Ipsos Interactive Services

4 COMMON MYTHS ABOUT MOBILE RESPONDENTS

GAME CHANGERS

Ipsos

Breaking the misconceptions and myths about mobile respondents.

We identified **4 common myths** the average market researcher believes to be true about mobile respondents.

Ipsos has completed a 3 leg multi-country mobile focused Research-on-Research program over the past 6 months to **debunk them.**

Myth 1 — **A mobile survey should never exceed 7 minutes.**

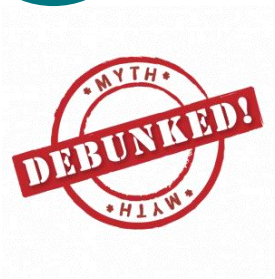
Myth 2 — **Mobile respondents do not behave the same as the general population.**

Myth 3 — **Mobile respondents are usually on-the-go; taking surveys out of home, more distracted etc.**

Myth 4 — **Mobile respondents & surveys provide lower quality data.**

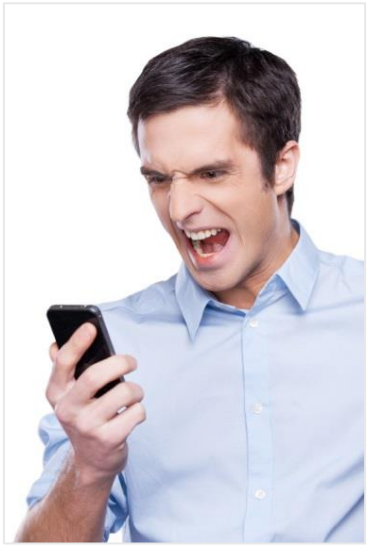
Myth 1

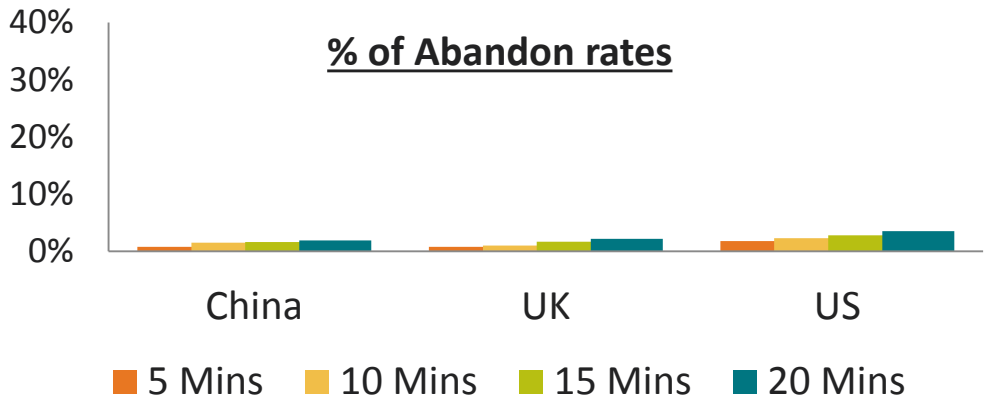
A mobile survey should never exceed 7 minutes.



Our RoR shows that globally surveys can be up to 15 minutes in length without any impact on drop out rates or data quality, abandon rates remaining low whatever the various interview lengths tested.

- Most abandonment happened before the main part of the survey (on the introduction page or during the screening process).
- As expected, within-survey abandonment increased as survey length increased; however, even at 15 and 20 minute lengths the abandonment levels would be manageable within a survey field.





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

DETAILS ON MYTH 1 (1)

Mobile surveys should never exceed 7 minutes.

ORIGIN

In 2007 with the release of the first generation iPhone from apple and less than 12 months later the appearance of the first android smartphone from Google the research community began to monitor the devices accessing their surveys. In early 2010 it was becoming a trend that these mobile respondents were only staying on average a few minutes in the survey and then would break off.

MYTH DEBUNKED

The average survey in 2010 was not optimized for mobile and difficult to navigate, often the respondent would hit a question which they could not progress beyond and would have to close the survey. Another issue which plagued mobile devices in 2007 to 2012 was the mobile internet speeds were much slower and impacted the users experience as they tried to navigate a survey; taking a minute or more for the next question to load.

Ipsos research-on-research shows that globally surveys can be up to 15 minutes in length without any impact on drop out rates or data quality.

However it is critical to respect the following guidelines to allow for a longer interview with mobile respondents:

1. **Always use a responsive design in programming**, this allows the content to be optimized for the screen viewing the web page.
2. **Minimize text (questions, instructions, and answers) and multimedia usage** to ensure it fits to the devices screen without excessive scrolling.
3. **Avoid traditional grids; keep open ends to a minimum; and never use Flash in a mobile survey**.

DETAILS ON MYTH 1 (2)

Mobile surveys should never exceed 7 minutes.

ADDITIONAL FACTS

Surveys up to 15 minutes (timed for PC) are ideal for mobile respondents. Our research showed that **mobile survey takers actually take longer to finish a survey on their device of choice;** on average an additional 5 minutes can be added to a 15 minute survey. **This effectively means that our maximum time with mobile respondents is 20 minutes**.

The **device itself is the reason for the additional time spent** in the survey adding seconds to each action for speed on page loading due to mobile broadband strength. We can conclude that **open ends play a role in adding additional minutes** to a survey due awkward very small keyboards, and this is supported by high dropout rates at these questions.

Marketing research surveys have conditioned panelists to answer on PCs; we estimate in the future this disparity between device time will normalize thanks to mobile broadband speeds and panelists acclimating to mobile first survey design.

Myth 2 — Mobile respondents do not behave the same as the general population.

Across devices, there were no meaningful differences / patterns in respondent attitudes, behaviors, and survey-taking behavior that would necessitate doing sampling differently.

- The device used did not produce different business results such as a comparison we did of a concept test; the data did not differ in any meaningful way between devices.
- Almost all of the attitudinal, behavioral, and survey-taking differences we found between PC/Tablet and smartphone respondents only reflected marketplace differences in smartphone prevalence and use.

	Top 2 Box		Mean	
	PC	SMP	PC	SMP
Purchase Intent	65%	69%	3.8	3.8
Value	68%	72%	3.8	3.9
Believability	68%	64%	3.9	3.9
Uniqueness (New/Different)	39%	36%	3.2	3.2

	Top 2 Box		Mean	
	PC/Tablet	SMP	PC/Tablet	SMP
Purchase Intent	31%	36%	3.2	3.3
Value	48%	52%	3.5	3.6
Believability	61%	60%	3.6	3.6
Uniqueness (New/Different)	14%	28%	2.5	2.8

	Top 2 Box		Mean	
	PC/Tablet	SMP	PC/Tablet	SMP
Purchase Intent	55%	60%	3.6	3.7
Value	67%	75%	3.9	4.0
Believability	80%	84%	4.1	4.1
Uniqueness (New/Different)	28%	24%	2.9	2.9

DETAILS ON MYTH 2 (1)

Mobile respondents do not behave the same as the general population…

ORIGIN

In 2010 we saw mainstream mobile research begin to take foot, and it was critical to profile the respondents who were taking surveys on their mobile devices. We often found that these responders were early technology adopters which didn't surprise many but what did was that these people were also moving away from PCs and spending a majority of their online time on their mobile. Demographically they tended to earn a higher income, be more educated, they were predominantly male, and they tended to be younger and thus we concluded *"Not like the general population".* This was also when smartphone ownership was breaking the double digit mark for most developed markets.

MYTH DEBUNKED

In 2015 if you visit a coffee shop, internet café, or even libraries, places where you once saw people huddled around laptops, today you will see that they are choosing smartphones and tablets to access the internet.
Smartphones are being used everywhere, so much so, that we often have to remind people not to use their smartphones in places where it might be dangerous (e.g. crossing the street and while driving).

Mobile is so pervasive and has been embraced in such great numbers that we knew the people trying to access surveys on mobile must have normalized but we needed data to back this claim up.

Ipsos Mobile and the IIS RoR team profiled mobile respondents in France, US, UK, and Brazil using benchmarks to measure differences between these groups.
Key areas observed at were offline and online attitudes, survey taking preferences, data quality, demographics, and were both given the same concept test to measure any difference in purchase intent, perceived value, believe & uniqueness.

Our research shows that **device is not a factor in influencing the survey responses. Mobile responders in developed and developing nations are not fundamentally different from PC survey responders in their attitudes, behaviors, or how they spend their time online.**

DETAILS ON MYTH 2 (2)

Mobile respondents do not behave the same as the general population…

ADDITIONAL FACTS

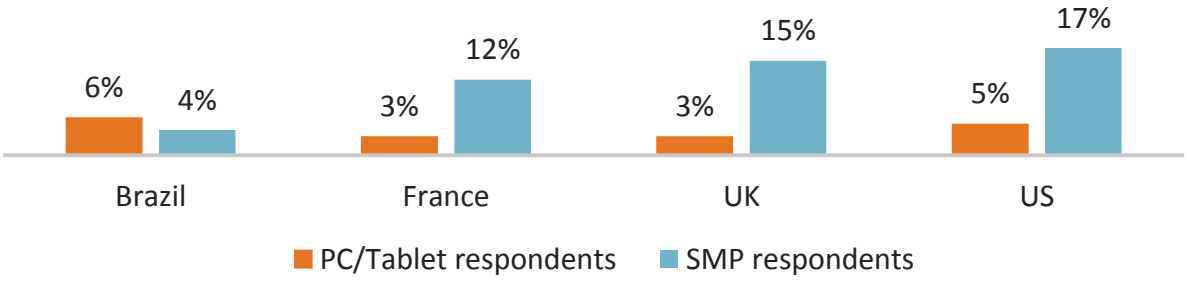
- There are inherent demographic preferences for which device is used when taking a survey, but these differences only represent the best way to access that demographic. We built a demographic equivalent population among both device users to measure any biasing or different results, of which there were none.
- The most notable of the demographic groups were ages 18-34 our quotas for mobile were first to meet target while the 35+ age group dragged out for weeks and in some legs of the research we had to close short of target; the PC survey respondents 35+ closed quickly and the 18-35 only took a few extra days to close field. This reinforces our **need to provide access to all devices in our surveys to quickly and cost effectively meet clients needs; there were clear time impacts to delivering on time when device preference is not considered.**
- In less developed markets there are certain demographics which have access to smartphones, while the majority do not. Until the smartphone penetration breaks into the lower SEC levels of a region it is encouraged to caveat all mobile only data as representative of the smartphone population in that region and not the entire population; we can conclude that in time this too will change.

Myth 3 — Mobile respondents are usually on-the-go; taking surveys out of home, thus more DISTRACTED.

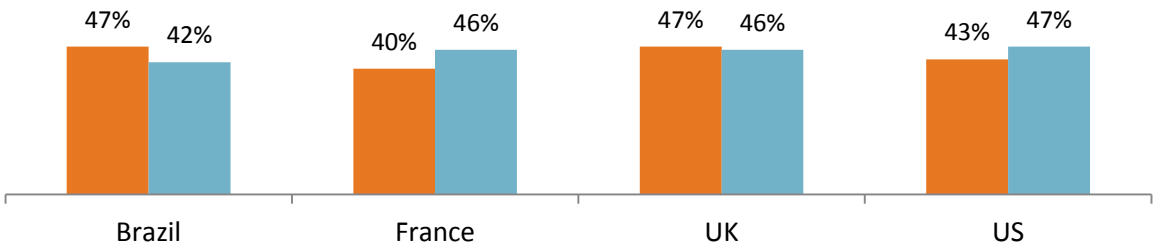
Actually there are more smartphone respondents who are taking surveys outside of traditional locations (i.e., home or work), but most still take the survey in traditional locations.

Even though more smartphone respondents are taking the survey outside of home/work, we can note that both groups (SMP and PC/tablets) are as much doing something else while completing the current survey, almost 50% each! Thus as much "Distracted."

% of those answering our survey outside of traditional locations (home & work)



% of people doing something else while completing survey



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DETAILS ON MYTH 3

Mobile respondents are typically on-the-go; taking surveys out of home and being more distracted.

ORIGIN

The mobility which mobile devices offers users had a significant impact on the marketing research industry, allowing the inception of what is now referred to as "in-the-moment" insights. Essentially branding mobile research as an out-of-home tool and by association all mobile respondents were grouped into a "on-the-go" behavioral bucket, and thus everyone assumed that all mobile respondents were out of home taking surveys and therefore potentially more distracted.

MYTH PARTIALLY DEBUNKED

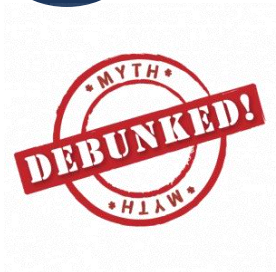
Based on the results of our research **we actually do see mobile respondents out of home taking surveys at higher rates than PC respondents**.

However the majority of survey takers regardless of device **still take surveys while at home or work.**

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**.**

This distraction can be minimized using the guidelines for mobile survey design (i.e. quick, brief, question text and answer choices) which can be less disengaging and result in respondent distraction less likely.

Myth 4 — Mobile respondents & surveys provide lower quality data.



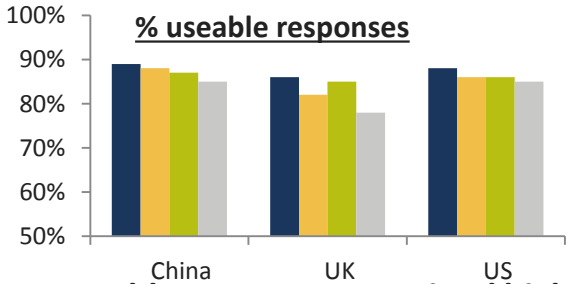
Our RoR showed that mobile respondents were flagged less often as "potentially disengaged".

Mobile respondents are actually less likely to speed through a survey or to straight line through questions. They are also less likely to provide questionable or unusable open end responses than PCs or Tablets.

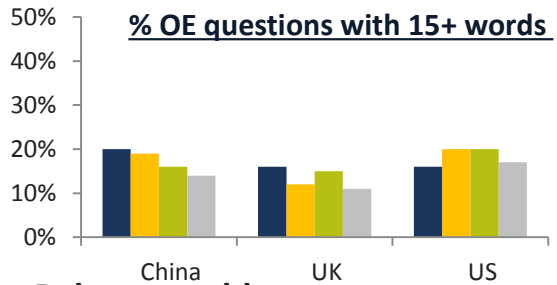
	5 min LOI	10 min LOI	15 min LOI	20 min LOI
China	0%	0.2%	0.2%	0%
UK	0.3%	1.3%	0.7%	1.5%
US	0.2%	0.6%	1.2%	1.3%

Speeding / straight-lining was minimal for all countries, even at 20 mins.

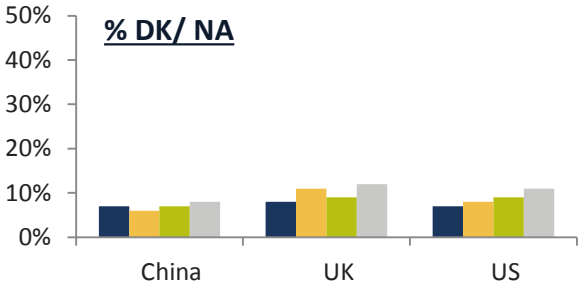
And almost all numbers were lower than what we normally see for all devices combined (mostly PCs).



Useable responses remained high, even at 20 mins.



Robust useable responses were slightly higher at 15 than 20 mins.



DK/NA remained fairly flat over 5-15 mins, with a slight increase at 20 mins.

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DETAILS ON MYTH 4

Mobile respondents provide lower quality data.

ORIGIN

There is an assumption that because you have less time to interview a mobile respondent that the quality of the data will suffer because there is less to draw conclusions with and make correlations with.

MYTH DEBUNKED

The data we have from the mobile respondents foundational research showed **mobile respondents were flagged less often as "potentially disengaged"** by our data quality scripts than any other device. All data quality checks are run once the respondent submits the final response to the survey.

Mobile respondents are less likely to speed through a survey, provide questionable responses, and also provide **less unusable open end** responses than PCs or Tablets.

We believe the reasons mobile respondents are less likely to disengage from a survey is **correlated to the use of mobile first survey design** and the new **survey templates which make surveys easier to answer** and visually they are more appealing.

And, don't under value that they are on the device of their choice.

For more information, or to share your myths,
please contact your IIS representative.