MOBILE FIRST
Best Practice Guide

02

Research Methods Toolkit

Ipsos MORI

WHY DOES MOBILE MATTER?

The proportion of people accessing the internet on their mobile has grown from 20% almost a decade ago to 72% in 2018.[1] As the smartphone has become the go-to device for accessing the web generally, we have seen a similar rise in online survey completion on a mobile device. For example, since the start of the Active Lives Survey, responses by smartphone have increased by around 4% year-on-year, while responses on a desktop or tablet have steadily decreased.

PUTTING THE RESPONDENT FIRST

As the smartphone becomes the device of choice for going online, it is crucial that researchers put respondents and their smartphones at the heart of survey design.

But my survey is already 'device-agnostic'…

In plain terms, a device-agnostic survey means the survey can be completed on any device. But it does not necessarily mean the survey will work well or be easy to complete on that device. Online surveys should be designed as 'mobile-first', so the respondent can easily and comfortably complete the survey on any device – from a smartphone to a computer.

So, what do we mean by mobile-first?

We call our approach mobile-first because we begin by considering the look, feel and usability of the questionnaire on smartphones. Only then do we look at other devices. The rationale: if it works on the smallest of screens, it will also work on the largest. As a result, questionnaire design is consistent across devices, which is essential for limiting mode effects.

WHAT ARE THE BENEFITS OF MOBILE-FIRST DESIGN?

Allowing respondents to complete the survey on a device of their choice will improve:

The overall survey response – respondents are less likely to abandon completing a survey if the survey is easy to complete;

The composition of the sample – those completing surveys on mobile are more likely to be in groups that are typically harder to reach - such as disadvantaged groups;[2]

The respondents' survey experience; and

The quality and validity of the data collected.

WHAT CAN HAPPEN IF YOUR SURVEY ISN'T DESIGNED FOR MOBILE?

Mobile devices can substantially constrain the ways in which questionnaires are presented to respondents – largely because of small screen sizes and the need for horizontal and vertical scrolling. This can lead to significant increases in drop-outs and measurement errors if the survey is not designed for mobile completion.[3]

Example of a grid question on a mobile screen – to answer this question, respondents are required to scroll horizontally to see the full response scale:
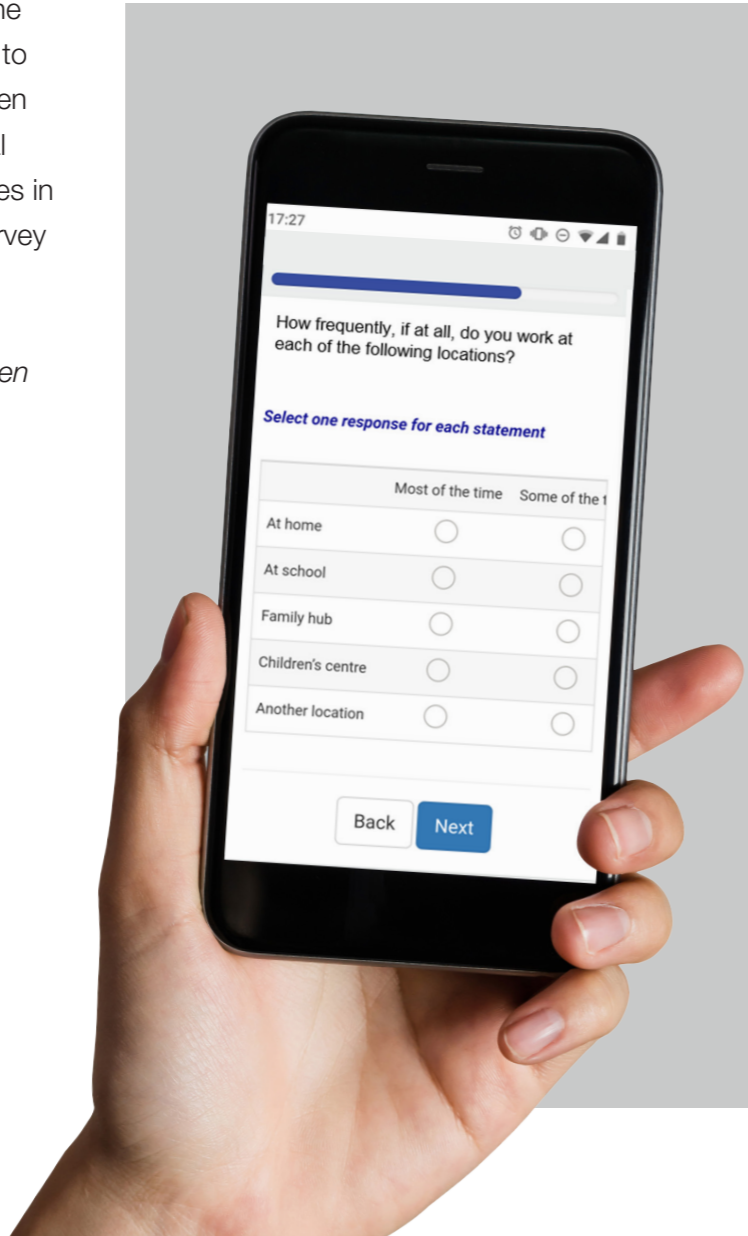
TO DESIGN YOUR SURVEY AS MOBILE-FIRST, FOLLOW THESE RULES

01

Minimise clutter

Remove or reduce all non-essential, non-question content

Keep introductory text concise, using bullet points where possible

Show logos on the welcome / closing screens only (when included, eye tracking studies highlight that eyes are drawn to the top-left corner first so your main logo should go here)

Remove conversational phrases / unnecessary wording (e.g. "may I ask you…")

Only use progress bars where this may be motivational (i.e. where the survey is short and has limited routing so the progress bar is accurate)

Only use instructions and explanations when they are absolutely essential

02

Keep it concise

Avoid exceeding 140 characters in the question stem (including spaces)

Limit the number of response options to 7 per question. If this is not possible, consider using expandable headers and ensure that the "next" button is at the bottom of the list

Emphasise subtle changes to question wording (**bold** or underline) if similar questions are presented consecutively

Only use info buttons for additional or background information. If the information changes the meaning or how the question is interpreted or answered, it should be stated explicitly as part of the question

03

Keep it consistent

Harmonise the visual appearance of the questionnaire

- Use a consistent page layout
- Ensure question text, instructions and response options are distinctly formatted
- Keep the spacing between categories equal

Standardise the question text and response options

- Use device-agnostic language ("select" rather than "click")

04

Minimise respondent burden

Ensure the questionnaire is "finger-friendly". Unrealistic levels of touch precision should not be required (avoid sliders and small response buttons)

Where possible, show lists in full, even if this means vertically scrolling

Reserve drop-down lists for very long lists with natural order (e.g. alphabetised list of countries)

Try to avoid open-ended questions. If you do use them, use no more than two per questionnaire and remember to set an appropriate character limit

Use numeric entry sparingly, and where used, program the keyboard to appear as numeric and set a wide or liberal range

Present transitions on the same screens as the next topic, not by themselves on separate screens. Placing transitions on their own screens increases manual effort and time to download, which adds to respondent burden

05

Use mobile-friendly formats

Avoid formats that require horizontal scrolling

Where possible, use a 4- or 5-point scale to minimise the need for scrolling and the potential for primacy effects

Display scales vertically to fit a mobile screen

Use mobile-friendly grid formats or replace with separate questions (grouping similar questions on the same screen / page)

Mobile-friendly grids

We often want respondents to rate a series of items using the same scale. When rating each item, data quality can benefit from the respondent being able to compare their answers across all items. On paper, we can achieve this by providing a traditional grid with the items presented vertically on the left and the scale presented horizontally on the top (here is an example from the Active Lives Survey).

For mobile-optimised online surveys, use a collapsible grid. The items are listed vertically with the rating scale revealed under the first item. When the respondent answers the first item, the rating scale for the first item closes (collapses) and appears under the second item. The selected answer for each item is displayed alongside the item so that the respondent can compare their ratings across all items. Try it on your smartphone at *https://ipsos.uk/demogrids*

Sometimes we want the respondent to focus on each item separately; (e.g. questions about how often the survey participant has experienced an event or taken part in a certain activity.) A progressive (or carousel) grid can help with this. Items are displayed in a box at the top of the screen, one at a time. The response list is displayed under the item. When the survey participant selects an answer, the item is replaced by the next item and the response list is refreshed. Give it a go at *https://ipsos.uk/demogrids*

Example of collapsible grid:
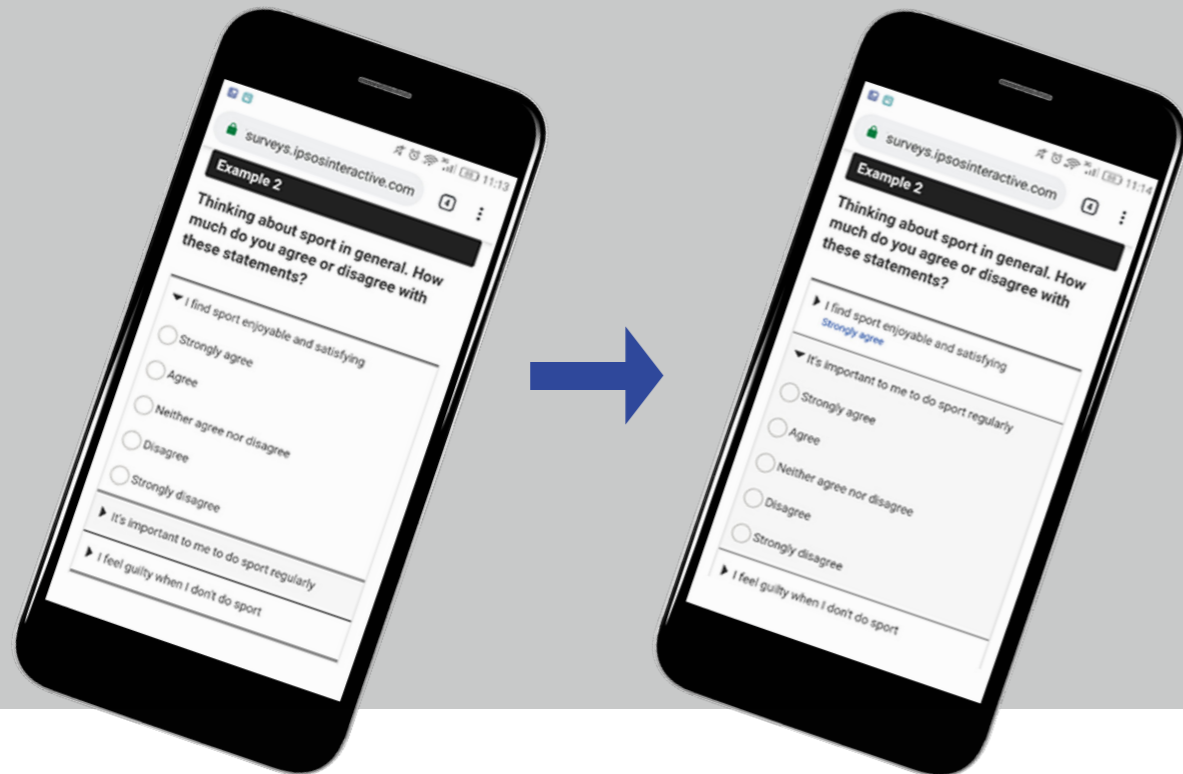
06

Test, test, test

Always test your survey on a smartphone in portrait mode, since this is the orientation that most people use when completing a survey on a smartphone

Test the survey across different operating systems (iOS, Android, Windows) and across different browsers for optimisation

Test the survey with older and smaller versions of smartphones to check for problems with presentation

Use cognitive testing to optimise questionnaire design – designing questions to fit on a smartphone means going back to the basic principles of good questionnaire design

Use usability testing to optimise respondent experience

Use the expertise of your research team to review your questionnaire and share best practice

HOW CAN I MOVE MY EXISTING SURVEY TO A MOBILE-FIRST DESIGN?

As survey completions on smartphones continue to rise, moving your online survey to a mobile-first design is an important step in future-proofing your research.

A

Review your existing questionnaire

Ask…
- How will this question be presented on mobile? Consider the smallest screen size this question may appear on
- Will this question be easy to answer on a mobile device?
- If your survey was previously administered by an interviewer, does this question work for self-completion?

Your research team can help guide this process based on experience and best practice

B

Consider comparability

Changes to the way questions are asked or presented may impact your ability to compare your survey results to previous waves

When suggesting changes, flag the potential risk to trend data

In some cases, it will be more important to break trend data to improve and future-proof the survey design

C

Test, test, test

As above, testing will be a key step in your mobile-first survey design

Cognitive testing can help refine your survey questions and check what information is essential to include, and what information can be removed as clutter

Usability testing can help ensure your survey is easy to complete across devices

Pilot your revised survey to test how it is working before it is rolled out to the full sample
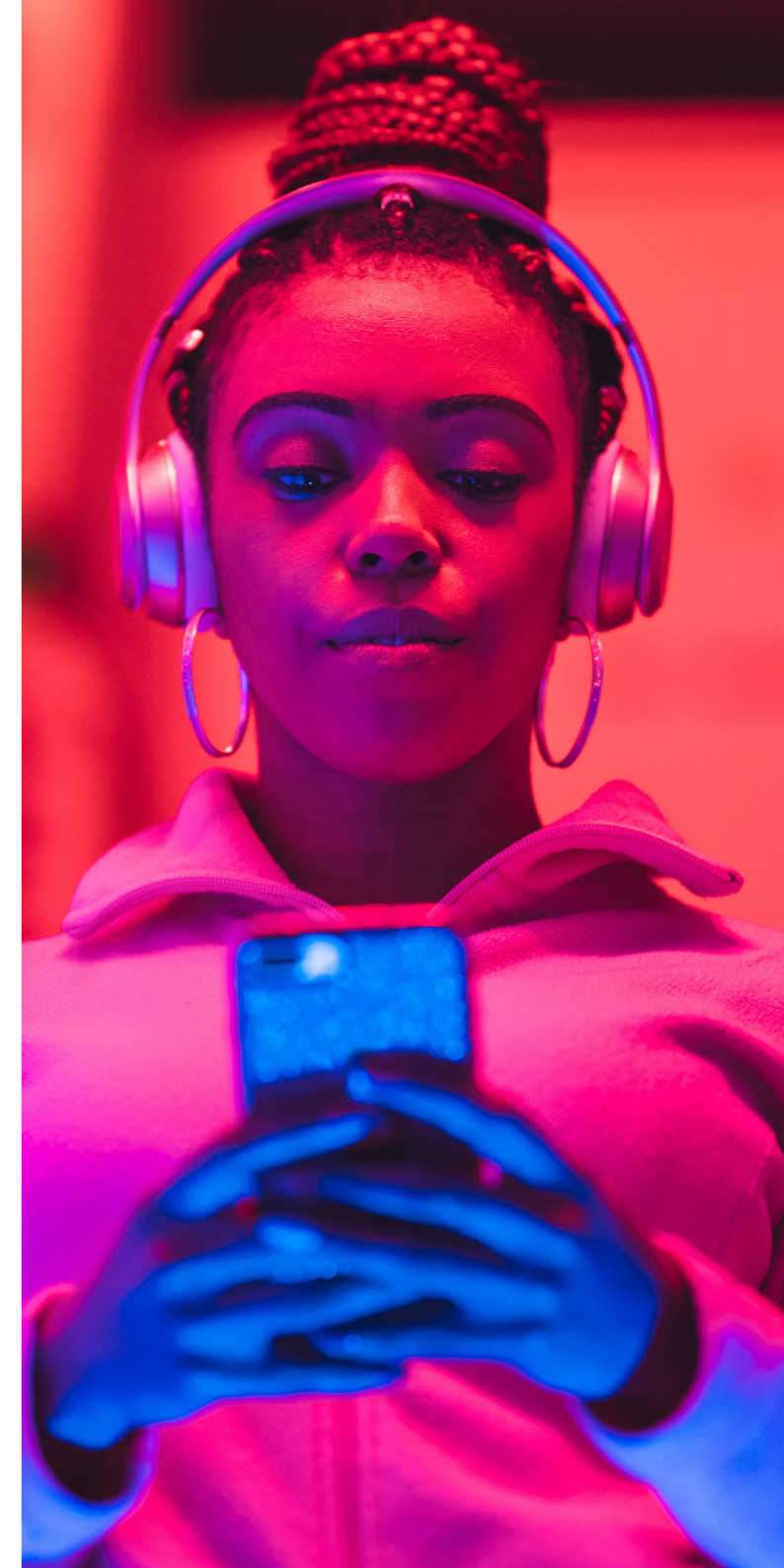
LOOKING AHEAD

This guide reflects current best practice in mobile-first design. As people's use of smartphones – and mobile devices of future generations – becomes more pervasive, researchers will need to revisit these guidelines, with an eye always to making the respondent experience as simple and rewarding as possible. We expect that technology may prove both an ally and, at times, an obstacle in achieving these all-important goals; it is up to researchers and their clients to keep a close watch on that balance.

References

1.   https://www.ofcom.org.uk/about-ofcom/latest/features-and-news/decade-of-digital-dependency

2.   In a 2019 survey of parents/carers of secondary school pupils, smartphone respondents were more likely to be disadvantaged:
   •   27% of smartphone respondents had a household income of £20,000 or below, compared with 16% of desktop respondents
   •   22% of smartphone respondents considered their child to be eligible for free school meals (FSM), compared with 10% of desktop respondents
   •   23% of smartphone respondents lived in areas of high deprivation (defined as the most deprived quintile based on their Income Deprivation Affecting Children Index (IDACI) score), compared with 15% of desktop respondents

3.   Wenz, A. (2017). Completing web surveys on mobile devices: does screen size affect data quality? ISER Working Paper Series

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