DEVICE-AGNOSTIC SURVEYS
A NECESSARY EVOLUTION

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What are device-agnostic surveys?

“Device-agnostic” implies that panelists can take in-browser surveys on any device they choose

- Smartphone
- Tablet
- PC

Current characteristics of device-agnostic surveys at Ipsos:

- The questionnaire adapts itself to the respondent’s device thanks to our device responsive survey template (Engage)
- The survey is written with the smallest screen size in mind - “mobile first”
- The survey is 15 minutes or less
DEVICE-AGNOSTIC SURVEYS
A NECESSARY EVOLUTION

1. Why it is critical to move to Device Agnostic now

2. How to adapt your research

3. Research on Research findings

4. Specific points for trackers and methodologies with benchmarks

5. Device Agnostic in brief & future developments
Why it is critical to MOVE TO DEVICE AGNOSTIC now?
The world is becoming increasingly MOBILE

80% Of adults will have a smartphone by 2020*

Number of SMP users worldwide (in millions) - actual and estimated **

Smartphone penetration is strong everywhere and even higher in desirable targets – 18-35***

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* Worldwide – World Bank, GSMA  
**: Statista.  
Consumers are increasingly ACCESSING THE INTERNET through their MOBILE devices

1 BILLION
PEOPLE USING ONLY THEIR SMARTPHONE TO ACCESS THE INTERNET***

BASED ON CURRENT TRENDS, PC AND MOBILE INTERenet USERS WILL CONVERGE NEXT YEAR

Internet access has doubled in a few years, thanks to mobile. The frequency via mobile has significantly increased (x7 in 5 years) while it remains stable with PC.

People’s REALITY has changed

Smartphone users connect in short bursts 221 times/day on average*

Uses their phone for 1372 minutes a week*

Attention span went from 12 seconds in 2000 to 8 seconds today**

*UK Survey by One Poll commissioned by Tecmark

**Statistic Brain – www.statisticbrain.com

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Whenever and wherever people are, SMARTPHONE ARE ALWAYS IN PEOPLE’S POCKETS or handbags and USED ALL THE TIME EVERYWHERE and in particular in places where other devices don’t go, like in stores.

Source: Forrester research 2015
Excluding mobile respondents from our research prevents us from listening properly.
New respondents increasingly join our panels via smartphone and expect to answer surveys in the same way.

Yet, there are not enough mobile friendly surveys: 1/3 or more of the respondents who want to answer via mobile are “sniffed out.”
What happens if nothing changes and respondents cannot answer surveys on their mobile?

**Panel and Samples Become Less Representative**
As more respondents are mobile users only

**Increased Research Costs**
Need to constantly recruit and send invites to larger groups due to lower participation w/o mobile

**Higher Drop-Out Rates and Impact on Timing**
Due to bad experience for panelists

**Reduced Feasibility/Sustainability**
Difficult to reach some targets and to ensure consistency between samples over time
How to adapt your research to this CONSUMER REALITY?
Make your surveys available to mobile respondents

MAKE SURE YOUR QUESTIONNAIRE is DESIGNED TO BE MOBILE-FIRST

Use the Ipsos ENGAGE TEMPLATE and follow our guidelines and recommendations

SHORTEN YOUR QUESTIONNAIRES

Ideal survey length is 15 minutes or less

For tracking and methodology with historical benchmark, all changes will be made in full partnership between Ipsos and clients, using our Research on Research findings as a basis.
Follow our RoR findings

**TOP TIPS**

1. **Keep the small screen in mind**
   - Keep it short and simple
   - Stick to 15 minutes max
   - Simplify your questions; only keep the crucial ones
   - Any doubts? Cut it out!
   - Write like you speak, less like research
   - Use the right # of answers
   - Remove unnecessary instructions
   - Minimize the # of open-ended questions

2. **Use media wisely**
   - Limit the # of images
   - Limit videos to 3x30 sec.

3. **Provide the best survey experience!**
   - Use responsive and progressive grids....
   - ...expandable lists and drop down boxes
   - ...sliders
   - .. With visuals!

4. **Check how your survey looks on a smartphone**
   - Use the right # of answers
   - Remove unnecessary instructions
   - Minimize the # of open-ended questions

**Device Agnostic**

**GAME CHANGERS**
And engage your respondents

What our panelists are saying:

“Surveys would be fantastic this way; I love the fact that I can answer from my smartphone, thank you :) Thank you for the invitation, I hope to receive similar surveys soon.”

Smartphone Respondents in Mexico
Ipsos Research on Research findings
Defining the right Length of Interview

Historically, the industry standard for Length of Interview (LOI) was 7 minutes for smartphone surveys. But we wanted to get our own facts to maximize the LOI for smartphone respondents while maintaining high data quality. Tests run in the UK, US and China.

Data quality is not a concern with smartphone interviews **UP TO 15 MINUTES.**

When the survey is designed to be mobile-first, our ROR shows that surveys can be **up to 15 minutes** in length without any impact on drop-out rates or data quality, abandon rates remaining low across the various interview lengths tested. This is true across regions.

Abandonment triggers are the same for all respondents (smartphone and PC) → grids and open-ends.

<table>
<thead>
<tr>
<th></th>
<th>5 mins</th>
<th>10 mins</th>
<th>15 mins</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>99%</td>
<td>99%</td>
<td>98%</td>
</tr>
<tr>
<td>UK</td>
<td>99%</td>
<td>99%</td>
<td>98%</td>
</tr>
<tr>
<td>US</td>
<td>98%</td>
<td>98%</td>
<td>97%</td>
</tr>
</tbody>
</table>

This only holds of course if you know how to engage mobile respondents.
Understanding smartphone respondents

To provide foundational understanding around differences between smartphone respondents and online respondents using more traditional devices to take surveys, in terms of attitudes, behaviors, demographics and survey-taking. Tests run in the US, UK, France and Brazil.

Mobile respondents **BEHAVE** the same as the general population.

People who access surveys via smartphone are not always the same demographic groups as those who access via PC. However, across devices, there were no meaningful differences / patterns in respondent attitudes, behaviors, and survey-taking behavior that would necessitate doing sampling differently. This means that smartphone, tablet, and PC respondents can be used interchangeably on studies, allowing respondents the freedom to answer via the device of their choice, as long as the survey is optimized to be mobile-first.

Results from Brazil concept test

<table>
<thead>
<tr>
<th></th>
<th>Top 2 Box</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PC</td>
<td>SMP</td>
</tr>
<tr>
<td>Purchase Intent</td>
<td>65%</td>
<td>69%</td>
</tr>
<tr>
<td>Value</td>
<td>68%</td>
<td>72%</td>
</tr>
<tr>
<td>Believability</td>
<td>68%</td>
<td>64%</td>
</tr>
<tr>
<td>Uniqueness (New/Different)</td>
<td>39%</td>
<td>36%</td>
</tr>
</tbody>
</table>
Understanding their level of distraction

Mobile respondents were traditionally grouped into an “on-the-go” behavioral bucket; it was assumed that all mobile respondents were taking surveys out of home and therefore potentially more distracted. Tests run in the UK, US, France, and Brazil.

Regardless of the device used, respondents are as “distracted” by their day-to-day life.

Our RoR shows that, even though more smartphone respondents are taking the survey outside of home/work, both groups (SMP and PC/tablets) have the same tendency to do something else while completing the current survey, almost 50% each!

The respondent distraction due to multi-tasking is more prevalent and concerning than any distraction we might associate with being outside of the traditional survey taking settings.

Distraction levels can be minimized using the guidelines for mobile survey design (i.e. quick, brief, question text and answer choices) – optimized surveys are more engaging and result in respondents less prone to distractions.
Assessing mobile respondents’ level of engagement when answering

There is an assumption that, because you have less time to interview a mobile respondent, the quality of the data will suffer because there is less information to draw conclusions with and analyze. Tests run in the UK, US and China.

Mobile respondents are less likely to be “potentially disengaged”.

Our RoR showed that mobile respondents are actually less likely to straight-line or speed through a survey. They are also less likely to provide questionable or unusable open-end responses than PCs or Tablets respondents.

We believe mobile respondents are less likely to disengage from a survey because of the use of mobile first survey design and the new survey templates, which make surveys easier to answer and visually more appealing. In addition, we can’t under-value the fact that they are on the device of their choice.

<table>
<thead>
<tr>
<th></th>
<th>% speeding/straight-lining</th>
<th>Typical PC %</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UK</strong></td>
<td>0.7%</td>
<td>1.5%</td>
</tr>
<tr>
<td><strong>US</strong></td>
<td>1.2%</td>
<td>2%</td>
</tr>
</tbody>
</table>
Moving to small screens

To understand the potential data impact when moving a question from a mobile-unfriendly structure to a mobile-friendly one, and when using alternative mobile-friendly options for commonly-used question structures that could result in different layouts across device screens. Tests run in the UK, US and Mexico.

There is NO SIGNIFICANT IMPACT WHEN THE DESIGN IS CHANGED FROM “TRADITIONAL” TO “MOBILE-FRIENDLY” for most single-answer/punch question types.

However there are differences for some question types, such as multiple answer grids. These differences likely come from context effects (all statements are not seen at the same time in the mobile-friendly design because of screen size) or from repetitiveness of the task.

Open-ended questions were not answered differently between PC and smartphone (% of valid answers, % robust answers).

![% valid responses by OE box position](chart.png)
Moving tracking to mobile first survey design, on PC and on smartphone

To understand response patterns in the mobile-first design across devices in order to prepare transition to “future proof” tracking. Tests run in the UK, Russia, Canada, China, Argentina

The mobile-first design and mobile interviewing works well for tracking but the design can impact some data.

With mobile-first design, respondents properly answer questions: the collected data is sensitive to changes over time and discriminates between brands, and ads. However, the change in question wording and design can impact some of the survey data, meaning that one should plan for some disruption in data patterns by choosing a quiet period to make the change(s), and examining the data carefully in the early stages to connect to previous measures and trends.

For tracking and research with benchmark, please reach your Ipsos client service, Ipsos analytics and/or IIS RoR teams to put in place the right transition plan.
Specific points for trackers and methodologies with benchmarks
Trackers and product with existing benchmarks...

...whether norms or historical data points/references

• While mobile respondents themselves may not be inherently different from general population respondents, a specific study’s results may not be identical.

• Going device-agnostic does create a significant improvement in respondents’ experiences, and as a result, it certainly can lead to different response profiles, and depending on the scope of the changes, to more representative answers.

• As a result, we should plan for some disruption...
How to move trackers to device-agnostic

Process to be done with *Ipsos Connect P3* and *IIS RoR teams*

1. **Analyze the tracker’s specifications** – Assessment eligibility based on questionnaire length, questions types, presence of modules, targets...

2. **Future-proof specifications** – Rethink quotas, exclusions, sample sources etc., based on latest data and best practices (especially for “old” trackers).

3. **Redesign questionnaire** using Ipsos Engage/Mobile first template - Match Ipsos Connect Tracking directives on key indicators (awareness, image attributes...).

4. **Design parallel tests** (if required) – Define sample, period of test, organization.
   
   *Instead of parallels*, the start of the new survey can also be aligned with the finish of the old, if a potential break in trends at that point in time is acceptable to the client.

5. **Examine the data carefully** to connect to previous measures and trends.
Device Agnostic in brief & Future developments
In brief - The value of Device Agnostic is clear

The right people
Easier and more frequent access to respondents
+ More representative samples

The right questions
More engaging research

TRUE INSIGHTS
+ Keeping up with the industry
Future Developments

Ipsos is continuously exploring new ideas and new ways to make mobile first surveys more engaging to consumers – because consumer engagement is the foundation of good research...

- We are planning on continuing to test longer lengths of interviews (25 and 30 minute LOIs)

- We are also experimenting with modular approaches – combining two short surveys (e.g., 15 minutes + 15 minutes)

As technology and behaviors change, reviewing and refreshing our learnings on smartphone respondents on a regular basis will be important as well...
BE BENEFITS:

- RESPONDENT ENGAGEMENT
- SPEED
- SAMPLE REPRESENTATIVITY
- GOOD DATA QUALITY
- GREATER COVERAGE
- EASIER TO FIND HARD TO REACH TARGETS
- FEASIBILITY /SUSTAINABILITY
- COST EFFECTIVENESS