# Device Agnostic: A Researcher's Guide

# Device Agnostic:
## A Researcher's Guide



# THE NEW
# RESEARCH REALITY

Today, over half of the global population is using a smartphone and these numbers are rising fast (by 2021, it's predicted to rise to over 70%). More importantly, smartphones are becoming more central to consumers' lives and experiences. Owners reach for their phones first thing in the morning, and continuously throughout the day, to document their lives, stay in touch with friends and family, play games and consume media. These patterns are true globally: for example, the most recent *Deloitte Market Consumers Trend Report* found, on average, 78% of smartphone owners in developed markets and 93% in developing markets checked their phone within one hour of waking up.

This explains why most marketers are increasingly using multi-channel approaches to reach consumers where they are, regardless of device. By extension, the market research industry must follow  suit: respondents now expect to be able to use their smartphones to complete surveys.

If we do not quickly increase our device-agnostic[1] offering, it will represent a significant risk in terms of feasibility, costs, and overall quality; samples will become increasingly non-representative and simply harder to obtain.

There is no question that allowing respondents to take surveys on smartphones represents a critical tipping point for our industry. On one hand, it is an absolute necessity to allow us to stay connected to consumers, but it also creates risks as we need to rethink our questionnaire design to meet our respondents' expectations on smartphones. In other words, we need to better match the mobile users' reality, and this is why length of interview is such a critical topic. Consumers interact with their smartphone constantly, but often in bursts. As a result, one of the key dangers of mobile research is consumers tuning us out, and simply walking away from surveys (first, abandoning specific surveys, but ultimately, abandoning the industry). Yet, we also need to meet our clients' needs.

We have conducted Research on Research (RoR) to understand the trade-offs associated with length on mobile. What is too long? Are there lengths that are simply not sustainable/appropriate?

> **"**
> **This last RoR shows that respondents can take 20 minutes surveys without unduly compromising quality and operational considerations.**
> **We believe a maximum 20 minutes LOI represents a good compromise across all the measures we have captured. This document presents our key findings and recommendations. "**

**GAME CHANGERS** | Ipsos

# Device Agnostic:
## A Researcher's Guide

# OUR RESEARCH ON RESEARCH (ROR) GOALS AND RECOMMENDATIONS

Length of interview (LOI) is a critical issue in terms of respondent engagement.

Long questionnaires translate into respondent disengagement, regardless of device. This means higher abandons and lower quality answers (on open-ended and closed-ended questions).

Over the years, we have set forth different recommendations for appropriate smartphone LOIs. As consumers become more and more familiar with their mobile devices, we have slowly let longer surveys through our systems.

- Our RoR department ran a first exercise in 2014 that allowed us to identify a 15 minute LOI as the tipping point for respondent engagement on smartphones.

- In 2016, we ran an updated version of this experiment, focusing on longer LOIs (15, 20, 25 and 30 minutes) and their relationship to engagement, in five markets (France, Mexico, Russia, UK and USA). We wanted to understand whether we could set new limits for smartphone research.

## ▶▶ BEFORE WE GET STARTED

Let's address a recurring question: why even bother setting limits? Why can't we just open up all our surveys to mobile, and hope for the best? After all, even with LOIs upward of 30 minutes, some respondents do complete on mobile. Isn't any mobile respondent better than no mobile respondent?

**The issue is that 30 minute mobile respondents** may simply not be truly representative of the typical consumers. Ultimately, our respondents are just people.

The more we ask of them, in terms of time and effort, the more people simply abandon, and walk away.

- The person who completes a 30 minute survey on their mobile device is likely not "average".

- If we are lucky, we are talking to someone who enjoys taking surveys.

- If we are very lucky, we are talking to someone who is very passionate about the topic.

- At worst, we may end up talking to people who are only motivated by the incentives, and thus, give us low quality answers.

**To be clear, this is not exclusive to smartphones** – although it is particularly obvious and significant on mobile – the issue exists across all methodologies. Historically, we have always believed that shorter questionnaires were better questionnaires. As time went by, as an industry, we let the average LOIs creep up. We need to think of the transition to device-agnostic as an opportunity to transform our offer to match consumers' changing expectations. The quick rule of thumb we should apply to any questionnaire is whether WE would be willing to take the survey, or to ask a family member or friend to take it: if we are not, why would we expect other people to take time to meaningfully answer our questions?

Finally, not being able to anticipate the number of mobile respondents (since countries/targets/age groups, questionnaire flow, length and topic could all significantly affect these proportions) would make it difficult to compare to past waves or norms.

In any case, it is important to provide a great survey experience to our respondents. A questionnaire not considering the respondents experience can cause **higher abandon rates** (not just in the survey itself, but from panels and the industry as well) and **bad quality answers**, as respondents become increasingly **unengaged and stop paying attention** to the questions. The sheer length of the survey is not the only cause of a bad survey experience. Repetitive questions, high number of grids, high number of open-ends, unclear questions, etc. can all contribute, but it is an obvious driver, and one that we *can* control.

**GAME CHANGERS** Ipsos

# 2

# DESIGN AND ANALYTICAL PLAN

Our Research on Research consisted of:

**a) Questionnaire and flow:** Four distinct survey lengths were assessed (15, 20, 25 and 30 minutes) for smartphone respondents. Six questionnaire modules were created; each was five minutes in length and all had the same structure (question type and order), with only the topics/content differing by module. Questions in each module were designed to be optimally shown on a smartphone ("mobile-first"). In other words, the project was run on Engage, Ipsos' responsive design platform.

Depending on the length they were randomly assigned to, respondents saw three - six modules, randomly selected and randomly ordered (e.g., the 15 minute length saw three x five minute modules, in random order, the 20 minute length saw four x five minute modules, also in random order, etc.).

**b) Scope and timeframe:** Research was carried out in three regions - North America (US), Europe (UK, France, and Russia), and LATAM (Mexico), and across two sample sources (Ipsos' online access panel for all markets and additionally, Ampario, Ipsos' non-panel sample, in the US), in September – November 2016. Sample sizes were 200 per interview length and source, with quotas on age, gender, and region (within country).

Quotas were based on general population figures for each country.

**c) Other design considerations:** Respondents were aware of the length they were assigned to before they entered the survey, as it was mentioned on the survey landing page (once the programming had randomly assigned them to a condition). In addition, in the US, we also ran PC-only control cells for each of the length conditions.

**d)** The research assessed how smartphone respondents performed against **multiple performance indicators**, to examine whether increasing the survey length caused data quality issues (and, if so, at what length quality issues occured).

Variables assessed included **measures of survey fatigue and/or disengagement**:

- evidence of data degradation (via multi-select and open-ended responses),

- poor quality survey behaviour (abandon rates, speeding/straight-lining),

- and respondent satisfaction with the survey.

**e)** In addition, **natural 'length of interview'** differences (actual time taken vs. estimated time needed) were measured for each length condition, and for the US these figures were also compared to 200 respondents (per condition) who took the survey on a PC.
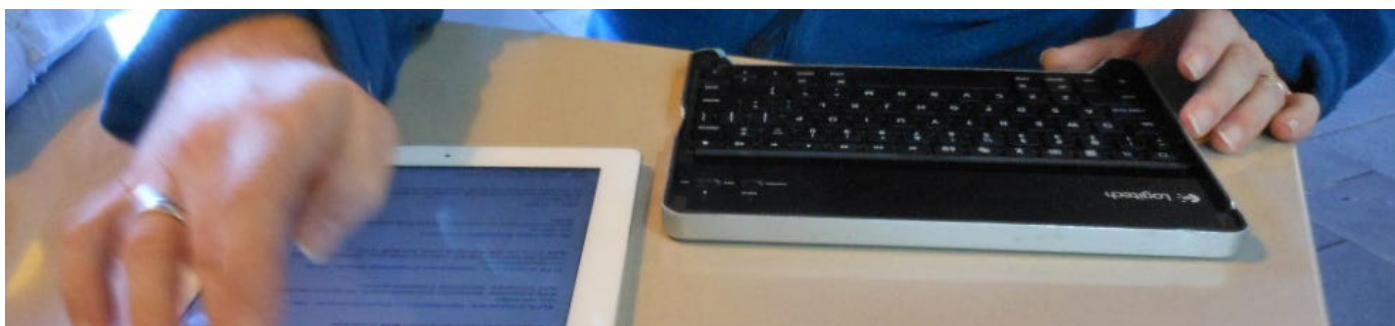
# 3

# DATA FINDINGS

Let's firstly review the variables that showed little to no differences across the numerous interview lengths.

## Data degradation

**Interestingly, when looking at closed-ended questions, we did not notice any significant differences across LOIs; we had a 95% consistency on average among conditions, with no meaningful patterns of difference across 5830 pairs.**

While this is encouraging at first glance, we need to stay cautious about these results for two reasons:

1. We need to keep in mind the clear possibility that these findings – run across general populations, and on fairly simple topics – may not always hold if the target is narrower or the questions cognitively heavier.

2. The people who accept longer surveys may eventually prove to be atypical consumers.

## Speeding and Straight-lining

**In most cases, issues associated with speeding and straight-lining were minimal, regardless of the length.** (Note that because of the low percentage of issues, we combined speeding and straight-lining for reporting purposes).

| | 15 mins | 20 mins | 25 mins | 30 mins |
|---|---|---|---|---|
| **US** | 2% | 0% | 0% | 0% |
| **UK** | 2% | 1% | 2% | 3% |
| **France** | 1% | 0% | 3% | 6% |
| **Russia** | 5% | 4% | 4% | 7% |
| **Mexico PANEL** | 4% | 7% | 6% | 15% |
| **Mexico AMPARIO** | 21% | 21% | 31% | 26% |

Table 1.1: Actual % of speeding/Straight-lining vs. Total Base Size

As shown in table 1.1, there is a slight increase at the 30 minute mark for France and Russia. Mexico shows a similar pattern, although it shows higher percentages of "bad behaviour" across anything over 15 minutes.

On the other hand, we did notice some significant differences across conditions for the following three dimensions:

- Open-ends
- Abandon rates
- Satisfaction

## Abandon rates

**Abandon is a critical metric of quality and reliability for our surveys.**

The more people walk away from a survey, the more likely it is that the completes we gather are biased in ways we cannot anticipate.

Regardless of market, there is a direct relationship between survey length and abandon for panelists, as can be seen in table 1.2. Of course, different markets have different starting points and tolerance levels. The US respondents, for example, abandon at a much higher rate than their UK counterparts, regardless of the condition. But the trend is apparent in all five markets investigated.



Table 1.2: Smartphone abandon by LOI and country

# Device Agnostic:
## A Researcher's Guide

This pattern seems unlikely to reverse: we can assume that increasing or failing to limit the LOI on smartphones will likely have three types of consequences:

- **Longer studies will become increasingly expensive and require longer field times**. As respondents abandon at increasing rates, we will struggle more and more to close field within reasonable timings and within budget.

- **Longer studies might be compromised by decreased representativity**. In other words, can we safely assume that the respondents who agree to take and stay in a longer survey are truly typical of the consumers we want to engage with? Or are they even the same as respondents that take shorter surveys?

- **There is also a longer-term risk: the overall health of panels**. If smartphone panelists abandon longer surveys at a higher rate, will they eventually leave panels altogether because they have become increasingly dissatisfied?

Note: this data is only for panelists – when looking at Ampario respondents (Ampario is Ipsos' proprietary real-time sample), it is clear that they are even less accepting of longer lengths. For example, at the **30 minutes mark**, in the US, Ampario respondents show a **15% increase in abandon** vs. their counterparts from our panel.

Clearly, **length contributes to abandon**. But we wanted to understand where we saw breaks or jumps in the trend across conditions. To do so, because each country has different preferences and incoming levels of abandon, we normalised the data by indexing the abandon for each length to the 15 minute result.

| | 15 mins | 20 mins | 25 mins | 30 mins |
|---|---|---|---|---|
| **US** | 100 | 190 | 224 | 262 |
| **UK** | 100 | 119 | 152 | 217 |
| **France** | 100 | 158 | 330 | 301 |
| **Russia** | 100 | 102 | 123 | 142 |
| **Mexico** | 100 | 119 | 135 | 187 |

Table 1.3: Abandon Indexes (vs. 15 minutes)

For most countries, **25 minutes** is where we see the most significant "jumps" in abandon across all questionnaire length.

## Open-Ends

For open-ends (to keep our analysis relatively simple and to allow for easier cross-country comparisons) we decided to evaluate which length, out of the four tested, gave us, at the same time:

1. The maximum amount of rich verbatims (i.e. longer answers, with in-depth content/insights) as well as the minimum amount of empty or nonsensical/garbage verbatims (Empty → NA, don't know, no comment, vs. nonsensical → hfdkjshfkjs, 111, etc.). This was designated as the **best-in-class** questionnaire length.

2. The minimum amount of rich verbatims as well as the maximum amount of empty or nonsensical/garbage verbatims – this was of course the **worst-in-class** questionnaire length.

| | Best in Class | Worst in Class |
|---|---|---|
| **US** | **30 min** | 25 min |
| **UK** | 20 min | 25 min |
| **France** | 15 min | 30 min |
| **Russia** | 20 min | 25 min |

Table 1.4: Best-in-Class vs. Worst-in-Class Condition by Market

**"**

**For most markets, longer LOIs (most often 25 minutes) tend to be the condition most likely to give us the least amount of insights, combined with the maximum number of empty verbatims.**

**"**

# Device Agnostic:
## A Researcher's Guide

Why is there not a direct correlation between length and quality of verbatims in the US? After all, one could expect that the longest LOI should always get the worst responses to open-ends and, by contrast, the shortest LOI the best possible responses.

Our hypothesis is that in the US, respondents who do accept to complete the longest possible survey (usually 30 minutes) may in fact be atypical and more committed to the survey-taking experience. By contrast, 25 minutes may be more of a grey area, with respondents thinking that sounds acceptable initially, but "fading" as they go through the questionnaire and taking shortcuts (for example, giving empty answers vs. fewer long/rich answers). This might be a warning sign of the potential impact of increased abandons.

## Respondent Satisfaction

This is the last dimension we investigated (note: results are all indexed to the 15 minute length for easier reference).

As can be seen in table 1.5:

- **Interest in further participation unsurprisingly declines when length goes up.** As we discussed at the beginning of this paper, this is the issue we are most concerned about. Sample is not an infinite resource. Sample is people: if individuals do not come back/leave panels, who is left to talk to?

- **Unsurprisingly, perception of the reward as sufficient sharply decreases as the survey gets longer.** The temptation might be to offset the declining interest by higher incentives. But **higher incentives increase our costs**, as well as create other types of issues: they can, for example, **increase fraud issues**, by making them a lot more attractive for over-qualifiers.

- For most countries, the 25 minute LOI represents the biggest "jump" in the perception of the survey as too long.

- Interestingly, **the length of the survey even affects the perception of the survey's visual appeal**, even though in our exercise, all four conditions were identical in terms of look and feel. This clearly illustrates how significant the length of the survey is: it impacts the way the respondent experiences the survey itself!

| | Would participate again | | | Sufficient Reward | | | Survey too long | | | Visual Appeal | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| | 20 mins | 25 mins | 30 mins | 20 mins | 25 mins | 30 mins | 20 mins | 25 mins | 30 mins | 20 mins | 25 mins | 30 mins |
| **US** | 105 | 99 | 89 | 87 | 88 | 71 | 137 | 175 | 216 | 94 | 103 | 91 |
| **UK** | 96 | 87 | 84 | 93 | 73 | 75 | 114 | 143 | 181 | 88 | 77 | 91 |
| **France** | 99 | 93 | 96 | 75 | 86 | 81 | 116 | 152 | 147 | 99 | 90 | 91 |
| **Russia** | 98 | 89 | 92 | 98 | 87 | 89 | 98 | 132 | 177 | 99 | 90 | 91 |
| **Mexico** | 87 | 95 | 89 | 96 | 95 | 70 | 124 | 136 | 133 | 107 | 95 | 97 |

Table 1.5: Respondent "Satisfaction" Indexes (vs. 15 minute length)

# 4

# OTHER OBSERVATIONS

**As a rule, we significantly underestimate how long it truly takes respondents to go through surveys**. In **all** tested markets, there is a clear disconnect between the estimated survey length (based on optimal network access and dedicated survey taking) and the median time spent by **panelists** (this pattern does not seem to apply for non-panelists) on a smartphone.

☐ Expected LOI    ☐ Incremental Time Spent in Survey

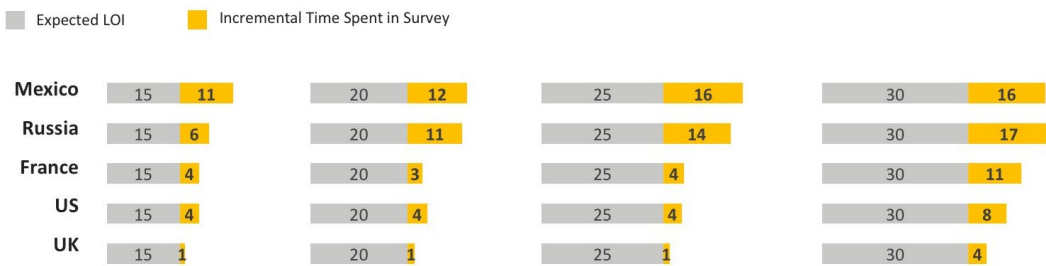| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Mexico** | 15 | 11 | 20 | 12 | 25 | 16 | 30 | 16 |
| **Russia** | 15 | 6 | 20 | 11 | 25 | 14 | 30 | 17 |
| **France** | 15 | 4 | 20 | 3 | 25 | 4 | 30 | 11 |
| **US** | 15 | 4 | 20 | 4 | 25 | 4 | 30 | 8 |
| **UK** | 15 | 1 | 20 | 1 | 25 | 1 | 30 | 4 |

Table 1.6: Expected vs. Actual LOI (Smartphone legs – panel only)

- **Some of these differences are likely cultural** (i.e. English vs. Spanish vs. French, high context cultures vs. low context cultures, etc.). But there must be other effects at work (the US, for example, still shows the average respondent needs 38 minutes to complete the 30 minute survey, while a respondent in the UK "only" needs 34 minutes – so language cannot be the only differentiation point). We believe that **differences in technology, data plans, device familiarity, and levels of disruption/distraction come into play as well**.

- **We believe device familiarity is a factor**, because when we look at information collected through Ampario vs. the panel data for the US, we see that Ampario respondents are much more closely aligned with expectations. If anything, they are almost exactly on "target" vs. our LOI estimates.

☐ Expected LOI    ☐ Incremental Time Spent in Survey

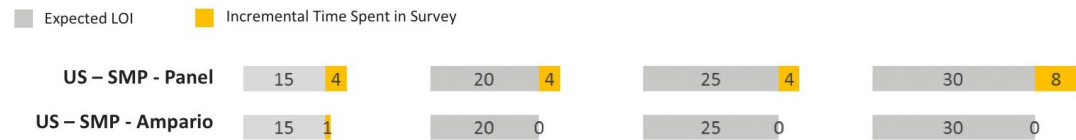| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **US – SMP - Panel** | 15 | 4 | 20 | 4 | 25 | 4 | 30 | 8 |
| **US – SMP - Ampario** | 15 | 1 | 20 | 0 | 25 | 0 | 30 | 0 |

Table 1.7: Expected vs. Actual LOI (Smartphone legs – panel vs. Ampario in the US)

We also looked at the actual LOIs on PC (again, in the US). Once more, the LOIs were almost exactly on target.

☐ Expected LOI    ☐ Incremental Time Spent in Survey

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **US – SMP - Panel** | 15 | 4 | 20 | 4 | 25 | 4 | 30 | 8 |
| **US – PC - Panel** | 15 | 1 | 20 | 2 | 25 | 0 | 30 | 1 |

Table 1.8: Expected vs. Actual LOI (panel in the US, PC vs. Smartphone)

**GAME CHANGERS**    Ipsos

# Device Agnostic:
## A Researcher's Guide

# 5

# CONCLUSIONS

- LOI is only a part of the puzzle: just because we reduce a survey to 20 minutes does not mean we have a device agnostic study. We must also understand the potential data impact associated with the changes we are making to the question itself, to make it mobile-friendly.

- Like any RoR effort, this exercise needs to be taken in the proper context: while this exercise shows no significant data degradation, it is important to remember that shortening a client study may in fact have an impact. The goal of the RoR is to explicitly account for the impact of length specifically – but all other variables were held constant.

- In reality, when we transition a study to a shorter LOI, there are often other associated changes. For example: brand lists get simplified, questions get reworded[2], or removed altogether, the questionnaire flow gets changed… all these changes can have an impact on your data.

- In parallel, we need to keep in mind that the questions we used were very rational questions: i.e. "are you aware of Brand X?", "have you purchased Product Y in the P12M" – questions that are more attitudinal/subjective might show greater amounts of noise. We also asked relatively simple and "non-threatening" open-ends (we did not ask about socially undesirable behaviours, health conditions or even potentially polarising topics, such as opinions of current events, etc.).

---

1. Device-agnostic surveys are electronic surveys that deliver a consistent look and feel across a range of devices. They are used most frequently across desktop and laptop personal computers, tablets and smartphone devices. 'Device agnostic surveys' is also used to mean surveys that can be accessed by respondents on any device.

2. On this topic, we highly recommend referring to Ipsos Connect P3 team's findings on the impact of the new awareness questions in trackers – it is a great example of how a seemingly very "static" measure – brand awareness – can be affected by the way we ask and frame the question.

## KEY TAKEAWAYS

Based on the entirety of the findings we have described so far, we feel comfortable that respondents will take 20 minute surveys without unduly compromising quality and operational considerations. 20 minutes is the upper allowable limit, however; whenever possible, we should still aim for shorter lengths.

We believe a maximum 20 minutes LOI represents a good compromise across all the measures we have captured, because:

- **There does not seem to be any data degradation**

- **We still get good quality open-ends, and satisfied respondents**

- **We limit abandon to practical levels (even if they are higher than what we see at shorter LOIs)**

As a result, we get representative and engaged respondents, thus protecting our studies (today, as well as tomorrow...).



**GAME CHANGERS** | Ipsos

# Device Agnostic:
## A Researcher's Guide

**Nancy Brigham, Ph.D.**
SVP, Global Head of Sampling and RoR
Ipsos Interactive Services

**Cecile Carre**
VP, Global Operations, RoR
Ipsos Interactive Services

**Eva Wittman**
Director, Global RoR
Ipsos Interactive Services

**Jason Fuller**
Director, Global RoR
Ipsos Interactive Services

**Sara Wilkinson**
Director, Global RoR
Ipsos Interactive Services

Ipsos Interactive Services (IIS) are the Ipsos online and mobile global research division with more than 15 years of experience. With 1,700 passionate online and mobile experts we deliver industry leading research with access to 100+ countries. The Ipsos network spans online panels, real time sampling and mobile respondents. IIS is member of ESOMAR, AIMRI, CASRO, ARF and EFAMRO and certified on key ISO 9001, 20252 and 27001.

<<Game Changers>> is the **Ipsos** signature.
At **Ipsos** we are passionately curious about people, markets, brands and society. We make our changing world easier and faster to navigate and inspire clients to make smarter decisions. We deliver with security, simplicity, speed and substance. We are Game Changers.

**www.ipsos.com**
**@_Ipsos**
**IKC@ipsos.com**

**GAME CHANGERS** Ipsos