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IPSOS VIEWS

Device Agnostic: Why You Need to Transform Now

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Device agnostic is no longer the future of online research. It's happening now.

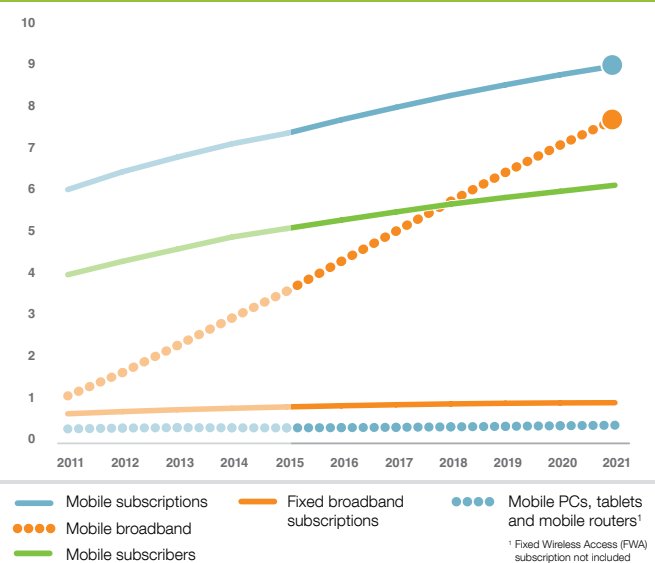
Marketers must adapt quickly or risk losing touch with their consumers. Over half of the global population is now using a smartphone and that is predicted to rise to over 70% by 2021. At the same time, fixed broadband Internet subscriptions are flatlining. As a result, we will see online research being replaced by mobile research as the face of digital changes:

- From 2015 to 2021 smartphone subscriptions will increase by 3 billion – and mobile Internet will reach 8 billion users
- During the same period, the Middle East and Africa will see 4x growth in mobile broadband subscriptions
- In emerging territories, including Asia, PC/mobile convergence has already been achieved - meaning that consumers have now switched to a mobile first method of connecting to the Internet

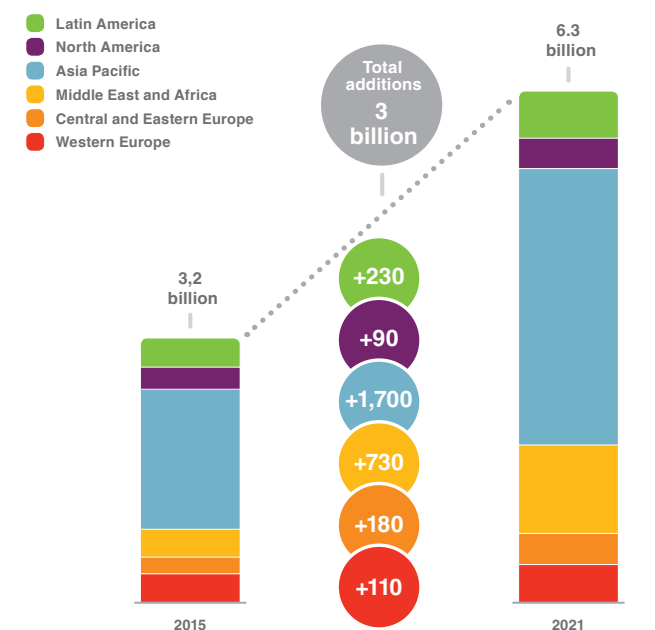
As a result, researchers need to be mobile first too. This means we have to be device agnostic – but what exactly does this mean?

Simply stated, device agnostic surveys are designed to allow respondents to complete them on their device of choice: from the smallest smartphone through tablets, PCs, smart TVs and gaming consoles. Migrating to device agnostic is not just about using a new technical platform, it actually requires a new way of thinking about research. Device agnostic is forcing us to develop shorter, sharper, more refined questionnaires which will ultimately improve the quality of consumer insights.

Subscriptions/lines, subscribers (billion)



Smartphone subscriptions per region 2015–2021



How do you transform traditional surveys into device agnostic surveys?

Device agnostic means adapting the survey display to every type of screen – starting with the smallest screens inherent to mobile phones. However, it's not only about the survey viewing experience; it's about creating survey experiences that are similar to how respondents live their lives on their devices. With this in mind, and with guidance from our R&D, we recommend the following guidelines for creating device agnostic surveys:



Create a survey that is 15 minutes or less (include only critical questions).



Make sure respondents do not have to scroll horizontally.



Write questions in a conversational and direct tone to align with the way people “talk” on their devices.



Be efficient with answer lists: don't try to account for every possible answer when you know some of them will have very low responses.



Use progressive grids, expandable lists, drop-down boxes and sliders to make the survey experience easier. (Progressive grids advance the respondent through a traditional grid, one statement/brand at a time. The grid is displayed as a separate question on separate screens for each statement sequentially.)



Include no more than two open-ended questions.



Minimise the number of images and move the text outside of the image.



Use no more than three videos (30 seconds or less each).

Can you trust device agnostic results?

We conducted R&D around device agnostic surveys to determine how long the survey could be without impacting data quality and whether or not device agnostic was comparable to PC-based research. The R&D was conducted in the UK, US, and China. The results are outlined below.

1. Data quality is not a concern for smartphone interviews up to 15 minutes

Mobile surveys can be up to 15 minutes long without any impact on dropout rates or data quality.

Moreover, we are conducting R&D to understand mobile trends and habits which might prove that surveys even longer than 15 minutes are acceptable to consumers.

2. Mobile respondents behave the same way as the general population

There were no meaningful differences in attitudes, behaviours, and survey-taking behaviour.

3. Mobile respondents tend to be more engaged

Mobile respondents are less likely to speed through a survey or 'straight line' through questions. They are less likely to provide questionable or unusable open end responses than PC/tablet participants.

4. There is no significant impact when the survey design is changed from 'traditional' to 'mobile friendly' for most single answer/punch question types and for open ends

There are differences, however, for some question types such as grids with multiple answers. At Ipsos, we are addressing this by creating new mobile-friendly question formats. For example, we use forced scrolling which requires a respondent to view all answers before choosing a response.

It should be noted that device agnostic surveys look different and, therefore, some trends in tracking research might be disrupted when moving to device agnostic. Caution should be exercised when transitioning to a device agnostic design if the survey is dependent on trends or normative benchmarks. Researchers need to bear in mind that the device is not the only factor that may influence the respondent: other factors include changes to question phrasing, question design and sample composition.

Device agnostic: the key to sample representivity

Device agnostic surveys will be instrumental in preventing samples from becoming unrepresentative. Why? Because the market research industry is already facing the challenge of attracting and retaining younger respondents (18-29 year olds). Many of them do not want to commit to joining an online panel. They are willing to take a survey now and again, but the survey-taking process must be relevant to how they live their lives – and this means smartphone and tablet access. Our results point to the fact that these younger ages will not only take surveys, but will take surveys of longer lengths when those surveys are relevantly delivered to them.

In addition to younger respondents, device agnostic also allows us to better connect with consumers in emerging markets who are more likely to have smartphone Internet access than broadband access.

Device agnostic is improving the way we do research

Here are some examples of how device agnostic is helping us to connect with consumers better:

1. Device agnostic product testing that reflects how consumers use products in real life

Device agnostic can be applied to product tests to capture product usage in-the-moment, over time and in different occasions. For example, we tested a reformulated lipstick using PC and mobile surveys. Consumers used their smartphones to report when and where they used the lipstick and provided pictures – thus enabling us to capture usage occasions more accurately.

2. Mobile concept testing that uses swipeable concepts as the stimulus

Using device agnostic for concept testing can improve data quality: our R&D found that respondents spent over 50% more time reading a swipe concept designed for a mobile device than a traditional concept designed for a PC. This can be attributed in part to respondents being more engaged with the stimulus on mobile.

3. Device agnostic Usage & Attitude studies that are shorter and faster

Marketers no longer have the time to wait for the results of large foundational studies to make all of their brand decisions. Instead, they are turning to device agnostic for quick answers that can help them to move their brand

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in the right direction now. Our home care category client used our device agnostic U&A survey to get fast insights into daily washing and cleaning products. The research led to the rapid formation of innovation platforms and, soon after, the development of concepts.

4. Device agnostic shopper research that can be conducted in the store and at the moment of truth

Device agnostic lets us connect with real shoppers, at real stores, in real time. For example, our client wanted to understand in-store mobile behaviour. Using device agnostic, he obtained new insights into offline and digital shopping experiences. Device agnostic can also measure emotions at the moment of purchase, noticeability of packaging on the shelf, and POS merchandising effectiveness.

Device agnostic is today, not tomorrow

We live in a connected world, and it is time your surveys are connected as well.

Device agnostic surveys enable continuous access to respondents, which in turn allows for more natural, in-the-moment responses. It helps us connect with hard-to-reach respondents and allows for better respondent engagement. Perhaps more importantly, we are seeing new research applications – such as video analytics, swipe-able concepts, and emotions measurements – that we were not able to get to in the past. As we continue to evolve what is possible, look at your current research approaches and ask yourself if you are connecting to your consumers as they are living life in the real world. If not, device agnostic will connect you to the right people at the right time with shorter, more engaging surveys that will ultimately lead to better business outcomes.

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