

VERIFYING CONSUMERS ONLINE

Exploring digital and mobile identity for the GSMA

Summary

Situation

The GSMA is working on a strategic initiative to investigate digital and mobile identity. It wanted to conduct an in-depth exploration of this fast-changing topic in order to understand how MNOs can best respond to the opportunity.

Approach

We conducted qualitative research with three key respondent types: subject matter experts, service providers and consumers. Working closely with the GSMA, we developed identity use cases which were then tested in a quantitative survey of consumers. In addition to a results presentation, an infographic and a short video report were produced, and have been used by the GSMA to communicate the findings.

Outcome

GSMA stakeholders have used the findings to engage with the MNOs, raising awareness and supporting them in building business cases. The work has also been used to communicate internally within the GSMA and there are plans to further publicise the research to inform the wider mobile industry and the government



Situation

The GSM Association (GSMA) represents the interests of the worldwide mobile communications industry. It focuses on innovating, incubating and creating new opportunities for its membership through various strategic initiatives, with the aim of driving growth in the mobile communications industry. One such current initiative focuses on finding how to reliably identify and authenticate individuals online, to facilitate online transactions with service providers (e.g. retailers). The issue is particularly relevant to mobile network operators (MNOs), who have an opportunity to develop identity solutions based on existing contractual relationships with consumers.

The GSMA wanted to investigate consumer understanding and acceptance of digital and mobile identity and service providers' requirements from any proposed identity solution, to understand how MNOs can best respond to the opportunity. Our extensive experience in digital and mobile markets and our expertise in market opportunity and innovation research meant that we were well suited to accomplish this project.

Approach

We took a holistic approach to this challenging project, conducting both qualitative and quantitative research and interviewing respondents with varying perspectives on the topic.

Qualitative research was undertaken with three key respondent types:

- 1 Circa 30 telephone depth interviews were conducted with subject matter experts (consultants, identity experts, innovation functions in telecoms industry) to understand current uses of digital and mobile identity, market readiness and attitudes to MNOs as solution providers. Challenges facing the mobile industry were also explored.
- 2 Circa 30 telephone depth interviews were completed with service providers to gain an overview of current solutions, gauge understanding of digital and mobile identity, and explore perceived benefits of and barriers to identity solutions and to MNOs as providers.
- 3 Eight focus groups took place with consumers to understand existing online usage patterns and needs, and to explore perceived benefits and barriers to adoption for a variety of digital and mobile identity use cases.

"The GfK team members were engaged, honest and hard-working throughout. I am really happy that we made the right choice."

Andy Rudd,
Mobile Identity,
GSM Association

“The collateral that we developed with GfK is really important. The GfK team has gone more than the extra mile on the infographic, which is very powerful, and on the video, which is a great way to share the research.”

Andy Rudd,
Mobile Identity,
GSM Association



We worked closely with the GSMA to develop and refine identity use cases and to analyse the qualitative research, the output of which was used to design the quantitative stage. We interviewed 2,000 consumers face-to-face to ensure we achieved a representative sample which included non-internet and non-mobile users. The survey was used to quantify the findings of the focus groups and to test the identity use cases, providing an assessment of appeal and likely uptake, which we benchmarked against GfK concept testing norms. We also mapped the concepts using our consumer needs framework to identify gaps in the identity solutions market and to prioritise the opportunities for MNOs.

In addition to a results presentation, we produced an infographic and a short video report. These have been used by the GSMA to communicate the findings both internally and with members.

Outcome

The research has been used in two key ways by the GSMA. Firstly, internal stakeholders have used the findings to engage with the MNOs, raising awareness and supporting them in building business cases to address the digital identity opportunity, and in understanding the challenges they face in going to market.

Secondly, the work has been used to inform GSMA's stakeholders about the importance of the project, to contribute to planning the future of the strategic initiative and to communicate the importance of the topic to members in other national markets.

The GSMA plans to further publicise the research to inform the mobile industry, the government and other interested parties within the UK.

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We understand that your future is based on big thinking. And that's our offer to you and every one of our clients. Whatever your size, and wherever you are.

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