

at the European Commission (DG Communication), knew the problem would eventually spread to other countries (as people increasingly surrender landlines through lack of need). Papacostas was in search for a robust, future-proof solution.

FULL PICTURE

The Flash EB survey is a big beast. It is conducted in 27 EU countries, plus three candidate countries (the Former Yugoslav Republic of Macedonia, Croatia and Turkey), the Turkish community in North Cyprus, Iceland, Switzerland, Norway, and the US (benchmark). The key issue is representativity, says Papacostas. As part of a conference held last November in Paris to celebrate the EB survey, which dates back to 1973 and which includes two other major surveys beyond Flash, Papacostas organised a session to bring together a number of methodological experts including those from Gallup, TNS, Ipsos and GfK.

One of those experts, Bill Blyth, global methods director for TNS, says that the issue with Flash goes to the heart of democracy. "In many countries the coverage of fixed line is falling below 80%. And that must give rise to the concern, therefore, that if one is only using fixed line, then important sub-groups are not represented and the EU may not be getting a full picture of citizens' beliefs and opinions."

Papacostas says that he's after a 'global' solution that can apply equally to all countries covered, rather than a patchwork quilt of different methodologies in each country, such as is starting to happen. "Until now for the Flash EB we have done some minor adaptations but we need to review our methods. This is a very difficult task because we have to find a common solution which is valid in all member states. The technological reality in each member state is completely different."

"This presents a challenge," says Leendert de Voogd, global head of TNS Political & Social, "There is no one-fit method in terms of coverage and speed." Of course, face-to-face is able to pretty much guarantee sufficient coverage but without the speed. So the solution being discussed is using a mixed-mode, landline and mobile combination.

From a penetration (and hence representativity) point of view this sounds reasonable given that a phone of some kind reaches at least 90% of the population in every country except Romania, but even that is pretty high at 80%. Online is not a viable option due to insufficient penetration, even within developed countries.

READY FOR PRIME TIME?

So this brings us to the question that is likely to be the most contentious among the methodological experts: is mobile ready for prime time?

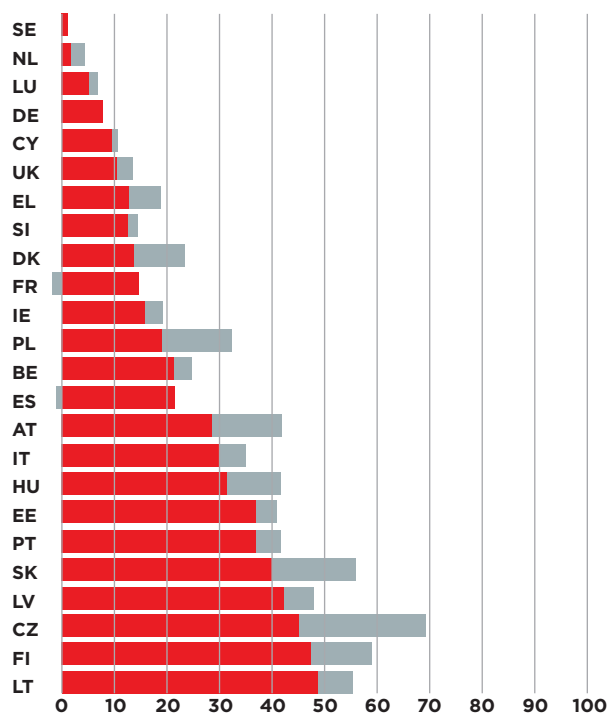
TNS's Blyth sums up the status quo. "There are no accepted protocols for mobile phone research that have been designed by the world's methodological experts," even though lots of mobile phone research is already happening. Given this, would the EU really be prepared to make heavy use of a methodology that is not seen, in some quarters, as fully tried and tested?

Hence the reason the EU has also turned to ESOMAR to contribute to deliberations. Papacostas says, "We would like to co-operate with ESOMAR to find the best way to tackle the problem of mobile telephone penetration. My personal conclusion is that it is very difficult to continue Flash EB as it is with just fixed-line phones."

In other words, something has to be done. And in terms of driving forward a solution, perhaps a central issue is: will ideology (waiting until mobile is declared robust) trump pragmatism (the need to address this issue sooner rather than later)?

Although Blyth is careful not to declare a position on the issue, he clearly needs convincing that mobile is ready for widespread use in such an important survey.

**CHART 1 -
% INDIVIDUALS WITH MOBILE AND NO FIXED LINE**



"It is very important that one has to have a methodology that is transparent and robust, and acceptable to all stakeholders."

In contrast, Flash EB's current custodian, Manchin, is much more confident, having grown increasingly comfortable with the use of mobile in Flash EB after completing over 34,000 mobile Flash interviews across five countries this year alone. In the interests of disclosure, Blyth's TNS runs the other two main EB surveys, and may compete with Manchin's Gallup for the Flash EB survey when it comes up for renewal later this year or next. But let's dig into why Blyth and Manchin hold such differing views.

MOBILE ISSUES

There are plenty of reasons for thinking that using mobiles is a really bad idea. Consider peoples' natural reaction to being cold-called on a mobile, particularly when driving or in a meeting. As Blyth says "The ethical and legal status of calling people on their mobile phones has yet to be established within the EU." Moreover, getting hold of sample lists is difficult if not impossible. And there are added complexities in sample design such as allowing for multiple mobile ownership or fixed line ownership.

Next, there are issues around mixing methodologies. Different methods, Blyth argues, create different response dynamics. "The questionnaire affects compound coverage and frame bias." And even though mobile-only users represent a relatively small proportion in the main EU countries, "those who are mobile-only are not necessarily the same people as those who have fixed-lines, in terms of their demographics, behaviour and attitudes." Yuck!

To support some of his contentions, Blyth points to a mobile study conducted by Nick Moon, head of social and political at GfK NOP. Moon observed that mobile respondents achieved lower response rates than landline respondents. He also found, says Blyth, that over-55-year-olds refused to participate at all!

Blyth's TNS colleague, de Voogd, also points out the high call charges associated with calling mobiles, and the risk of calling people while roaming, potentially leaving respondents liable to a hefty charge.

EASIER AND FASTER

So what has Gallup found in practice? (A caveat: these findings only account for a few of the 30+ countries in the Flash EB line up). Manchin says that mobile recruitment is actually easier and faster because you get straight to the respondent rather than having to recruit them via a Kisch grid. RDD is possible because Gallup works with a company that

provides a list of available number ranges by country. And although regionality is not a feature of mobile numbers, unlike landlines, it is established in the screener and so is still used in weighting.

Manchin seems pleasantly surprised to find that respondents embrace mobile interviews. "We have quite a bit of evidence now that it's more personal because you are not losing someone at the first stage of sample selection (recruitment)." And people seem more likely to give up time on their mobile because 'dead time' is easier to find, such as while commuting or during breaks. He adds that people are also less likely to drop the call on a mobile.

Costs are an issue, though. Call costs, he says, are up to five times higher than landlines. And screening times are slightly longer to gather the extra information required for weighting. But offsetting this, Manchin says, Gallup has found response rates to be higher on mobiles than landlines, in stark contrast to the earlier GfK NOP study. The net result, he says, is that interview costs are around 2.5 times higher on mobiles than landline.

"I might even think that the dominant mode would be switched to mobile, the way that things are going," concludes a highly confident Manchin.

As for the next step, the EU's Papacostas hopes to clarify what all this means for the full survey so that he can generate a clear framework for the new Flash EB tender document, which he hopes to issue later this year. It won't be an easy process but he couldn't have a finer set of experts to call upon. As Blyth puts it, "It gets very complicated indeed. The best thing would be to appoint a kind of group of wise men, academics or government experts to work with the Commission." **RW**

A project team working with ESOMAR's Professional Standards Committee is drafting a guideline on mobile phone research. It is not intended to cover the methodological aspects as this is still developing but to offer guidance on interviewing protocols to promote best practice and respectful relationships with the people being called. The project team chaired by Diane Bowers, member of the Professional Standards Committee and CASRO President also includes Reg Baker of Market Strategies, USA, Keith Bailey of Nokia Mobile Phones, UK, Bill Blyth of TNS plc, UK, Sarah Kelly of Japan Market Intelligence (JMI), Japan, Juliane Sauer of GfK Group, Germany and Pravin Shekar of Dexterity KPO Services, India.

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