

MOBILE FIRST SURVEY DESIGN

How to future-proof your research

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MOBILE FIRST RESEARCH

Most of us do not leave home without it. We lose track of how many times per day we reach for it, to check our email, social media, or for navigation. The mobile phone has reached ubiquity.

Here are a few stats that illustrate the presence of mobile in our everyday lives.

- There are **5 billion** mobile phones and **3.5 billion** smartphone users in the world.¹
- Smartphone usership is forecasted to grow by **several hundred million** in the next few years, with China, India and United States leading the way.²
- **80%** of mobile users search the internet with their device.
- **40%** of online transactions are made using a mobile device.³
- More than **six in ten** of Google's total paid search clicks were from mobile devices.⁴
- The amount of data passing through our phones has increased by **30%** in the past year.⁵

Moreover, mobile traffic now comprises more than half (56%) of all website traffic, and this is certain to increase with the advent of 5G networks⁶. In 2020, the advance of mobile means that we are now at a point, where as Silicon Valley entrepreneur Marc Andreessen said, "every failed idea from the dot com bubble is now possible". However, in many ways, online market research is still holding on to the practices of 2000.

Over 50% of our global population is now online, and the other half is following fast. Around 726 million people joined the web in the last three years.⁸

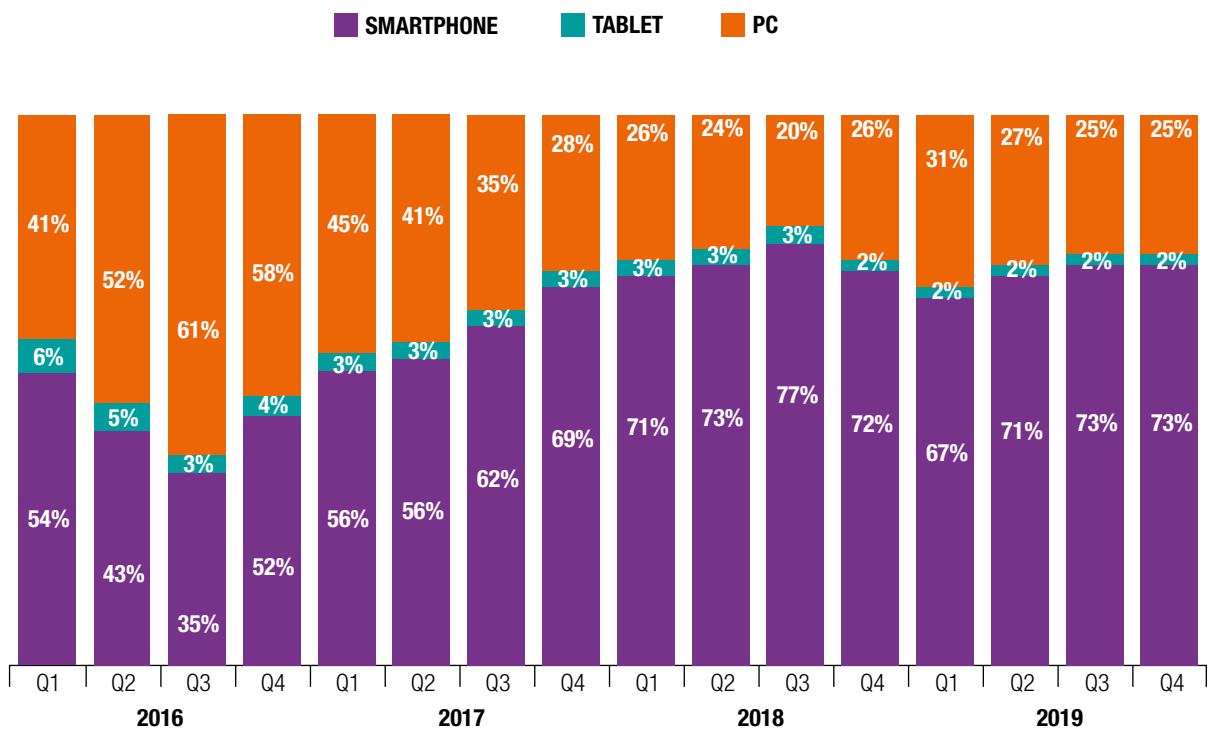
MOBILE MATTERS

Nowadays, people are more likely to interact using their smartphone – with family and friends, institutions, brands, media and market research companies. During the last quarter of 2019, most people who joined Ipsos panels (73%) did so via their mobile device, and recruitment efforts focus on mobile as the most effective way to engage potential panellists. Furthermore, two-thirds of Ipsos' online studies (68%) were run in a way that allowed for respondents to complete it on any device, including a mobile device.

However, this underrepresents some critical developing markets, like India which have built out 4G and 5G mobile networks rather than fibre optic networks, and where the population has moved directly to mobile to access the internet rather than transitioning from PC access.

Mobile first research is not the future, it is our reality, especially as, globally, six in ten cannot imagine life without their mobiles and two-thirds find themselves constantly looking at screens. It is not a stretch to assume this attachment to our mobiles extends to other activities, like market research.

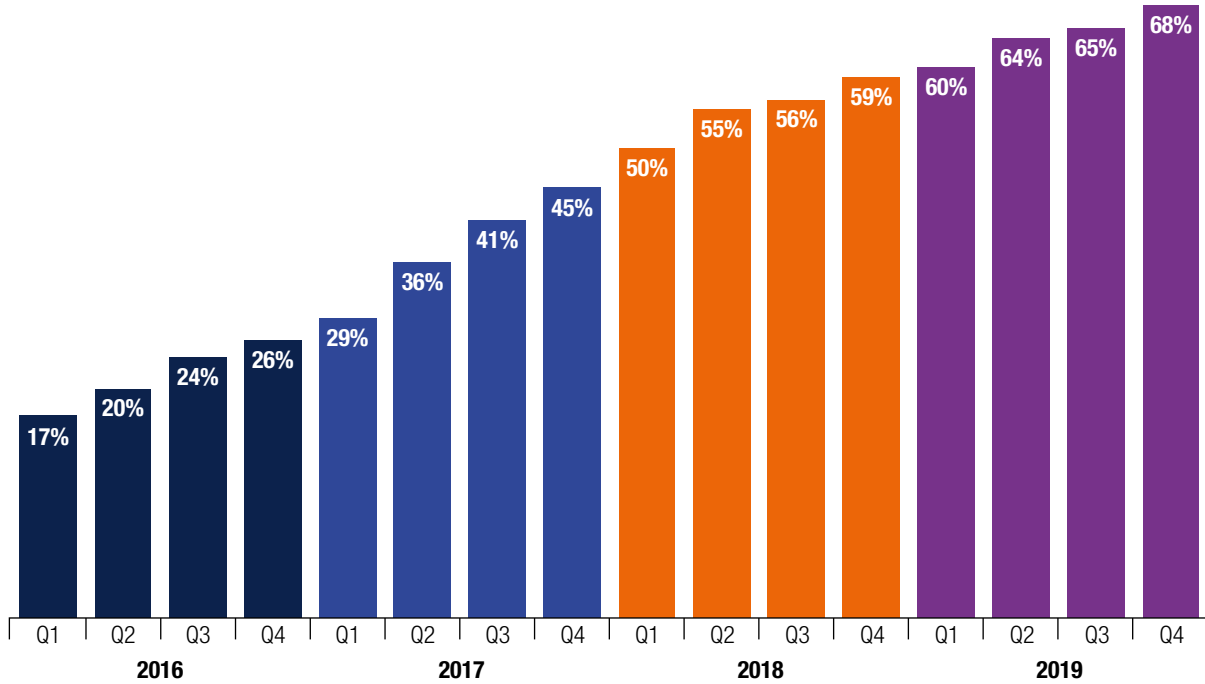
Figure 1 Proportion of global panellists who join the Ipsos iSay panel via PC, tablet and smartphones



Source: Ipsos Interactive Services 2020

The increase in mobile joins year after year does not follow a smooth trend. The increase in PC joins in 2016 and 2018 resulted from specific action to reduce smartphone joins and increase PC joins to offset the limited usage of device agnostic surveys.

Figure 1 Proportion of Ipsos studies that are Device Agnostic (can be taken from device of choice)



Source: Ipsos Interactive Services, 2020

WHAT DO WE MEAN BY MOBILE FIRST?

'Mobile first' research is more than making a survey available online and accessible by any device, be it a PC, tablet or smartphone. Mobile first research is designed, from the bottom up, to be conducted on a mobile phone. This means that the look, feel and usability of the survey will be best suited to a mobile phone. The rationale: if it works on the smallest of screens, it will also work on the largest.

Research should be designed as mobile first so that panelists can easily and comfortably complete surveys on the device of their choice. This means aligning survey design with how people use their mobile phones in day-to-day life. Mobile first research should be short, simple and direct.

By putting panelists and their smartphones at the heart of survey design, it is possible to provide quality insights with greater ease and speed.

WHAT HAPPENS IF YOUR STUDY IS NOT DESIGNED TO BE MOBILE FIRST?

Studies that are not designed to be mobile first and result in significant horizontal scrolling, for example, have high drop-out rates and increased likelihood of measurement errors.

A study might be 'device agnostic' (meaning it can be completed on any device), but if it is not designed to fit

effectively on a smartphone screen, your study will likely not retrieve the best quality data possible.

The likelihood of non-response bias also increases if respondents choose not to complete studies because of dissatisfaction with previous survey experiences.

WHY MOBILE FIRST?

Most importantly, this approach puts consumers and citizens first, creating improved engagement and ensuring higher quality data. Mobile first means that we:

1. Interact with people in a way that is relevant and fits with their lives.

It allows us to meet consumers at the point of activity - where they consume, and most importantly, where they interact with the brands and the categories that we want to question them about. This means the quality of insights is richer, facilitating better decision-making for brands.

2. Ensure representative access to all groups of consumers.

Surveys are increasingly competing with a larger pool of distractions, like social media, games, on-demand video, etc., and we are slowly losing access to large numbers of consumers. For specific groups, like Millennials or younger males, mobile first research ensures greater access to the target as they are less inclined to access the internet via a PC or laptop (see figure 3).

Mobile first research will also be the only way that will make it possible to easily access consumers in most global markets. We should not forget that regions like Asia and Africa are *mobile only*, let alone mobile first.

3. We create the right conditions for appropriate respondent engagement.

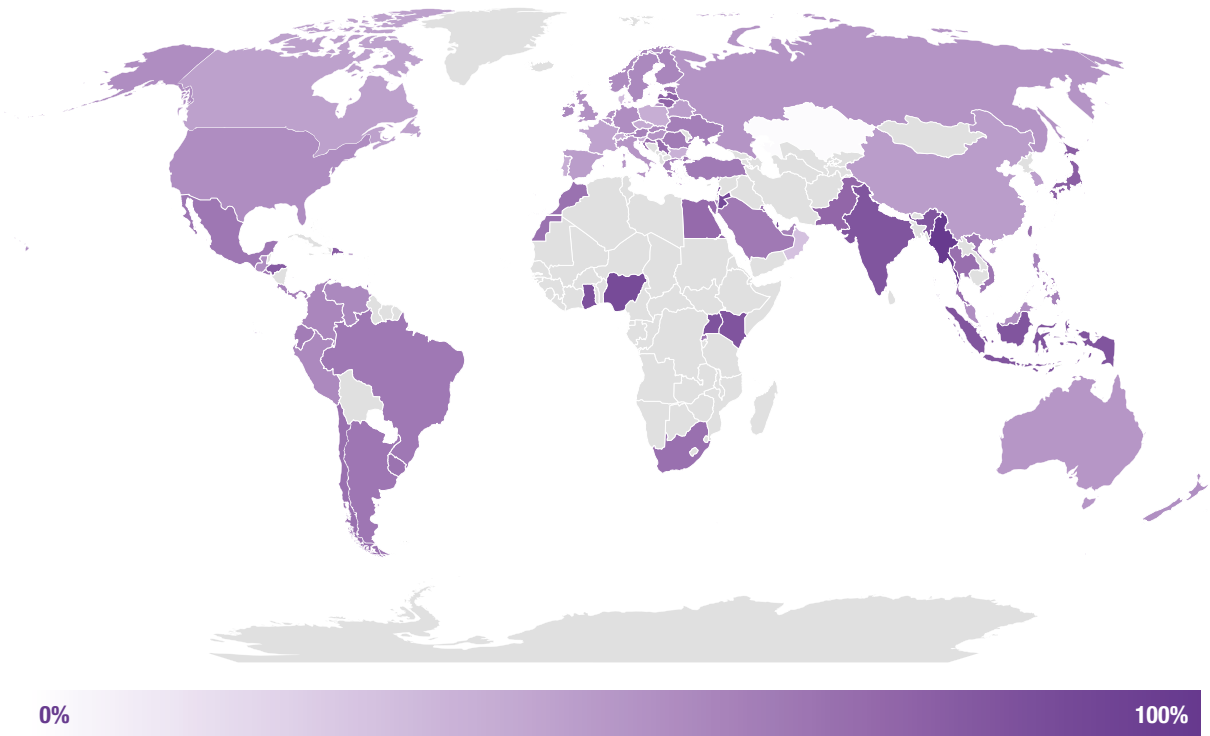
There is no negative impact associated with mobile first design for respondents who want to answer surveys from their PCs. In fact, it can even improve it. Mobile first design makes the experience on PC more engaging because mobile first design principles intend to make navigation and interaction with content easier. In addition, mobile also improves respondents' survey experience, so they are more likely to participate in future research studies.

MOBILE FIRST FORMATS

Mobile first research is designed so that it is easy to access, navigate and complete on a smartphone. It can mean a re-thinking and renovation of an existing program, or it can mean building a new program to be fit for purpose. Ultimately, it means designing a survey collaboratively (brands together with research supplier and mobile research experts) to have the look, feel and usability that takes into account the characteristics of a smartphone (e.g. small screen, touch-based navigation).

Mobile first research is not the future, it is our reality. It is not a stretch to think that our attachment to mobiles extends into market research.

Figure 3 Likelihood of males ages 18-24 to access an Ipsos survey via a smartphone



Source: Ipsos Interactive Services, 2020. Data available for the ~60 countries where Ipsos has proprietary panels.



MOBILE FIRST BEST PRACTICES



Use mobile-friendly formats

Minimize respondent burden by making questionnaires 'finger-friendly'. Here's how:

- **Make it easy to navigate.** Minimise the number of sliders and ensure drop-down lists are properly designed. If a drop-down list is required, ensure it has a natural order (e.g. an alphabetised list of countries) Also ensure that each drop-down list minimises the number of options to 25, with each option no more than 25 characters.
- **Reduce the number of open-ended questions** and set an appropriate character limit per open end
- **Eliminate horizontal scrolling** and limit screen transitions.
- If you need to show a stimulus, **include instructions** telling respondents to flip the device to landscape so that they can view it fully. Ipsos' dynamic formatting will automatically increase the size of the stimulus.



Keep it simple

Ensure the overall length of questionnaire, instructions and individual questions are short and concise. This includes:

- **Showing logos only on welcome and closing screens** – ideally in the top left corner where the eye is typically drawn
- **Removing or reducing** all non-essential, non-question content, like conversational language or progress bars
- Aiming for **questions with as few words as possible** and use bold or underline to highlight points of emphasis
- **Limit the number of response options** to seven per question, or use formats like expandable headers



Make it visually engaging

Ensure a consistent visual appearance, page layout and standardized response options throughout for a better experience. This means:

- **Distinctly formatting question text**, instructions and response options so that the respondents know what to do.
- Using **standardized question texts**.
- Using **mobile friendly language** like 'select' rather than 'click'.



Work with Ipsos experts to (re)design your study's questionnaire.

Our extensive research experience ensures we can help you properly transition your program. A few quick tips include:

- **Use short, 4 or 5-point scales** where possible to minimize scrolling and primacy effects.
- **Display scales vertically** to properly fit a smartphone screen.
- When it is useful for respondents to compare items in a grid, we recommend using **collapsible grids**. *With collapsible grids, all or most of the attributes are listed vertically with the scale revealed under the first option. When the first question is answered, the first option collapses and the scale for the second opens, and so on.*
- When a study requires a respondent to focus on an attribute individually, we recommend a **progressive grid** whereby attributes are displayed at the top, with the scale shown below. Once a response is selected the attribute is replaced by the next option.

TRANSITIONING TO MOBILE FIRST SURVEYS

Moving to a mobile first survey will help you to future-proof your research and ensure the best quality results. Here are three steps that you will need to take:

1. Deconstruct your survey

Interrogate your questionnaire, together with your Ipsos expert, to (re)design questions in the following ways:

- Enable questions to be presented on the smallest of mobile screens without any horizontal scrolling.
- Make questions easy to answer on a mobile device – minimizing the need for touch-input precision.
- Rework questions that were previously asked by an interviewer to make them easy to understand and answer as a self-complete.

2. Plan for data changes

We have found that there is no significant impact on data for most single answer question types. Open-ended questions also show similar responses, especially in terms of percentage of valid answers and percentage of robust answers, regardless of device¹³.

However, we do see differences for multiple answer grids, where structural limitations (e.g. it is not possible to show all statements at the same time in a mobile-friendly design) or the repetitiveness of the task play a role.

For long-running programs, it will be important to flag or highlight where trend data may be impacted. It might be worth reviewing whether the benefits of representative samples, better quality insights and a future-proof research program outweigh breaking trend data.

3. Pilot

It is important to hold on to research best practices such as piloting and parallel testing, especially when changing tracking programs. To be in the best position moving forward, we highly recommend conducting:

- Cognitive testing to help simplify your questionnaire. It can help you simplify questions and determine which information is necessary and which is nice to have and can be removed.
- Usability testing to ensure your research is easy to answer on a mobile screen.
- A pilot of your redesigned survey to help you understand its effectiveness before launching against a complete sample.

Moving to a mobile first survey will help you to future-proof your research.

FROM MOBILE FRIENDLY TO MOBILE FIRST

The individuals we interact with are already on their mobiles. By making our surveys mobile friendly, we make sure it is easy for them to provide us with the total understanding that points us towards the appropriate and necessary action.

But, increasingly, we are moving from mobile friendly to truly mobile first research, whereby we take full advantage of the capabilities of a smartphone. In truly mobile first research we can complement survey data with additional data sets that provide further value and guidance for decision-making.

Mobile first capabilities include, but are not limited to:

- **Geo-location data** which can:
 - Track peoples' journeys (e.g. how far they travel, how they travel, locations of interest)
 - Trigger studies when close to important locations (e.g. retail locations), and
 - Support media studies for Out of Home advertising.
- **Image, video and audio** capture to add richer insights than traditional open ends.
- **Voice and chat** surveys to enable hands-free survey responses. This can be especially valuable for target audiences like mothers of babies and can make longitudinal studies (like diaries) much easier for people to complete.
- **Passive metering** enables the monitoring of mobile behaviour, providing information on how to improve digital experiences.
- **Near Field Communications** (the technology behind Apple and Google Pay) can be leveraged for "in-the-moment" research simply and effectively.

To fully benefit from these additional data sources, online research must first universally become mobile first.

If you have questions on how and why to move your research to mobile first, reach out to your Ipsos partner to guide you through these best practices.



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