

DEVICE-AGNOSTIC SURVEYS - A NECESSARY EVOLUTION

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GAME CHANGERS



What are **device-agnostic surveys**

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



Smartphone



Tablet



PC

Current characteristics of device-agnostic surveys at Ipsos:



The survey is written with the smallest **screen size in mind, being “mobile first”**.

The questionnaire adapts itself to the respondent’s device thanks to our Engage, Ipsos’ device responsive survey template.



Ideal survey length is under **20* minutes**

DEVICE-AGNOSTIC SURVEYS A NECESSARY EVOLUTION

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Why it is critical to move to Device Agnostic now

2

How to adapt your research to this consumer reality

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Specific points for trackers and methodologies with benchmarks

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Device Agnostic in brief



Why it is critical to **MOVE TO** **DEVICE AGNOSTIC** now?

Because the world has gone MOBILE

80%

OF ADULTS
WILL HAVE A
SMARTPHONE
BY 2020*

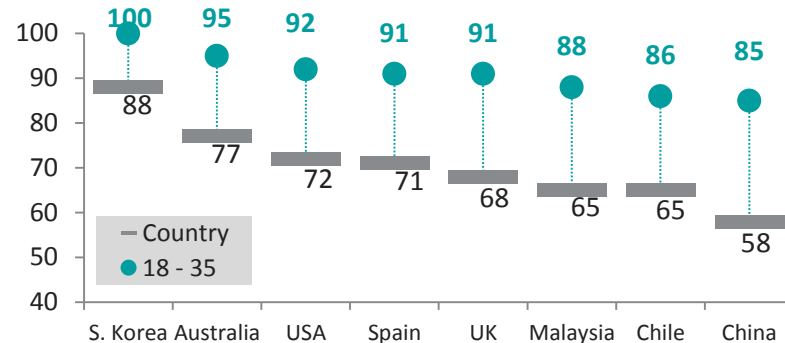
1 BILLION

PEOPLE USING ONLY
THEIR SMARTPHONE
TO ACCESS THE
INTERNET**

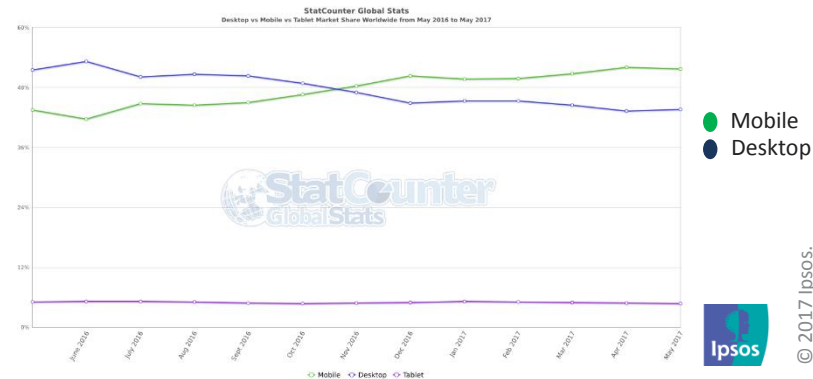
Internet access via “traditional” means (pc or laptop) is
not growing anymore

* Worldwide – World Bank, GSMA ** Ovum, 2014

SMARTPHONE PENETRATION IS STRONG EVERYWHERE AND EVEN HIGHER IN DESIRABLE TARGETS – 18-35**



MOBILE INTERNET ACCESS HAS ALREADY OVERTAKEN PC ACCESS



Because smartphones are an essential part of our lives...

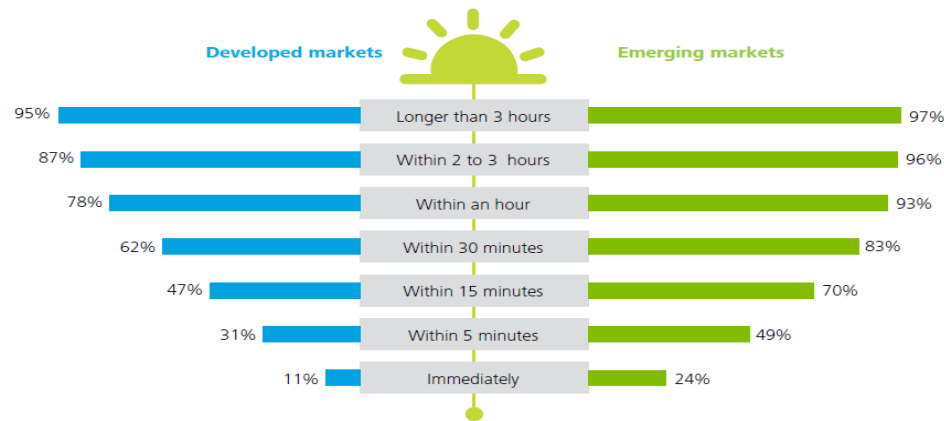
Smartphone users
connect in short
bursts

221

times/day on
average*

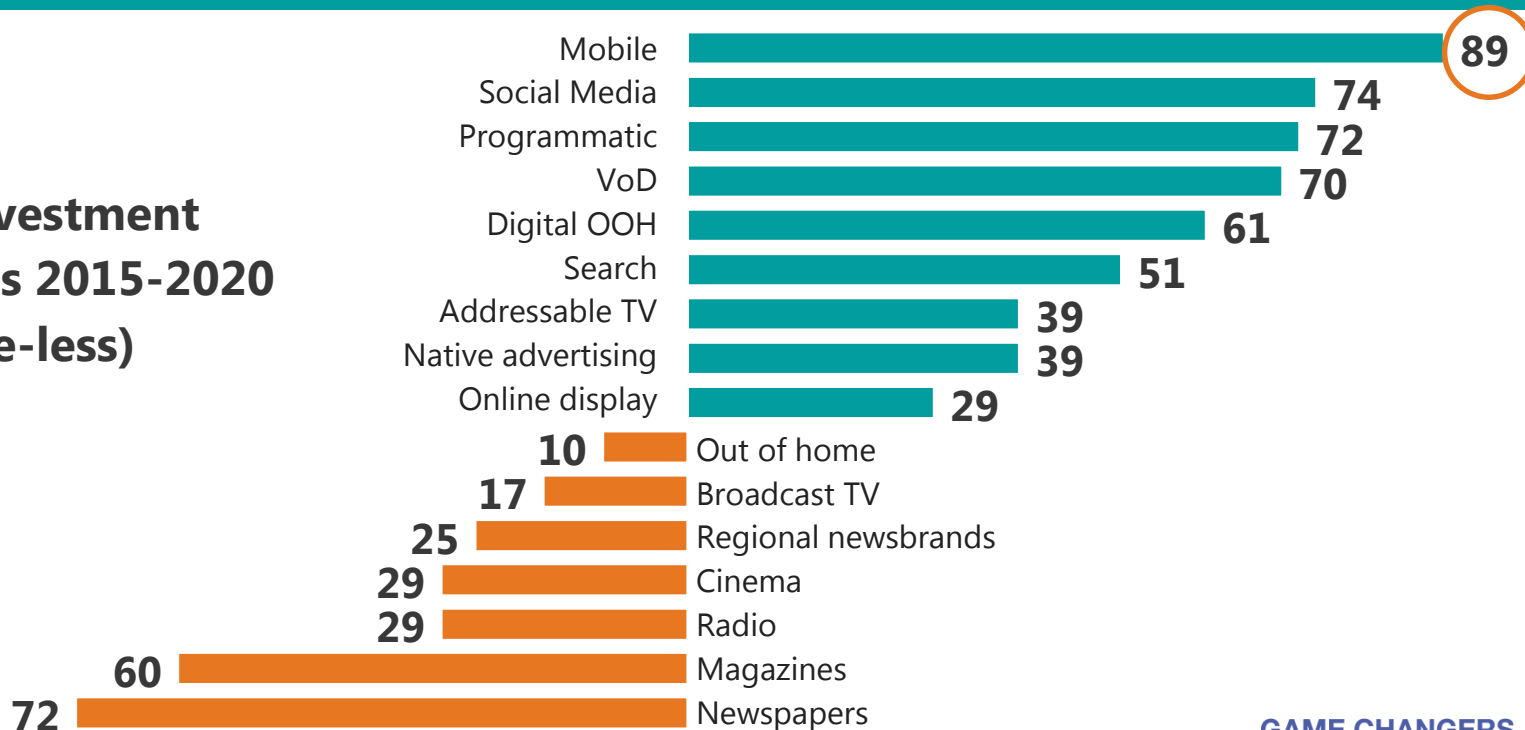
The mobile phone is already embedded as
part of our daily routine – **particularly in
emerging markets****

Typically, how long is the interval between you waking up and looking at your phone for the first time?



Because the reality of advertising and brand building has changed

Media investment intentions 2015-2020 (net more-less)



While brands use Multiplatform marketing, Research often remain single platform

We **exclude mobile respondents** from our surveys or force them to use a PC.

- **More than 1/3 of respondents** who want to answer via mobile are “**sniffed out**”*.
- Research is **less representative** and **less sustainable**.



* *Sniffed out: Is the process of device identification and using that information to qualify a respondent. A “sniff out” is specifically those respondents whom were disqualified because of their device choice.*

Our Research methods need to become mobile too...

making surveys available to mobile respondents thus device agnostic



To keep samples representative

- Most consumers rely heavily on their smartphone to interact with the world.
- Not considering this will lead to bias in samples.
 - Coverage bias: key parts of the target may be missed and survey data skewed
 - Non-response bias: certain segments may respond less to, or abandon more because their preferred device is not available. Data may be skewed too.



To keep sample targets sustainable

- Long-term sustainable research is also linked to the inclusion of smartphone respondents.
- Their inclusion will help maintain sample consistency over time.
- Including them also helps the entire market research provide the desired respondents for all studies.



HOW TO ADAPT YOUR RESEARCH TO THIS CONSUMER REALITY?

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Making surveys available to mobile respondents thus device agnostic

At Ipsos, there are two basic conditions to make surveys device-agnostic



DESIGNING QUESTIONNAIRES TO BE MOBILE-FIRST

Be sure questions fit for **any screen** (PC, laptop, tablet or SMP), and written with the smallest screen size in mind.

Use Engage, Ipsos' device responsive survey template and follow our **guidelines** and recommendations

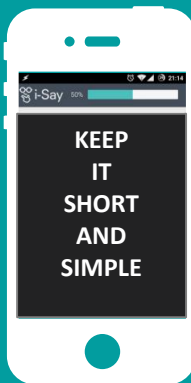
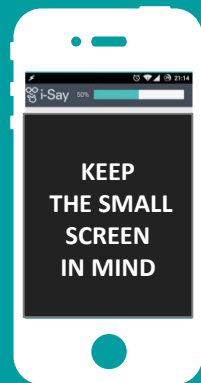


KEEPING QUESTIONNAIRES SHORT

Ideal survey length is
Under 20* minutes



1 Follow our RoR findings



Stick to **20 minutes** max

Simplify your questions; only keep the crucial ones

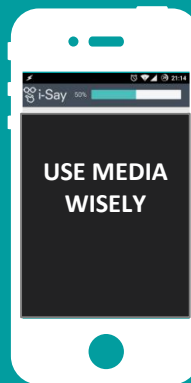
Any doubts? Cut it out!

Write like you speak, less like research

Use the right # of answers

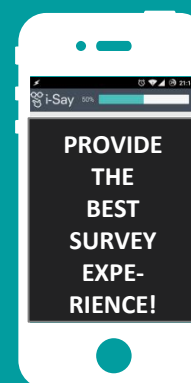
Remove unnecessary instructions

Minimize the # of open-ended questions



Limit the # of images

Limit videos to 3x30 sec.

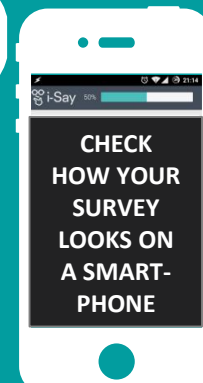


Use responsive and progressive grids...

...expandable lists and drop down boxes

...sliders

.. With visuals!



Device Agnostic TOP TIPS

2 Follow our guidelines and consult our library of questions types



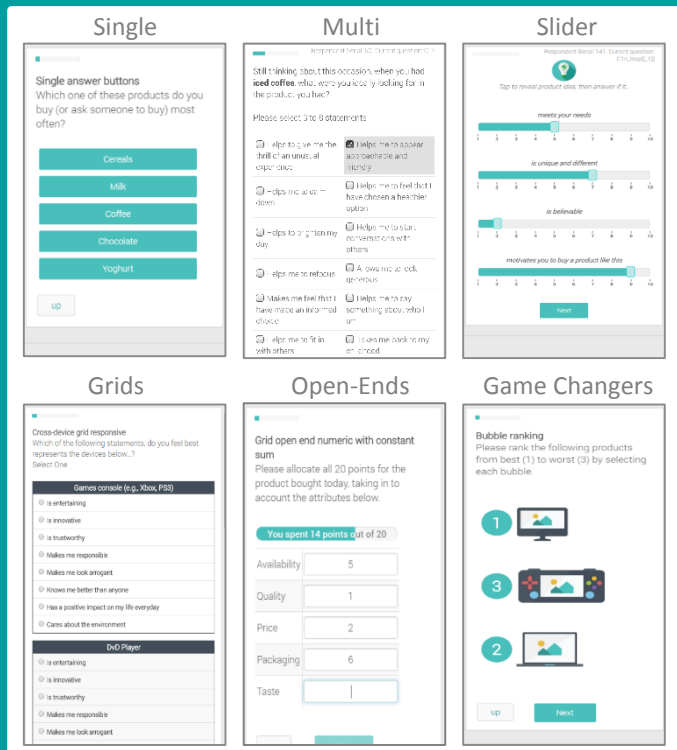
DEVICE AGNOSTIC

Guiding Principles

- The lack of context on the smaller screen reduces text comprehension.
- Reading through a peephole increases cognitive load and makes it about twice as hard to understand text on a mobile device as on a desktop.
- Short-term memory is weak, so the more users have to remember after it scrolls off the screen, the worse they'll do.
- It is imperative that mobile content be easy to read and scan. Roundabout, fluffy writing should be replaced with direct and concise content that is formatted for scannability.
- The 'fat finger' syndrome will be with us for years to come. Thus for a small screen, you must limit the number of features to those that matter the most.

Jakob Nielsen & Raluca Budiu, 2012, *Mobile Usability*

2 JUNE 2017 – Internal usage only



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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

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Issues covered by the Ipsos Research on Research

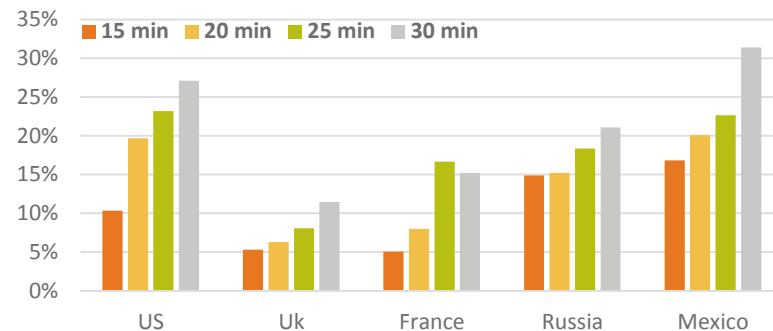
- Defining the right Length of Interview
- Understanding smartphone respondents
- Understanding their level of distraction
- Assessing mobile respondents' level of engagement when answering
- Moving to small screens
- Moving tracking to mobile first survey design, on PC and on smartphone

20 minutes* is now an acceptable LOI for mobile and DA studies

The 20 min LOI represents a good compromise across all the measures we have captured:

- No data degradation,
- Still good quality open-ends, and satisfied respondents,
- We limit abandon to practical levels (even if they are higher than we see at shorter LOIs)

Raw Abandon (SMP Only)



The 20min allows **to stay representative, engaged respondents, thus protecting our current and our future studies**. This rule is applicable across all regions for 3 reasons.

The 20 min is encouraging, as it **suggests that respondents are quickly gaining confidence in taking longer surveys on a mobile device**.

There are requirements associated with that 20 min LOI:

SURVEYS MUST BE DESIGNED TO BE MOBILE-FIRST

Length of interview is not the only requirement for a DA study;

The survey **must be designed to be truly “mobile-first”**, i.e. following the Ipsos guidelines.

LIMIT OPEN ENDED AND GRIDS QUESTIONS

Survey abandonment triggers on smartphone are the same as with PCs.

Question choice and design matter to our respondents.

Our panelists may still be unfamiliar with survey-taking on SMP: the survey took longer to complete on a smartphone than expected, but only for Panelists (no such impact for Ampario).

CONSIDER THE TOPIC AND THE TARGET OF THE SURVEY

Not all targets/markets will have the same tolerance levels for a longer survey.

This is also compounded by the **topic** of the questionnaire.

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**.
- This offers respondents the freedom to answer via the device of their choice, as long as the survey is optimized to be mobile-first.

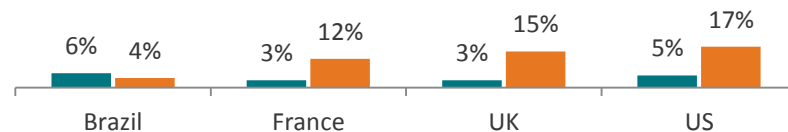
Results from Brazil concept test	Top 2 Box		Mean	
	PC	SMP	PC	SMP
Purchase Intent	65%	69%	3.80	3.80
Value	68%	72%	3.80	3.90
Believability	68%	64%	3.90	3.90
Uniqueness (New/Different)	39%	36%	3.20	3.20

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.

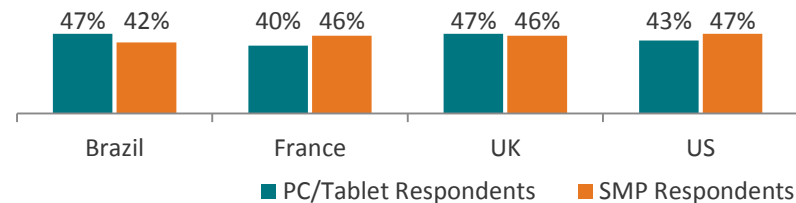
Regardless of the device used, respondents are as “distracted” by their day-to-day life

- 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.

% of those answering our survey outside of home or work



% of people doing sthg else while taking a survey



➤ **Distraction can be minimized using the guidelines for mobile survey design** (i.e. short, question text and answer choices) – optimized surveys are more engaging and result in respondents less prone to distractions.

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

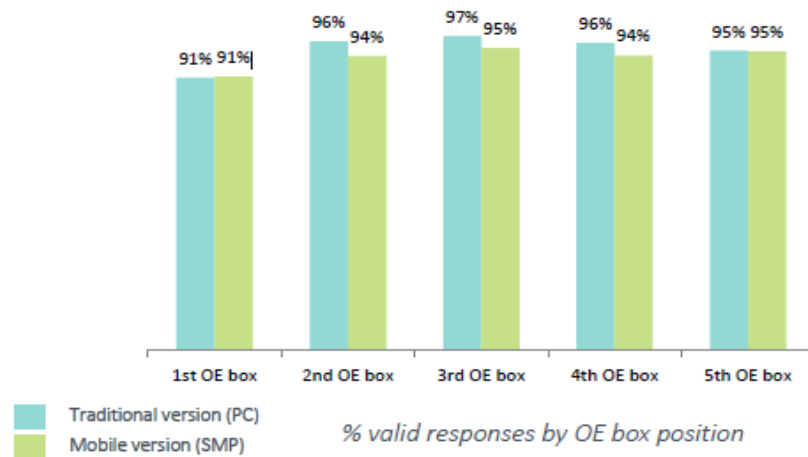
- **Our RoR showed that mobile respondents are actually less likely to straight-line or speed through a survey.** They are also **less likely to provide questionable or unusable open-end responses** than PCs or Tablets respondents.
- **We believe mobile respondents are less likely to disengage** from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

Engagement metrics for a 15 min SMP survey

	% speeding/ straight-lining	Typical PC %
UK	0.7%	1.5%
US	1.2%	2%

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).



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.



be **MOBILE
FRIENDLY**

be **DEVICE
AGNOSTIC**

BENEFITS:

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