour of players like Google. We're seeing the death of the 3rd party cookie, moving to a world of 1st

party data, where you have a GDPR-compliant capture of data from the consumer.

As we know some brands are trying to build out a large 1st party data set, to market to their own customers and prospects, and some of those brands are walled garden tech giants. One of the big trends in the last few years has been the huge success of businesses like Qualtrics, who are doing C-Sat and CX type work using surveys, but actually, that leverages first party data sets. So, I'm going to talk to my customers only. What that doesn't enable them to leverage is access to competitors' customers. I might know for example that I have an NPS of 50% or 8.9 or whatever, measured just after someone completes a purchase or experiences my brand – renting a

car let's say. And my score has gone up a little bit... but is that score good?! How am I doing in my category? With a behaviour-triggered survey, on a panel you can then benchmark, you can survey people around experience across the category, so I'm not reliant just on my 1st party data to look at my own customer experience. To do that requires behavioural data collection that is GDPR-compliant and which you can leverage for survey research, at sufficient scale.

## Trends and opportunities right now

One big opportunity is in measuring new-style media consumption. Statistics like '80% of video content in Asia will soon be on mobile devices' - these tell us that the world of traditional TV ratings is clearly breaking down, as fragmentation accelerates. We need to be able to measure viewing across the different operating systems, device types and the different streaming services. Right now, look at the massive financial investments people like Disney are making in the streaming sector; and it's easy to see there's a massive gap / a huge blind spot around migration to this new media. It's a global phenomenon and we're in the early stages of that, so as much as the use of media moves, the whole measurement world will have to evolve along with that.

True, many of the world's largest market research companies have been addressing this - Nielsen and Ipsos are moving towards cross-media and de-



### GfK Rolls Out Sales Tracking App 'Performance Pulse'

March 5 2019

GfK has introduced a mobile app called 'GfK Performance Pulse', which combines POS data with its experience of working with manufacturers, to help sales teams optimise ROI during launches and promotions.

duplicated measurement for example. These MR giants are not competitors to RealityMine, but clients. We welcome the moves these major players are making, and work with them, but the point is that it's continuous - ongoing. The industry needs to try and keep pace with the rate of consumer behaviour change and media owner change, not just catch up once with something that has happened.

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The truth is, if you want to capture a lot of this behavioural data, you're only going to be able to do it - given tightening of privacy and the growing control and influence of the walled garden tech giants - via a mobile panel.

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There are more general opportunities. The research industry has been used to working with certain types of data for a long time - survey data, the outputs of qualitative research. But in the last ten years we've moved into a world of different types and shapes of data. Clearly behavioural is different - we're dealing with millions of rows of events across a panel, and we've been on a learning curve as to how

to make best use of it. Metering is not new, we've been doing it for twenty years now, starting with desktop, and we're starting to see maturity in terms of how to integrate the new data into dashboards and/or with survey research, and so on.

It's a huge opening for traditional MR, because primarily of the skills in the analytics part of the value chain. As we know a lot of agencies are doubling down on data science and the data pipeline, just because of the sheer availability of data that their clients have - but the traditional MR industry also possesses a massive asset which is its existing GDPR-compliant panels. The most future proof of these will be mobile panels, particularly those with popular native panel apps and good treatment of panellists - communication, incentives, UX, privacy - in their company DNA.

The truth is, if you want to capture a lot of this behavioural data, you're only going to be able to do it - given tightening of privacy and the growing control and influence of the walled garden tech giants - via such a panel. It gives the industry a great basis for fighting back. Insight professionals should be delving deep into the possibilities of new data, and in particular developing their own ways of bringing different types together: not because if they don't do it it'll be too late, just because that's where the interesting stuff is happening. And whenever you do decide to embrace it, you'll be pleased you did. ■



**Chris Havemann**  
RealityMine CEO

*Chris Havemann was co-founder of Research Now, the world's leading online survey data collection business within the market research industry, where he served as CEO from 2000-2011. Following his tenure, he served as CEO of Rated People from 2012-2015. He received his BSc with Joint Honours in Mathematics & Economics from the University of Surrey in 1990 and his MBA with distinction from London Business School in 1999. Chris was awarded the AIM Entrepreneur of the Year award by the London Stock Exchange in 2009. He joined the Board of RealityMine in 2016 and became its CEO two years ago.*

### **New Service Merges YouGov Profiles, IPA TouchPoints**

March 14 2019

YouGov media planning and audience segmentation tool Profiles has been combined with the IPA's TouchPoints survey, which provides an annual view of where, when and in what mood people consume media in Britain.

# THE YEAR IN MOBILE

By Mel Crowther, MrWeb



## Brandwatch Buys Public Opinion Survey App Qriously

March 28 2019

Social media intelligence firm Brandwatch has acquired London and New York-based Qriously, which offers a location-based public opinion survey app. Terms of the deal have not been disclosed.



Every year mobile technology makes big leaps forward, and user behaviour becomes more complex. Unsurprisingly, it's now a fact that there are considerably more mobile devices functioning on planet Earth than there are humans. The way data and insights professionals use mobile tech and the services they offer have seen big advances in the last 12 months as in most previous periods: here are some of them, as reported on DRNO - with apologies for skating over the surface in places and for choosing certain examples when others might serve just as well.

**Location data** has become hot property - from a privacy standpoint it may be a minefield, but there are plenty of firms prepared to thread their way through it for the riches that await. This year has been dominated by partnerships, such as that between IRI and PlacelQ, who continued to extend theirs, or new alliances such as those struck by Unacast at the turn of the year with both Mapidea and Verto Analytics; and by investment and acquisition. Consumer data giant Experian invested in PlacelQ in the summer, and later in smart mobile marketing data platform Vserv; while digital media analytics specialist Quotient bought Israel's Ubimo, and Foursquare bought rival Placed from Snapchat owner Snap Inc. in the summer, backed by a \$150m investment. DRNO reported on the launch of a 'Personalization Performance Calculator' by Localytics, and a new footfall measure in the summer by Mobiquity, which may be gearing up for a stock market listing.

This year has been dominated by partnerships, new alliances and by investment and acquisition.

Meanwhile in London, underground operator TfL announced it would use a WiFi tracking system to chart and analyse the movements of passengers, using existing beacons installed in 260 stations. There were some murmurs about privacy, true, but also some whacky statistics about the unlikely routes people take between stations, which made it all right.

**Video feedback tools** have been around for a few years now, with successful companies like Birmingham, UK-based Voxpopme scaling up their business with financing this year (in this case a £7.5m [\$9m] Series A1 round of equity financing, in September). Video feedback firm LivingLens was snapped up by sector giant Medallia in February for around \$26m in cash, while in December US-based 20|20 Research strengthened its qual offer with the acquisition of Chicago-based Over the Shoulder - you can read the thoughts of the latter's founder and EVP Ross McLean in this supplement.

New and innovative firms and product launches increasingly take advantage not only of advances in technology, but also of the ubiquity of mobile phones - not only does almost everyone have them, they're always with them, and consumers can report back on their activities actively or passively as they go or 'in the moment', improving accuracy and frequency of feedback. This year's crop have included the UK roll-out of Australian video survey platform Qualie in

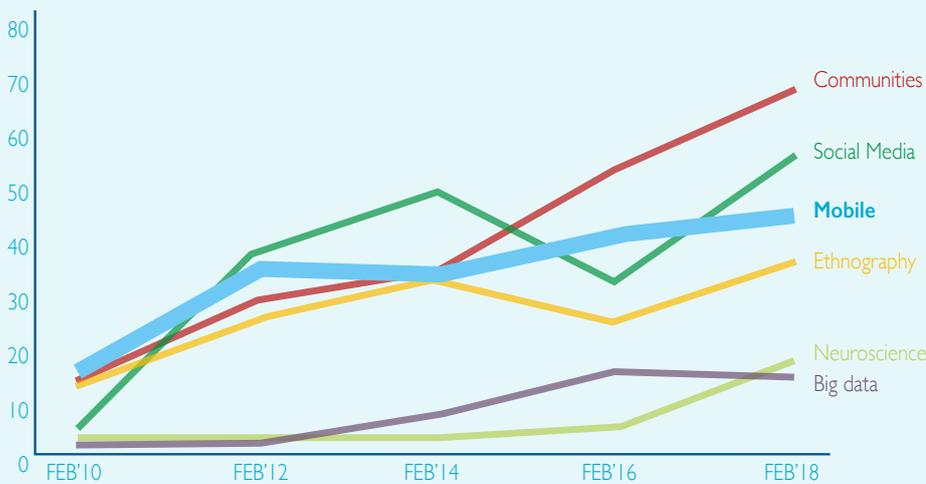
New and innovative firms and product launches increasingly take advantage not only of advances in technology, but also of the ubiquity of mobile phones

### CoolTool Launches Usability App UXReality

April 2 2019

San Francisco-based consumer research and neuromarketing platform CoolTool has launched an app called UXReality, to help clients create their own 'universe' of insights while users interact with mobile sites and apps.

Mentions of hot topics per 1,000 UK job ads on MrWeb\*



Around a year ago, there were launches for Canada's Rival Technologies - a mobile and messaging insights and engagement platform called Chat Lab (see Matt Kleinschmitt's article in this publication); for US firm UserTesting whose 'Live Conversation Mobile' allows users to interview customers on their mobile devices; and US consumer intelligence specialist Quester which added a service offering one-on-one in-home interviews via Amazon's virtual assistant Alexa. MFour quickly followed up the launch of their ExperienceCheck retail and restaurant instant feedback tool with a partnership with RealityMine in June last year, bringing together observed digital and location behavior with validated surveys in 'Connected Consumer Data'.

Here also providers are merging, acquiring and winning substantial funds for expansion. Mid-Atlantic public opinion survey app Qriously was acquired in March 2019 by UK-based social media intelligence firm Brandwatch. Finnish cross-media measurement specialist Verto Analytics has recently closed some \$16m in funds, for use in rolling out its behavioral analytics research platform in the US and Europe.

Mid-Atlantic public opinion survey app Qriously was acquired in March 2019 by UK-based social media intelligence firm Brandwatch.

Research techniques used over previous 12 months vs expectations of next 12 months\*



December, via a partnership with MMR Research Worldwide; the launch of a video response tool by MR tech and survey programming company Jibunu, in October; RealityMine's 'RealLife Social' ad tracker in October; and launches by healthcare specialist nuaxia, scaling up video capture and analysis, and US-based MFour Research, including its in-store feedback tool DisplayCheck.

More general **survey apps** continue to pour out: ZoomInfo with a b2b tool in January; Hamburg, Germany-based platform Appinio, relaunching in November; PRS INVIVO with a pack and product test using behavioral science; and in November the Facebook 'Viewpoints' app, which pays users to take part in surveys.

**Localytics Debuts 'Personalization Performance Calculator'**

April 14 2019

In the US, mobile engagement platform Localytics has launched a 'Personalization Performance Calculator', to help brands understand the level and impact of their mobile personalization efforts.



One of the busiest firms in the sector has been mobile measurement and fraud prevention firm Adjust, which opened and expanded offices / teams in the UK, Israel and Mexico; and acquired the F.O.X. smartphone ad measurement tool from its Japanese creator in October, all supported by a massive injection of funds last June, when it raised \$227m. We're pleased to include an item by UK MD Andy Chandler in this supplement, looking at the latest trends.

New tools, new teams and new offices abound, along with at least two 'new categories'. Brandwatch, with new products and senior team continued the impressive advance marked the previous year by its merger with Crimson Hexagon, and launched a new category, which it calls 'Digital Consumer Intelligence'; while fellow category-launcher Toluna continued to enhance its flagship QuickSurveys on-demand platform, helping users to create and launch complex studies - and found time to open a Media and Entertainment Practice in October.

Mobile specialists are themselves mobile - nimble enough to open offices on other continents soon after launch, evolve quickly and follow business around the globe, with Europe a key focus. This year Research on Mobile, a company started 18 months ago in Beirut, has shifted its HQ to Paris and its focus to European markets, which have overtaken MENA in its revenue count; while Melbourne, Australia-based mobile researcher MDI (originally Mobile Digital Indaba) has expanded its footprint to London and hired former

GfK NOP leader Arno Hummerston as Director for Europe.

**Cross-media audience measurement** - as discussed in Chris Havemann's article above, has continued to hit the headlines with general recognition of the need to track consumers across various platforms and devices, and to deduplicate audience figures accordingly. Comscore and Nielsen continue their attempts to address

Britain's ad currency body UKOM, after more than eight years, promising cross-device expertise grown through its provision of audience metrics for a range of other bodies including PAMCo, IPA Touchpoints and the BBC. TV audience body BARB announced that Kantar's 'Focal Meters' will now be attached to the broadband routers in panel homes, to track streaming activity by any member of the household on any device.

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Mobile specialists are themselves mobile - nimble enough to open offices on other continents soon after launch, evolve quickly and follow business around the globe, with Europe a key focus.

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this, and whilst they do so from rather different standpoints in terms of size, stability and legacy, they are both the targets of other agencies large and small, challenging their 'established' positions. Comscore continues to announce broad-based measurement contracts with US broadcast groups, and has responded to the Covid-19 crisis deftly with the launch of related products; while Nielsen has rapidly expanded its Digital Ad Ratings for YouTube's mobile app, across the world, and has recently innovated with the launch of what it claims is the world's first passive in-car measurement system, being trialled in Norway.

Meanwhile Ipsos has replaced Comscore as the official supplier for

Providers continue to partner for the **integration** of their existing platforms and data sources: for example a year ago YouGov's media planning and audience segmentation tool Profiles was integrated with the IPA's TouchPoints survey of British media consumption, allowing users to target, plan and buy their media campaigns based on a much 'richer portrait of audiences, with access to hundreds of thousands of data variables linked with seven-day diarised cross-media behaviour'.

On the **client side**, a group of advertisers including EA, Mastercard, P&G and Unilever in October announced a global initiative called the Cross Media Working Group, designed

#### MFour Launches ExperienceCheck Instant Feedback Tool *April 17 2019*

In the US, mobile research specialist MFour has launched a tool called ExperienceCheck, to help retail and restaurant brands understand what needs to be improved or optimized - from product placement to staff performance, store ambiance and checkout experience.



'to ensure the advertiser's voice is heard in decisions on cross-media measurement'.

Rising awareness of privacy issues - always referencing now on the Cambridge Analytica / Facebook scandal - has not stopped huge investment in and by companies focused on passive measurement of mobile behaviour. If this is done correctly (see Chris Havemann's Intro article again), it can stay very much on the right side of GDPR and California's CCPA, for example, while delivering very powerful data to drive the new mobile economy. US-based app metrics specialist App Annie

rebranded in September and acquired mobile analytics firm Libring, aiming to give its mobile publisher and brand clients market data and advertising analytics side by side. The same month, app engagement analyst Neura raised \$16m in a Series B round of funding for growth and development in the US and EU. RealityMine partnered with consumer and audience insights company Vividata, digital data collection specialist Delvinia, and Ipsos, to launch a passive panel 'first' in Canada; while Kantar has also been busy in the area, launching the 'Great British Podcast Tracker' last summer and subsequently partnering with voice app testing platform Pulse Labs, in the US, to

understand the motivation behind consumers' usage of voice assistant technology.

The 'Duopoly' of **Facebook and Google** seemingly have an advantage over even the largest research groups in the colossal scope of their user base and the regularity of its interaction with them, but with such power now comes great, or at least much-increased scrutiny. Facebook's privacy trials (literal and metaphorical) are well-documented, and Google - initially the quiet beneficiary of its rival's problems - has slipped up too, making headlines last year over the 'hidden microphone' in its 'Nest' security devices' (who'd

### Rival Technologies Launches Chat Lab

April 25 2019

In Canada, insight tech business Rival Technologies is launching a mobile and messaging insights and engagement platform called Chat Lab.

have thought it would be recording us eh?), and now seems as much at pains to point out to watchdogs the things it \*won't\* be doing with data, as to investors and clients the things it will. For example when it acquired exercise data wearables firm Fitbit in November for around \$2.1bn, the announcement was accompanied by assurances that users would remain 'in control of their data' and that Fitbit's health and wellness data 'would not be used for Google ads'.

We've learned that such promises need careful monitoring too: when Facebook bought the famously advertising-averse WhatsApp six years ago it was with the assurance that the latter's data would never be shared with its new parent for advertising purposes, but since then proposed changes to allow more data sharing after all have been beaten back on more than one occasion by the reaction of privacy groups and regulators. One of the less talked about downsides of the Covid-19 pandemic is the rush to use WhatsApp, online learning and other sharing services, 'because now there's no other way'. The privacy issues of such usage are the same as they always were, regardless of the pressures pushing people to run their lives through the services of walled gardens, and the amount of data that's being harvested by these mega-firms has rocketed in the last few weeks, from an already colossal base.

Unsurprisingly with these new obstacles and with the potential revenue from ad targeting, there's no shortage of brainpower being trained

on the area. Instagram's new Head of Analytics Tamar Shapiro, promoted to the role last June, leads a team of more than 150 data scientists and data engineers.

For much of the year the word on every leading edge pair of lips has been one of the proposed solutions to the privacy puzzle: **Blockchain**. Market research now has its own blockchain specialists, including data marketplace Measure Protocol, whose users can 'take control of their data' and monetize it directly with researchers, advertisers and brands, completing surveys and other data-generating tasks via an app or providing access to existing data sources such as health and location. The software now includes community functionality, courtesy of a recent partnership with insights agency Interpret who will use it to operate a video gaming community.

The marketing press, thank goodness, seem to have stopped making predictions about how 'this will be the year of mobile' (they did so every year for about a decade from 2008 onwards, seems to me), and have accepted that it's already everywhere, has grown and spread rapidly every year, and continues to boom. Insight and data providers have to find their niche within it, and combine a good understanding of the technology and its global use with exploitation of the talents they already have. The past year shows that there are some good examples out there of companies making it big in the new world - and given that it's never too late, we look forward to reporting on some new names next year. ■



Mel Crowther, MrWeb

*Mel Crowther became MrWeb's News Editor in 2006 after nearly seven years leading ORC International's marketing team in London. Since then she's gathered and written the majority of Daily Research News stories, driving and consolidating its position as 'the MR world's daily paper'.*

The marketing press, thank goodness, seem to have stopped making predictions about how 'this will be the year of mobile'

### College Pulse Gets Funds for Student Platform

April 25 2019

In the US, College Pulse has raised \$1.5m in a seed round of funding, as it launches a real-time analytics platform to track and predict the opinions, interests and buying behaviour of US college students.

April 2019

# 2. THE OPPORTUNITY

## PODCAST in conversation: ROSS MCLEAN

Listen to the whole podcast at  
<https://happymr.com/ross-mclean>.

After working on the marketing agency side overseeing brand strategy for people like Kraft mac n cheese, jello, Lunchables and KFC, Ross McLean founded Over the Shoulder as a qualitative research app for diary-like studies, and sold it in December of last year to 20|20 Research. Among other things, here's what happened in between those last two.



ROSS MCLEAN  
20|20 RESEARCH

### Quester Adds Alexa Interview 'Skill'

May 21 2019

In the US, consumer intelligence company Quester has launched a service using Amazon's virtual assistant Alexa to conduct one-on-one interviews with consumers in households with smart speakers.

## Empathy or Bust

**RML:** My dad was a marketing guy for a big company in Canada and I think I learned a lot just from observation and from his stories, what the world was like and how it worked: but I think what affected me most was probably empathy - he was very, very big on 'Don't ever judge anyone until you've walked a mile in their shoes'. Even if they're difficult or objectionable, get their perspective and then you can go forward. He made me curious about consumers and why people do the things they do, and that's stuck with me for life.

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'Don't ever judge anyone until you've walked a mile in their shoes'.

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**JB:** How does empathy play into research?

**RML:** I think it's fundamental. I've spent my career more on the qual than the quant side, and I think specifically for qual it's an empathy-based process. What you're trying to achieve is - even if they disagree with you, that you understand exactly how they feel and why they feel that way. It's crucial in marketing because I've always thought you can't cynically market anything to anybody - you've got to have a little respect for the people that you're talking to and if you do that you're going to naturally be much better at communicating with them, and say things that are going to be meaningful.

## Coke and a Smile

**RML:** If you're succeeding it's because you're leveraging empathy at some level, and there are examples where we've had a definite advantage over our competitors because we knew the story much better than anybody else... I've also worked in places where people were cynical about their target audiences, and I've seen people flounder because they didn't have empathy and sometimes didn't even seem to want it. It's essential to build bonds and connections...

**JB:** Coca-Cola seems like a brand who do a tremendous job - it just has a seat at the table, almost like product placement... they're just there at the moments.

**RML:** Yeah to me that's a really good example. I remember a time when Coke and Pepsi were really vying for the market, 49% and 51%, and Coke has done a good job of really understanding their brand, really understanding their consumers and how they fit into people's lives, and just amplifying those kinds of moments. It's not just their ads: their packaging and promotion and their digital stuff all come from [the same] place... they know what they're about and what their consumer is about. They're not just saying 'here's where we're about, do you want to be a part of it?' - but really knowing that the answer is Yes, because they understand their consumer.

## Looking Back at Over the Shoulder

**RML:** The company was started 10-11 years ago, by a bunch of strategists, qual researchers and ethnographers. Around about the time when smartphones exploded onto the scene, we spent a lot of time doing traditional style research. Occasionally we did a few ethnographies but they are expensive and don't always get selected: but we wanted to do ethnographies, because we felt like 'when we get out into the world and we see these moments, see these experiences and see people's lives from their own perspective, as opposed to having them describe it in a focus group, we always learn more and always understand more'.

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When smartphones came along, we said 'Oh My Gosh, everyone's going to have one of these, they're going to be carrying them 24/7' - and someone needs to write the software that will allow us to ride along in people's pockets

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### London Underground to Track Passenger Movements Using WiFi May 24 2019

London Underground operator TfL has announced it will use a WiFi tracking system to chart and analyse the movements of passengers, using existing wifi beacons installed in 260 stations. The move follows a pilot exercise in 2016 which focused on 54 stations and saw data collected from 5.6m mobile devices.

When smartphones came along, we said 'Oh My Gosh, everyone's going to have one of these, they're going to be carrying them 24/7' - and someone needs to write the software that will allow us to ride along in people's pockets with them, interact richly and qualitatively with them, but in the moment and over time. I remember doing a project for a big middle American restaurant, who asked 'what does mid-week dinner look like for our target audience?' - they didn't know - so we did a project where we put together all these self-addressed FedEx envelopes, stuck together flip cameras and SD cards and envelopes that said things like 'don't open this up until you're just about to sit down and have dinner one night this week', just to try and get in and desperately see what's going on in these people's worlds.

Someone's Blackberry was sitting there, and we were thinking 'this process is going to be massively more powerful when instead of FedEx back and forth we're doing it through the devices that people are carrying with them as they go about their regular lives'. There wasn't really any software that did that, so we kind of put together a flier, pulled some money together, just a pretty small amount, just put a platform together so we could start playing with it and testing it. To see if we were right, if this was actually going to be more insightful, because we weren't sure if it was going to work.

## Growth and Security

**RML:** For the first 4 years we were the researchers and the analysts and the strategic consultants and we developed the software, and did over 400 projects, way back before people were really doing this kind of stuff. At the start, we bumped into every sharp object out there. We had to figure out how to do it, it was different from face-to-face qual, it was different from just about anything else out there. We learned every lesson and improved the software dramatically, improved the user experience which is the most important thing to get right. We learned how to create the assignments so they would really engage people and they would kind of have fun and it would drive their

just called, they realised it's actually beneficial to be just 3 taps away from your consumer and be able to interact with them in this way.

The first sign that you're onto a good idea is you get a lot of competition, and we ended up with a whole lot of competition, to say nothing of the online competition that was already there when we jumped in. Now there were companies with hundreds of employees, and we looked at it and said 'In that space it's going to be increasingly hard for a little software company, highly specialised, to continue to develop, so the 20|20 thing was great, because it just puts OTS alongside some other fantastic online qual software like QualBoard and QualMeeting... brings recruiting... makes

It was different from just about anything else out there. We learned every lesson and improved the software dramatically, improved the user experience which is the most important thing to get right.

creativity and imagination and the emotional side of it. We learned how to recruit, incentivise them, how to keep them engaged. Scroll forward to 2018-19 and the situation had changed: I remember in the beginning people seeing our presentations would say 'That's amazing, very cool, and then they would never call because they just weren't ready for it.

...then by about 4 years ago we didn't do presentations any more because people

it easier, smoother and better through 20|20, with a ton of resources we didn't use to have. So in addition to a great bunch of people that we really respect, they also have scale, and sales teams and marketing structure, we're going to be a lot more competitive because we're part of that and have access to it. We've said: OK that was fun, we had a great decade but as we look to the next one we've got to be set up differently to make sure that we're still one of the viable players at the end of it.

### Massive Expansion for Nielsen's YouTube Mobile Measure

June 3 2019

Nielsen is extending its Digital Ad Ratings for YouTube's mobile app to 26 more countries, bringing the total to 34.

## The Next 5 Years

**JB:** what is going to be different in our space over the next 5 years... will there be another 'Blackberry on the dining table' moment?

**RML:** Yes I suspect there probably will, I don't know that there's anything that's as big as the smartphone, but there's certainly other bits of tech that can be leveraged to do better qualitative, so I think it's an exciting future. There's a lot of work we have to do to make sure it's as quick as we can [make it] without sacrificing the quality that's out there. If you put a 5-year time limit on it, I think it will look quite different, because I think there are a couple of reckonings that we're going to have, and I think they'll happen mostly in the next 5 years.

One thing is taking blockchain and applying it to respondent identity and credibility, that's going to be big and positive; the reckoning that we have to have now is yeah, online surveys are very efficient and we have lots of ways to hold them together and make them happen, but I think we are also realising that there's a lot of bad data in there, and this space really needs to be reformed so we have greater confidence in the data.

I think that reckoning is coming for us, and we can do that, but the other big one that I think about a lot is, right now, as an industry, we're using people's data very liberally and paying them very little, people will have more control over their data and they're starting to

There's certainly other bits of tech that can be leveraged to do better qualitative, so I think it's an exciting future.

realise how much it's worth, and I don't think we'll be able to do quick cheap and cheerful stuff as we used to. We think if you're going to take two hours of a person's time to put into a project, you need to be respectful of how much they've put into it. In a lot of cases consumers are forking over data without having any idea what the value is, and I think that's going to change. In future the work that's being done is smarter and better, but the process of getting there might not be very easy, and those two things are going to both pop up in the next five years.

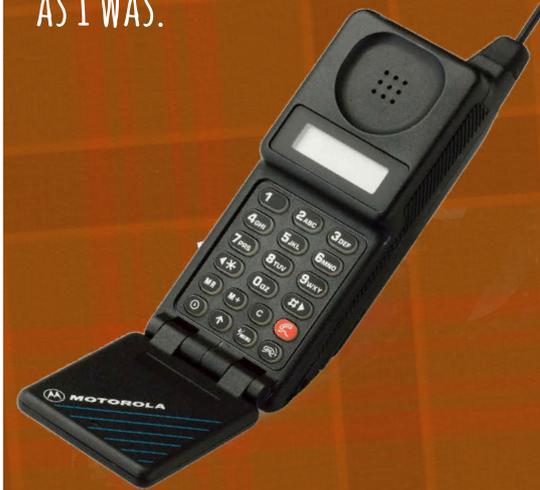
... ultimately I think it's going to be better and fairer, but I think it's going to hurt getting there. ■



Ross was interviewed by Jamin Brazil of Happy Market Research

## MY FIRST MOBILE PHONE... ROSS MCLEAN

MY FIRST MOBILE WAS A MOTOROLA SOMETHING-OR-OTHER, ISSUED TO ME C.1994. ONE TIME WHEN I WAS IN PAISLEY, SCOTLAND, I USED IT TO CALL MY GRANDMOTHER, BECAUSE THAT'S WHERE SHE MIGRATED FROM AS A CHILD. HOWEVER, SHE WASN'T NEARLY AS GEEKED OUT ABOUT IT AS I WAS.



THIS MAY NOT BE THE EXACT MODEL, BUT IT LOOKED SOMETHING LIKE THIS...

### Location Data Firms Combine as Snap Sells

June 3 2019

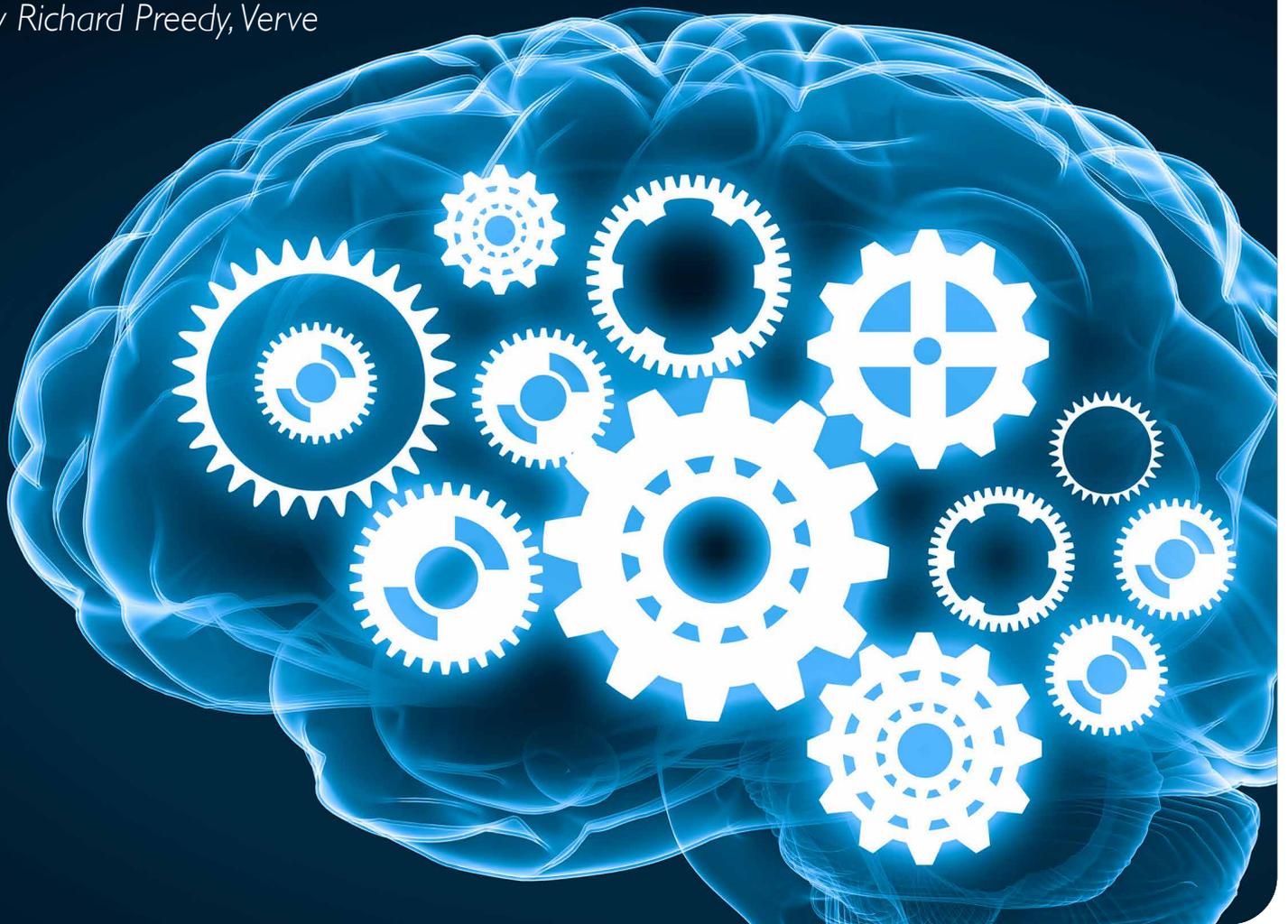
Location intelligence provider Foursquare is acquiring rival technology Placed from Snapchat owner Snap Inc. Funding for the deal will come from a \$150m investment in Foursquare by merchant bank The Raine Group.

June 2019

# ACCURACY AND AUTHENTICITY

## HOW SMARTPHONES REVOLUTIONISED RESEARCH

by Richard Preedy, Verve



### Instagram Names Head of Analytics

June 7 2019

In the US, Facebook-owned photo and video-sharing service Instagram has promoted Tamar Shapiro to the role of Head of Analytics, leading a team of more than 150 data scientists and data engineers.

The research world today is full of technology-led approaches that claim to help us understand consumer behaviour like never before, from machine-learning to conversational AI and the voice economy.

So, it's easy to lose sight of the fact that perhaps the most revolutionary development for research in general and community panels specifically, is the smartphone - and there are a couple of standout reasons why this has been so important for us.

Most of the work we do at Verve is via project-based pop-up communities and on-going community panels. Smartphones mean that every customer who's also a community panel member always has a research tool with them, enabling us to talk to them whenever and wherever they are.

The significance of smartphones in people's lives now also makes mobile approaches the most pertinent way of accessing, observing and interacting with them. This isn't just about finding acceptable alternative approaches because online and on-mobile are more cost-effective: it's about gathering better data.

We've known for a long time in research that humans are notoriously unreliable when it comes to remembering behaviour and relating it accurately. Psychologist Daniel Kahnemann helped explain this, identifying the difference between the experiencing self ('What's it like now?') and the remembering self ('How was it on the whole?').

Confusing the experience with the memory of that experience can be deceptive, so the remembering self tends to win out. The reason for this is the 'peak-end rule' - people judge an experience largely on how they felt at its peak (i.e. its most intense point, the worst or best moments) and at its end, rather than the total sum or average of the experience.

This has fairly significant implications for considering when and how to best gather consumer experiences. Add smartphones to the mix though and, using push notifications or time/event/location triggers, we can get an instant understanding of what people are doing and how they feel about it, making research more timely, more authentic and more accurate.

And what does this mean in terms of the work we do with our clients?

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People judge an experience largely on how they felt at its peak (i.e. its most intense point, the worst or best moments) and at its end.

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Richard Preedy,  
Verve

*Richard is joint head of the research team in the UK. He joined Verve in 2014 and has 14 years of research experience from running large-scale global brand, experience and innovation programmes. He works across a range of categories, including financial services, lifestyle and tech brands to deliver customer communities and broader strategic research projects. He has a particular interest in how customer-brand relationships and service delivery are evolving in the digital age and how this technology can deliver a fuller understanding of consumer behaviour and underlying needs.*

#### **Mobiquity Launches AdTribute Footfall Measure** June 11 2019

In New York, programmatic ad tech provider Mobiquity Technologies has launched a measurement tool called AdTribute, to help marketers identify in-store, bricks-and-mortar footfall as a result of exposure to digital advertising.

June 2019



Working with a major airline, we ran a community panel project to overcome memory biases, recording feedback and emotions during the whole flight experience, including the peaks and troughs that occur along the way. Using an app, we gathered customers' moments, thoughts, feelings and experiences of travelling with the airline over the Christmas period, played back as it happened through imagery, text and video. In doing this we built a view of how satisfied customers were and what was driving that at an emotional level - based on the experiencing self not the remembering self.

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Enabling customers to interact and respond in a way that is genuine, natural and aligned with their 'typical' behaviour provides us with a clear window

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Capturing feedback in such a timely way also creates greater authenticity. Enabling customers to interact and respond in a way that is genuine, natural and aligned with their 'typical' behaviour provides us with a clear window to observe the experiences they're having in their day-to-day lives.

The impact this can have on quality of insight is huge. Partnering with an organisation representing the worldwide music industry, we ran a

**Kantar 'Focal Meters' Added to BARB Panel Homes** *June 11 2019*

BARB, the UK television audience measurement currency, has commissioned Kantar to install its 'Focal Meters' technology into the BARB panel of homes. The tech will track streaming activity by any member of the household on any device.



music diary and pop up community with Chinese consumers to get closer to the role music plays in their lives. Gathering rich multimedia content about their experiences via mobile allowed us to build a detailed understanding of how lifestyle and culture influence the success of music streaming for this culturally and geographically diverse market. And it's a concept that extends to all kinds of groups, making hard-to-reach audiences much less hard-to-reach. From talking to tradesmen about their experiences in builders' merchants to developing an ad campaign with C-Suite and ITDMs across Europe - all in a way that allowed the respondent to be in control of when and how they interact.

In fact, having consumers (almost) always in the possession of their smartphone means it is much easier to gather more accurate insight from multiple places at multiple points in time. This could be as simple as recording how someone is interacting with a product or service at multiple stages over a long period. We've also worked with an energy provider to capture exposure and reactions to digital, print, TV and outdoor advertising as people go about their typical week of commuting, working, relaxing and socialising. The presence of their smartphone throughout their day makes it the perfect data collection tool.

Still thinking about this greater accuracy, one interesting benefit of smartphones is getting closer to understanding the perception versus reality of a situation.

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## For us, in-the-moment research via smartphones is the now and the future of community panels.

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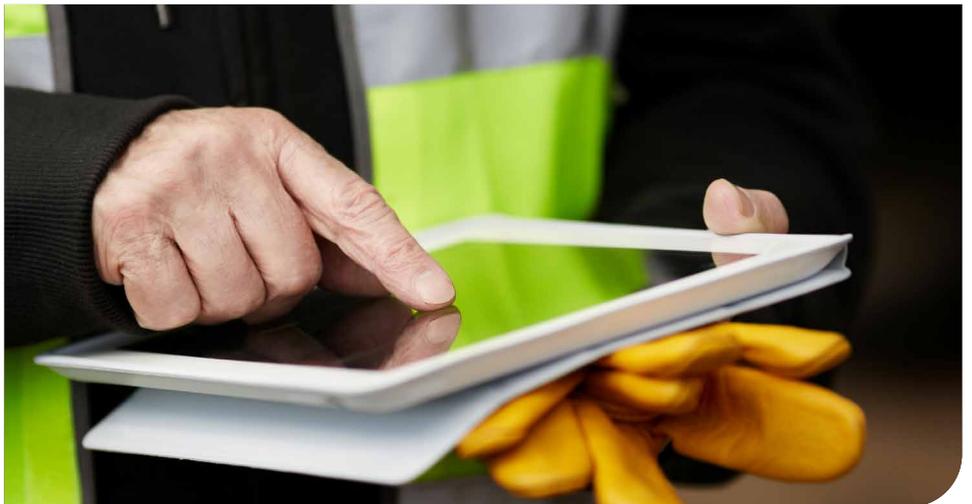
We ran a project with a mobile communication provider to compare consumers' perception of network capability with actual network coverage. With permission, we used cookies to capture background phone data,

then gathered feedback on coverage and service issues, allowing us to

determine whether it was 'perception or reception' driving the problem.

For us, in-the-moment research via smartphones is the now and the future of community panels. Having large groups of customers who see the value of sharing their experiences and feedback and being able to access them whenever and wherever they are is incredibly powerful.

Smartphones are not just another channel via which to reach those people and they're not just a good alternative, they enable us to get better information and do better research - more accurate, more authentic and more timely. ■




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From talking to tradesmen about their experiences in builders' merchants to developing an ad campaign with C-Suite and ITDMs across Europe - all in a way that allowed the respondent to be in control of when and how they interact.

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### RealityMine and MFour Offer 'Connected Consumer Data' June 18 2019

Mobile research firms RealityMine and MFour have partnered to launch a solution called 'Connected Consumer Data', providing clients with a single-source continuous data set that combines observed digital and location behavior with validated surveys.

June 2019

# 3. BEST PRACTICE



## 7 STEPS TO A BETTER MOBILE SURVEY

by Dennis Sewberath, QuenchTec

QuenchTec Survey Designer Dennis Sewberath highlights seven ways to turn a survey into a 'beautiful conversation', for the sake of better feedback and higher completion rates.

If we want better feedback and higher completion rates we should aim to make a survey a 'beautiful conversation'. First we need to realise what's important and why.

### **It's critical we update our surveys for online and mobile research**

We all face difficulties reaching certain target groups. If we find them, we can get a low response in terms of people even starting the survey. And if we finally get them participating we have another challenge to keep them going and make sure they complete the survey. High dropouts occur because surveys are not mobile friendly, too long, not engaging / boring, with a lot of repetition... and they're not personal enough.

### **We can't afford not to change**

We need to think and feel differently about setting up our surveys. Often we think in terms of just scripting them: we need to think more about designing them.

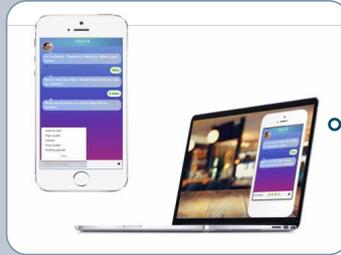
### **Corporate Insight Expands US Healthcare Research Suite** *June 20 2019*

US customer experience research specialist Corporate Insight has launched two new products: the Health System Monitor, which analyses patients' digital journeys; and Health Plan Mobile Audit, to benchmark analysis of insurers' mobile app experience.

Here's our easy 7-step checklist to make sure we create the best type of survey.

## 1. Make it Device Friendly

We can't predict what kind of device, operating system or screen size someone is using. Therefore we need to design our survey for all kind of devices and screen sizes. Participants can choose their preferred device.



## 2. Think about how to reach people

There are lots of options: Panel Integration, SMS invites, Mail invites, Inline popup, Embed in surveys, websites, social media, QR Code, URL (client base or social media). And put some effort into your invitation: it's the first contact you have with them, so make it interesting, get people curious and willing to take part.



## 4. Work on the content

We need to motivate people to take the time to read and think before answering your questions, so make it interesting and challenge people. Ask only what you really need and try to write questions the way you would speak them.

Improve survey flow, by grouping and combining questions, Add extra screens, autofill and auto next where possible; provide instant feedback and show progress; split surveys and use blocks of questions

## 3. Pitch it for your target group

Respondents are real people, so don't just fire computerized questions, or people will just tick off the answers! Make it more human and personal. When something is personal people feel more engaged. Set the right stage and tone of voice.

## 6. Make the most of the options for layout

In contrast to traditional surveys where you normally move from one page to another, there are a variety of different layout options now: for example rollover screens, leaflets, one page, card based, etc. which make surveys seamless, intuitive, easier to digest and much faster and more effective to fill in.

## 5. Design It!

Make it visually attractive and content driven. Visuals engage and commit people. Use visuals and icons for a reason: just adding a smiley or incorrect representation of an icon/brand/logo can lead to wrong interpretation.



## 7. Get the right question types

Use question types that capture the right type of information - and don't add interactive question types just for fun. Repetition of the same type of question can makes a survey less interesting and mean that people lose their concentration. Question types must also be device agnostic: this does not (just) mean responsive or adaptive design so that surveys look great on each device, it's all about getting the exact same look and feel on each device. You don't want different experiences to influence behaviour in how people fill in your survey.

### Brandwatch Debuts New Product, Claims 'New Category' June 25 2019

Social media monitoring firm Brandwatch claims to have launched a new category called 'Digital Consumer Intelligence', which combines social media, (other) digital, survey and first-party data and applies artificial intelligence and data science techniques to generate new customer insights.

June 2019



## Dennis Sewberath, QuenchTec

*Dennis Sewberath joined London-based MR tech company QuenchTec last summer, with twenty years' experience in research including spells as a Programmer at Synovate, then as Creative Research Director at Lightspeed and Chief Design Officer at MSI-ACI. With a passion for making survey design a priority and developing creative approaches for more engaging survey experiences, he has also worked as an independent consultant focusing on the development of interactive survey applications.*

## Conversation design

Conversation design is not just a new idea or hype: it's the correct way to communicate with your participants. In particular, don't just fire computerized questions at them. Make it personal and set the right tone of voice. People will appreciate this and give valuable feedback in return!

To set up the right type of conversation we need to understand what has changed in the last decade in our behaviour.

**Life has changed:** we want everything, now, always and everywhere. We don't have time, and we don't take the time. We are distracted quickly and have a short attention span, therefore long surveys are not working like they used to. A survey longer than 15 minutes results automatically in higher dropouts.

**Our device usage has changed:** mobile phones are no longer something for use when on the move. At home laptops and PCs are often replaced by smartphones and tablets. If people want to do something on the Internet, they want to do it on their mobile device too. Period. So this is the same for online surveys.

Take a mobile-first design approach - but don't be limited to mobile devices only! Mobile is not the light version of your survey. Mobile forces you to better survey design even if you not decide to go for mobile. When it works for small screens it also works for large screens.

**Online content has changed:** from text to visual content-driven. A survey

needs to be visually attractive to engage and commit people. By applying small adjustments in wordings and visuals in your survey you can already create huge improvements. Be creative with using question types that capture the right type of information: there are more solutions and features available than just straightforward questions. A grid question doesn't work on a small screen but using a carousel or swipe layout for the grid is ideal for any type of screen.

### How we communicate has

**changed:** we have more choices how to communicate and how we reach people, traditionally by email invites but also by push notifications, SMS, inline popups or messengers. Through the use of all these chat messengers and social media, we all communicate in a new and different style: much faster and shorter, and when and where we want.

We can apply the same technique to surveys: turning your questions into a chat session fits exactly how we communicate, which is why at QuenchTec we created our Chatbot SurveyBuilder - see the box to the right. A tool like this will help you follow the ideas above and make the most of the potential of this new world, but we can all achieve better feedback and higher completion rates just by thinking about and planning for those beautiful conversations. ■

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We want everything,  
now, always and  
everywhere.

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### New Funds for Mobile Measurement Firm Adjust June 27 2019

Mobile measurement and fraud prevention specialist Adjust has raised \$227m in a new round of funding, which it will use to further develop its product suite and to expand its presence in new and existing regions.

We have more choices how to communicate and how we reach people, traditionally by email invites but also by push notifications, SMS, inline popups or messengers.

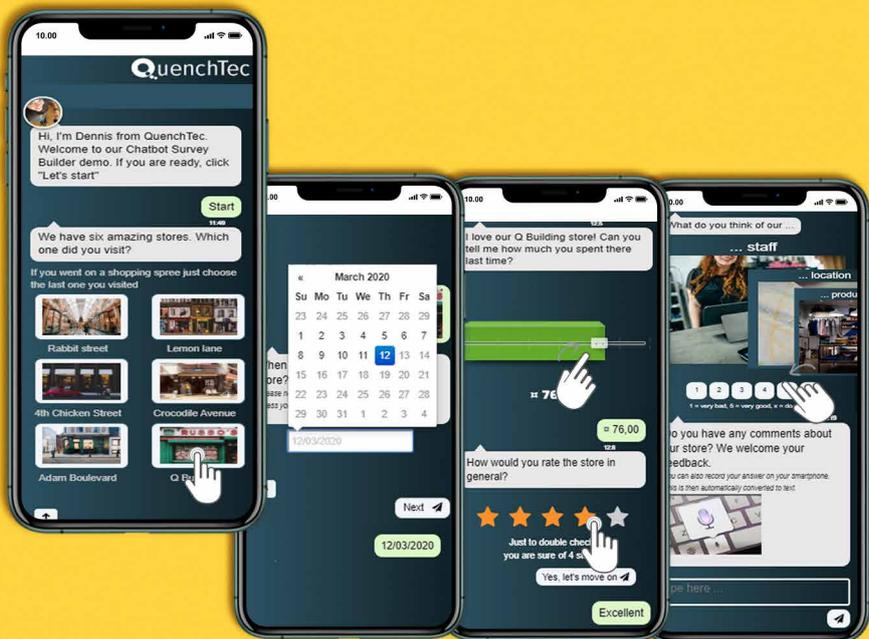
### Chatbot SurveyBuilder

Nowadays you see a lot of chatbots which you can use or add to your website. These chatbot platforms are created to improve customer service, but they are all set up for chatting, not with a focus on data collection and reporting. With QuenchTec Chatbot SurveyBuilder you create your survey with all its interactive question types (video/photo upload, sliders, carousels, star ratings), logic, filtering, quotas, redirect links, etc. as you always do. Including all your panel, sampling, data exports and processing, reporting and dashboarding. You only need to select the chatbot module to turn your survey into a chatbot design.

More information and demo at:  
[www.quenchtec.com/chatbot-survey-builder](http://www.quenchtec.com/chatbot-survey-builder)



## From question to conversation



[quenchtec.com](http://quenchtec.com)

### Get better feedback with our Chatbot SurveyBuilder

#### PRS IN VIVO Launches Pack and Product Test

July 29 2019

Consumer insights firm PRS IN VIVO has launched the BEQual Toolkit, which applies behavioral science to projective qualitative research techniques using tablets and real-time feedback.



# DELIVERING GREAT MOBILE QUALITATIVE: FOUR KEYS TO SUCCESS

by Ross McLean, 20|20 Research



This has already been an interesting year for us, with our acquisition by 20|20 Research, which has brought the best qualitative platforms together with great recruiting and other project expertise to make online qual easier and better for practitioners.

One thing we didn't plan for was what happened when we combined Over the Shoulder's pool of smartphone research designers with the research management team at 20|20. Vigorous discussion and debate began immediately around the topic of how to best design online and mobile projects for maximum participant engagement and the best possible insight. Designers with decades of experience in online qualitative of all types compared notes. Tips and tricks began to fly, and we decided to boil down the best of it into this list of four crucial tips for great mobile qualitative.

## RealityMine Adds Five to Manchester Team

July 31 2019

Mobile research technology firm RealityMine has added five new members of staff to its Manchester team.

## Tip #1: Design Your Project to be Entertaining and Engaging

The best mobile qualitative leverages the enjoyment participants get out of telling their stories and sharing their truths. Your study design should always reflect this. So:

- ‘De-formalize’ and ‘conversationalize’ your language. This ensures your participants feel comfortable and know there really is a true human at the other end of the research.
- Fill your study with ‘Easter Egg’ questions. These fun tidbits can provide moments of levity and little emotional rewards to participants
- Use a platform that lets you set up logic to give real-time acknowledgement to your participants. For example, if you

ask a participant to rate their test-drive experience from ‘Amazing’ to ‘Disappointing’ and they chose ‘Disappointing’, following up with ‘Oh no! What do you mean when you say ‘Disappointing?’ makes participants feel like they’re engaging with someone who really wants to hear what they have to say, not a machine.

- Use emoticons to let participants express themselves, and use them

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Fill your study with ‘Easter Egg’ questions. These fun tidbits can provide moments of levity and little emotional rewards to participants

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in your design for standout, visual appeal and clarity.

- If you include scales, remember that having your participants rate the moment they’ve just experienced on a scale of ‘Best time ever’ through ‘Major bummer’ is more fun and conducive to emotional disclosure than rating it on a scale of ‘1-7, with 7 being extremely satisfactory.’

Just about any project (whether it’s a board, smartphone qualitative or something else) can be designed to be engaging to interact with, and the insights you get back get better when your project is inclusive and fun.

## Tip #2: Always Participate in an On-Device Test Before You Launch

Seriously. We never let a study we’ve designed and built for a client go into the field without its designer going through it on their own smartphone (NOT an on-screen emulator).

Even our most experienced project designers, who have designed hundreds of digital and smartphone qualitative projects for our clients, will tell you they almost invariably learn something from doing an on-device test. Often it’s something that can make the participant experience of your project better and the project more successful. Not to mention that walking through your study on the same device your participants will use will instantly reveal if you’ve broken tip #1. Plus, knowing

### Kantar to Launch GB Podcast Tracker August 19 2019

Kantar is launching the ‘Great British Podcast Tracker’, billed as the country’s ‘first longitudinal service’ measuring consumer behaviour and attitudes to podcasts and providing a continuous, representative, single source of insight, from September.





Ross McLean,  
Vice President, Mobile  
Qualitative at 20|20  
Research

*Smartphone-based mobile ethnography platform Over the Shoulder, of which Ross was co-founder, was recently acquired by 20|20 Research, developer of research software and services including QualBoard and QualMeeting*

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Asking for an in-store selfie video will make them uncomfortable (or should we say ‘even more uncomfortable’).

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what it feels like to be on the receiving end of your assignments, journals, and questions will definitely make you a better project designer:

### *Tip #3: Use Media Wisely to Allow Participants to Easily and Comfortably Express Themselves.*

One of the most exciting things about mobile qualitative is obviously the ability to submit beautiful ‘selfie’ videos in answer to your questions. And there’s no doubt that a great in-the-moment HD video can be an insightful showstopper in a presentation.

But video isn’t the right capture medium in all situations. For example, if you’ve sent your hemorrhoid-suffering participants into the drug store to check out the shelves and tell you about the product that’s most relevant to them and why, asking for an in-store selfie video will make them uncomfortable (or should we say ‘even more uncomfortable’). But they can easily take a photo of the product that’s doing the best job of addressing their current needs, then hold their phone up to their ear (feigning a phone call) and make an audio recording telling you about the thought process that made the product stand out and be chosen. You’ll get far better insights for it, not to mention better compliance. More thoughts on choosing the right media can be found in ‘In praise of audio recordings’.

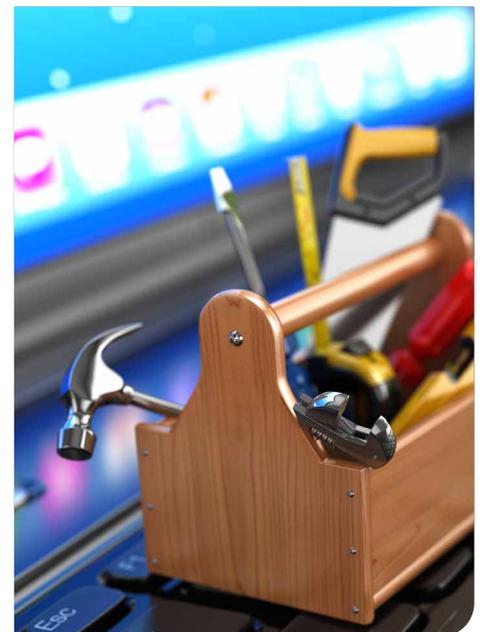
### *Tip #4: Choose the Tool that Best Matches your Project’s Needs*

For example, if the most important element of your project is extensive, in-the-moment journaling that includes

multiple instructions, logic, a photo and a video, go with a dedicated smartphone app. A well-designed smartphone qualitative app puts your participants as little as three screen taps away from sharing their real life with you as it happens. And that makes a big difference to how much of their reality you see and can learn from.

On the other hand, if your project relies on group interaction, or requires activities that are well-suited for desktop as well as mobile, consider a community message board. These online discussion platforms are constantly adding powerful new features and functionality so it’s important to know what’s out there and what will deliver the findings you’re looking for. Another option? Think through your activities and consider a combination of tools to get the right mix of insights.

With the power of smartphones, it’s easy to be with your desired audience at the moments that matter to your research. These four tips can help ensure you design a study that makes the most of the power that a mobile device provides, so you can deliver the right insights, every time. ■



# 20|20

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# MY FIRST MOBILE PHONE...

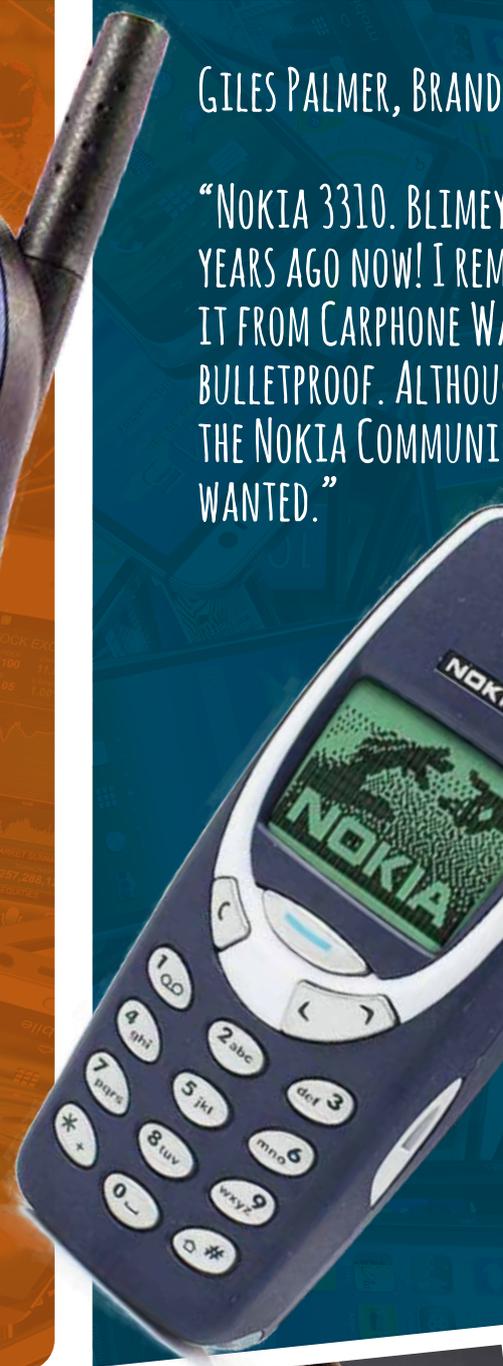
RICHARD PREEDY, VERVE

“IT WAS THE PHILIPS SAVVY (NOPE, ME NEITHER) IN A FETCHING BLUE COLOUR. BOUGHT IN THE YEAR 2000. I WAS IN MY FIRST SUMMER BREAK DURING UNIVERSITY AND BOUGHT THIS AS A DESPERATE ATTEMPT TO CATCH UP & FIT IN WITH OTHER STUDENTS. THIS DIDN'T HELP. SHOULD REALLY HAVE BOUGHT A NOKIA”.



GILES PALMER, BRAND

“NOKIA 3310. BLIMEY YEARS AGO NOW! I REM IT FROM CARPHONE WA BULLETPROOF. ALTHO THE NOKIA COMMUNI WANTED.”



MATT KLEINSCHMIT, REACH3 INSIGHTS

“SAMSUNG SPH-N400, 1999  
MY FIRST MOBILE PHONE WAS IN 1999 - AND THIS BEAUTY WAS A MODIFIED FLIP THAT HAD ADVANCED FEATURES SUCH AS A COLOR SCREEN AND SPEAKER PHONE!”



WATCH

Y, IT MUST BE 20  
MEMBER GOING TO GET  
AREHOUSE. IT WAS  
GH AS SOON AS I SAW  
CATOR, THAT'S WHAT I



NICK THOMAS,  
MR WEB

“NEC P100, 1994  
MY DAD HAD A COOL  
CARPHONE IN THE  
MID-80S, WHEN  
THERE WERE TWO OTHER  
KINDS, ‘PORTABLE’ AND ‘TRANSPORTABLE’.  
PORTABLE MEANT IT TORE THE STITCHING  
OUT OF YOUR INSIDE POCKET AFTER A WHILE.  
TRANSPORTABLE MEANT YOU NEEDED A  
SPECIAL LORRY TO CARRY IT AROUND.

I WAS ALWAYS A BIT EMBARRASSED ABOUT  
HAVING THE P100, AS A MOBILE STILL  
SEEMED LIKE A YUPPIE THING (I LOVE DOM  
JOLY’S MOBILE PHONE SKETCHES – HERE’S A  
COMPILATION).

WHEN IT RANG ON THE TRAIN OR BUS I USED  
TO TRY AND COCOON IT IN MY HAND WHEN  
I SPOKE AND PRETEND I WAS MUTTERING TO  
MYSELF – BETTER TO BE ‘THE NUTTER’. BUT I  
WOULD HAVE NEEDED VERY LARGE HANDS TO  
SUCCEED AS IT WAS \*BIG\*. AND EVENTUALLY  
OF COURSE EVERYONE ON THE BUS SAW IT,  
ON THE FLOOR, WHEN ONE DAY IT TORE THE  
STITCHING OUT OF MY INSIDE POCKET.



## PODCAST

in conversation:  
CHRIS HAVEMANN

*Listen to the whole podcast online soon.*

Chris Havemann was co-founder of Research Now, the world's leading online survey data collection business within the market research industry, where he served as CEO from 2000-2011. Following his tenure, he served as CEO of Rated People from 2012-2015. He received his BSc with Joint Honours in Mathematics & Economics from the University of Surrey in 1990 and his MBA with distinction from London Business School in 1999. Chris was awarded the AIM Entrepreneur of the Year award by the London Stock Exchange in 2009. He joined the Board of RealityMine in 2016 and became its CEO two years ago.



CHRIS HAVEMANN  
CEO, REALITYMINE

### Experian Invests in PlacIQ

August 27 2019

Global information services company Experian has made an undisclosed 'strategic investment' in location intelligence firm PlacIQ.

## My Grandfather

**CH:** I left my parents' home in Canada when I was 15 and moved back to where I was born in England - I lived with my grandparents, so my formative late teenage years were spent with them. My Grandfather was an entrepreneur - his only employer was the RAF during WW2, and that seeded an entrepreneurial gene.

**JB:** Interesting - I moved in with my grandparents in my mid-teens too, and my grandfather is also an entrepreneur - importing and exporting etc.. I wonder, was yours around when you started Research Now?

**CH:** He was around when Andrew Cooper and I started Research Now in 2000 - or started a company which we rebranded in 2003 as Research Now - and for 7-8 years after that, so he saw the early struggle and more. I'm very

pleased that he saw the early successes, including floating on the London Stock Exchange, and he was very proud that I'd managed to get a business off the ground with my co-founder.

**JB:** After leaving RN you started Rated People, then moved to Reality Mine... what do you think your grandfather would say looking at your current path?

**CH:** an interesting question - his main interest would be in whether I was enjoying it. Rated People was completely different - it's an online platform to find tradespeople, so completely outside MR; now I've found myself back in the research industry. You do one thing, it's interesting for a while, then your brain spurs you on out of curiosity to do something different: and this is just like the way he did it. My grandfather moved from one thing to another - opened a hotel, ran a café, nothing to do with data or MR, but in a way, a similar journey.

## Starting Research Now

**JB:** The US firm eRewards bought Research Now in 2009, and promptly rebranded as Research Now - why?

**CH:** The US team at eRewards just felt that it was a better name. Their core client base was MR agencies and the name spoke very clearly to them - the speed of online data collection.

**JB:** Right - eRewards came out of creating a rewards system for airlines and other large companies - they participated in surveys to get rewards... but Research Now is probably the best name in consumer insights - given that efficiency is everything.

**CH:** I remember coming up with the name, sitting around with Andrew,

because we'd started a business called the Mobile Channel - a permission-based mobile ad proposition. So both eRewards and Research Now started about the same time as permission-based ad businesses, and then when those models struggled, both companies pivoted (as we now fashionably say! - it's what you do when you're nearly bust) - into saying rather than an advertising audience incentivised to see it, we'll incentivise these people to do MR surveys. There were 3 of us at that time and we thought it had the potential to be a big company - by the time I left there were 1200 people. We said 'Research online is going to be cheaper, arguably better, certainly faster... why wouldn't you want your research now, rather than in 3 weeks?'

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It's funny this CEO job, at times it feels like the worst job in the building, but most of the time I think it's actually the best job. As much as anyone has control, the CEO does - a strange thing to say in this era of Covid-19

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## Motivation

**JB:** What is your motivation now... to continue in these roles? You probably did OK financially from the RN sale, and most people would agree CEO jobs are remarkably stressful - ?

**CH:** It's funny this CEO job, at times it feels like the worst job in the building, but most of the time I think it's actually the best job. As much as anyone has control, the CEO does - a strange thing to say in this era of Covid-19, but you have a lot of understanding of the context. That makes me feel less stressed than jobs I had earlier in my career when I was a small cog in a corporate machine.

**JB:** ...but there must be something else - it's a 24-hour job sometimes. Where does the joy actually come from?

**Vividata Partners for Passive Panel Launch in Canada** August 29 2019  
Consumer and audience insights company Vividata has partnered with mobile research technology firm RealityMine, digital data collection specialist Delvinia, and Ipsos, to launch what it calls the first passive panel of its kind in Canada.

August 2019

**CH:** Probably the same thing that made me highly competitive when I was a kid, whether it was a game of Scrabble or a computer game or whatever: I like to complete and I like to win. I get a lot of pleasure from seeking success and also the journey being challenging. So yes we had a lot of success at RN and that was a great journey. I took a bit of time off but then I actually wanted to re-enter that challenge. The fact my last job was an unrelated sector is neither here nor there. You still play to win! That certainly motivates me.

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We're capturing very, very detailed behavioural data, which is a massive complement to a lot of other things going on in the world of MR.

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## The Reality of RealityMine

**JB:** What is RealityMine's value proposition, and who is it delivering it to?

**CH:** It's a software provider, firmly and fairly and squarely in the MR industry, and I'll come back to why that is. I wasn't a founder this time, there were two co-founders and I came along later as CEO to kind of take the business on to its next phase. We deploy our software typically onto mobile devices but also tablet and laptop devices of MR panellists and we capture very rich behavioural data: so it's still in the world of incentivised panels, but RealityMine's software can capture data about the content people are watching. It might be streaming Netflix on a tablet, we can see that; they might be going on a purchase journey on Amazon or Walmart.com, we can see that; we can see in-app behaviour. So we're capturing very, very detailed behavioural data, which is a massive complement to a lot of other things going on in the world of MR. Measuring stuff - there's a large industry around simply what media people are consuming and what they're buying; what people are thinking, based on survey research; and this passive behavioural data is highly complementary to that but of course the emergence of the smartphone roughly a decade ago and the huge impact that's had on our lives as consumers is pivotal to why this is so important.

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Researchers are used to de  
that's well known and loved  
rows of individual events: a  
person with this ID used th

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**JB:** During 2019 I found one of the key themes with my guests was the challenge of connecting [non-survey] consumer data to their survey data in a way that can be leveraged for action in their organisation. It used to be a nice to have, now it's a key thing to have. Who's your buyer in this new world?

**CH:** Typically our clients are the big global MR players, the household names, like Ipsos and so on, but also we work for lots of innovative smaller agencies, and the big use cases are around measurement, especially video. In Asia, most of video watching is on mobile phones, not TV, so if you think of what's happening through the lens of TV ratings you're missing the picture: and even here in western markets there's an explosive change of behaviour. Researchers who are interested in what's happening in the world of media need tools like RealityMine. Similarly if you're talking about journeys towards purchasing, we live in an omnichannel world - well we used to until the Covid-19 outbreak, now we live in a surprisingly digital world, but let's assume we go back to some semblance of normality, consumers have this massive array of choices and influences in terms of how they end up buying product

### Adjust Names General Manager in Israel

August 30 2019

Mobile measurement and fraud prevention specialist Adjust has appointed Moshi Blum as General Manager in Israel, responsible for accelerating growth and building the team in Tel Aviv.

dealing with survey data,  
and; our tech is millions of  
at this time stamp, this  
this device to do this

xyz in a certain category, in a certain location or digital space, and our product certainly helps integrate the off-line world with the digital journeys people are making.

**JB:** How are smaller agencies using it?

**CH:** for example Flamingo are using our tool, deploying an app which we provide to a small group of people in a category, eg 50 people who are buyers of maybe sports shoes and they are using that rich data to draw a picture of the lives of these people - maybe they are running enthusiasts. I think the real issue in your question is 'Can this [particular small] agency handle the type of data our tech outputs?' Researchers are used to dealing with survey data, that's well known and loved; our tech is millions of rows of individual events: at this time stamp, this person with this ID used this device to do this - used Netflix for 14 minutes or whatever it might be, and you've got to have a certain capability to handle huge amounts of data and integrate it with other types to bring it to life, so how it's used very much depends on the skills of the agency client we're working with.

## Change and continuity in the Covid-19 era

**JB:** you touched on Covid-19, probably the single biggest event we'll encounter in our lifetime, at a global level - any idea on how things will be different after it?

**CH:** an interesting one. There's been a lot of comment in the media that markets like business travel might never really go back to where they were, people will get used to these endless Zoom meetings and decide they like it and so on, and I think some of that is overblown, I think a lot of things people like doing they'll return to, whether work or personal. A lot depends on how long the world remains in a lockdown or semi-lockdown state, whether they have to learn new habits. There are some things which will have ratcheted, so for example, there were some people who were maybe reticent to do online shopping in certain categories. For what we call a DIY project in the UK, you used to go to your local DIY store and buy what you need, you can't do that now and it turns out you can do it very easily online and it gets delivered. 'Hey why didn't I do that before?' - and I think there will be some categories where we will see a systematic step change in the move towards online and digital. But I don't know maybe I'm a Luddite but I think a lot of us will return to old familiar patterns if we're able to.  
... it's interesting you said Covid-19 was or would be the biggest event in our lifetime. It's true from a tactical

point of view, but arguably there's a bigger thing happening, boiling in the pot which is climate change. Will we see intersections in those things? Looking at Covid-19, maybe because of the impact of things like distancing in planes, and people's reticence to travel, we may see systematic change in the airline industry: less flying, fewer people on aircraft, higher prices - maybe that change is here to stay and the environmental pressure will only be released to accelerate that.

**JB:** We have lived through an era where everybody flies... airlines have leveraged that ridiculously, seats getting smaller and smaller - and I'm not even a tall guy! - and now the opposite. There'll be plenty of leg room!

**CH:** We'll have to be able to reach out on both sides and not touch anyone!

**JB:** ...kind of crazy. But yes pollution and greenhouse gases have fallen [during the pandemic], with an effect on nature - where I live the skies are clearer right now than they have been in decades. I can see the Sierras right now from my backyard for the first time in my life.

I think a lot of things people like doing they'll return to, whether work or personal.

### Nuaxia Adds Enhanced Video Analysis

August 30 2019

Healthcare research and marketing services provider nuaxia has announced a number of enhancements to improve the speed and scale by which video data can be captured and analysed.

August 2019

## Pressure on traditional MR

**JB:** How will things change in the next 5 years?

**CH:** It's always tempting to think that everything's changing so fast, but you've got to step back and say what are the fundamentals that have stayed the same, even over many decades, and some of those are 'needing to follow the consumer to deliver insight'. That doesn't change - but in how you do that, there are trends. The existence of RealityMine as a player in the industry is simply because a decade ago the smartphone came along and this tool was suddenly radically changing consumer behaviour. People are managing their lives... watching, buying on devices: RealityMine has developed to capture that opportunity.

I also think the effect of competition in the industry has been more and more intense, and I look back on my career in two halves, pre-Internet pre-2000 and a post-2000 Internet career - the digitisation of the world has created a massive 'test & learn' capability for companies - everything's now measurable. One form of insight is just to do something and see what happens - if you think about the average employee and think where do I get my insight from, it's not necessary to call up a big MR agency and get my results in 6 weeks, they'll just try something - that puts time pressure on researchers and it will only accelerate.

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The existence of RealityMine as a player in the industry is simply because a decade ago the smartphone came along and this tool was suddenly radically changing consumer behaviour. People are managing their lives... watching, buying on devices.

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... so coming back to your question re 5 years' time: some of those inexorable pressures around the greater scope of issues to cover, the fragmentation of options for data collection, the need to weave in different methods and techniques to drive insight, all will accelerate at the same time as clients wanting more for less.

**JB:** you're interacting regularly with agencies in the insight space... what is the biggest issue / are the biggest issues they are facing today?

**CH:** if you think about the largest agencies there are honourable exceptions, for example Ipsos pre-Covid was still growing organically - but if you look at the other research majors they are generally contracting, and you have to step back and ask why is that: I think we're just living in this period of unprecedented change... traditional methods of capturing and analysing data are under tremendous pressure. Clients are having to innovate faster, but as ever when things change, they cling to things that they know, techniques and revenue streams that they've had for many, many years. It's hard to defend those

while innovating aggressively - very challenging. That of course also throws up lots of opportunities for smaller, nimble guys with nothing to lose - much of the innovation you're seeing is coming from smaller businesses in the sector who are coming at it from a different angle. But there's massive scope for great researchers to integrate the best methods and technologies to keep their clients happy.

**JB:** Ipsos have done a remarkable job of differentiating themselves...

**CH:** I have a view on that. We see that historically a lot of Ipsos' growth has been by acquisition, and in managing those acquisitions there's been a lot of focus on the founding entrepreneurs, and a focus locally / geographically on responsibility within a business unit, and at times that may have looked like not the best strategy, vs a global common product approach, but in times that are disruptive, if you've got a local person in charge that really cares about the biz, with a line of communication to the top, that's potentially very powerful and that is one of the things going on at Ipsos.

### MDI Hires Hummerston for European Expansion

September 5 2019

Melbourne, Australia-based mobile researcher MDI has expanded its footprint to London, with the appointment of former GfK NOP leader Arno Hummerston as Director - Europe.

## Motto

**CH:** an interesting question but I don't really have one. One thing from my grandfather's time that inspired me: 'If a job's worth doing, it's worth doing right'. I even think about that in lockdown when I'm outside cleaning the patio - I'm either not going to do that job at all or I'm going to do it really thoroughly, so that's one of the things I believe in. In a business context, either things don't feel important; or they do feel important in which case you should really go to town on doing them well. ■

if you think about the largest agencies there are honourable exceptions, for example Ipsos pre-Covid was still growing organically - but if you look at the other research majors they are generally contracting, and you have to step back and ask why is that: I think we're just living in this period of unprecedented change...

# MY FIRST MOBILE PHONE...

## CHRIS HAVEMANN

MY FIRST MOBILE IN 1994 WAS A COMPANY-PROVIDED NOKIA 2110, THE CLASSIC CORPORATE WORKHORSE OF THAT ERA.

TERRIBLE BATTERY LIFE SO EVERYONE CARRIED AROUND A SPARE DOUBLE THICKNESS BATTERY THAT MEANT IT LOST ITS SLIM LINE MARS BAR DESIGN.

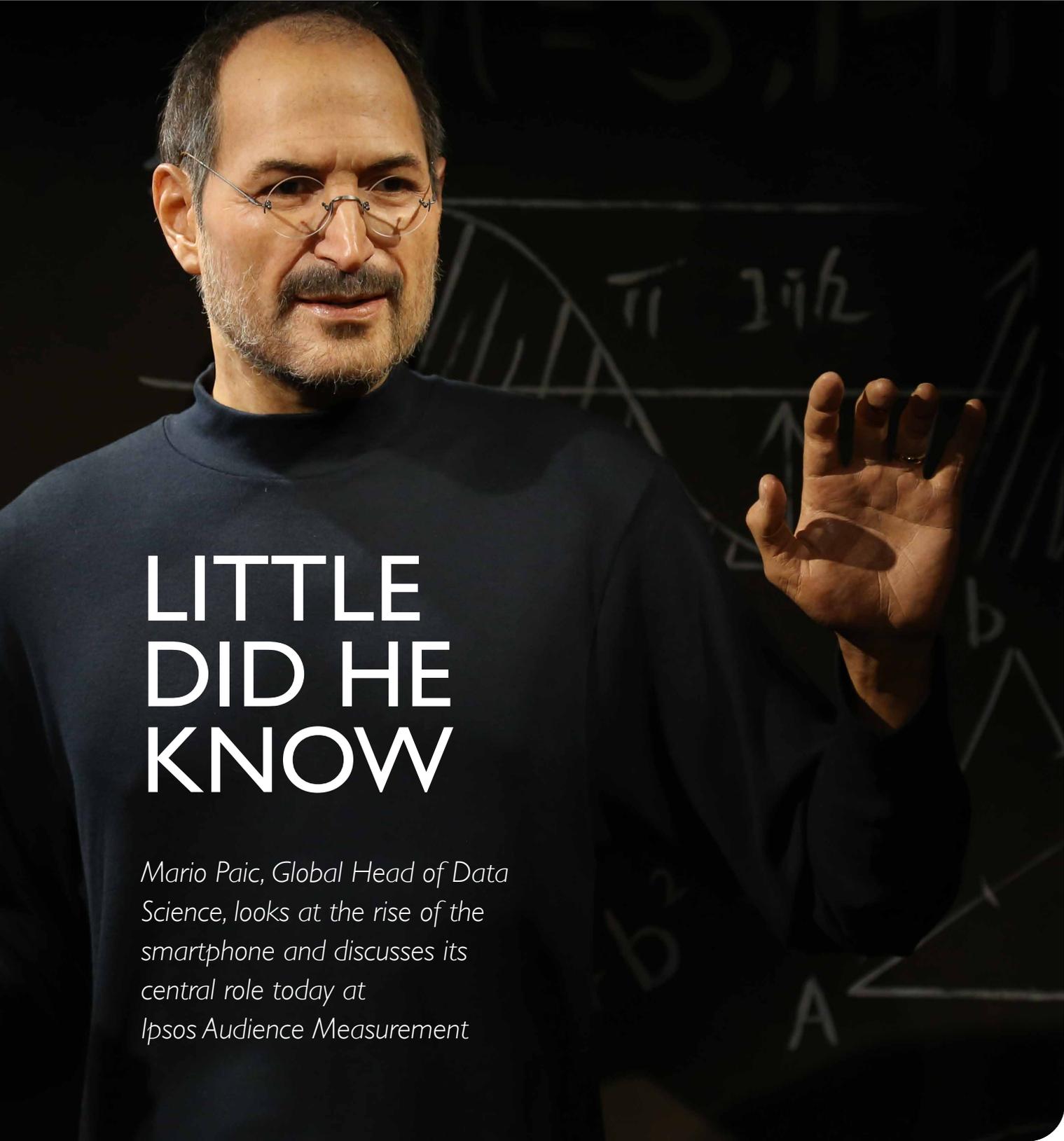
THE PHONE USED TO HEAT UP ON LONG CALLS SO WE ALL SPECULATED ABOUT BRAIN CANCER. BUT IT COULD ALSO CONNECT YOUR LAPTOP WIRELESSLY TO EMAIL (USING A PLUG IN PCMCIA CARD) WITH CONNECTION SPEEDS AT A BLISTERING 14.4 KBPS OVER GSM NETWORKS... REVOLUTIONARY STUFF AT THE TIME!



### New Funds for App Engagement Analytics Firm Neura September 6 2019

Neura, which provides developers with analysis of how users engage with their apps, has raised \$16m in a Series B round of funding. Funds will be used to expand its headcount, develop its business in the US and EU, and launch new products.

September 2019



# LITTLE DID HE KNOW

*Mario Paic, Global Head of Data Science, looks at the rise of the smartphone and discusses its central role today at Ipsos Audience Measurement*

## **Kantar and Pulse Labs in Voice App Analysis Deal**

*September 6 2019*

In the US, Kantar has partnered with voice app testing platform Pulse Labs, to understand the motivation behind consumers' usage of voice assistant technology.

## It's been almost 13 years since Steve Jobs stood on stage at Moscone Center in San Francisco and introduced the world to the iPhone.

At the time, Jobs knew that this device would change the way we communicate, browse and consume media, but it is likely that even he couldn't have predicted the scale and ramifications of its impact on the future. The iPhone may not have been the first smartphone, but it kick-started the mobile revolution. How the world has changed has been truly remarkable.

Today, around 45% of the world's population use a smartphone - in many countries more than 90%. That's roughly 3.5 billion people using a pocket-sized super computer with an ultra-high definition touchscreen, a camera capable of shooting professional videos and a wide

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Today, around 45% of the world's population use a smartphone - in many countries more than 90%. That's roughly 3.5 billion people using a pocket-sized super computer.

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range of sensors that can track motion, position and various environmental parameters. Using it as an integral part of daily life, to communicate, shop, play, learn, navigate, consume media and many, many other more or less essential purposes. With the current pandemic, governments are planning to start using it as a disease-control tool.

One important purpose - for those of us in the industry - is its usefulness as a market research tool.

Its ubiquity, always on and always connected status combined with data-producing hardware and software, and its constant use by and proximity to the user, makes it a perfect platform for all types of market research. This includes audience

measurement, the focus of this piece. Specifically, how it's used as a vehicle for delivering and completing surveys and as technology that can passively measure media consumption.

Some smartphone statistics report average daily use in 2019 at almost 4 hours, which is more than watching TV. A great part of this time is consuming media content of one kind or another. More than 20% of us are picking it up and checking it every few minutes; around half of us do so a few times every hour, amounting to 60+ interactions per day for an average user.

So mobile is not just an option, it is central to any measurement of media audiences – newspapers, TV, radio or online.

But have we as an industry fully embraced the “mobile-first” approach and applied it to everything we do, from sampling, recruiting participants, writing and designing questionnaires to utilising all the tech packed into these devices?



**Voxpopme Closes £7.5m Investment Round** *September 10 2019*  
Birmingham, UK-based video feedback, insights and analytics company Voxpopme has closed a £7.5m (\$9m) Series A I round of equity financing, which it will use to fund further investment in its platform and add to its global team.

September 2019

We are still seeing long and participant-hostile questionnaires, optimised for large screens, pushed to participants to complete on mobile phones. Currency data collected from disjointed PC and mobile panels, instead of a single-source all device approach. The list goes on...

When it comes to utilising surveys for measuring audiences, it is crucial that researchers put participants and their smartphones at the heart of survey design. In plain terms, a device-agnostic survey is one that can be completed on any device. But it does not necessarily mean the survey will work well or be easy to complete on that device. Online surveys should be designed as 'mobile-first', so the respondent can easily and comfortably complete them on anything from a smartphone to a computer. This Mobile-First Best Practice Guide outlines the benefits of mobile-first and the simple rules that should be followed when designing or reviewing an online survey.

With regard to passive techniques of audience measurement, at Ipsos we have a core vision that drives our solutions for the next generation of TV, radio and online measurement, which is to embrace the principle of 'Passive Simplicity'. This means building natural solutions to deliver high quality data with a broad measurement scope, ensuring that we keep the subjects of our measurement, people, central to the overall research and technology design.

That's why we utilise familiar and trustworthy devices which already

fit into people's lives, and are ideally already in place, such as smartphones. This is the basic premise of Ipsos MediaCell, a mobile app solution that transforms smartphones into powerful audio metering devices, in which the task for the panellist is to keep them close and charged. As the statistics show, people do this anyway.

One of the best examples of the principles described above is BBC Compass – a single-source, cross-media measurement panel that Ipsos has built for the BBC, to measure the audiences of all of their content and services across all platforms. It employs a customised version of Ipsos MediaCell software known as MediaCell+, which integrates Ipsos' own technology for measuring viewing and listening, and Reality Mine's industry leading on-device measurement technology, into a single app installed on participants' smartphones (and other devices). The BBC Compass panel also forms the foundation of a bigger, 10,000 strong, single-source panel that Ipsos is building as the new industry-endorsed solution for online audience measurement in the UK. The solution - called Ipsos iris – is approved by UKOM (the industry body that defines and governs online measurement standards in the UK) and launches in January 2021. It's a system which maintains a "hybrid" approach, combining census level traffic data with panels, but recognises the primacy of mobile devices for accessing content online.

And lastly, an example of utilising the smartphone as a platform for passively

measuring "out-of-home" audiences. Ipsos GeoQuest, an app that allows us

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Perhaps even more relevant in our new world of lockdowns and social distancing, software based passive measurement technology seems poised to become the obvious choice for cross-media measurement.

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**IRI and PlacelQ Dig Deeper into Consumer Journey** *September 19 2019*  
Consumer data giant IRI and location intelligence firm PlacelQ have further extended their partnership, integrating the latter anonymous foot traffic data in the former's Liquid Data loyalty card and point-of-sale analysis platform.

to track the location of participants, both indoors and outside, using a combination of GPS and Bluetooth technologies. It is a component part of one of the measurement solutions we offer to the Out-of-Home advertising industry.

Perhaps even more relevant in our new world of lockdowns and social distancing, software based passive measurement technology, deployed via contactless recruitment (CATI, online panels), seems poised to become the obvious choice for cross-media measurement.

Having said all of the above, it would be wrong to present mobile phones as a panacea for all the ills of traditional market research.



- For example, while fully embracing the “mobile-first” approach to designing questionnaires, we forget that we can never present a questionnaire as well on a mobile phone screen as we can on a larger display.
- As much as the penetration of mobile phones allows us to recruit nationally representative samples, we need to be mindful of people that are less conversant with mobile phones or people that simply don't own or use one, and deploy solutions that can be combined with the core mobile-first approaches.
- There are also limits to what can be accurately captured with passive measurement, due to various technological or data privacy reasons. That's where these approaches benefit from a combination with more traditional approaches such as diaries, for example used on the BBC Compass project to capture additional data for smart TVs, “walled gardens” etc.

Going back to that day in June 2007. In trying to reinvent the phone, Apple reinvented much more. So, for market researchers, 13 years since the start of the mobile revolution, it is not about whether to use mobile anymore, it is about how much to use it and how to mix it with other methods to collect reliable and complete information. As the man himself put it: “An iPhone is like having your life in your pocket”. Little did he know. ■



### Mario Paic Global Head of Data Science at Ipsos Audience Measurement

*Mario has 20 years' experience in MR. In his current role, leading a team of 12 data scientists, he actively supports local teams across all Ipsos markets on various technical and methodological aspects, including data science, measurement technology and reporting tools; and assures the latest developments in cross-media measurement are continuously added to Ipsos portfolio and implemented in local deployments. This includes Ipsos iris, the new online measurement industry standard in the UK. Before moving to London and joining the global AUM team in 2014, Mario was based in Sydney, Australia, where he was the Technical Director responsible for the successful development and launch of emma™ (Enhanced Media Metrics Australia) - the new currency audience metric for the Australian print and digital industry, launched in 2013.*

#### Facebook Suspends Apps, Announces New Rules September 23 2019

Facebook has announced the suspension of 'tens of thousands' of apps, created by around 400 different developers, as it continues an eighteen-month investigation following the Cambridge Analytica scandal.

September 2019

## PODCAST in conversation: GILES PALMER

Listen to the whole podcast at  
<https://happymr.com/giles-palmer>

Giles Palmer is the CEO and founder of digital consumer intelligence company, Brandwatch. Giles' experience spans leading transformation teams in the financial markets at Lloyds of London through to heading up Business Development at Sky Interactive during the dot com boom. He has a Physics degree from Durham University and is a qualified Chartered Accountant. Giles is also Non-Executive Chairman at Futurli ([www.futurli.com](http://www.futurli.com)), a Brighton-based tech start-up.



GILES PALMER,  
FOUNDER & CEO OF  
BRANDWATCH

### **Mobiquity Gears up for Growth and Listing** *September 25 2019*

US programmatic ad tech and footfall insights provider Mobiquity Technologies has announced a successful recapitalization, cleared the way for a Nasdaq application, and extended the contracts of two key execs from recently acquired Advangelists, who it says will play a key role in its future.

## Generation Game

I had kind of a traditional 'stay-at-home mum and working dad' family. My dad had a very high work ethic, came from a working class background, a smart guy that did OK at school and got into quantity surveying. He joined a firm when he was 27, retired from the same firm when he was 55 and a Senior Partner. That said, he didn't put too much pressure on my sister and me to work hard when we were kids, in fact I often asked him for advice and he was reluctant to give me advice: he said 'you've just gotta figure it out for yourself', kind of thing. I went to a private school and a good university where I read physics, came out pretty young with no idea about anything and went into accountancy just to get a general business grounding.

I wasn't very good at it - my heart wasn't in it - and then I joined a few other industries, didn't really get on with any of those. I was a geeky kid, into computer games etc.. and the Internet didn't really appear until I was in my late 20s, when me and some friends started a company which we called Runtime Collective, building web applications for people. I think if I picked one thing I got from parents it would be that work ethic - I was kind of a lazy kid but I can do things reasonably well when I try, especially the science stuff. Now I work really hard!

My mum was incredibly organised and ran the household, so together they set us up as kids really well, provided a safe and loving environment. I think because I come from a middle class, very safe environment I've always been attracted to risk more than other people

- there was never any sense of jeopardy anywhere.

Now I have 4 children including one stepdaughter - aged 16 to 20. I think I've taken the work ethic thing too far with them, put more [academic] pressure on them than my parents put on me [laughs]. I'm very impatient, in particular with my son who is happy doing nothing but online gaming. When he wakes me up at 5am screaming down the headphones, I lose my cool! But habits you pick up from your parents are very strong. They'll probably do the same thing to their kids and so on down the generations - that's my own guilt coming through from when I was a kid - it's one of those tragic things that you repeat the mistakes of your parents!

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They'll probably do the same thing to their kids and so on down the generations... it's one of those tragic things that you repeat the mistakes of your parents!

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However... we have a low drama household and we all muck in to a degree - hopefully that will give them a solid footing. Since the start of lockdown, I've been really impressed with the way they have stepped up regarding their granny. She is now on her own stuck at home, and I'm really proud of the fact they are now actually calling her twice a week - because they see her vulnerability, in her 80s and on her own.

## In the Pipeline

**JB:** give us some context re Brandwatch - what's it doing today?

**GP:** Firstly, we are trying to bring together some of the innovations that we've been working on for the last couple of years behind the scenes, around NLP, universal translation and some of the Open AI projects that have come to light. Using these to analyse the enormous volume of social data: we've received something like 700m posts a day for 12 years - maybe 1.5 trillion pages. In that archive there are interesting insights, it's just How the hell do you sift the signal from the noise?

It's an interesting challenge from an engineering point of view because it's such a huge dataset, and from an analysis point of view because it's natural language and the structure is different depending on the source - tweets vs forums vs news site content etc.. So how do you bring it all together to give users the ability to get insights from this vast data set? Small innovations and significant but incremental improvements are happening all the time, but there are then the longer-term engineering breakthroughs which - if they can really shift the ability to analyse things at scale and make it easier to wrestle with - are doing a massive service for users. So we're trying to productise some of the big engineering programmes we've been on - they may have involved only 3 or 4 people but they're big efforts that have gone on for multiple years.

### App Annie Buys and Rebrands *September 27 2019*

App metrics specialist App Annie has acquired mobile analytics firm Libring, for an undisclosed sum, allowing it to provide its mobile publisher and brand clients with market data and advertising analytics side by side.



Secondly our application has been a bit like a Model-T Ford, you can use it for lots of different things as above, but it's the same model, so we've been pulling that apart into a jobs-to-be-done or use case-based framework; to take what we've built and think of it more as a platform to create applications that are easy to use.

Thirdly, we're learning about scaling the company and doing so globally - my leadership team is ten people, I think 3 in Boston, 1 in New York, 4 or 5 in the UK, 1 in France, and teams for other functions are also distributed, and we need to structure them so it's efficient but not siloed. We're learning as we go. Covid-19 has actually helped us work more cross-functionally, which is interesting.

Fourthly and finally, there's something we announced about a year ago when we acquired Qriously - a mobile-based survey company - we're trying to bring together different data sets to give a bigger picture of consumer behaviour and we're calling it 'Digital Consumer Intelligence' - so we're trying to expand the way we think of ourselves from social media analysis to this - taking things from different sources and trying to mash them up and make sense of

of those are at a very early stage but I'm trying to think long term.

**JB:** Companies can no longer just leverage primary data - they now have to lay other data on top of that. It's really difficult to do... but even more relevant now in the age of Covid.

**GP:** Yes, there's a fundamental split depending on how the data is used within big companies: whether it's in a 1, 2 or 3-year cycle, long-term strategic input, or whether they're asking 'What's happening today and what are our competitors doing' and it's more tactical - with other data informing that tactical feedback loop, such as sales data or performance or online marketing and search. So the boundaries around the timeline of decision-making are really important. [If you're combining sources / types...] Having the skills very close by is important - maybe a tight partnership with an agency that can run quantifiable analysis quickly on data that's been gathered, and say whether they've found anything and what - we're seeing that 'market research data' feedback loop shortened dramatically inside a lot of our customers as they look to be consumer fit and adaptable / fast-changing.

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We're learning as we go. Covid-19 has actually helped us work more cross-functionally, which is interesting.

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them. In addition to survey app data from Qriously this includes things like online transactions, search data. Some

Many of our customers are getting their budgets reduced but their workload increased, and the research

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Having the skills very close by is important ...We're seeing that 'market research data' feedback loop shortened dramatically inside a lot of our customers as they look to be consumer fit and adaptable / fast-changing.

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industry is evolving from qual to quant, from quarterly to daily, from reports to quant data - or quantifiable insights rather. 'We've seen x number of people do this, we think this is a trend'. All powered by this availability of big data and the need to work with it.

... so it's an extra-interesting time in the world of MR, and it would be honest to be great to change the name of the industry which has a bit of a stodgy old school ring to it. By contrast, what's happening with consumer insights in some of the world's best companies today is really quite groundbreaking and innovative, and very forward-looking, so I think we're seeing a sea change in the MR industry. It [the industry] will get bigger, but it will change the way it is.

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**Skopos Invests in App Maker HearMe** *October 1 2019*

Market insight consultancy Skopos has made a 'sizeable' investment in UK tech firm HearMe Scientific (HMSL), with the two firms forming a joint venture to focus on the development of apps and platforms for digital engagement and analytics.

## Getting started and making money

**JB:** I want to dive into the story of Brandwatch. You started the business in 2007, Facebook did its IPO I believe in 2012 and Twitter the following year, so you were really ahead of the curve.

**GP:** yeah so we should have got a lot further than we have to be honest [laughter]

**JB:** yeah there is that [also chuckling]. No but... then we hit a recession, directly after you started the business - how did you navigate that?

**GP:** I had been running this tech services business with some friends and I didn't want to do that any more, I wanted to build a product company. I started with not much idea, but I wanted to build a product. We had been working on this small project around building a web crawler, which was never really finished - and I used that as an impetus to create Brandwatch, I said to my partner I want to take this and he said 'you can buy me out and off you go'. He went and joined Google and latterly DeepMind, so an amazing guy... but I wanted to build a product.

We took maybe a year to build out the web crawler and then work on

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I wanted to build a product company. I started with not much idea, but I wanted to build a product.

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some basic sentiment analysis on what we'd found; launched it in August 2007 as an SaaS product, and our focus was on special interest forums - a UK one called moneysavingexpert - bank accounts and financial decisions, mortgages and so on. So we were crawling that site and one of the big banks in the UK wanted to launch a new bank account for young people, so they wanted to use our system to know how that was resonating inside that community. That was our first subscriber in September 2007 - we didn't get our 2nd customer until Jan 2008, which was a challenging time, sure! Trying to raise money as well, to keep the lights on.

Then the agency world in London - creative and ad agencies are always very strong here - started to realise

there was this new ability to tap into consumer insights and understand them, so they started subscribing to it, not paying a lot of money. A couple of thousand dollars a month - not a small amount but I mean you need quite a few of those to keep a team of ten going! - and we started to see some traction, so we built the product with their needs in mind, and they had all sorts of different needs so that's why the product ended up being this very flexible system. In terms of the recession, it didn't really impact us. Well, who knows because I don't have a control group, non-recession!...

**JB:** [laughs] that's fair!

**GP:** ...but we did pretty well throughout the recession mainly because it wasn't a crazy expensive product compared to people-based MR. Not that we were really thinking of ourselves as MR at that time - but also even during the recession, the world was going online - social media etc.. smartphones, Google, Twitter - online was still growing like

### Advertisers Form Global Cross Media Measurement Group *October 4 2019*

A group of advertisers including EA, Mastercard, P&G and Unilever has launched a global initiative called the Cross Media Working Group, designed to ensure the advertiser's voice is heard in decisions on cross-media measurement.

October 2019

We'd be within 5 or 10% of it every year, because it's reasonably easy to look at the waterfall of money, sign up a customer, have a certain % of them renew, some of them grow, some of them churn. It's not a complex model.

crazy and that was our domain. The move of money from off-line to online is the trend of the last 20 years, or one of them, and that's our playground so we were insulated from the recession.

**JB:** With an SaaS businesses, you really appreciate having guaranteed revenue in a recession...

**GP:** right - it's not guaranteed though!

**JB:** well OK...

**GP:** ...but yeah, the predictability of Brandwatch has been pretty good - except for the last 18 months, we've merged with Crimson Hexagon, that's been a much more unpredictable time, but up until that transaction we would put out a number at the beginning of the year and we'd be there or thereabouts at the end of it - we were always a little bit optimistic, but we'd be within 5 or 10% of it every year, because it's reasonably easy to look at the waterfall of money, sign up a customer, have a certain % of them renew, some of them grow, some of them churn. It's not a complex model.

## The 5x Future

**JB:** are you ready for some rapid fire questions? Good. How do you think the MR space will be different in the next 5 years?

**GP:** more quant, faster, easier to use, cheaper tools, 5x bigger as an industry.

**JB:** [laughing / resisting the urge to immediately probe that large multiplier] Er... biggest issue facing today's market researchers?

**GP:** complexity of data, the amount of data, the time it takes to do stuff and the cost.

**JB:** and the three characteristics of an all-star employee?

**GP:** they're all behavioural, all about attitude, so:

1. willingness to learn; 2. ability to collaborate; and 3. work ethic.

**JB:** [laughing] Really great speed there. I want to delve into the phrase '5x bigger'. The space overall has been relatively flat at an aggregate level, according to ESOMAR for example. Why so optimistic?

**GP:** it's a nomenclature issue - there are certain things that go on today that are not called MR and are not captured, so it's the way it needs to

be measured going forwards, but I'm optimistic because I remember an Uber investor speaking at a conference saying that Uber '5x'd the New York taxi market', not because more people wanted to travel, but because they made it cheaper, faster to use: use the app, it comes to you, you don't have to tip and that annoying stuff; but they were also cheaper. He said that 5 or 7 years ago but that stuck with me. Usage will go up - that's what's going on with MR - it's no longer just 'Find a focus group... write a report, deliver it 3 months after it was commissioned' - that doesn't happen much any more, so where we are making it faster and cheaper I think you will see usage going up. Where you will see that on the client side... the companies that are able to adapt more quickly to the changing consumer landscape are more successful. If you're a company and you're not baking consumer insight into everything you're doing as an organisation, then you're likely to be out-innovated by someone who is: you're not adapting as quickly as your competition. If we can make it faster, easier and cheaper then it [what we do as an industry] will happen more - so 5x could be a massive understatement. It's no longer MR - it's decision management, and if you're not baking consumer insights into your decision management you are probably not going to win.

We'll be 5x bigger as an industry... where we are making it faster and cheaper I think you will see usage going up.

## Personal motto?

**GP:** I don't have one but I want to get one [laughs]... The cultural foundation upon which Brandwatch is built, from the very beginning - also Runtime Collective - is 'treat other people as you would like them to treat you'. So if I lived by that golden rule more than I probably do now, that would be good. ■



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# BUZZING BUSINESS

An app-based insights & data business growing at 30% a month? Nick Thomas caught up with Tugce Bulut, founder and CEO of Streetbees on 1st May

**NT:** Is Streetbees your first business?

**TB:** Yes, my first formal business. I was lucky enough to look for my 1st job in the middle of the 2008 recession [laughs] - there weren't a lot of jobs! So I started a consumer business for myself – it was a lot of fun, but I got into consultancy shortly after that, at the end of 2008.

**NT:** What led you to start it?

**TB:** Streetbees drew on everything I'd done before - my degree, the strategic consultancy and work with the

## **Raft of Senior Appointments for Booming Brandwatch, October 4 2019**

UK-based Brandwatch has transformed its leadership team with the addition of Guy Berruyer as Chairman of its Board, Fergus Gloster as an NED, Eva Klein as Chief Customer Officer, Dan Freund as Chief Sales Officer, and Ian Collins as CFO.



World Bank looking at the impact of microfinance on poverty and global living standards. It was obvious to me that businesses are incredibly important in lifting people out of poverty, more so than aid - and that people need information from around the world.

In consultancy, one of our biggest challenges was that it was hard to develop a strategy when there was a lack of information. As you may know in consultancy we have 4- or 6-week periods to develop strategy on something and you need to get data from the consumer in that period: we would be using traditional research companies like Kantar and Ipsos, and although they add value it was quite expensive and you wouldn't get results for 6-8 weeks, sometimes 12 weeks. Also a lot of the questions were multiple choice, so you only ask people for the answers when you already know the answers - and growth doesn't come from what you already know. You don't know what you don't know, so you should let the consumer speak to you in their own words.

So I built Streetbees as a platform to allow people to participate and share moments from their lives as and when they happen, and instead of asking multiple choice questions let them speak to us like a conversation. We pioneered conversational research. We do this with millions and millions of people so we get the depth of qual but also the robustness and accuracy of quantitative research.

**NT:** I was about to bring the words qual and quant into it - you see

yourself doing both, right?

**TB:** Absolutely, you don't have to choose any more. It was always the case that you do some qual to test things, or you do some quant and fill it out with qual - and it was never the perfect solution because you have to integrate them. The solution we now have means you don't have to choose any more. You get the depth of qual because we capture open text, images and videos, but thanks to the NLP [natural language processing] and neural networks we have been training over 5 years we can analyse qual data at quant scale.

**NT:** Does this mean things are iterative at the early stages of your projects - you change the topics depending on what's coming out of it..?

**TB:** Great question, a lot of this works iteratively but not so much questions - this was one of the changes we made, we call this unstructured research. You are sharing a moment from your life, who else is around you, what is happening today, what are you planning for the rest of the day. We automatically add the time of day etc.. to comments and images so we get a lot of data points attached to those. What that means is you get a database with all the info you already need, and then run different algorithms on it to pull out [what you want].

**NT:** That means it's absolutely crucial how the analysis is done - how would you sum up the types of analysis available with Streetbees?



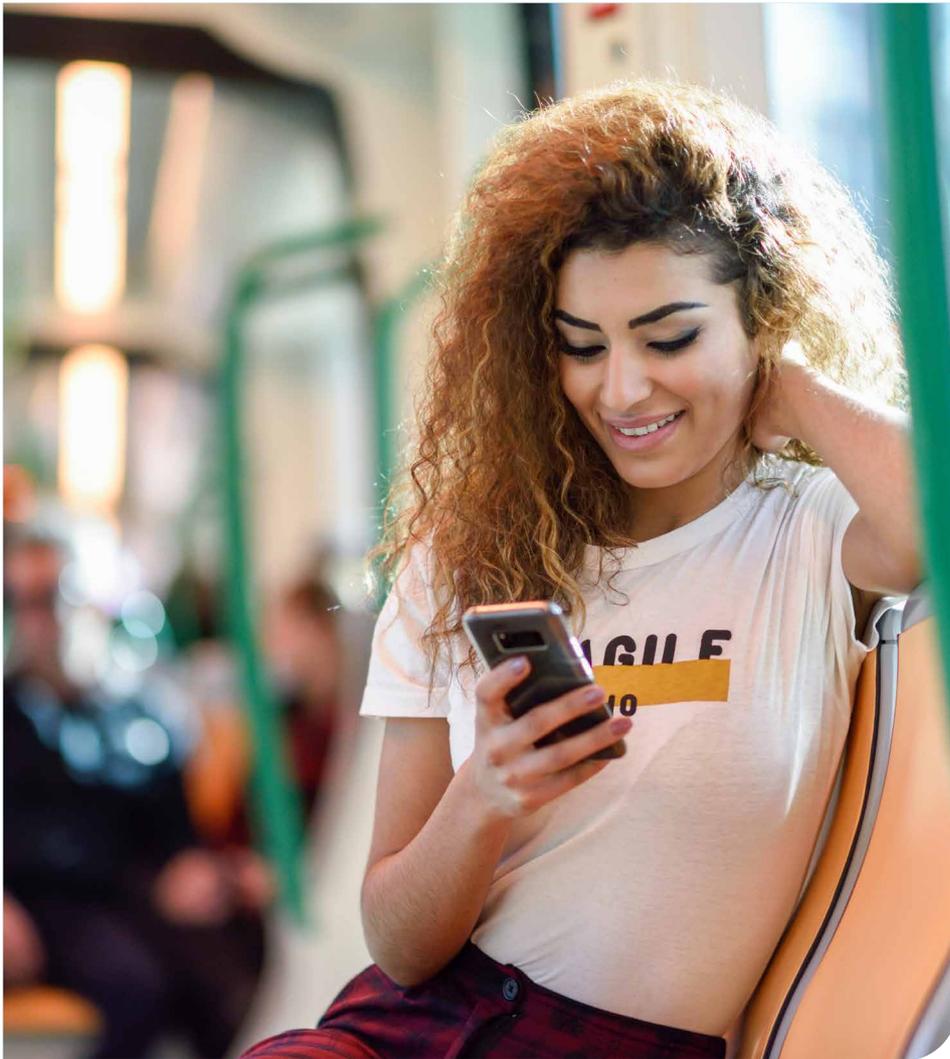
Tugce Bulut,  
founder and CEO,  
Streetbees

*Tugce Bulut started mobile feedback business Streetbees five years ago, after working as a strategy consultant advising technology and consumer companies on how to accelerate growth in international markets. Passionate about the power of data and the positive change it can bring to the world, she is a published author and Master's graduate from the University of Cambridge, specialising in poverty alleviation and global living standards.*

### Adjust Buys F.O.X. Smartphone Ad Measurement Tool October 10 2019

Mobile measurement and fraud prevention specialist Adjust has acquired the Force Operation X (F.O.X) smartphone advertising effectiveness measurement tool from its creator, Japanese marketing agency CyberZ. Terms of the deal have not been disclosed.

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An app-based solution is easy enough to do with younger people, by which I mean under-55, those groups were never a challenge for us. 55 plus could be more challenging and we had to address that.

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another panel to provide the data. That didn't work out because we needed real life moments being captured in their millions and millions, and when we gave the challenge to the panels they are very much geared up for specific questions and 'claimed' answers, and not set up for real life moments. So we built our own from scratch.

We had to work hard at national representation. An app-based solution is easy enough to do with younger people, by which I mean under-55, those groups were never a challenge for us. 55 plus could be more challenging and we had to address that. We changed things like font sizes and the UX generally to make it a lot more friendly (to appeal to the 55 plus group). Our research has to be nationally representative, as you are building mass brands on the strategies. At the moment we are representative in terms of income, age, gender and region; we operate in 150 countries and in all those we are able to provide nationally representative research.

**TB:** All the time we're building analytical streams and currently we have 3. The first one is what we call Dynamic Demand Engine, basically a replacement for the traditional occasions or demand stations type of work - we do it on an always-on basis for people to understand the drivers of demand. The second one we call BrandX, which is brand experience, it replaces traditional brand solutions, and that works by understanding what exactly drives your brand choice vs competitors', in specific experience

spaces. Then the third one is what we call Out of Home, it looks at restaurants and cafés and how people are interacting.

**NT:** Tell us about the 'Bees' - who are they and how are they recruited?

**TB:** So we have 3.5 million Bees, active users around the world, buzzing around sharing moments of their lives. When I started the business, we focused on strategy and algorithms and we were kind of hoping we could just use

### **Toluna Opens Media and Entertainment Practice** *October 10 2019*

In the US, online community and survey tech provider Toluna has launched a specialized practice focused on the needs of the Media & Entertainment industry, led by long-time company exec Patricia Chapin-Bayley.

**NT:** How do you recruit them?

**TB:** In a couple of different ways. To get national representation you have to recruit from different sources. We started with advertising through Facebook and Google, then we faced the challenge of accessing people who can't be reached that way. We wanted to go to tier 3 and 4 cities in China, rural India, modern cities in African countries and for that we started building our own ambassador network. We call them Super Bees - they go into local neighbourhoods, might be shopping malls or the exit from a church on Sunday, they basically explain what Streetbees is about and invite them to take part in our community. We did so much of this that about 20-30% - depending on the country - is acquired by our local ambassadors. This means we can reach groups who are lower income, less familiar with technology, etc.

**NT:** How do you incentivise Super Bees?

**TB:** They are incentivised on the basis of active users they bring in. The Bees are also incentivised, but on a very different model. One thing we noticed with the panels, and one reason they didn't get us what we needed was because their incentive models were not quite right for this. If you pay people in points and they accumulate them till they can buy something from your shop, that's not interesting for most people, right? So what we wanted to do is give a fair share of our earnings back to the community. We have said from the beginning, "your data is extremely

valuable to us, you are sharing this with us, and we will share back with you, in terms of the value we can create with this". So... the Bees get paid... in cash!

**NT:** In real money? How do I join?

**TB:** You can download the app!

**NT:** What are you working on at the moment... what's exciting you about Streetbees right now and in terms of where you hope to be in a year's time? No trade secrets of course... unless you really want to.

**TB:** I'm a firm believer in transparency - we openly share our pipeline and where we're going. Our focus has always been 'in the moment' research and we want to continue in that direction. We have fully automated data pipelines which means it takes us a few hours to get our results in front of our customers, the brands.

When it comes to the Covid-19 situation, we wanted to be able to help both governments and health organisations but also brands, to handle the situation, so we brought out a Covid-19 Human Impact Tracker ('HIT') and we're looking into what's happening in everyday lives under lockdown - to avoid COVID, to handle being in lockdown (home schooling,

having to cook at home etc.). We are now also monitoring the recovery - the shape of it, what are people coming back to, when are they going to go out again, what does 'going out' mean, are they able to go to restaurants and bars? What is the recovery going to look like? We are in a very fortunate place because we have multiple years of historical data, to compare against, to understand the drivers: and we launched 'HIT' in January - this was happening in China, it was obvious that it was going to become a global challenge. So we've accumulated enough data by now to project how the recovery is going to happen.

**NT:** Are you doing this work for government, media, or for (other) private clients or what?

**TB:** For both. We are helping brands monitor the lockdown and the recovery, and we work pro bono for governments too. We are very proud that we are supporting the NHS, and we are also supporting the Department of Health and Social Care, and the London Mayor's Office here in the UK, and also helping a couple of foreign governments in terms of handling it. The reason mental health is a big focus is that we have always asked our Bees, 'How are they feeling?' as a main question. We've always been

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We are helping brands monitor the lockdown and the recovery, and we work pro bono for governments too. We are very proud that we are supporting the NHS.

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### Blockchain Pioneer Adds Communities Option *October 22 2019*

In the UK, person-based, blockchain-powered data marketplace Measure Protocol has added community functionality into its MSR App, initially in partnership with global consumer insights agency Interpret, which will use it for a new video gaming community.

October 2019

asking this so we have data in their own words for 5 years and now we know what the mental health challenges are by city, country, age group... which is obviously a very powerful thing for governments to be able to see.

**NT:** Of course when I asked you the question What are you working on at the moment?, I should have split it into two parts - what were you doing 4 months ago, and what's changed now. 4 months seems a very long time ago now doesn't it? Have you forgotten about the things you were working on then..?

**TB:** Not at all, no! To be honest, direction-wise nothing has changed for us. The business has been booming - we are seeing 30% month-on-month growth at the moment, which puts us in a very fortunate position, especially in an economic climate like this. It's the same as 4 months ago in that our focus has always been: How do we get the info analysed and turned into strategy as fast as possible for our customers? How do we take the consumer data, interpret it and analyse it, and get it in front of the world's biggest brands? That means our focus has been on developing what we call Knowledge Graph - a type of unstructured AI which looks at unstructured text and makes sense of that data on the fly to answer specific questions.

So rather than involving humans really early on which slows things down, we analyse things first with our knowledge graph, and then humans of course still come into it later on to interpret the solutions, but we can gain a lot of

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One of the biggest challenges longer term in our R&D teams is actually adapting the questions on the basis of previous open text answers.

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speed by doing this automatically. Now this is the really interesting part I'm most excited about: we are building a b2b / consumer intelligence search engine, We have more than 2.5bn data points from the last 5 years which are real life experiences - so rather than clients having to come to us and ask us questions, we are building this search engine which means for example they can ask, 'I run an Italian restaurant and my footfall is falling at the moment, what can I do in summer to increase my footfall?' - they will literally be able to write this in a search box and they will get the answer within minutes to that question. It's not going to be in the form of raw data, it's going to be an answer to the question as well. This is a big, big project we've been working on for 5 years which is the reason we've been able to get reports and analysis to our clients on a daily basis, where it's not really possible for a lot of research companies - so we'll continue to go in that direction.

**NT:** On your home page you have something saying 'Contact us 8.30, questions ready by 11, data in by 2pm etc...' - does this mean that's not quick

enough for you now?

**TB:** Yes, that's right. If you think about it for big brands now, their real challenge is not just to get the fieldwork done in a day, many of us can do that, their real challenge is to get the analysis done in a day. Most research agencies would take months to produce the right reports and analysis. Our challenge has been How do we get AI to do the really high value add stuff that the human brain does... and only leave the part that's creative to the human brain at the very end? Because creativity obviously you can't build into algorithms... yet - who knows one day.

**NT:** So the analysis side is the focus of your development work. Is there anything you're doing to develop the front end, the bee-facing part of it?

**TB:** Yes, we have a separate team for that, a community team, constantly working on making the experience more fun and more engaging for the Bees. We run competitions and we allow them to see each other's situations and results as well, obviously anonymised and at aggregate levels. Generally we're always working to make it faster, easier and more engaging for the Bees.

**NT:** What are the biggest challenges in creating and developing an app that's easy to use for your Bees?

**TB:** One of the biggest challenges longer term in our R&D teams focusing on longer-term projects is actually adapting the questions on the basis of previous open text answers.

## RealityMine Adds Social Media Advertising Measure

October 23 2019

Mobile research tech firm RealityMine has launched a feature called 'RealLife Social', giving researchers a window on the ads and sponsored content that opted-in users are exposed to on social media.

For example, you and I are having a conversation where you keep changing your questions based on what I just said, right, and that's what a real conversation looks like, so we are trying to mimic that with AI. At the moment we are using some smart mechanisms, but it can go all the way: based on what a user or consumer just said in their own words, we can change the next question to go deeper and deeper in projective research techniques. It's going to be a lot of fun because that would completely replace the need for ftf interviews.

**NT:** Wouldn't that be sad? If you're a lover of ftf interviews like me... But I guess what you're saying or could be saying is that they can choose - they won't have to do any of this but at any point where they feel it would be useful they can break away from their other work and add in something like that.

**TB:** Yes absolutely, I do want to caveat that - nothing will ever completely

replace someone from a brand or marketing team speaking to a consumer, and neither should it. Like once in a while you do need to pick up the phone and listen to people, so I agree with you that will always be a need. But it can become more elective and optional whether to do that.

**NT:** Do you ever yearn for a bigger screen in order to communicate with your Bees?

**TB:** No, never, and we wouldn't allow it. We have to be in the moment. When you are shaving, you have to be able to share with us when you are shaving - the laptop has no place in that! When you are cooking, your smartphone is always with you, right? It's like an extension of our natural selves.

**NT:** But is there ever a time when the screen's too small? There's a graphic you want to display or some complicated choice you want to lay out and there's not enough room to make it clear?

**TB:** A good question but we have to make those trade-offs, and our customers really work with us to do things this way. A lot of times in other MR firms we would be designing matrix questions. At Streetbees matrix questions are the original sin! You are just not allowed to do that, not only because it doesn't fit in a mobile screen, but also because people don't think that way.

**NT:** Do you do projects for other research companies?

**TB:** We don't actually work on projects, therefore no. We work on an ongoing basis - our system does things like demand forecasting and brand tracking for you, and all these are subscription solutions - and we work with customers to help them embed this into their systems. So the clients are brands, not other research companies.

**NT:** There are 15 current jobs on your careers page - are they all still live?

**TB:** I'm glad you asked - and they are all still live. We are very actively looking for strategists, looking for client partners for large scale enterprise partners. As I said we are growing at 30pc per month at present so we are very, very keen to get more people on board. ■

[www.streetbees.com](http://www.streetbees.com)

See section 7 for current opportunities at Streetbees!



### Jibunu Launches Video Responses Tool

October 28 2019

Market research technology and survey programming company Jibunu has released a video response capture tool, allowing researchers to collect 'user-generated qual feedback at quant scale'.

October 2019



# DEBUNKING 3 APP MARKETING & METRICS MYTHS

by Andy Chandler, Adjust

## Mobile Measurement Firm Adjust Expands in UK *October 31 2019*

Mobile measurement and fraud prevention specialist Adjust has expanded its UK team with the appointment of Andy Chandler as General Manager UK & Ireland, and Isabel Ferreira as Sales Director. Both will be based in the firm's London office.



Mobile has seen explosive growth in the past decade, with time spent on it now far and away eclipsing all other channels. It's estimated that throughout 2020, UK consumers will spend close to four hours a day on their smartphones - overtaking TV by more than an hour.

Given mobile's meteoric rise, it's easy to forget that it's still a very new channel. Trends in the space move fast, and what's more, there are few books or courses that can really prepare marketers for a career in mobile.

As a result, there's a whole range of practises within the industry that have evolved to become standard - but that doesn't necessarily mean they're right. Look more closely, and it becomes obvious that many of these practises are inherently flawed. With this piece, we want to shed light and debunk three common mobile marketing and measurement myths - looking at the precision and customisation needed in selecting what to measure; how an evolving and dynamic response to

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There's a whole range of practises within the industry that have evolved to become standard - but that doesn't necessarily mean they're right.

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spotting ad fraud beats reliance on closed-source SDKs; and how current solutions for people-based attribution flout both GDPR and upcoming CCPA regulation.

### *Myth 1: People-based attribution is an effective way to connect mobile users across apps and mobile web*

Recently, mobile attribution companies have been generating a lot of buzz about connecting mobile users across apps and mobile web, which they have dubbed 'people-based attribution'. Looking behind the curtain, it becomes increasingly obvious that current solutions for people-based attribution simply mean connecting the mobile web browser of a device to apps installed on that same device. To do this, MMPs drop a cookie in the browser and somehow make a connection to the device's IDFA.

The only viable way providers can currently do this would be by tapping into their clients' data. Whenever an app user gets deeplinked, they will then



Andy Chandler  
General Manager, UK & Ireland at Adjust

*Andy is responsible for managing and scaling its business in the region, helping brands navigate their digital transformation and grow their mobile offering. He brings over 18 years' experience in the ad tech industry, having previously worked at Amazon, Microsoft and Telegraph Media Group. Most recently, he served as VP EMEA at the mobile advertising platform Tapjoy.*

#### **Location Sciences Expands to Australia**

November 1 2019

Mobile data intelligence and verification specialist Location Sciences has expanded to Australia, where it will be led by digital marketer Rupert Pay as the company's local representative.

Oct = Nov 2019

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A user's profile is not stored within the scope of a single app but becomes part of a device graph that is owned and operated by the attribution provider. The data remains stored in this graph even if a user uninstalls the app, and most worryingly, even if a user opts-out of an app's data-sharing agreement.

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drop a cookie and store its connection to the device ID in their device graph - a database of users spanning mobile web and apps.

And this is where the problems begin: a user's profile is not stored within the scope of a single app but becomes part of a device graph that is owned and operated by the attribution provider. The data remains stored in this graph even if a user uninstalls the app, and most worryingly, even if a user opts-out of an app's data-sharing agreement.

This means when an attribution company feeds user data into a user graph that is then sold to clients, they should in fact be asking the user to opt in first. But none of them ask for permission to collect users' data - in fact, none even let users know they are being tracked. A private graph, on the other hand, usually doesn't offer enough coverage to really make it work. So while the technology behind people-based attribution is creepy at best, at worst, it is simply unacceptable for an attribution company to sell private user data.

So what's the alternative? App developers should keep as close to first party data as possible - this makes it very easy to observe consent and stick to the right side of the law. Rather than leaving something on the customer's device, they should be matched up with existing customer records when they reinstall, for example. Consent then becomes a lot clearer, which is exactly what GDPR is all about.

If anyone's building a business on browser-based cookies right now, they need to reconsider this move!

## *Myth 2: Service providers should recommend and select standard metrics for developers*

Aside from privacy, the outstanding issue of the big data age is: How to get enough data for insight but not be overwhelmed by it?

It's tempting to talk about 'standard metrics', and for companies like Adjust to give developers the benefit of their

industry experience, which can be leveraged to measure the success of their app. But beware: every app is different, and every developer needs to find out for themselves what measurements are important for their specific situation, in order to gauge and optimise the success of their app.

So how much do you measure? Do you take into account open rates and subscriptions, or do you want to track everything a user does inside the app? You can choose to not track a lot of things, or to track everything. If marketers decide to track more, they can then churn that bigger pool of data and begin mapping out patterns for the best performing customers - whether you're measuring this 'bottom line' in terms of making purchases, playing games, or doing surveys.

We recommend going big: start by measuring everything and look at the

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## So how much do you measure? Do you take into account open rates and subscriptions, or do you want to track everything a user does inside the app?

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drop-off points on the way to being a valuable customer. Adjust's platform, for example, allows you to pull out metrics and say 'if day 7 retention seems to be

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### **Google Buys Fitbit, but 'Won't Use Data for Ads'** *November 4 2019*

Google has acquired wearable fitness / wellness tracker Fitbit in a deal valued at approximately \$2.1 billion. Fitbit has issued an assurance that it will continue to put users in control of their data and that its health and wellness data will not be used for Google ads.



## If you focus too much on what you imagine up-front might be important, you're very likely to miss key points

really important in driving 'successful customers', watch it carefully, and get more budget into improving it'. The more data you're measuring the better you can understand the customer journey. But if you focus too much on what you imagine up-front might be important, you're very likely to miss key points, or at least be unable to fine-tune your approach.

Some examples: for those users dropping out, is it possible to win them back as a valuable customer with smart retargeting? If you're losing a significant amount of users during registration, are you asking for too much information or is the process too lengthy? Using data this way takes it beyond the silo of marketing, and means it can actually feed into the process of making a better app too.

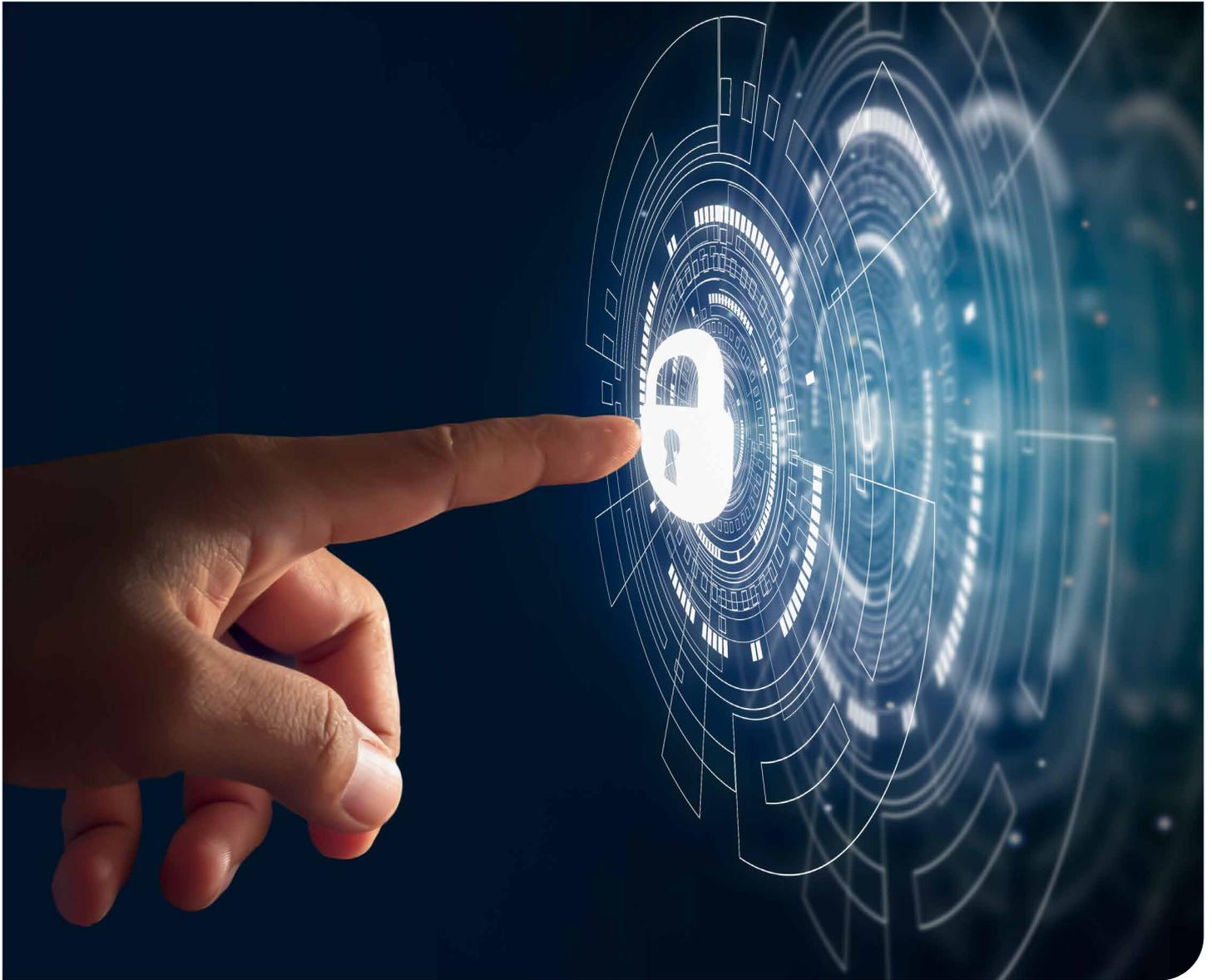
Adjust works consultatively with clients to define exactly what events to measure. Subtle differences will have a huge impact on the bottom line, and on these we can and do advise. For example many brands see retention rate - specifically 'day 1' - as a vital indicator of campaign performance, and traditionally this has been measured by changing dates on a calendar, such

### Quotient to Buy Location Intelligence Platform Ubimo

November 7 2019

Digital media analytics specialist Quotient has agreed to acquire Israel-based location intelligence platform Ubimo. Terms of the deal have not been disclosed.

November 2019



that the user has been 'retained' if he uses it on the day after he installed. But realistically, users are spread all over the globe and operate in different time zones - never mind the users who actually move between time zones. This makes it almost impossible to tell when the calendar day for each individual user has changed to the next, and should be considered as retained for day 1. We now advise defining 'day' as

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Adjust's open source SDK software means developers can see exactly what data is flowing into and out of their app, which gives vital transparency for app developers and market researchers who deal with a lot of sensitive data.

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**Experian Buys Into Mobile marketing Data Firm** *November 8 2019*

Consumer data giant Experian has announced a strategic investment in smart mobile marketing data platform Vserv. Details of the deal were not disclosed. Vserv's proprietary DMP, AudiencePro, combines off-line and online attributes to create more than 400m user profiles for mobile targeting.

a period of 24 hours: brands compare two timestamps of a user opening an app and determine if more than 24 hours have passed in between them. Nuance? Certainly not: this will decide how much money is bid on a platform, and could easily make the difference between focusing marketing effort on one platform or another.

### **Myth 3: Closed-source SDKs are the best defence against ad fraud**

Adjust's open source SDK software means developers can see exactly what data is flowing into and out of their app, which gives vital transparency for app developers and market researchers who deal with a lot of sensitive data. Closed-source evangelists argue that it's impossible to secure an open-source SDK against one of the most pervasive forms of ad fraud out there - SDK Spoofing, which, if done right, allows a fraudster to create an unlimited number of real looking users and in-app events, without ever running the actual app on a phone.

Fraudsters use real device IDs so that the fake data they create looks identical to real data, which works well, unless you are using a cryptographic signature to secure the data sent from the app. But are closed-source SDKs really more secure? During Adjust's extensive research into SDK Spoofing, we discovered that in every single case, the function they used to sign data requests was extremely easy to extract in human-readable form. In fact, for some

of the closed-source SDKs, it took our researchers only minutes to find and crack the signing function - meaning that within moments, the closed-source SDK's protection had been completely removed. The main takeaway? Don't believe that an open-source SDK can't be secured, and don't believe that a closed-source SDK can't be spoofed.

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Fraud is always evolving, and the challenge is to evolve to match and catch it. Over the last year, fraudsters have started to use in-app bots which can 'game' an app to make money off it. Unlike ad fraud, which targets an app's marketing budget, bot fraud attacks the app itself. In gaming apps, for example, bots are used to create profiles and build up a character which fraudsters can then sell, which ruins the fun for people playing the game properly. They can also be used to take surveys, a real threat to research integrity. We've developed a system via an acquisition last year called Unbotify, which spots fraud using sensor data from the phone itself such as the gyroscope, battery usage, patterns of clicking and the amount of pressure on the screen for the click. If you have a phone with a lot of activity on an app and the gyroscope

has not moved for the last five days, or if it's been on 100% battery life throughout, then it's fairly obvious that's not a real user.

Such front-line methods, combined with closing off some vital parts of the signature code in our SDK, provide what we think is the best defence against ad fraudsters, but it is important to understand that not every open- and closed-source solution is the same. It's up to the MMP to find the right measures.

Key to moving our industry forward is not being afraid to challenge the status quo. While that might seem like an uphill battle, it's also part of what makes the mobile ecosystem such an exciting space to be in. Only by working together and coming up with new solutions will we be able to drive data accuracy, and someday win the fight against ad fraud - all while upholding the strongest privacy compliance. ■

[www.adjust.com](http://www.adjust.com)

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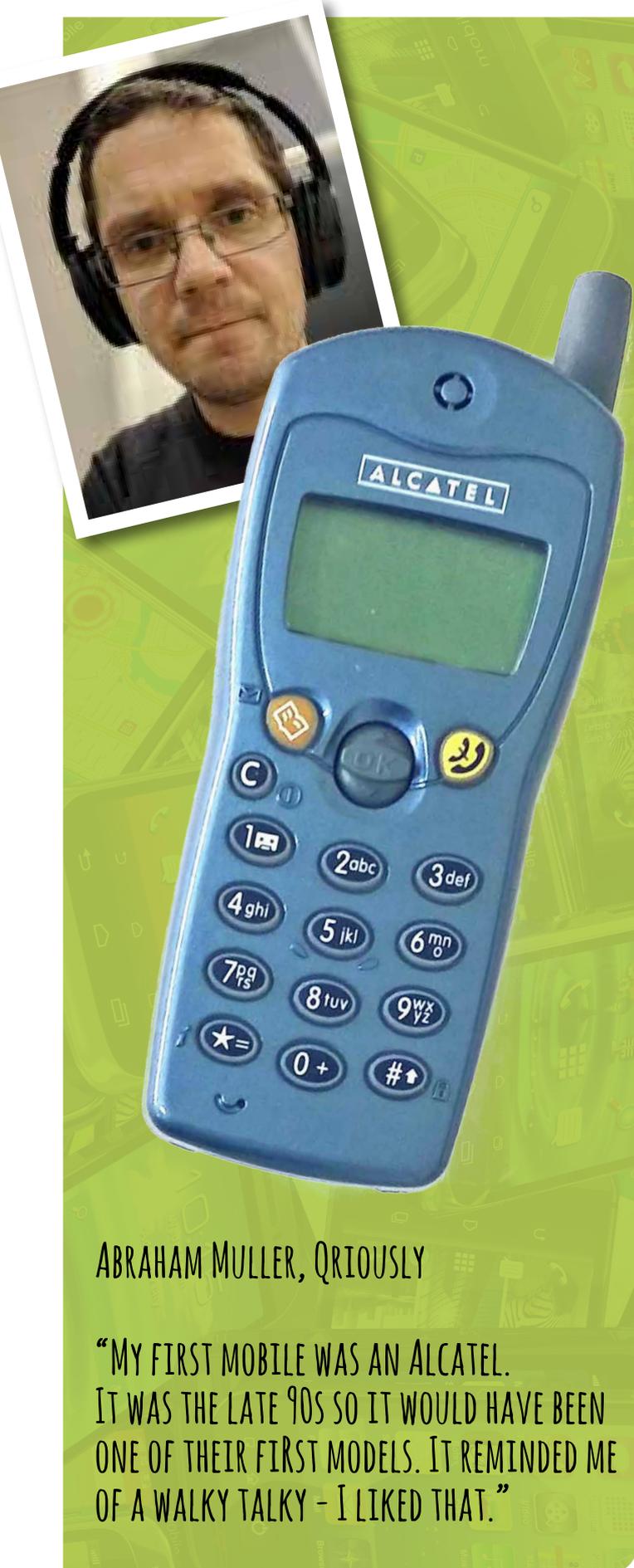
#### **Toluna Adds Scripting Enhancements to QuickSurveys**

November 19 2019

Consumer intelligence platform Toluna has added advanced scripting capabilities to its flagship QuickSurveys on-demand platform, helping users to create and launch complex studies.

November 2019

# MY FIRST MOBILE PHONE...



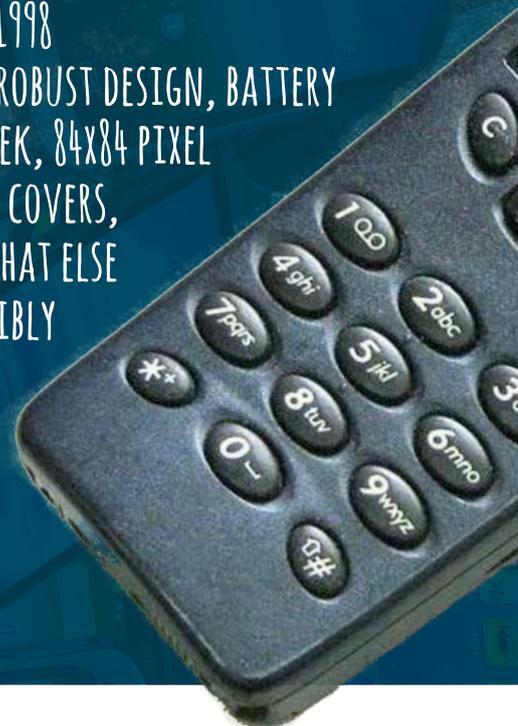
ABRAHAM MULLER, QRIOUSLY

“MY FIRST MOBILE WAS AN ALCATEL. IT WAS THE LATE 90S SO IT WOULD HAVE BEEN ONE OF THEIR FIRST MODELS. IT REMINDED ME OF A WALKY TALKY - I LIKED THAT.”



MARIO PAIC, IPSOS AUDIENCE MEASUREMENT

NOKIA 5110, c.1998  
“GREAT PHONE, ROBUST DESIGN, BATTERY GOING FOR A WEEK, 84X84 PIXEL SCREEN, CUSTOM COVERS, SNAKE GAME- WHAT ELSE COULD YOU POSSIBLY NEED”



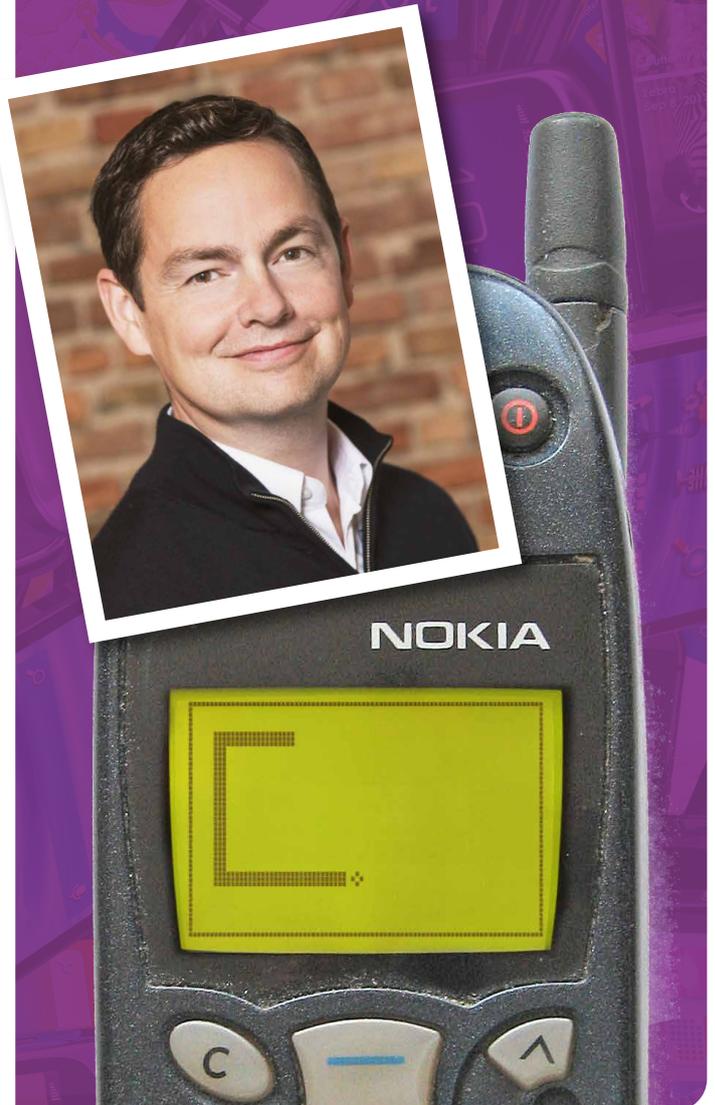
DENNIS SEWBERATH, QUENCHTEC

“PANASONIC GD30 (YEAH BABY!) . BOUGHT IN 1999 (SH\*T, I’M GETTING OLD). WE DISCOVERED THAT THERE WAS A TRICK TO MAKE FREE SHORT PHONE CALLS - DIAL THE NUMBER AND WHEN THE CONNECTION WAS MADE, YOU QUICKLY OPENED THE BACK COVER, LIFTED THE BATTERY A LITTLE BIT SO YOU COULD ACCESS THE SIMCARD SLOT, AND REMOVED THE SIM CARD. THE CONNECTION WAS BROKEN AFTER 20 SECONDS”



ANDY CHANDLER, ADJUST

“MY FIRST MOBILE WAS THE NOKIA 5110 BACK IN 1998 - SECOND YEAR OF UNIVERSITY. IT WAS MUCH EASIER THAN QUEUING UP FOR THE PAY PHONE TO TALK TO EVERYONE! I GOT 50 MINUTES FREE (AFTER 8PM) FOR 50P A DAY. IT ALSO HAD ‘SNAKE’ WHICH I MUST ADMIT TRANSFORMED SOME OF MY MORE UNINTERESTING LECTURES!”



# 6. CASE STUDIES

## MOBILE ELECTION POLLING

*By Abraham Muller, CTO at Brandwatch Qriously*



### **Paris Move and Shift of Focus for Research on Mobile**

November 22 2019

Digital data collection agency Research on Mobile has moved its headquarters from Beirut to Paris, and says that after a successful first year Europe is emerging as its biggest market, overtaking MENA.

## Henry Durant, a British polling pioneer, once called opinion polling ‘the stupidest of professions’. Why would someone risk their reputation on a prediction that could be so easily misled?

Recently we’ve seen the polls get things wrong left, right, and centre, but it’s always been an imprecise practice.

One of the most infamous polling defeats was during the Roosevelt-Landon Presidential contest of 1936. At that time, the leading poll of the day was conducted by The Literary Digest Magazine, which had a good record of picking presidential winners. The polling process was quite the operation - several thousand workers reached millions of respondents who had been selected from, among a few other things, telephone directories.

The Digest confidently asserted that Republican Alf Landon would beat the Democrat Franklin Roosevelt, but the results would prove them quite wrong - Landon suffered the worst defeat in US history.

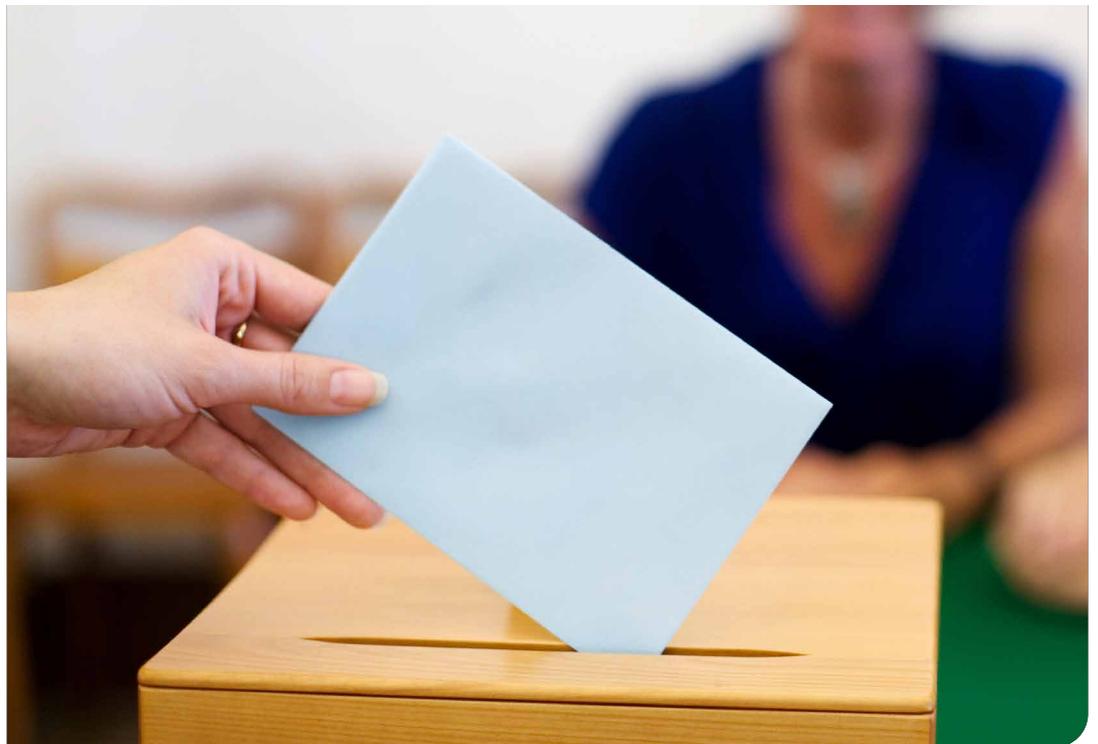
It was actually George Gallup’s American Institute of Public Opinion, founded the year before the election, that called the correct result. Gallup favored a different way of selecting respondents, polling a relatively tiny proportion of US citizens compared to the Digest’s study and instructing his interviewers to seek out very specific groups of people. This method of sampling meant a large sample size wasn’t needed to get a representative view of what the electorate was thinking.

The trouble with selecting respondents from telephone directories at the time was that, during the Great Depression, only the wealthiest citizens tended to have access to a home telephone. The Digest’s respondents would be wealthier than the general population and more likely to vote Republican, which was reflected in their incorrect prediction.

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One of the most infamous polling defeats was during the Roosevelt-Landon Presidential contest of 1936.

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### Appinio Re-launches App and Plans Global Expansion

November 26 2019

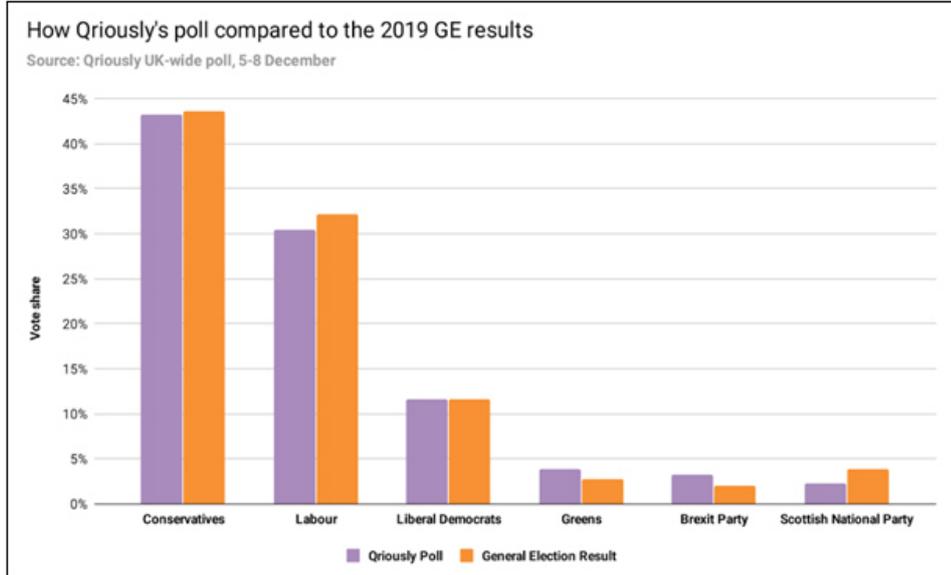
Hamburg, Germany-based market research platform Appinion has re-launched its consumer panel app, and is preparing to roll it out globally.

November 2019



Abraham Muller, co-founder and CTO at Brandwatch Qriously.

*Qriously, an innovative survey company acquired by Brandwatch last year, asks consumers questions via ads on mobile apps. Having spent ten years at Qriously, Abraham has seen many changes to the product and overseen many projects, including successful election predictions. He is based in London.*



Fast forward 83 years, and times have changed rather dramatically. The mobile phone, unlike the landline of the 1930's, is a staple of modern society and a medium through which large and highly representative samples of people can be polled. At Brandwatch Qriously, we believe they are also the medium on which the best election predictions can be made. We've proved it, too - Qriously correctly called last month's UK General Election, predicted the Labour surge in the 2017 Election, and forecast the result of the Brexit referendum.

Brandwatch Qriously is the only member of the British Polling Council which uses already established mobile advertisement infrastructure to collect data for an accurate prediction. To reach respondents, the team bid on advertising spots in ad-supported mobile apps, and show a neutral survey question instead of an advert. When someone answers that question, they'll be shown the full survey.

You absolutely need your data to represent the people whose behaviour you're trying to predict. This is why gigantic polls involving huge numbers of people can produce bad predictions.

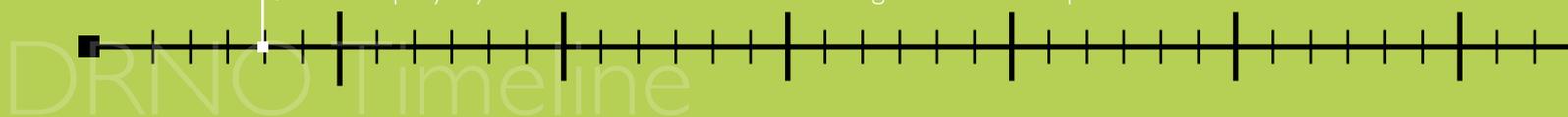
For the 2019 General Election, we asked people if they are registered to vote, and how likely they were to vote, on a scale of 0-10. Only respondents that stated 9 or 10 were then included in the study and asked who they intended to vote for.

While we're theoretically able to reach two billion respondents worldwide, the focus when it comes to election prediction is on representation.

#### Facebook Rolls Out 'Viewpoints' MR App

November 26 2019

Facebook has launched a market research app called Viewpoints, paying users to take part in surveys. The company says it won't sell or share the resulting data with third parties.



'For the 2019 General Election prediction, we ensured our data was representative of the UK adult population in terms of age, gender, region, the type of constituency (counties versus boroughs) and education level', says Brandwatch Research Data Scientist Peter Fairfax, who worked on the project. 'You absolutely need your data to represent the people whose behavior you're trying to predict. This is why gigantic polls involving huge numbers of people can produce bad predictions'.

That results are collected using ads on mobile apps is what differentiates Brandwatch Qriously from other modern pollsters, and our strength lies in our ability to weight the data gathered to represent the opinions of large swathes of voters and consumers.

'The thing people worry about when they hear how Qriously works is that they will get a biased sample', says Billiejoe Charlton, a lead Data Scientist on the election prediction project. For example, one might imagine that young people would make up the large majority of respondents to their surveys.

'Firstly that's untrue because we do get respondents across all sections of society', he says. 'Secondly, we don't just ask people about their political views. We also ask them about themselves - how old they are, whether they're male or female, what qualifications they have, etc. So if there is a skew in the sample, we know about it and know how to account for it, so we can still fairly represent the views of the whole population'.

Incentivization is also a key differentiator. Charlton continues: 'Because Qriously's survey process is anonymous, respondents can answer honestly and don't feel pressured into giving more socially acceptable answers, such as pretending they vote when they don't. Plus, Qriously's non-incentivised data collection methodology avoids 'professional survey takers' - people who actively seek out online surveys offering paid incentives that might speed through the surveys just to get the reward'.

Qriously's success at generating accurate election predictions ties back to the issues faced by those attempting to estimate the results of the 1936 US Election: Representative samples are paramount (just polling those most convenient to reach is a poor alternative), and larger surveys don't always offer more accurate results (even by polling millions of people, you can come up with a totally inaccurate prediction).

Representative samples are paramount (just polling those most convenient to reach is a poor alternative)



The mobile age makes predicting elections, market research, and surveying generally easier to implement and more accurate. And, with the US Elections around the corner, the Qriously team are gearing up for their next big prediction project. ■

*For a demo of how you can make accurate predictions using Qriously, visit: [www.brandwatch.com/products/qriously](http://www.brandwatch.com/products/qriously)*

## 20|20 Buys Mobile Qual Specialist Over the Shoulder

December 9 2019

In the US, qual MR and technology specialist 20|20 Research is to acquire Chicago-based mobile qual provider Over the Shoulder, for an undisclosed sum.

# DID YOU GET THE MESSAGE?

## THE RISE OF THE MOBILE MESSAGING-BASED SURVEY

*By Matt Kleinschmit, Reach3 Insights*



### Former Placed Leader Takes Reins at Foursquare

*December 10 2019*

In the US, location intelligence provider Foursquare has named David Shim its new Chief Executive Officer, replacing Jeff Glueck, who will be leaving at the end of this year to 'explore new opportunities'.

## The latest GreenBook Research Innovation Trends report shows that mobile surveys are finally the hottest emerging technology in insights.

According to the annual study, 56% of researchers are now using mobile-first surveys, with an additional 20% considering adding them to their research stack. Mobile surveys now outrank text analytics, social media analytics and big data analysis as the next big trend in marketing research.

It's not very surprising that a majority of researchers have already invested in the area. We live in a mobile-first era - a world where there are more cellphones than people, so it's imperative for market research to take advantage of mobile technology to get an accurate understanding of evolving consumer sentiment and behavior. But there's more to a mobile strategy than just mobile surveys - a mobile survey is still a survey, and re-sizing buttons and grids for mobile devices is unlikely to improve the quantity or quality of responses if we do not address the underlying issues.

To take advantage of the opportunity in front of us, we have to re-imagine the mobile research experience from the ground up. When I started Reach3, it was done with the belief that our industry can do a lot more to be relevant for the mobile era. While people are moving to SMS and messaging apps, a majority of market research approaches and technology still rely on stodgy, email-based methods that put people in 'test-taking'

mode, and I think that needs to change. The idea is simple: engage people in a conversational style using the mobile messaging networks and apps they already use to communicate with friends and family. No overly formalized research language or long surveys dependent on email distributions. In other words, engage research participants like they are people, not merely as 'respondents', making research exercises feel more natural.

In less than two years, we've seen this conversational, mobile messaging-based approach to research bring enormous research and business benefits. Quite simply, it drives deeper, richer insights that fuel better business decisions.

Here are three notable examples.

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The idea is simple: engage people in a conversational style using the mobile messaging networks and apps they already use to communicate with friends and family.

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Matt Kleinschmit,  
Reach3 Insights

*Matt is CEO & Founder of Reach3 Insights, a strategic research consultancy that develops mobile messaging-based, conversational insight solutions for today's modern, agile enterprise. With over 20 years of hands-on consultative insights experience across a variety of industry sectors, Matt specializes in developing interdisciplinary strategic consulting teams and creative, technology accelerated insight solutions for global brands. Prior to founding Reach3, Matt held senior leadership roles at Maru/ Matchbox, Vision Critical and Ipsos.*

### Video Survey Platform Qualie Rolls Out in the UK

December 10 2019

Australia-based start-up Qualie has rolled out its video-driven survey platform in the UK market, through a partnership with consumer and sensory specialist MMR Research Worldwide.

## Jägermeister: Leveraging the universal appeal of messaging

One myth about mobile messaging is that it's a 'Gen Z thing'. In fact, studies show SMS and mobile messaging are popular among a wide array of demographics, including older consumers. For example, a study from Facebook found that 65% of Millennials, 65% of Gen Xers and 63% of Boomers prefer messaging over phone calls or email.

When we worked with the alcoholic beverage giant Jägermeister recently, we leveraged the universal appeal of mobile messaging to get a holistic picture of the brand's current landscape and where the company can go next. The multi-phase study involved engaging a mix of Millennials, Baby Boomers and GenXers to ask them about their perceptions of the Jägermeister brand and exploring

potential new territories for growth.

Using software from our sister company Rival Technologies, we engaged hundreds of legal-age adults across different demographics. Using a messaging-based quant and qual research approach, we captured 60% response and recontact rates across generations - showing both younger and older research participants are willing to provide feedback via messaging platforms.

The results drove the development of new formats, occasion-based positioning and advertising. The ability to iteratively re-engage consumers via mobile notification throughout the research process also enabled Jägermeister to have a truly agile insight solution - all while ensuring that it's hearing from all the consumer groups relevant to its business.

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Kimberly-Clark approached us when they noticed sub-par conversion rates for personal care items... They wanted to uncover barriers to purchasing personal care items through this retailer's online service and address those issues to help drive sales.

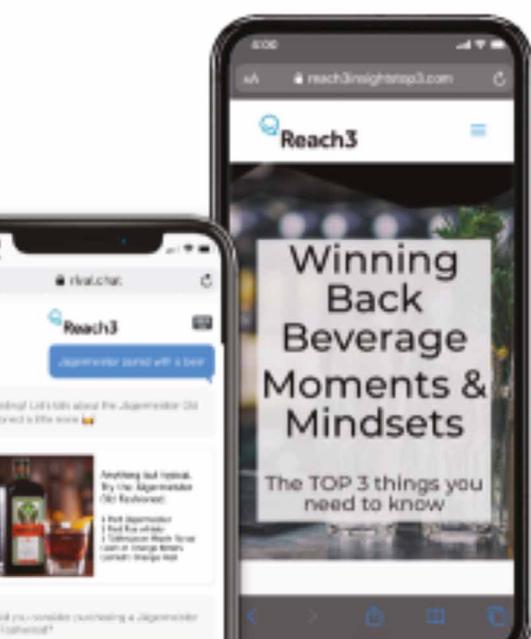
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## Hyundai: Using mobile capabilities to get closer to the experience

The ubiquity of mobile phones and immediacy of mobile notifications provide an opportunity to capture people's feedback in real time rather than asking participants to share feedback later on. This reduction in recall bias is powerful. Since people don't have to remember what they did or how they felt, they're less likely to rationalize their responses. The feedback is more candid and authentic, capturing in-the-moment experiential learning.

Engaging people in real time also boosts response rates: since engagement happens at the moment people are making decisions and forming opinions, the experience is still fresh in their minds. People don't have to rack their brains and struggle to remember what they did or how they felt. Instead, they can simply share their stream-of-consciousness feedback, using video to capture the contextual dynamics behind their opinions.

This ability to capture real-time feedback was crucial to an important research project we did for Hyundai. When this automotive giant ran an autonomous vehicle ride-sharing pilot, it needed to capture real-time feedback across the entire user experience, from online sign-up to the App user experience to the actual ride experience. The key to this project was understanding motivators and barriers,



### Verto Partners with Location Data Firm

December 16 2019

Behavioral and market research platform Verto Analytics has announced a partnership with location data and strategic insights company Unacast.



It's clear that the marketing research industry needs to go where consumers already are rather than forcing them to participate in increasingly antiquated methods.

usability issues and the experiential elements that drive both trial and repeat usage.

For this approach, we leveraged mobile messaging-based conversational activities that were triggered by QR code to engage riders in the moment, asking for their feedback during and immediately after their ride. The

messaging-based research approach that was employed was a huge win: we saw incredibly high response and recontact rates across the pilot. The client got robust base sizes for quantitative analysis as well as deep emotive qualitative feedback, including selfies and observational videos.

### *Kimberly-Clark: Increasing ecommerce sales and driving business outcomes*

Sometimes as researchers, we focus too much on methodology but don't pay enough attention to business outcomes. I think that's a huge miss, regardless of whether you're a client researcher or agency partner. One of the most rewarding aspects of our company's development of the past two years is seeing first-hand how mobile messaging-based solutions are proving to be a source of deeper, richer insights that drive results C-suite executives care about.

Our client Kimberly-Clark is a good example. The company approached us when they noticed sub-par conversion rates for personal care items on a partner's online grocery pick-up service. Kimberly-Clark wanted to uncover barriers to purchasing personal care items through this retailer's online service and address those issues to help drive sales.

Reach3 designed a multi-phase research approach to engage more than 500 consumers for a series of iterative quantitative and qualitative messaging-based exercises. Rather than

using email-based surveys, we leveraged mobile text notifications to deliver conversational chat exercises. Phase 1 of the study involved a robust quant exercise to understand drivers and barriers to service usage. For phase 2, we re-contacted select participants via mobile notification to further explore personal care shopping behaviors. Finally, phase 3 involved inviting specific respondents for one-on-one, in-depth virtual interviews, incorporating screen sharing to see actual e-commerce shopping experiences, search behaviors, pain and passion points.

This project was a huge success for the client: actions taken from the study resulted in 20% brand and category sales increases. In addition, the project won the 2019 EXPLOR Award at last year's Corporate Researchers Conference.

### *Conclusion*

For me it's clear that the marketing research industry needs to go where consumers already are rather than forcing them to participate in increasingly antiquated methods. That means moving away from email surveys and embracing mobile messaging-based solutions. The good news is that this new way of engaging with consumers unlocks incredible benefits from both research and business perspectives - delivering deeper, richer insights that fuel better business outcomes. Indeed, by leveraging the power of mobile messaging, the future of our industry is already in hand. ■

#### **Marchex Brings in Sales and Customer Success Leader**

December 19 2019

In the US, mobile ad analytics specialist Marchex has appointed former Criteo exec John Roswech as Chief Revenue Officer, leading the firm's Sales and Customer Success divisions

December 2019

# 7. SKILLS & CAREERS



First the pandemic, then the lockdown, business on pause... and the inevitable recruitment freeze from almost all firms employing data and insights professionals. What's an MR recruitment consultant to do? Just Let It Go, live off savings and government support and start again in July? Or is it not that easy? Nick Thomas surveys recruiters' experience of the last three months, and some 'early days' views of the possible long-term effects of the Covid-19 crisis.

**Contact details for all the recruiters quoted here are listed on p77**

## **Adjust Opens Mexico Office**

*December 19 2019*

Mobile measurement and fraud prevention specialist Adjust has expanded its operations in Latin America, with the opening of an office in Mexico City.

## Off the cliff

A lot of companies in the insights & data space are in good shape, but even among these, most are not recruiting. Companies still doing well include:

- those working in sectors untouched or buoyed up by the pandemic: for example groceries had a surge and are now back to fairly normal levels; health and pharma, eCommerce and fintech, online entertainment and indeed TV have seen a boost
- those getting an increased share of diminished spend elsewhere, due to their digital-ready methodologies, for example some panel and community-based agencies
- those affected by the slump but previously in high growth mode and with good backing: betting on a short recession and not wanting to miss out. This includes disruptors and challenger brands, AI-based trackers and data integrators, blockchain specialists and others.

That's quite a few firms in all. So why doesn't this translate into a lot of recruitment activity? There are a number of reasons, the most obvious of which is caution: if economies are in an unprecedented state of flux, it's tempting to curb spending in areas not seen as immediate requirements, even if you have plenty of money - and existing staff can do a bit more, can't they, just 'until we see which way the wind's blowing'? Deborah Lewis from Resources Group describes the freeze as 'one of several protective measures to ring-fence business and teams whilst assessing the situation, the impact of government restrictions, government stimulus packages and ultimately their pipelines'.

Then there's the phenomenon of spreading load: in big companies, whether on client side or among the global agencies, some areas will be going very well while others are slow. Rather than recruiting new people in the busy ones and making people redundant in the slow sectors, firms will move staff to work on what's needed. This is also true of the public sector, where spend on healthcare, communications

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So why doesn't this translate into a lot of recruitment activity? There are a number of reasons, the most obvious of which is caution: if economies are in an unprecedented state of flux, it's tempting to curb spending in areas not seen as immediate requirements, even if you have plenty of money.

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and public attitude / opinion research is rising but other projects are being put on hold, either because funds are diverted or purely because life has changed so much in two months that some other areas of policy don't currently excite much opinion one way or the other, according to one recruiter - and/or the questions government wanted answered aren't relevant now.

In a few cases, recruitment pauses are seen as very temporary. One tech researcher told us they would start again in two months or even less, whether or not things pick up - they need the staff, but they're diverting money to other investments while everyone else is frozen and uncertainty (they reckon) is at its peak. A couple have said they're recruiting but they feel it's wrong to shout about it - they're argue they're being sensitive to others who are suffering.

More reasons? 'It's not a great proposition, starting work and then sitting at home' says one recruiter. 'Some companies have induction courses they want staff to complete, and others just worry about making the job attractive in the current environment when no-one's in the office. Again, they're waiting'.

All of which adds up to a cliff-like drop-off in vacancy advertising, and in work for recruiters.

### Ipsos Replaces Comscore as UKOM Measurement Supplier

January 7 2020

UKOM, the body which defines and governs Britain's online audience measurement standard, has appointed Ipsos as its new supplier from January 2021. It replaces Comscore, which has held the contract since 2012.

Dec 19 - Jan 20

## 'What frozen things do in summer'

It may be the benefit of hindsight, but UK recruiters generally feel that January and February were busy months, by the standards of 2017-19 - some talking about the 'Boris Bounce' following the December election which capped 3+ years of Brexit uncertainty. That's now a distant memory, replaced by the big freeze. How long will it last? Nobody knows but if we were betting folk, we'd put money on a trickle back, starting as soon as June when some restrictions are likely to ease, but not gathering pace particularly fast. When the lockdown started there was talk of things returning to normal after 12 or 16 weeks, but few of our recruiter contributors are confident that a significant amount of their business will return at that time.

Things may be different around the world. Andrew Wood at Asia Talent says 'maybe' recruitment will get halfway back to February levels during the third quarter; 'but it will vary for each country in the region just as COVID management varies across the region'. For the UK, Spalding Goobey's Andrew Mercer sets expectations 3 months later / lower: 'If we believe that the recession will be a V (as is being suggested) then I would hope to see some shoots in the final quarter of the year. I hope I am wrong but I can't see things returning to February levels this year'.

So what about those hires that were made just as things fell apart in late February / early March?

## Warm heart

Many hires made just before the lockdown have since been confirmed - see Hasson Associates' experience in the previous article - although 'starting work' for these people generally consists of logging on and working from home. Many have not met any of their new colleagues yet, a month into their employment. Other placements have already been terminated or postponed - but the proportion of recruiters telling us that at least some of them have stuck, is heartening. 'Overall' says Deborah Lewis, 'MR companies have been committed to protecting their people - new and existing'.

## Early Thaw?

In the event that things pick up in July, most say the effect on their business will not have been catastrophic.

... depending on one's definition of catastrophic, I guess, but there is a general view that writing off 3-4 months and continuing will be both necessary and possible. SGA's Andrew Goobey says the business has 'plenty of latent potential' and despite being 'wounded financially' will make its best efforts to 'trade its way out of the situation'. His colleague Andrew Mercer states: 'As it stands nothing has changed in terms of the actual company... our contacts remain live and ready to restart things when the time comes, and the team is waiting for the nod to get back to it. When things resume we resume'. Andrew Wood (why are so many recruitment

UK recruiters generally feel that January and February were busy months ...following the December election which capped 3+ years of Brexit uncertainty. That's now a distant memory, replaced by the big freeze. How long will it last?

### Nielsen Launches In-Car Passive Measurement in Norway *January 21 2020*

Nielsen has launched what it claims is the world's first passive in-car measurement system, using a combination of proprietary algorithms and the 'accelerometer' built into its Portable People Meter, which can identify and report when a panellist is inside a vehicle.



consultants called Andrew?) would also be happy enough to see a resumption in the third quarter: 'We will manage the workload and be thoroughly back in gear with new services in place'. Some workers are furloughed, but the others meanwhile have plenty to do, as Deborah Lewis comments: 'Like our clients, we have made some tactical operational decisions to put us in the best shape to see this through. We are working harder than ever to stay connected with our clients and candidates, to understand what is happening in the market and where the opportunities lie. We're not saying it's easy, but it's business unusual with a firm and hopeful eye on the future!'

### **Clients might recover quickly too**

Views are more mixed on the effect the hiatus would have had on clients. Sinead Hasson believes some will be caught out, in recruitment terms, and end up putting too much stress on existing staff because they have allowed the recruitment cycle to lapse. They won't be able to bring new people in quickly when they do crank up the gears once more (see following article).

This may be helped however by the unusually rich talent pool developing as the crisis unfolds. 'We're spending a lot of time speaking to people, and giving coaching' says Pollen's Stephanie Fairbank, 'even where we can't help them in terms of roles. I've spoken to at least double the number of people I'd be speaking to in a normal April, and they're often really high calibre'. She

wonders, however, if things will recover quicker / more strongly at the senior end, especially for people with good contacts who can develop business. This has happened with previous downturns and recessions (think recoveries in 2003, 2011-12).

There are other reasons for optimism - views are mixed on whether recruitment cycles can be drastically shortened, but at least one recruiter suggested they won't be starting from scratch: 'Some clients who put things on hold have kept in touch with candidates and will be picking them up and taking them straight to the final round when they are ready to recruit'.

In the case of smaller agencies, however, there is the question of whether they'll even be there to pick up the pieces. MR associations in both the US and the UK - countries representing around half the world's MR spend between them - have written to governments warning of the potentially disastrous effects of the pandemic on our industry, but at the time of writing no sector-specific support has been forthcoming. Nevertheless, the general measures put in place to protect business could be sufficient to pull the majority of MR firms through, we think. 'If the furlough scheme carries on until things get back to some sort of normal' says Andrew Mercer, 'I think most companies will be able to pick up where they left off'. But he cautions that there are 'too many unknowns at this point to give a useful answer'. Andrew Wood says agencies in Asia have taken a very flexible approach to getting through the crisis, adopting video meetings

#### **Verto Closes \$16m New Funding Round** *January 21 2020*

New York and Helsinki-based cross-media measurement specialist Verto Analytics has completed a \$16m round of funding, which it will use to fuel the commercial roll out of its behavioral analytics research platform in the US and Europe.

January 2020



and home working, and in some cases pooling resources across countries where there is a shortage of staff, but still believes that 'some boutique/local agencies will not re-emerge post crisis'. Generally, he says, 'agencies across Asia are adopting a 'wait and see' approach without trying to forecast/anticipate next steps'. Gemma Lewis at Resources Group Australia notes: 'The only thing that will re-open the job market is consumer and business confidence and corporates spending money again. We suspect that Australia will recover quicker than the UK, as social distancing rules are being relaxed and businesses are re-opening' - nevertheless she expects 'a slow return to normality'.

## New Normal

Most of our recruiters expect some of the new processes from this unprecedented period to stick, when economies recover. 'I hate to say it,

but Zoom interviews may be on the horizon' says Andrew Goobey, voicing a common view of the package with which most seem to have a love/hate relationship, and which he describes as 'ubiquitous in the 'lockdownsphere''. Andrew Mercer says companies will be \*more\* open to 'doing the whole process via video', but not entirely so: 'I do think companies will go back to wanting to meet the person face to face... I personally feel you get a better take on someone and things run smoother'. SGA is among several recruiters who have seen at least one placement go all the way through using video, in the last month, with no major problems. 'Just last week', says Deborah Lewis at Resources Group, 'we successfully signed and sealed two business critical roles so there are opportunities out there. The entire interview process occurred remotely'.

An increase in remote working - and with it flexible working - is very likely

to be a long-term consequence of the pandemic. All recruiters agreed with this, and analysts in other sectors widely predict the same.

Covid-19 will have other lasting effects on general business practices. 'One thing is for sure' says Andrew Wood, 'there is a shift to more decentralised management, which might also mean less cross country travelling involved' - Wood is Asia-based but it's received wisdom that business and consumer flying will be hit long-term and many think levels will never return to what they were.

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## An increase in remote working - and with it flexible working - is very likely to be a long-term consequence of the pandemic.

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Another general effect has been to accelerate the already well-established 'shift to digital', in communications, media, commerce and other fields and companies well adapted to the new digital world will find it much easier to survive now than their more traditional counterparts, in all or most sectors. In the insight space, the pandemic may kill off many an attempt to hang on to old ways, decreasing the voice of traditional research advocates in the bigger agencies and in client teams alike.

Focusing on MR recruitment, a market which has always been candidate-led (ie good, experienced candidates are

### ZoomInfo Launches Mobile Apps *January 27 2020*

Business Intelligence provider ZoomInfo has launched free and premium versions of a new application, CommunitieZ Go and ZoomInfo Mobile, to support demand for 'instant access to actionable, high-quality B2B data'.

## There may be a change to a surplus of good people, especially in the short- to medium-term. The market will flip from being candidate led to vacancy led

in short supply so to some extent they call the shots), there may be a change to a surplus of good people, especially in the short- to medium-term. 'The market will flip from being candidate led to vacancy led' says Deborah Lewis - a view endorsed to a greater or lesser extent by most others. Pollen's Bridget Barry believes that if and when things pick up later in 2020, briefs will be 'incredibly specific' - clients won't be looking to bring people on board for general reasons or just 'because they're good and we don't want to miss them', but because specific gaps need to be filled.

This will be part of a difficult picture for the many candidates looking to resume their careers. Employers dipping their toes back in the water will probably consider offering temporary / contract roles, or at least temp-to-perm, and individuals will have to accept the uncertainty this brings as preferable to the uncertainty of continuing to look. They will at least be available for immediate start, in many cases.

### Same Boat

For all that every industry is different, and that some types of research will be among the hardest hit by Covid-19 (see Jane Frost's letters to the chancellor about ftf workers),

the problems we encounter as life - hopefully - returns to normal will be very similar to those faced by other sectors. These include psychological scars, including the long-term effects of incredibly tough decisions about staffing taken by senior people - mentioned by more than one recruiter; the difficulty of maintaining company culture while operating remotely and virtually; the need to rescope methods and redesign services to suit a more cautious and 'distanced' world in what's likely to be a very competitive market; and a probable shift in the balance of power between industries, resulting in shifting client bases and new market realities to understand.

On the last of these, there's no doubt that incredible shifts have occurred: think row after row of parked airliners; firms paying people to take oil away as opposed to selling it; more high street chains calling in the administrators while pureplay online sellers struggle to keep up with demand; and the massive opportunities for pharmaceutical companies. Some of the effect will be permanent.

### Ending on a high note...

At MrWeb we'll always look for a reason to be cheerful, and it's not hard to find even now. It's not so much our

## Thanks to:

Bridget Barry  
bridget@pollenrecruitment.com

Stephanie Fairbank  
stephanie@pollenrecruitment.com

Andrew Goobey  
andrew@spalding-goobey.co.uk

Sinead Hasson  
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Andrew Mercer  
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Andrew Wood  
andrew@asiatalent.asia

confidence that things will improve before too long - they will, but be in no doubt: 'though in some respects we can hope simply to 'pick up where we left off', in others we will be very much 'starting again'. But that in itself is a reason the industry should be aiming high: if businesses really do have to 'Forget everything you knew', that can't be altogether bad for those of us whose job it is to find things out - and that means plenty of jobs in insights. ■

See why Giles Palmer thinks the industry will grow 'x5', on page 44.

### Location Data Firms Mapidea and Unacast Team Up January 30 2020

Geospatial data and insights company Unacast has announced a partnership with location analytics firm Mapidea, with the aim of expanding in the international retail market and focused around Unacast's flagship product, The Real World Graph.

# CURRENT JOB OPPORTUNITIES

## UK

### Research Methodologist / Research Product Development

Central London

£45-50,000 + strong bonus + good benefits

Resources Group  
153864

### Insights Manager, Client-Side - Entertainment - Mixed Methods - Quant Focus

London

c.£35-40,000 + 15% bonus + excellent benefits

Pollen Recruitment  
153934

### Senior Enterprise Development Representative

London

£ Competitive salary and commission scheme

Streetbees  
153928

### Inside Sales Lead

London

£ Competitive salary, commission scheme and stock options

Streetbees  
153929

### Research Executive

London

£ Competitive salary based on experience

Streetbees  
153930

### Enterprise Development Representative

London

£ Competitive salary and commission scheme

Streetbees  
153931

### Research Manager

London

£ Competitive salary based on experience

Streetbees  
153921

### VP Sales

London

£ Competitive salary, commission scheme and stock options

Streetbees  
153922

### Product Manager (B2C)

London

£ Competitive salary based on experience

Streetbees  
153923

### Graphic Designer

London

£ Competitive salary based on experience

Streetbees  
153924

## EUROPE

### Technical Account Manager

Oslo, Norway or Malmo, Sweden

Competitive salary according to experience and location

QuenchTec  
153927



### Medallia Buys Video Feedback Firm LivingLens February 7 2020

Silicon Valley customer experience management specialist Medallia has agreed to pay around \$26m in cash to acquire video feedback platform LivingLens, which it says will help it 'bring the voice of the customer and employee to life'.

## ASIA AND AUSTRALIA

### Associate Research Director - Quantitative

Singapore

c.\$SG 104,000 plus bonus structure and allowances

Asia Talent  
153937

### Research Director, Quantitative

Vietnam

c.\$US 72,000 plus bonus structure and allowances

Asia Talent  
153938

### Research Manager - Quantitative

Singapore

c.\$SG 84,000 plus bonus structure and allowances

Asia Talent  
153939

### Associate Research Director - CX Technology

Sydney

\$AUD 90-100,000 + superannuation + benefits

Resources Group  
153935

## USA

### Researcher

New York

\$ salary to be discussed

Alpha  
153936

### Senior UX Designer

Chicago, IL, USA

\$ salary TBD

The Nielsen Company  
153893

### Technical Project Manager, Client Consulting

New York

\$ salary TBD

The Nielsen Company  
153892

### Associate Community Manager - Online Communities Research

Cincinnati, OH, USA

\$ salary TBD

Ipsos North America  
153840



### Localytics Sold to Upland for \$67.7m February 11 2020

In the US, mobile engagement platform Localytics has been acquired by work management solutions firm Upland Software for \$67.7m in cash. the firm taps into users' data to deliver targeted and personalized engagement campaigns, including push and in-app messages.

February 2020

# RECRUITMENT... INTERRUPTED

A golden chain is shown breaking apart in the center of the frame. The point of separation is surrounded by a bright, glowing cloud of sparks and particles, set against a dark background filled with stars and nebulae. The chain extends from the top right and bottom left towards the center.

*MrWeb's Nick Thomas talks to Sinead Hasson, founder of insight staff recruitment specialist Hasson Associates, about changes in skills and practices in the Mobile Age - before and after the pandemic.*

## **Roll Out for Virtual Australia Total TV Database** *February 27 2020*

OzTAM and Nielsen have rolled out the first phase of their Virtual Australia ('VOZ') Total TV database, which brings together broadcast viewing on TV sets and connected devices, to provide all-screen, cross-platform planning and reporting for Australia's television industry.

**NT:** we might as well start with Covid-19, as it's hard to get away from the subject anyhow and because it's put the whole recruitment sector on hold, has it not. What are your thoughts about how long it might all last and how quickly things will pick up again afterwards?

**SH:** Well to be honest I have no idea when and how we'll come out of this, but I'll tell you where we're at right now, and about my main worry. Job vacancies - of which we had loads in February - have been put on hold because of uncertainty, and not because the need for the people has gone away. Most companies we talk to still say there is a need for new staff, but they are managing to cope without them, because they have to, and they are finding ways round it. There have been blanket decisions to freeze all hiring but within those, there are [very] small pockets where people are still looking. One odd feature of this is that a lot of people are cancelling their contractors - that's flexible headcount and it's unusual to see. It may be because companies saw this as a very short-term problem. However...

I worry therefore that there's going to be quite a lot of staff and resources shortage - for the foreseeable future. The people that were overworked before are still going to be overworked now. What makes this worse is the fact that recruitment is a pipeline, not an instant process. In the normal run of things it takes perhaps 6-8 weeks to find someone, ie from a job going up to an offer being made, including getting CVs, giving feedback, organising and conducting interviews; and then from that point on it can be a further 3 months before the new people actually start, due to notice periods and other factors. So if companies don't restart their recruiting until July or possibly August, the people they hire won't actually start in their jobs until January 2021 - it's a very long cycle. Worse if it's a salesperson you're hiring because they're

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Most companies we talk to still say there is a need for new staff, but they are managing to cope without them, because they have to.

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not going to make an impact on your business until March - it will be a whole year. People are going to be struggling for a full year to get their skills quotas right again.

In the meantime there are a lot of staff who are overworked, unhappy and want to leave - this will affect quite a lot of companies. One company we know apparently made a lot of people redundant rather than furloughing them, and a candidate said she had been told 'this means in 3 or 4 months we can hire you back' - but I'm not sure they can do that.

**NT:** Are there things people can do to make the recruitment process quicker, and will this force that change do you think? Many people are saying things won't go back to the 'old normal' after the pandemic finally leaves the headlines.

**SH:** Yes, you can make the recruitment period quicker, but not all parts of it, and what we're trying to encourage people to do, if you know how long it will take, is just keep recruiting. You can still do the first and the second interview, and if you can't make your final decision until June that's only seven weeks away. But due to uncertainty about the recovery process, it's hard to persuade people to bet on June.

In terms of the candidate pool, Covid-19 has meant there are some amazing people now who are looking for jobs, not just because they've been furloughed or made redundant, but because they've had time to think about what they want, and look around. We're having some thoughtful conversations with some really good people, and companies might want to consider making them a provisional offer and then confirming it at some point. Everybody I talk to says 'we still need to hire people, we just don't know when'.

Practices and processes are changing of course: companies are more open to remote interviewing and virtual onboarding. Remarkably, we've had 3 people start jobs today from their living rooms - people we placed before it all blew up, and they're having online induction etc. In total, we had about 8 people who were starting in April and I thought 'oh God none of them are going to start', and actually they've

### mParticle Raises \$45m for Platform Expansion *March 3 2020*

In the US, customer data platform mParticle has raised \$45m in a Series D round of funding, for use in expanding its platform. Mobile app developers use the platform to collect, organize and synchronize data from mobile web and apps; and design and run personalization campaigns.

Feb - Mar 2020

all started, all of them. It's an interesting and challenging experience for them certainly - you start your new job, you don't go anywhere, you meet your new colleagues online...

**NT:** Looking as far back as February - if we can still remember what the world was like! - what would you say have been the longer-term trends in skills requirements and career paths, as what we're calling the 'Mobile Age' progresses?

**SH:** The fact that MR is becoming more technology-based, with more tech firms and more and more talk of platforms, has meant that traditionalists are being challenged - there were until fairly recently plenty of people who said 'I don't believe in online qual' for example - but that won't be helpful in terms of long term career development, CoronaVirus shows that the tech really does allow business to continue in a way that it wouldn't have done otherwise. It was interesting to see companies posting on LinkedIn 'we've converted all of our projects to online', as it flagged up the fact they \*had\* to - other companies would have said 'Well that's what we do anyway' so there was no lead time in changing over. For those of our clients that aren't classic MR agencies, the ability to work with new and different forms of tech and understand its value is key, partly because it also creates a more flexible person in terms of their skills. Now a good candidate for these companies needs to be tech friendly and really tech aware, but also have really strong commercial skills and ability to influence.

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Covid-19 has meant there are some amazing people now who are looking for jobs, not just because they've been furloughed or made redundant, but because they've had time to think about what they want, and look around.

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**NT:** that's interesting, why commercial skills if the process is more technical?

**SH:** A lot of people who work in traditional tech aren't very commercial - they can't sell the benefit of things...

**NT:** You're thinking geeks...

**SH:** Yes - whereas nowadays you need someone who's really techy but can also explain the technology to someone in a way that makes sense. You'll need to go into a client company,

**Affle Buys Proximity Measurement Firm Mediasmart** *March 4 2020*

New Delhi, India-based consumer intelligence platform Affle has expanded to Europe, with the acquisition of mobile programmatic and proximity measurement firm Mediasmart, which is headquartered in Spain.

a Pepsi or a Diageo or whoever and help them understand how this new solution will be just as effective as what they used previously, and you're going to be communicating with lots of different people. It might initially be a peer of yours, very young, but if you have to persuade people in the C-Suite it'll require a totally different approach. I think influencing skills, communications skills are vital in any kind of agency environment, but where you're persuading people to transform the way they do things, it's a very specific need. Sell the idea and then do the research, a fusion of skills in one person rather than it being two separate roles as it used to be. But I'm not saying you have to turn into a programmer - not that level of familiarity with the technology.

**NT:** I find a good way to assess what's changed is to look first at what hasn't. A lot of what we do still requires the same skills - would you agree?

**SH:** Agreed, and because technology has made certain aspects of the job quicker, conversely you have more time to be creative and thoughtful about projects. Some people say tech and AI automate things and that's bad, but more often I think it takes away the time-consuming tasks, it *\*should\** free you up to spend more time on generating deeper insights, and adding value. One example is in international research, which can now be done much quicker so execs at these firms will spend much more time looking at cultural issues and differences, and are able to do such comparisons on projects where they wouldn't have

before.

**NT:** Adding value certainly isn't a new requirement 'though - it's been a rallying cry since time immemorial...

**SH:** Yes, clients are still saying the same old thing - we want more from our agencies. I suppose the truth is that they're never going to get what they want because what they want always changes. It's a constantly evolving thing, you never achieve perfection. If you went to the MRS Conference and all the clients were saying 'You do everything right', it'd be a really *\*weird\** conference [laughing].

'Adding Value' does change however as technology changes. At the heart of it, clients have always wanted a better understanding of what their customers want, and if technology can help researchers get at it that's a good thing, but if the tech is available and the in-house people can run it themselves, the agency's role can be reduced. Agencies have to be really smart and do something the client is unable to do, to maintain their value.

**NT:** Looking specifically at mobile tech, we have some articles in this issue about survey design for mobile, survey optimisation and native mobile design; and clearly it's an art that needs mastering by someone, but is it a skill for the general researcher?

**SH:** It depends on the company, including company size. If you've got an old fashioned ops team in an agency, designing a survey that can be run on multiple platforms would be their job.



Sinead Hasson  
Managing Director,  
Hasson Associates  
Recruitment

*London-based Hasson Associates is a specialist research & insight recruitment agency founded in 2008. The team finds talent for agencies and in-house teams in the UK and Europe, with a strong focus on career development and talent management. Sinead has worked in recruitment in this sector since 1996, at firms including Price Jamieson where she managed an industry-leading MR team.*

#### **BARB Integrates with IPA TouchPoints** March 10 2020

UK television audience measurement body BARB has combined its daily audience data with the IPA's TouchPoints survey, to help media owners, clients and agencies understand more about viewers through a wider range of behavioural definitions.

March 2020



But even where this is the case, ops and research work together to get the questions right, in partnership, so it's not a bad thing for the researcher to learn those skills, and understand a bit more about the complexity of designing a survey for multiple platforms.

**NT:** so you're saying there's no revolution in this - just an evolution of the old system where field & ops work with researchers?

**SH:** Yes if it was CAPI and CATI before, now it's mobile, panels... that relationship between the functions in an agency doesn't really change, not massively. There are more tools available and more data resources for everybody - I mean I loved what YouGov did when they reimagined their business, looked at the data they had lying around and came up with Profiles... but at the end of the day the basic functions of a business are the

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Recruitment is a pipeline, not an instant process. In the normal run of things it takes perhaps 6-8 weeks to find someone ...And then from that point on it can be a further 3 months before the new people actually start.

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same, what evolves is how can you do it more efficiently and successfully. In our line of work, you still send a CV to somebody and they still say 'I'll interview them' - I could send it on carrier pigeon or a mobile, the relationship is the same.

**NT:** the operational side of recruitment is one area that the current crisis

may change long-term of course, with people getting more used to interviewing remotely - it was fascinating to hear that so many of your placements from immediately before the crisis have gone ahead, with people working from home - but the tech for remote working has been around for a long, long time, and people could have been using it a lot more. Was anybody interviewing candidates remotely before March?

**SH:** Well yes, you have lots of telephone interviews and some Skype interviews for people who are abroad - but apart from that not a lot. We've just filled a position that came in after the virus too actually - the client interviewed the person on Zoom and offered them the job.

**NT:** ...and again that could have been done years ago, but now people have been forced into it. will things be any different going back now?

**SH:** I think so yes - there have been a lot of changes in workplace culture, a lot more homeworking. I've heard rumours that people will be allowed to go back to work as long as they stay 2 metres apart! I'm not sure what chance there is of that. But some changes are going to be there - we might go back to how it was before, but certainly some big companies are going to say 'Actually we don't need this space', and we could get another £1m or so off the bottom line if we got rid of this'. Hot desking? I'm not sure - people want their own space - but some variation on it maybe. My team do a lot of homeworking but there was one person who didn't want to mix home

### Remesh Raises \$25m to Expand Company and Platform

March 12 2020

MR software firm Remesh has raised \$25m in a Series A2 round of funding, which will be used to drive expansion of the company and its platform.



and work: now he's been working at home for 3 weeks and is actually quite enjoying it.

**NT:** To what extent are any kind of 'mobile skills' or experience with surveys on mobile, for example, talked about by your clients - is it just taken for granted that people will be savvy?

**SH:** 'Mobile' is not mentioned at all. If you're hiring somebody who's a programmer or scripter you just want them to have whatever package they'll work with, but it's not about mobile surveys.

**NT:** Maybe under aliases - agile or in-the-moment experience?

**SH:** They might say 'in the moment' - however a job spec wouldn't specifically say Mobile, it would have the things they'll work with.

**NT:** There's also a lot of talk about conducting more 'hybrid research' - do people ask for skills relevant to this?

**SH:** Yes we get a lot of that, but it's more to do with mixing traditional skills with expertise in data analytics and data visualization - bringing in data from multiple sources and having the skill to integrate it. Data viz is actually a really good skill to have: if you're a classic data processor and you can also create good data visualizations that's helpful as everyone's trying to up their ante on presentation - we will sometimes hire data viz and graphic designers.

**NT:** ...a separate requirement from other IT skills?

**SH:** Yes, separate from a scripter for example, unless it's in a small company where people double up roles more. A researcher doesn't need to be good on that side - it's more a question of ability to use them rather than create them.

**NT:** Lastly, another thing that pops up in talking to people for this issue, and divides opinion. Has the industry been slow to adopt mobile do you think?

**SH:** I think in the last five years I wouldn't say that. The people who founded and ran the panels companies were really strong entrepreneurs who were quite transformative, and were able easily to flip onto the next thing. They were or are a different breed with a different culture to traditional researchers - more opportunistic and have moved faster. ■

[www.hassonassociates.com](http://www.hassonassociates.com)

## MY FIRST MOBILE PHONE... SINEAD HASSON

1999. IT WAS A NOKIA - EITHER THE 3210 OR THE 7110 - AND WE GOT ONE PHONE FOR THE TWO OF US. IF YOU SIGNED UP YOU HAD A WEEKEND AWAY IN A HOTEL IN MARLBOROUGH. I'LL NEVER FORGET IT AS EVERYONE AT BREAKFAST HAD A NEW MOBILE PHONE - I MEAN PRETTY MUCH EVERYONE IN THE HOTEL. THAT ANNOYING ORIGINAL RING TONE WAS EVERYWHERE.



### Route Adds 'Spot Level' Audience Measurement *March 12 2020*

In the UK, out-of-home (OOH) audience research body Route has launched a measurement system which offers 'spot level' audience measurement at 15-minute levels for ads shown on any digital poster or screen, in order to pinpoint who is exposed to ads and for how long.

March 2020

# BACKWORD



It's hard to remember anything MrWeb's published that's missed as many deadlines as this 'Mobile Age' special issue - we're sorry. So much for 'Agile'. On the other hand, they have been rather strange times and it still feels good to be putting out something so full of positive thinking and dynamic people - we think it was worth the wait in the end, and hope you agree. In addition to the effects of the pandemic, the delays included unrelated illnesses for no fewer than three of the major contributors, and on the healthier side, a lot of work that went into setting up and launching our new jobs partnership with ESOMAR - announced in February and keeping us more than usually busy at the start of the year.

Now that it's published, 'Mobile Age' will join the Online Communities supplement on our MRT features section, now linked to our home page Marketplace directory, and we'll be looking to establish rolling updates for MRT once again. We said when the supplements were launched as a '21st Birthday' special that if they went down well we'd think about establishing them as a continuing feature, and at the moment that seems likely to happen.

Huge thanks go to two 'Chris H's. Chris Havemann at RealityMine for serving as the title sponsor this time around, and providing plenty of dynamic input to the

supplement as a whole and not just the articles on which his company's name appears.

In laying out, illustrating and publishing, Chris Hayton at Fullpoint Design was patient enough with the Communities supplement but has achieved near saintly status with this more protracted issue, and we heartily recommend his excellent services ([chris@fullpointdesign.com](mailto:chris@fullpointdesign.com)). Chueyee Yang at Happy Market Research has also been extremely helpful and good to work with in scheduling and producing the podcasts.

In the summer, we aim to publish a third supplement, looking at Data Visualization - please contact us on [ads@mrweb.com](mailto:ads@mrweb.com) if you want to be a part of it.

Keep giving us your feedback on DRNO ([www.mrweb.com/drno](http://www.mrweb.com/drno), if you're not already a subscriber to the MR world's daily paper), and let us know what you think of the special issues so far, on [hello@mrweb.com](mailto:hello@mrweb.com).

Thanks for reading!

Nick Thomas,  
MrWeb

## NEXT ISSUE SUMMER 2020

Next we'll be looking at Data Visualization, including presentation software, real-time analytics, infographics, mapping and charting. Sponsors and advertisers: contact [ads@mrweb.com](mailto:ads@mrweb.com).

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