

# MOBILE MESSAGING APPS: 800+ MILLION CAPTIVE CONSUMERS FOR REAL TIME INSIGHT

## IMPROVING THE UNDERSTANDING OF CONSUMER BEHAVIOUR THROUGH REAL TIME DATA ACQUISITION

*Navin Williams • Mark Sismey • Pippa Bailey • Simon Harris • Siobhan Churchill*

### PREFACE

This paper describes the learnings and insights gained by the novel use of a mobile instant messaging app (WeChat) to collect consumer data. Snacking behaviour was recorded to learn how a combination of qualitative, quantitative and observational techniques can be administered via WeChat to provide a powerful method to record real-time consumer consumption behaviour. This paper will share the findings as well as the benefits and challenges of using an instant messaging app to better understand drivers of choice.

### INTRODUCTION

#### **The need to access timely data to accurately guide new product development (NPD)**

Much food and drink NPD activity starts with ideas or opportunities identified through large scale usage & attitude (U&A) studies. These studies effectively provide a detailed review of who, what, why, when and frequency of use for key brands/products in order to provide an overview of a defined category. Through this process brand owners can use the data to find areas of white space for new product development as well as identify further opportunities to improve their existing offering versus competitors. However, there are three potential issues with the design of these types of surveys, which are traditionally conducted online.

The first of these is that the online surveys are typically very long, in some cases up to an hour. The surveys tend to be repetitive with the inclusion of many grid style questions which are renowned for driving consumer drop out and the straight-lining of responses. This raises issues of how representative the sample is for those willing to complete such surveys and the quality of the resultant data.

However, a greater challenge in trying to access valid insights is the fact that most of the questions posed to participants are reflective in nature, often requiring participants to recall purchase and usage information over the past year. It is well known that people are very poor at recalling their behaviour (Ahmed, Brzozowski and Crossley, 2006) over a period of 24 hours – let alone trying to estimate how often they have purchased and used certain products and brands over the past weeks or even months. Poor consumer recall can be easily demonstrated and shows the risks associated with posing these types of questions to consumers.

The final issue is that usage and attitude studies often revolve around asking participants about product choice in pre-defined occasions (e.g. breakfast, mid-morning snack, lunch, dinner). The unstated assumption is that the time of day ultimately defines consumer choice, when in reality the emotional state and functional needs of an individual at a given point in time will more clearly determine the nature of brands and products they choose.

MMR Research Worldwide (MMR RW) Mindsets™ is a research approach that was developed in recognition of the fact that how a person feels and what his or her functional needs are at a specific point in time are better determinants of which brands/products are ultimately chosen for consumption, rather than the occasion itself. Therefore, it is possible to understand the size of the opportunity for each of the resultant Mindsets™ and the associated choices being made – meaning that it is possible to uncover the criteria for what makes a brand/product really work for a given set of emotional and functional needs. This knowledge ultimately provides the opportunity to steal a greater share of the market by either optimising existing offerings or through other means of innovation.

The approach typically starts with the consumer perspective and no pre-existing assumptions, employing qualitative pre-work in the form of a week-long Market Research Online Community (outside of the scope of this paper) to more fully understand how consumers talk about the category of interest (in this case snacking) and the emotional and functional language they use.

This information is then taken forward in designing a predominantly quantitative survey to uncover the emotional state and functional needs of relevant consumers for the category as well as the what, when, where and who with questions.

Historically, the quantitative data has been captured via online surveys in which it is necessary to use qualitative understandings to create concept-like descriptions of real occasions in an attempt to elicit consumer recall and reflection on needs, emotions and ultimately consumption choice. Despite the use of indirect questioning and soft gamification in the survey to encourage this reflection, however, it is acknowledged that this could only ever be a weak indicator of the Mindset™ at the actual point of consumption. Thus, irrespective of the sophisticated analysis used, it is very apparent that in order to get valid insights it is necessary to capture this data in real time, and at multiple points, for each consumer.

This led to the development of a research app in which it is possible to employ the gamification tools and indirect questioning methods around emotional states and functional needs, and capture consumption choices in the moment – as well as to understand more about location, what consumers are doing, who they are with and what they have chosen to consume along with the opportunity for photo/video validation. Accessing this in-the-moment data meant that it was possible to capture this information every time a relevant choice/consumption occasion arose over a period of time (weeks or months).

This overcame the biggest barrier in terms of data validity and the approach has been proven to provide high quality data, though it was not without its challenges. Using an app-based approach, it was possible to get a high level of engagement from participants once the app had been downloaded (with over 90% of participants using the app every day to record their behaviour) but the biggest challenge was getting screened participants to download the app in the first instance, with a dropout rate of 49%.<sup>1)</sup>

Intuitively, mobile provided the right technological solutions as it is always on and always within arm's reach, allowing for the recording of real choice behaviour and also for the context surrounding that choice. However, it was necessary to look at other routes to engage survey participants in order to make the method efficient and scalable. Given this challenge, MMR RW consulted MobileMeasure (MM) and the idea to utilise social messaging platforms to assess in the moment consumer choice behaviours was put forward.

### Mobile instant messaging

One potential solution came in the form of mobile instant messaging platforms, which have been credited with the drop in global SMS use. Instant messaging apps are becoming increasingly popular across the globe, and are the most common feature of mobile phone activity amongst mobile internet users in China (table 1).

TABLE 1. LEADING MOBILE PHONE INTERNET ACTIVITIES AMONG MOBILE INTERNET USERS IN CHINA JANUARY 2013

% of respondents	
Instant messaging	70.1%
Searching	54.4%
Browsing news	51.5%
Social networking	46.3%
Mobile reading	42.9%
Downloading apps	38.9%
Mobile shopping	36.8%
Email	36.0%
Mobile payment	34.3%
Mobile banking	27.6%
Visiting BBS	25.9%
Video	25.7%
Online mobile gaming	22.1%
Travel booking	13.4%
Location-based check-in	13.3%
Other	0.4%

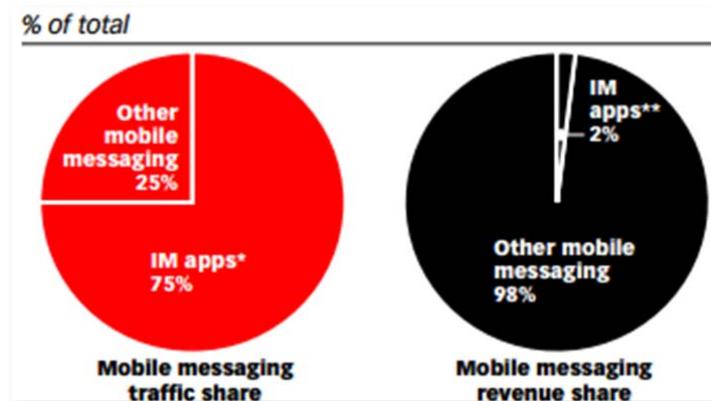
Note: n=37,434 who have accessed in the past six months

Source: iResearch Consulting Group, "China Mobile Internet Users Behavior 2012-2013 Report", Sep 24, 2013

Of all the mobile apps used, mobile instant messaging apps are on the rise and will continue to dominate over other social apps and messaging services such as SMS or email. Currently most of the messaging platforms are not integrated into e-commerce engines and payment gateways and therefore the revenue they generate is tiny in comparison to their share of traffic (figure 1), save for WeChat which has around 100+ million users already registered for their payment gateways, purchasing and paying for goods and services. Market researchers can take advantage of this e-commerce and payment backbone to instantly compensate participating consumers for the successful fulfilment of surveys. While the

commercialization of messaging platforms will be led by the e-commerce giants, the abilities and services that market researchers can offer will benefit from its growth.

**FIGURE 1. INSTANT MESSAGING APP SHARE OF MOBILE MESSAGING TRAFFIC AND REVENUES WORLDWIDE, 2018 ESTIMATION**



Note: total messaging market includes instant messaging, MMS, mobile email, RCS/RCS-e (rich communications suite), SMS and social messaging

\* 63 trillion messages; \*\* \$3 billion in revenues

Source: Juniper Research, "Mobile Messaging Markets: IM, Social, SMS, MMS, Email, RCS/RCS-e 2014-2018" as cited in press release, Feb 18, 2014

### WeChat

Whilst WhatsApp is credited as the messaging platform innovator and first mover globally, it is the China-made messaging platform WeChat which has shown the most intriguing potential for growth and development.

Launched in 2011, WeChat started as a free messaging platform and has continued to expand its user base and range of services. It now offers multiple functions beyond its core messaging services, including the ability to anonymously seek other users (dating), social sharing with selected contacts (social media very similar to Facebook), branded content (sponsored brand zones), voice messaging and calling, and online and offline shopping (e-commerce integrated), amongst other evolving features. In January 2015 (Tech in Asia, 2015), WeChat started tentatively integrating more direct ad content and rolled out its activity tracking feature (Steps Taken) which can be done competitively amongst WeChat 'friends'.

In its home market of China, WeChat is far and away the dominant messaging platform (We Are Social, 2015), in addition to being the fastest growing messaging platform globally. WeChat has an active base of over 450 million users in China alone, making it the single most active social platform in China.

In recent years, WeChat has started to focus on expansion into other countries in direct competition with the aforementioned messaging service WhatsApp, which has 600 million active monthly subscribers. WeChat's current global base is reportedly over 750 million users, though the active user base of WhatsApp is considered slightly larger at the moment given its larger global foot print.

With such a large group of users consistently online and using these services, the opportunities for tapping into this user base are vast though still relatively untested.

### Utilising WeChat for market research

This brings us to an evaluation of how mobile instant messaging apps can be utilised for market research, and in particular how we used WeChat to collect timely and insightful consumer data. All messaging platforms have large communities which can potentially be tapped into by research providers for market research interactions; however, WeChat in particular is ideally suited in how it is structured so that brands and service providers can use WeChat as a channel to offer communications and services to its subscribers.

Effectively there are two types of identities on WeChat: 1) The individual WeChat user, and 2) Non-consumers, groups or enterprises which are allowed to create accounts or virtual identities. These account types are similar to brand zones which can use this platform to communicate and offer goods and services, all operating seamlessly within WeChat. Consumers can interact with these brand zones by 'following' the branded account's activities, being alerted to special deals/promotions, and having customer service transactions – all by adding the accounts to their list of WeChat contacts.

The brands themselves cannot add or invite consumers, preventing any sort of predatory behaviour on their part. This is unique in many ways as it gives full control to the consumer, who can follow and unfollow these accounts as they wish, so no content push is allowed unless the individual users have opted in as a follower. There are also strict restrictions on these special non-consumer accounts, which are divided into three sub-groups: 1) Service Account; 2) Subscription Account; and 3) Enterprise Account. The Enterprise Account is for internal company relations of its employees. Given that it is for large enterprises, its usage has enhanced security and verification levels. Subscription and Service Accounts, in contrast, are intended for external communications and are focused more on individual privacy directly defined by WeChat's user policy (table 2).

**TABLE 2. KEY TYPES OF WECHAT ACCOUNT FOR ORGANISATIONS AND BRAND ENTITIES**

FUNTIONALITY	ENTERPRISE	SERVICE	SUBSCRIPTION
<b>Owners</b>	Companies only	Companies only	Individual or Company
<b>User Management</b>	Includes mechanism to review users Authentication required by users Users must be company employees	Anyone can follow the account. Control panel for all accounts.	Anyone can follow the account. Control panel only for verified accounts.
<b>Information Push</b>	Real-time info distribution Unlimited images & text messages	Limited to 4 times a month	Limited to 1 message a day
<b>Goals and Usage</b>	Based on ERP & QA; focus on process control	Based on CRM, focuses more on sales conversion	Broadcast communication
<b>Appearance</b>	Shown in friends list No prompts during info push (shows as a Red dot)	Prompts shown during info push	Grouped with other Subscription account
<b>Purpose</b>	Suitable for a company's internal mgmt, internal comms & vertical supply chain mgmt.	Suitable for external promotion and consumer oriented services	Broadcast channel for one way communication to group members
<b>Additional features:</b>	Geo Location, Push Notification, Voice Recognition, QR Codes, Collect User Data, E-commerce	Geo Location, Push Notification, Voice Recognition, QR Codes, Collect User Data, E-commerce	Standard. Limited customization possible
<b>Security</b>	Control on access & sharing by users can be defined	N/A	N/A

With the ability to embed content via a Service account (such a mini-webpages, video sharing, services sharing and so on) or push content (via a Service / Subscription account), any creative content can reach a wide audience via WeChat. Market research agencies can also thus create accounts for themselves via Subscription or Service accounts, based on the level of engagement and features they want to introduce into the surveys that members are asked to engage in. For user-targeted and dynamic surveys, it would be necessary to set-up a Service account as it allows for: 1) the integration of CRM features to seek and record user profiles for respondent management; and 2) access to the payment gateway systems for providing instant incentive delivery.

### **WeChat study background and objectives**

To learn more about how to execute a mini-panel study entirely within WeChat, we used WeChat to reach out to young Chinese consumers and learn more about their snacking behaviour.

Snacking is rapidly evolving in China, with massive competition for shelf space both among Western born brands as well as more traditional Chinese brands. A significant opportunity thus exists for the development of the next big idea to deliver against the changing behaviour of Chinese consumers. Using WeChat allowed us to explore how qualitative, quantitative and observational research can be effectively conducted using this platform to capture in-the-moment consumer choice behaviour without the need for users to download additional software.

Whilst surveys conducted using mobile technology are becoming popular and more widespread, WeChat and other messaging platforms are not yet being widely exploited.

## **METHODOLOGY**

### **Technical application of surveys using WeChat**

The methodology used can be divided into two distinct parts:

1. Interactive data collection channel (Linking MM's TPV+ Survey Platform to WeChat )
2. Data analytics – Exploring in the moment snacking choice behaviours as an example application for this research platform (MMR's Mindsets™)

### Interactive data collection channel

Before any survey could be shared via WeChat, we needed to first establish a Service Account in order to integrate MM's CRM and TPV+ Mobile Survey platform into the WeChat system. The set-up process requires several verification steps, including submission of local IDs and company registration documents to prove the company as a legitimate business. It is this level of scrutiny that allows consumers to be comfortable following WeChat Service and Subscription Accounts, as any companies found to be involved in indecent activities will have their account wiped and rejected for any future applications.

Once the account is verified, messaging or push notifications can be set. For a Subscription Account, the limit is one message per day, whereas for Service Accounts it is one message per week. These messages are limited to 600 characters and can include links to outside content, which thanks to WeChat's programming can still be fully loaded and run within WeChat. Therefore, it is a simple process to set up an online survey, then share the link in a push notification message and instantly reach hundreds, if not thousands, of followers. The messaging can even be set so that new followers will also receive the same survey message days after the survey has launched and allow for members to share within their networks to grow the community further.

Setting up the survey itself required outside programming work. MM has developed a mobile web survey platform with the same functionality and appearance as its mobile survey app platform, MM TPV+ which can be integrated into WeChat.

From a user perspective, participation is quick and easy. For the purpose of this study, in the absence of an existing panel of WeChat contacts, consumers were recruited using a mix of traditional methods (Face to Face) and referral (using Moments sharing within WeChat). Consumers were screened on the following criteria (table 3), with their use of WeChat being a key requirement. This sample was designed to ensure active users of WeChat accounts to ensure high levels of participation in the study, which needs to be a factor when considering the feasibility of using instant messaging apps for mainstream market research.

TABLE 3. CONSUMER CRITERIA AND DEFINITIONS

Criteria	Definition
Nationality	Chinese
Residence	Shanghai
Age	Young Adults (18-29 years of age)
Category usage	Consumers of pre-packaged snacks at least 3 times per week
Technology	Owners of smartphones with cameras and active data packages
	Active WeChat members, posting at least 1 once per day

Once approved for the study, consumers were instructed to search for "MobileMeasure" via our account via WeChat's search function and add the account. Thanks to WeChat's push notification which allows for "automatic messaging", participants would be immediately sent a link to start the survey (figure 2).

FIGURE 2. THE PROCESS OF FOLLOWING AN ACCOUNT AND ACCESSING A SURVEY

			
<b>WeChat's search function</b>	<b>Account profile</b>	<b>Welcome message</b>	<b>Survey introduction page</b>
Searching for MM's Subscription Account "mobilemeasure" on WeChat to start the survey. Other ways of being added include being invited by other members or clicking on a banner shared in Moments.	Account Name Card, which allows respondents to follow and turn the "receive messages" function on or off.	For those receiving messages, WeChat's push notification sends an automatic message as set by the host account. In this case it is a welcome message and invitation to join the snacking survey.	From here the invitation in the previous message has linked to a HTML5 Mobile Web TPV+ survey, which is still embedded in WeChat and features the same range of functions as an online survey.

Once the participants are linked to the WeChat account, they have access to the survey through an automated survey invite message sent from this account. The survey was a snacking diary where participants were asked to provide details of their snacking behaviours three times over the course of a week, including taking pictures of the snack and physical surroundings, further adding context to the output. Participants could easily retrieve the link by returning to the WeChat conversation or by writing a message which would prompt the link to be re-sent.

The first page of the survey features the snacking diary instructions, with the same page featuring basic demographics (age, location, phone number for matching with the recruitment screener). Thanks to the CRM cookies, this question will only be asked of the participant once (figure 3).

FIGURE 3. BEGINNING THE SURVEY

	
<p align="center"><b>Survey introduction page</b></p> <p>Overview of the snacking diary, instructing the participants to fill this diary three times, when having a snack.</p>	<p align="center"><b>Demographics survey</b></p> <p>Demographics screener covering age, gender, location and phone number. This screener will only be filled once and will be remembered by WeChat so their profile can be linked in the future as well. When the survey is done for the second and third time, the demographic questions will be skipped and the survey would start with the first question.</p>

Surveys within WeChat require the participant to fill in his or her diary in a Wi-Fi zone or when the mobile data plan is active. One advantage is convenience, given that consumers would already have the WeChat app downloaded on their phones and would be Wi-Fi/data plan users on an ongoing basis. This would allow participation in surveys which are short, well-designed, fast-loading, interactive and convenient. As no other downloads are required, and combined with a short questionnaire, the entire process could be completed in a matter of minutes. These combined advantages encourage a greater response rate and higher levels of participant engagement. However, it should be noted that internet access is an additional factor when considering the feasibility of using instant messaging apps for mainstream market research.

In addition to recruiting F2F, WeChat’s Accounts platform was utilised to further increase participation and find more participants. Thanks to widespread content sharing across WeChat, particularly on the Moments page, information about surveys and other related activities can spread across WeChat via the Flyers feature. WeChat Service and Subscription Accounts both have the ability to create and share Flyers, which are simple display pages which can share more in-depth text, photos and videos than regular push notifications. Unlike the push notification messaging feature, these Flyers are shareable on the WeChat account homepage and can also go viral within consumer networks via a user’s Moments or personal chats.

FIGURE 4. “FLYER” BEING SHARED ON WECHAT MOMENTS AND PERSONAL CHAT INVITE

			
<p>A User’s Moments Page</p>	<p>Flyer posted on WeChat Moments</p>	<p>Flyer invite to join &amp; participate in survey</p>	<p>1 on 1 chat invite to participate in survey</p>

**Data Analytics - Exploring in the moment snacking choice behaviours as an example application**

Once the participants have signed up to the mobile app and completed the screener they are directed to the main survey. The aim of any app-based survey should be to collect only the relevant data in as short a survey as possible in order to encourage high levels of participation and data quality. The survey captured product consumption, location of occasion, with whom the occasion was taking place, the emotional state of the consumer and the satisfaction with the product that they had chosen for the given occasion (figures 5 and 6).

An additional benefit of using technology such as this, is that there is no requirement to ask consumers to manually enter the time and date at which the occasion is taking place; this is automatically captured at the time of the upload, ensuring high accuracy.

FIGURE 5. THE SURVEY

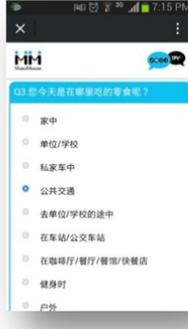
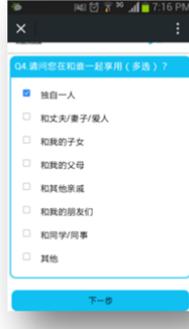
			
<p><b>Open-response question</b> Open-end to collect brand and product consumed, used for follow-on research, allowing us to profile the key brands</p>	<p><b>Photo/Video share</b> Observational data to verify product usage and provide additional insights such as location of occasion (outside the scope of this paper)</p>	<p><b>Single-choice question</b> Location of consumption – 13 responses</p>	<p><b>Multiple-choice question</b> Whom the occasion is taking place with – 8 responses</p>

FIGURE 6. THE SURVEY, CONTINUED

			
<p><b>BullsEye explanation page</b></p>	<p><b>BullsEye question</b></p>	<p><b>Thermometer scale</b></p>	<p><b>Submit page</b></p>
<p>Designed to be intuitive and remove explicit rationality from the exercise, consumers are instructed to tap each of the conceptual terms onto the BullsEye in order to indicate how relevant each of the terms are to how they are feeling during the occasion; a word closer to the centre indicates it is more relevant.</p>		<p>Product satisfaction – 5 point scale</p>	<p>To confirm upload of data</p>

**Summary of findings**

*Viability of WeChat as a method of data collection*

N=272 consumers were recruited to the survey, and of these n=220 completed the survey at least once, providing a completion rate of 81% - higher than achieved using an equivalent research-specific mobile app requiring an additional download, where we had to over-recruit to account for an approximate dropout rate of 50%.<sup>2)</sup>

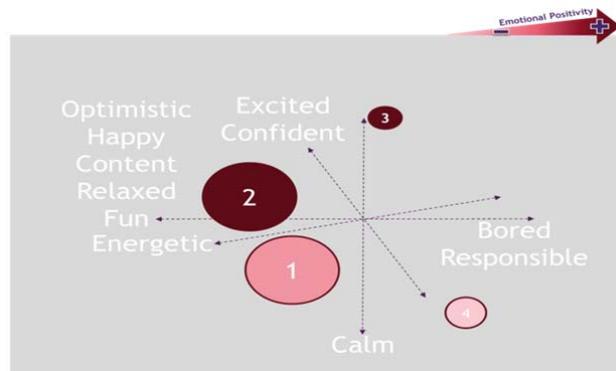
After data cleaning, over a six-day period n=211 participants completed the survey an average of 3.1 times, generating 656 snacking occasions. This therefore successfully demonstrated that instant messaging apps are viable data collection alternative to research-specific mobile apps.

*Viability of WeChat as a method for accurate, timely and insightful data collection*

Analysis of the emotional states using segmentation analysis revealed four segments, which are shown graphically in figure 7. Each of the four segments represents a different Mindset™ for pre-packaged snacking occasions amongst young adult Chinese consumers in Shanghai. This result is in line with previous studies conducted across multiple categories (including alcoholic drinks, sandwiches, hot snacks, out-of-home breakfast and sweet snacking) in which we find a similar number of segments.

The key dimensions shown in figure 7 indicate a difference in the level of positivity and engagement. The top left quadrant is more emotionally positive whilst the lower right quadrant has a lower level of engagement, with consumers claiming to be Bored, Responsible and Calm. The Mindsets™ are represented by coloured circles with the size of the circle representing the proportion of all occasions captured where that choice behaviour occurred.

FIGURE 7. YOUNG ADULT CHINESE PRE-PACKAGED SNACKING OCCASIONS (A VISUAL SUMMARY OF BASED ON PRINCIPLE COMPONENT ANALYSIS)



Overlaying data in terms of what, when, where and who reveals further differences. Mindset™ 3, which was identified as being about Excitement, claims to be “always searching for new and exciting snacks” more so than the others – further reinforcing the emotional state and therefore the criteria against which any snacking product will need to deliver.

Mindset™ 4, which was identified as being characterised by a Responsible, Calm state of being, with an associated Boredom, claims to be less likely to share snacks and is more likely to occur when participants are alone and on the go. Occasions with which this emotional state is associated have a claimed lower satisfaction with the snacks being consumed (table 4), therefore highlighting an opportunity for manufacturers to develop products targeted at these occasions.

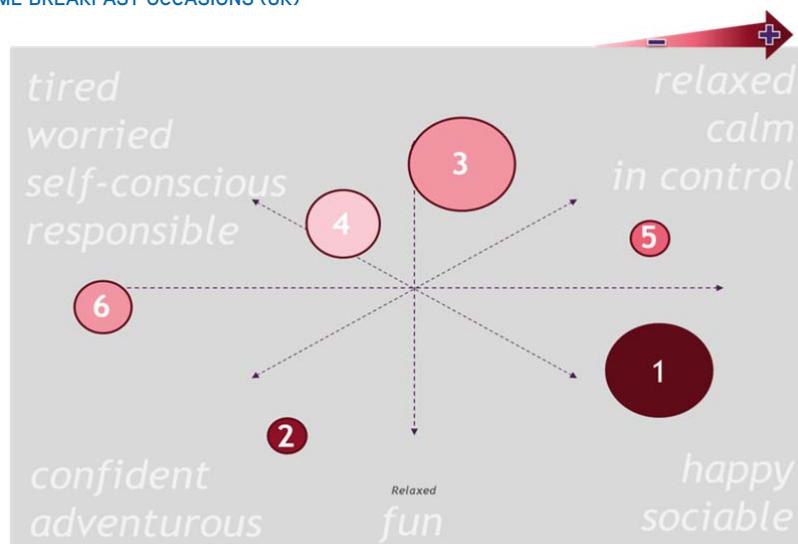
TABLE 4. CURRENT SNACK SELECTION SATISFACTION SCORES

Mindset™	Average Satisfaction Score (5pt Scale)
1 (a)	4.4 <b>D</b>
2 (b)	4.5 <b>D</b>
3 (c)	4.6 <b>D</b>
4 (d)	3.9

Note: All significances are reported with a 95% Confidence level ( $p < 0.05$ ) two tailed t-test

Therefore this case study demonstrates that instant messaging apps are a viable alternative to research-specific mobile apps, allowing for accurate, rich and comprehensive findings, aligning with results we have observed in other markets and categories (figure 8).

FIGURE 8. OUT-OF-HOME BREAKFAST OCCASIONS (UK)

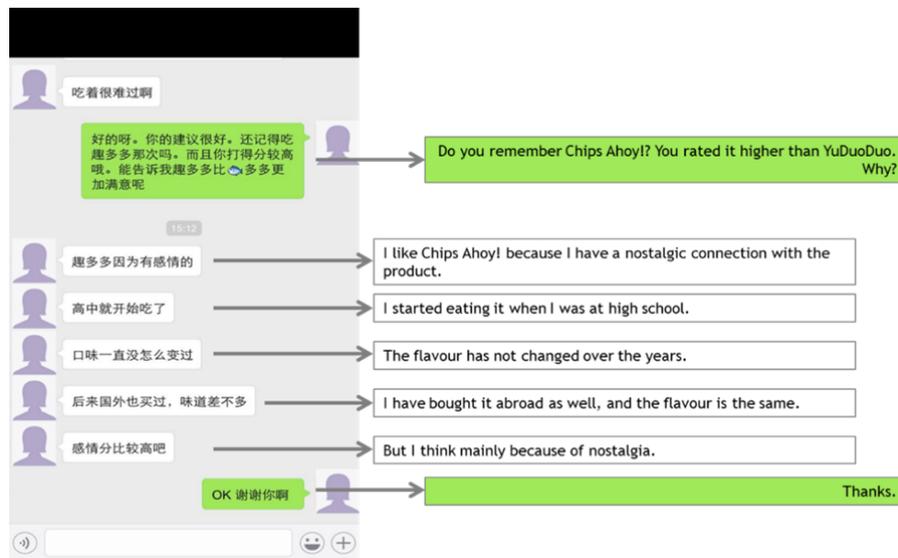


#### Utilising additional functionality of instant messaging apps

An added benefit of using instant mobile messaging apps over a research-specific app is that researchers can harness the instant messaging benefit of the software to conduct qualitative research. At the time of recruitment, participants were asked to provide consent to be contacted following the research for additional data collection. Our researchers identified participants in the data set who were not satisfied with the snacks they choose on certain occasions and used the instant messaging functionality with consumers in order to understand better. Using instant messaging apps in this way allows for a natural dialogue to flow between the participant and the researcher, which will look and feel very natural for the participant, therefore eliciting better quality data.

As illustrated in figure 9, we used a trade-off process between two products the consumer consumed, where one received a low satisfaction score, and another received a high satisfaction score. We were able to discover that in addition to taste, the consumer associates a satisfaction with the wider product delivery, the snack rated lower in satisfaction seems to deliver a functional relief from hunger, but not any higher emotional reward.

FIGURE 9. EXAMPLE QUALITATIVE TRADE OFF TECHNIQUE USING INSTANT MESSAGING



And in the figure 10 we can see that the consumer again considers the whole product delivery, including packaging as well as the taste and texture, and a product that delivers on all of these elements is a better fit with a more positive emotional state.

FIGURE 10. EXAMPLE QUALITATIVE TRADE OFF TECHNIQUES USING INSTANT MESSAGING



The usage of camera and video camera functionality, now standard on the majority of smartphones, allows for observational techniques to provide either validation of consumer responses, in this case actual product usage in addition to claimed usage via an open end (figure 11), or to provide additional consumer insight such as video capture of the occasion to further explain the location or the reason for product choice (beyond the scope of this research).

FIGURE 11. EXAMPLE OBSERVATIONAL TECHNIQUES FOR DATA VALIDATION



### CONCLUDING REMARKS

The study demonstrates that WeChat, and potentially other instant mobile messaging app platforms, should be considered by researchers and brand owners as an effective tool in the research toolbox. They allow for collection of data in a format that is both convenient (no additional downloads required) and familiar (used on a daily, if not hourly, basis) for consumers therefore meaning that the data captured is more accurate and insightful.

In this case study, consumers were recruited using traditional face-to-face methods; however, many brands now have communities on messaging platforms such as WeChat, as well as large pools of target consumers using these platforms on a daily basis. These communities could be leveraged much more effectively by the market research community to conduct cost-effective and fast research, two factors which should resonate with every research professional. This will be particularly relevant to brand owners who have WeChat groups which can be cost effectively and easily targeted.

Additionally, consumers in this case study were paid incentives in a conventional manner; however, WeChat allows for the transfer of either funds or tokens to consumer accounts, therefore there is no reason that panels could not be built to function in a way similar to existing traditional online panels.

While our example was a large study in the understanding of the Chinese consumer's snacking habits involving multiple touch points with the consumer, we see messaging apps evolving into a major force for quick turnaround research and exclusive mobile and mobile messaging panels. However, further consideration from researchers and technical experts is required given the following:

1. WeChat is available on multiple platforms, mobile and tablet, all of which can be accessed using a single registered WeChat account – therefore researchers and programmers need to give careful thought as to the types of questions and the formats used within surveys to ensure that consumers will see them appropriately.
2. This case study focused on young adults in Shanghai who are active users of WeChat – the expansion of this platform as a research tool will of course require careful consideration to ensure that the approach is suitable for the target audience, allowing a representative result to be achieved which is not skewed by access to mobile instant messaging apps or mobile internet data. The approach would also require testing across other markets in which messaging apps may not be as commonplace as in China, and potentially across other instant messaging platforms where WeChat does not have sufficient market penetration. Though it should be possible to use any given messaging platform, some may not be as friendly to "survey set up & survey management" as WeChat. Survey links could be sent via structures like Service or Subscription accounts, but might direct respondents outside of the messaging ecosystem, unlike WeChat. It can still be considered early days for messaging platforms, however, and they can be expected to gain more dynamic functionality to include other services in addition to the core messaging functions.
3. The use of qualitative techniques in instant messaging could prove very useful, but consideration needs to be given to how interviewers interact in this medium. We discovered multiple instances of consumers replying with icons or images (including emoticons), and interviewers will need to learn how to interpret and respond to these in a way that helps build consumer engagement.

To summarise, instant messaging apps (such as WeChat) provide a captive group of members, via a medium that consumers are very familiar with and which requires no additional app download. Therefore we can envisage a future of robust and efficient consumer panels where consumers are rewarded instantly upon successful participation and completion. All of this provides a benefit to researchers and brands in terms of real-time data, giving an insight into things as they happen, producing spontaneous (not overthought) responses allowing for the development of rich insights.

## METHODOLOGY AND WECHAT ADOPTION BY RESEARCHERS GLOBALLY

The solution described in this paper has two distinct parts:

1. Interactive Data collection Channel (i.e. Linking MM's TPV+ Survey Platform to WeChat)
2. Data Analytics (i.e. MMR's Mindsets™)

Both parts described in this paper are proprietary - due to the thinking, customization and development by MM and MMR RW. These however *"can be independently built and developed by anyone"* provided they have the technical, linguistic (access to the WeChat system is mainly in Chinese only) and research knowhow. In terms of the Data Analytics, the example used is simply intended to demonstrate the feasibility of the platform, WeChat is at the disposal of researchers for administering any research approach which is suitable for a mobile platform. Table 5 summarises the three existing engagement points in WeChat that researchers can tap into for insights from WeChat consumers. The three being:

1. Moments Sharing – content sharing through profile page of consumers within WeChat. Generally limited to polls and quality of sample highly dependent on the extent of sharing, participation and quality of communication in terms of graphics and topic of interest.
2. Standard Non Consumer Accounts (i.e. Subscription, Service and Enterprise, see table 2) – Content sharing within a brands WeChat community. Limited to fans / followers of brands. Given this is primarily communication channel for brands, limited to small gamified engagements. Limited research usage.
3. Standard Non Consumer Research Accounts (integrated with a market research CRM enabled platform) – A custom build account within WeChat by a research firm or service with the specific reason to acquire and retain followers for conducting market research.

TABLE 5. CHANNELS OF ENGAGEMENT

	MOMENTS SHARING	STANDARD ACCOUNTS: SUBSCRIPTION / SERVICE / ENTERPRISE	STANDARD ACCOUNTS INTEGRATED WITH A MARKET RESEARCH CRM PLATFORM
<b>WHO CAN USE</b>	All	Brands	Agencies
<b>Type of Research</b>	Quick turn around brand equity, comms & product research.	Branded ongoing community engagement.	Can be highly customized based on objectives.
<b>Max Engagement</b>	Quantitative polls (~1-2 Qs)	Mainly Quantitative (~5-10 Qs)	Quantitative and Qualitative. (complexity depends on TG, usability, UI, convenience, etc).
<b>Target Respondent</b>	General Population / Friends / Limited to Referrals	Branded communities (Limited to Brand Followers)	Communities built specifically for Research. Can target specific consumer groups or profiles as per product/TG.
<b>Set-up time (will improve with time)</b>	~48 hours	~ 1 week	~ 1 weeks
<b>Data Delivery</b>	Instant, Live Dashboards	Instant + analyzed data delivery	Instant raw data + tables as defined

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## ENDNOTES

1. Of 1,032 consumers screened and recruited to the survey from an online panel, 531 downloaded the App
2. The recruitment methods for the two studies were different, online versus face to face.

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## THE AUTHORS

Navin Williams is CEO, MobileMeasure, China/

Mark Sismey is Managing Director Asia Pacific, MMR Shanghai (Consulting), China.

Pippa Bailey is Innovation Director, MMR Research Worldwide, United Kingdom.

Simon Harris is Associate Director, MMR Shanghai (Consulting), China.

Siobhan Churchill is Mobile Research Manager, MobileMeasure, China.

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## APPENDIX - GLOSSARY

*Mindsets™* – MMR RW's analytical tool for analysing emotional states and functional needs.

*BullsEye* – MMR RW's tool for collecting emotional and functional associations from consumers.

*Gamification* – Interactive tools to increase richness of data, engagement and data validity.

*TPV+* – MM's mobile survey platform which covers all mobile surveys, data collection and consumer connectivity options to interact with consumers be it Mobile Internet, Mobile App, Mobile Messaging, SMS and other evolving forms in mobile.

*Segmentation Analysis* – Emotional states are segmented to identify common states.

*Flyers* – These are banners of text and images clickable to direct users to other content, in our case to participate in WeChat Surveys by directing them to join MM's WeChat account.

*Moments* – Moments is a real time social network content sharing service within WeChat. It allows WeChat users to post pictures, videos and other content real time onto WeChat for their contacts to see. It's private to the extent that only those in your WeChat contact can see the content posted by you and also you can control within that circle as well what they can or cannot see. Similarly you can only view content posted by your contacts – provided they have not put any restrictions to your viewing access to their "moments" feed.

*Steps Taken* – Tencents, the owners of WeChat, have launched a service within WeChat called WeChat Sports in January 2015. By adding / opting in to WeChat Sports, the app can read motion tracking data from your phone that's pulled in from gadgets like a Fitbit, Nike Fuel, or a Xiaomi MiBand. If you have a phone that can read your movement, like the iPhone 5S or iPhone 6, you don't need a fitness tracker additionally. WeChat Sports counts your steps and turns it into a social competition, complete with a daily leaderboard that covers all your friends who have also opted in.

*Principle Component Analysis (PCA)* - A data reduction technique. PCA forms combinations of variables called principal components. A map is produced based on the first two principle components.

*TPV+ CRM System* – MobileMeasure's Customer Relationship Management system. The TPV+ CRM system manages the consumer sample database for sample segregation, targeting and fulfilment.