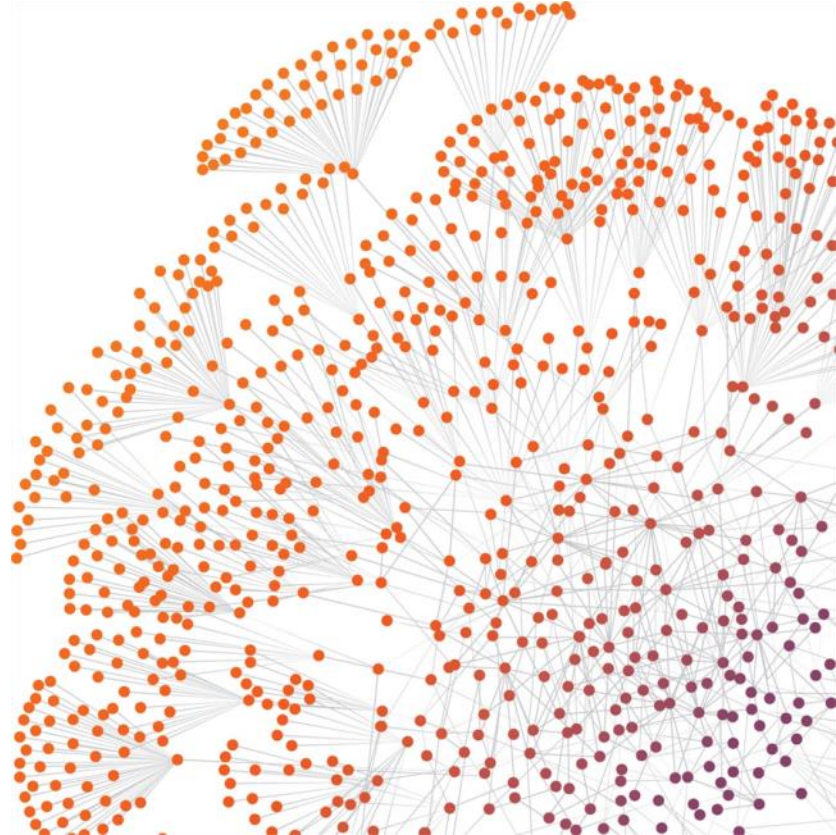




# Researching the impact of Mobile Optimisation

October, 2019

Justin Bennett, Toluna  
Pete Cape, Dynata  
Chris Stevens, Kantar  
Courtney Williams, Lucid



What we have done



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**Year 2 of our unprecedented collaborative effort between MRS and 4 panel provision organisations:**

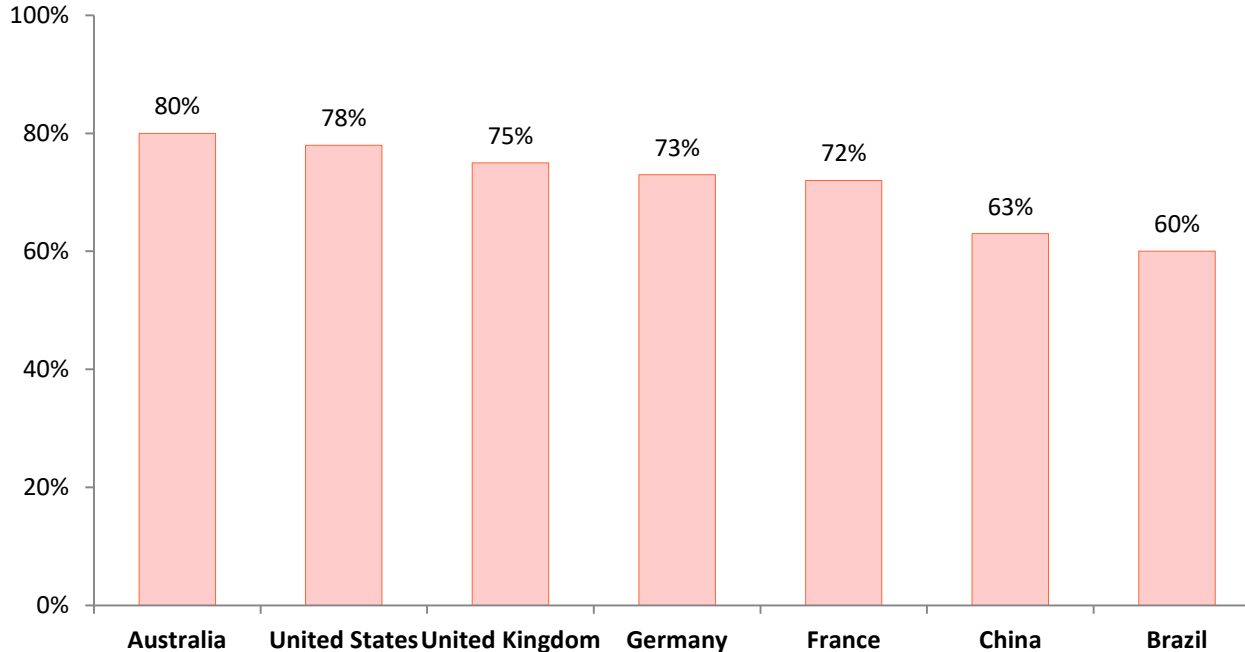
- Dynata
- Kantar
- Lucid
- Toluna

**MRS collated and aggregated three years of international panel data identifying response patterns between devices by age and country**

Globally 30% of surveys are not set up to allow smartphones devices



## Percentage of Surveys that Allow All Devices - 2018



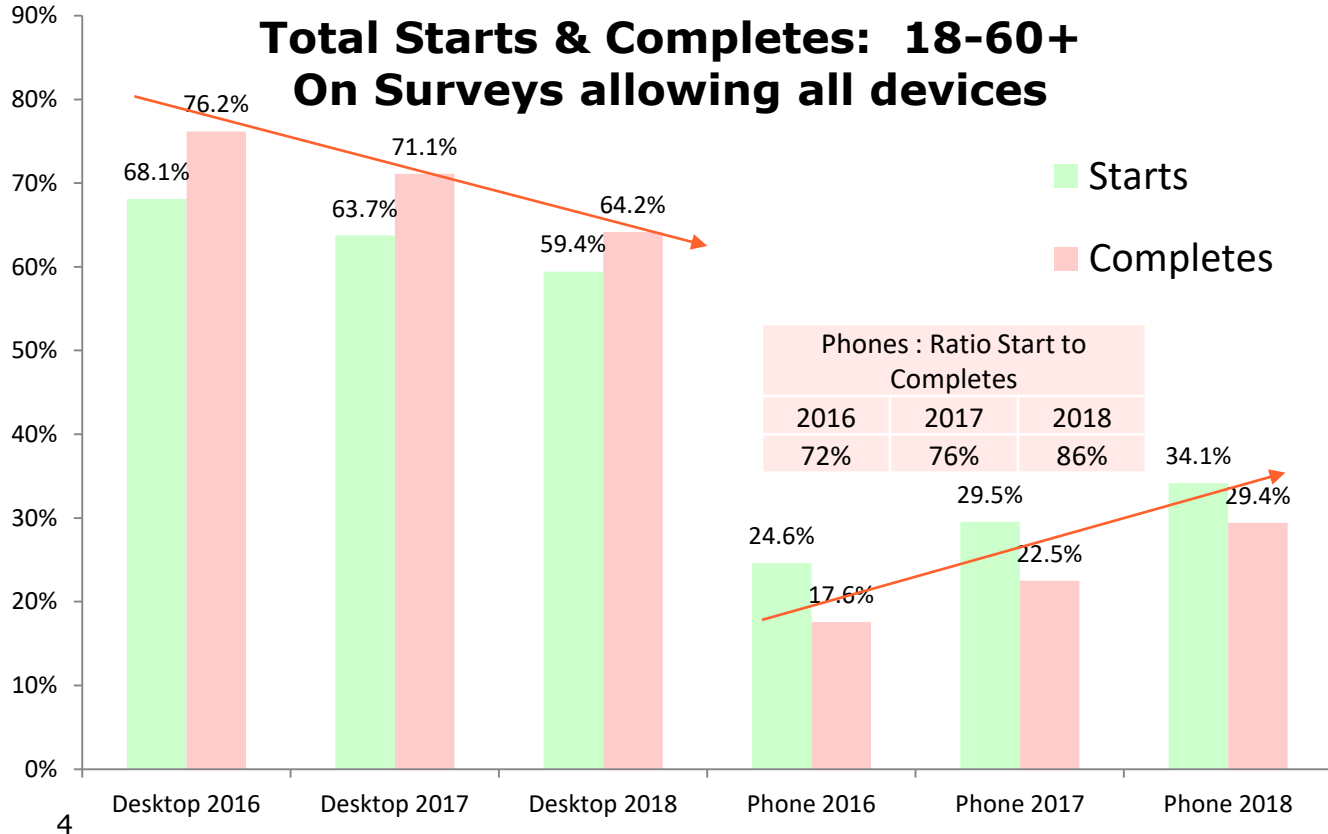
## Topline Outcomes:

- The research design – i.e. setting up to allow smartphones - is following the maturity of the market to online overall
- Examples in Brazil and China where offline surveys are moved online without updates and modernisation

What we found...increased mobile starts and completes



## Total Starts & Completes: 18-60+ On Surveys allowing all devices



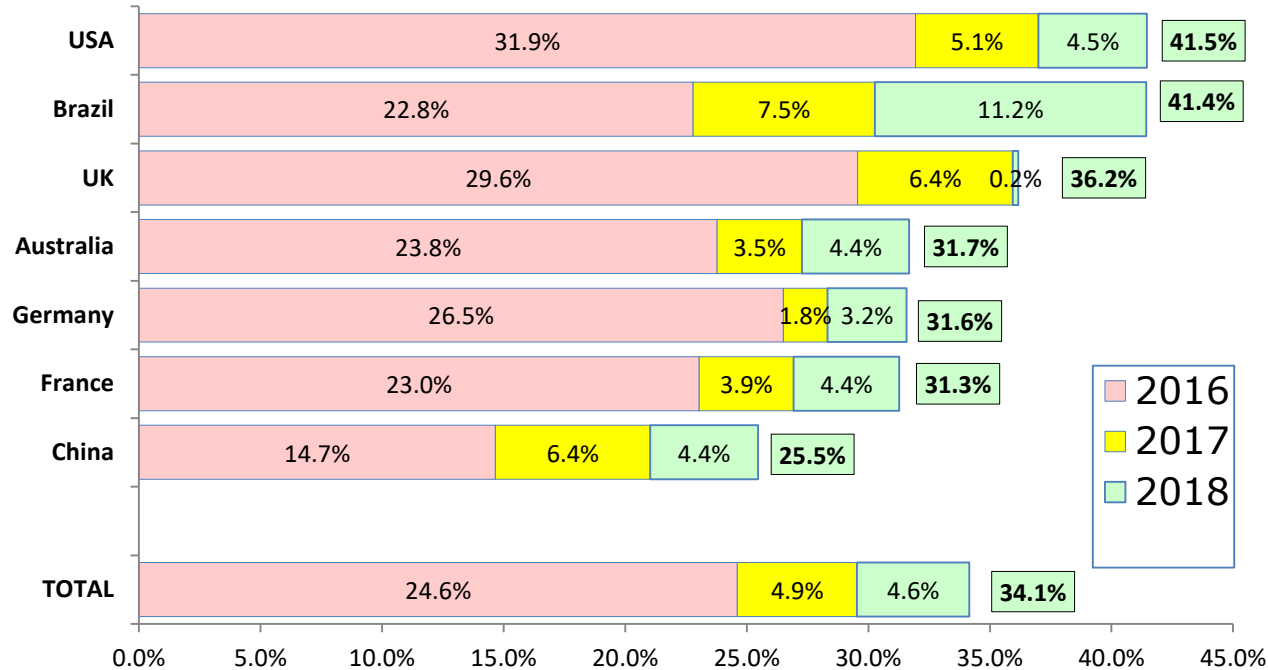
### Topline Outcomes:

- Good news is that mobile starts and completes have again increased
- The most encouraging news is that the ratio between starts and completes for phones has improved to 86%
- This is a good step towards parity with desktop devices for the surveys that allow all devices
- But the overall balance is still different to the device preference of respondents for survey completion
- We would expect to see continued growth to 50%+ on phone devices

What we found...growth in phone starts across the world



## Phone Starts by Country: 18-60+



### Topline Outcomes :

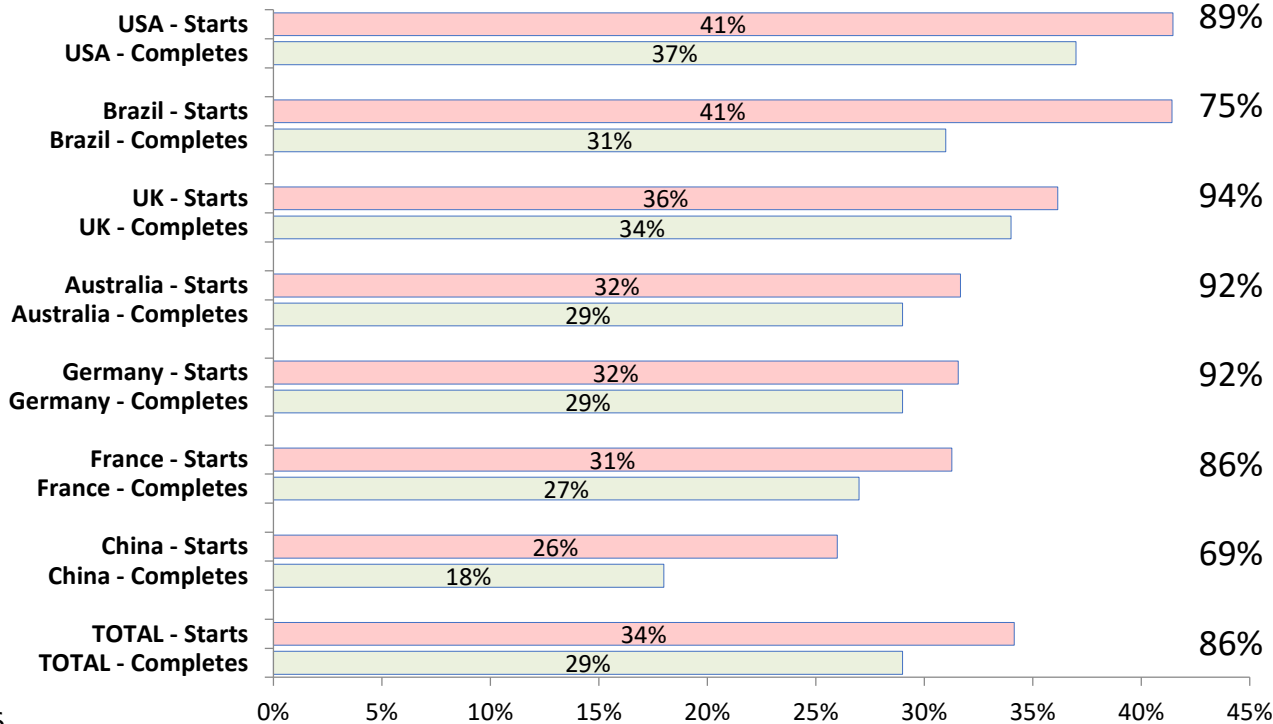
- Improvements across all countries, especially those at lower levels in 2017

But conversion from starts to completes not even



Conversion Rates

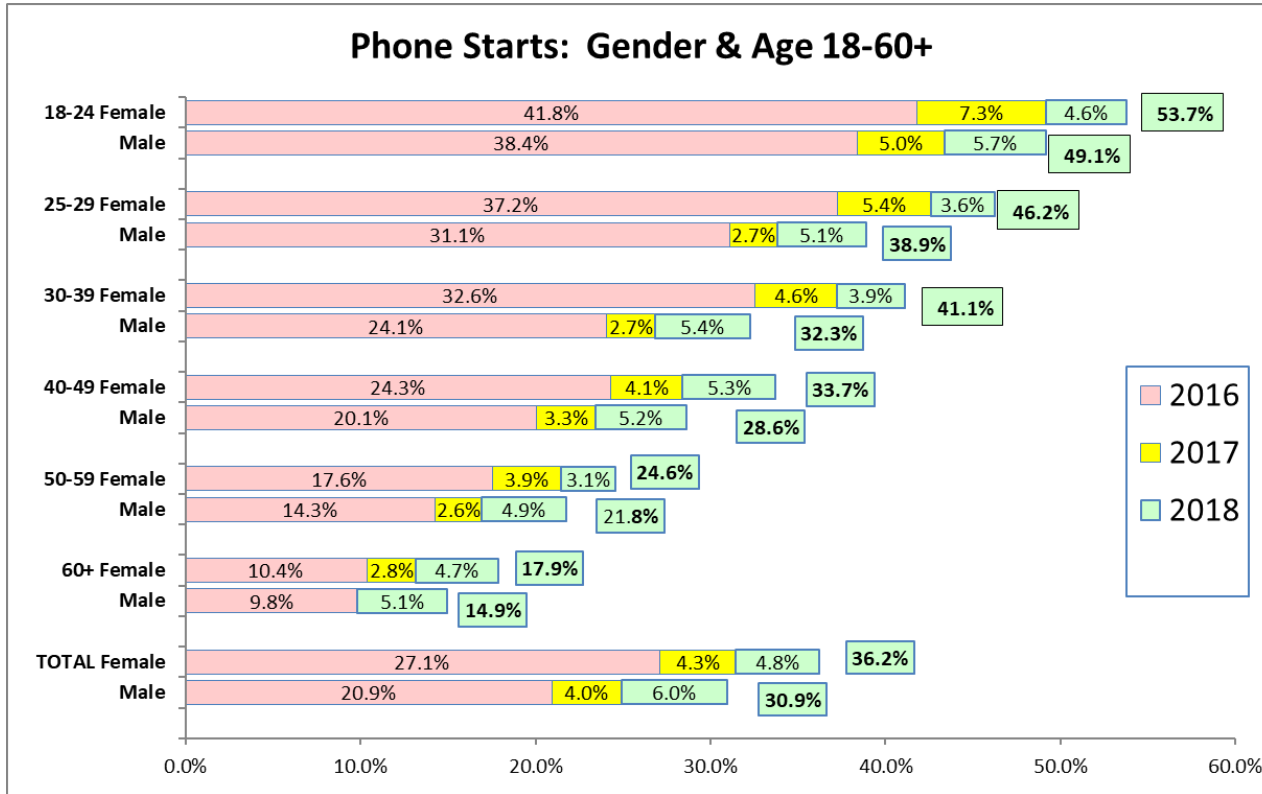
### Phone Starts and Completes by Country: 18-60+



### Topline Outcomes :

- Though Brazil and US lead in the level of starts, Brazil reduces dramatically on the share of completes by phones
- Same pattern in China

# What we found...female persistently higher in mobile



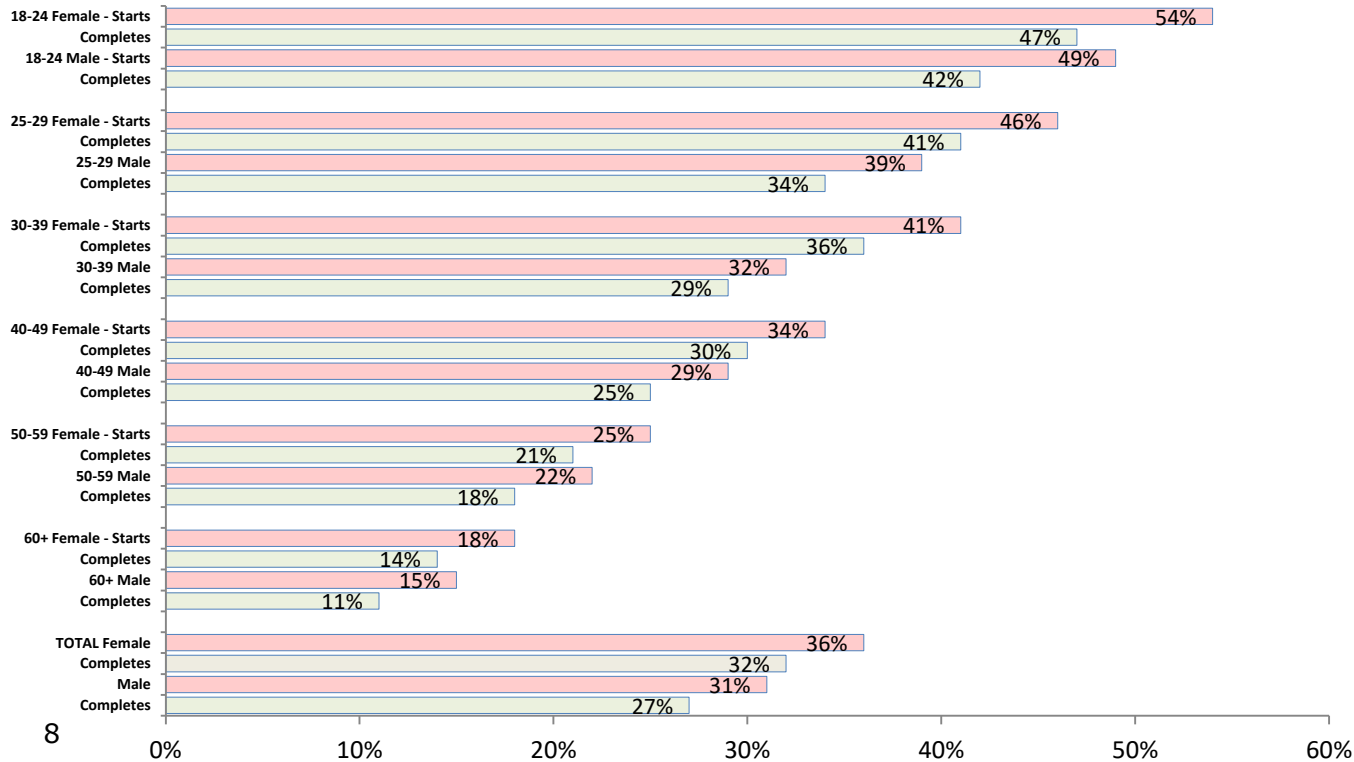
## Topline Outcome:

- Allowing respondents to participate on their choice of device is important for representivity and feasibility
- i.e. a mobile only study will struggle with the older age groups

What we found...female  
persistently higher in mobile



### Phone Starts & Completes: Gender & Age 18-60+



Topline Outcome:

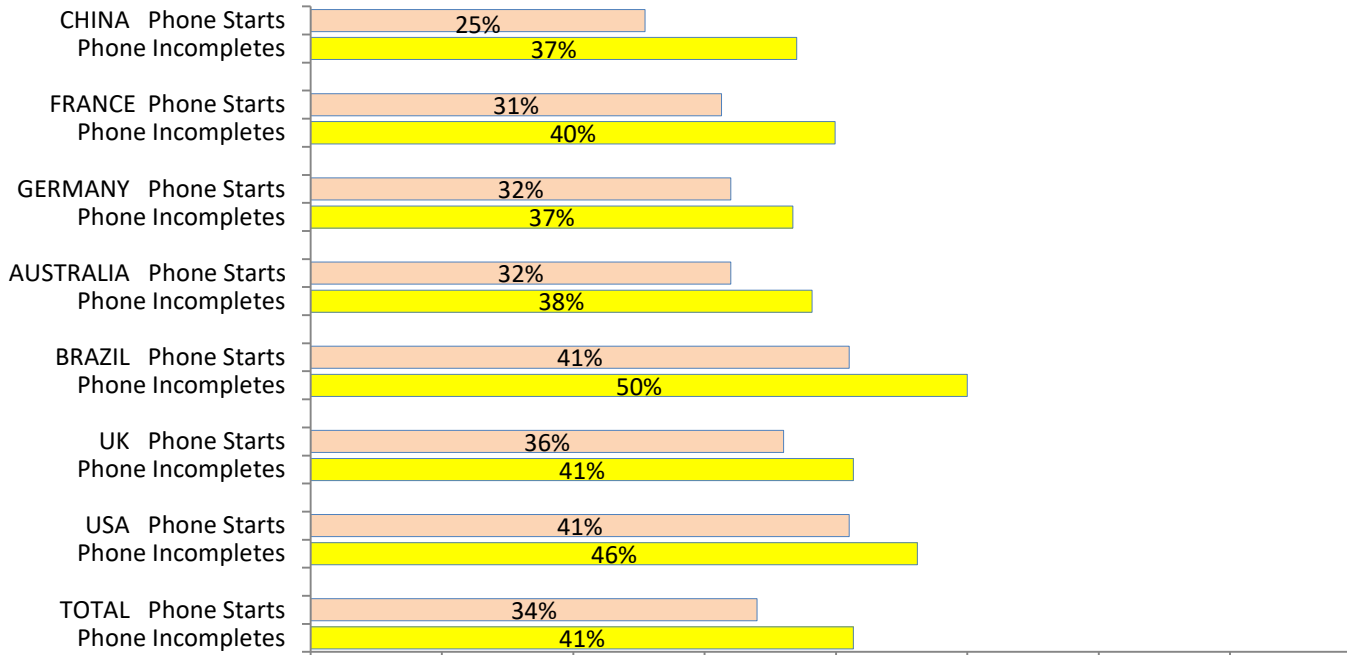
- All groups consistently down from share of starts to share of completes
- This is not an age matter!



Incomplete rates are a key driver...



## Starts & Incompletes Share for Phones



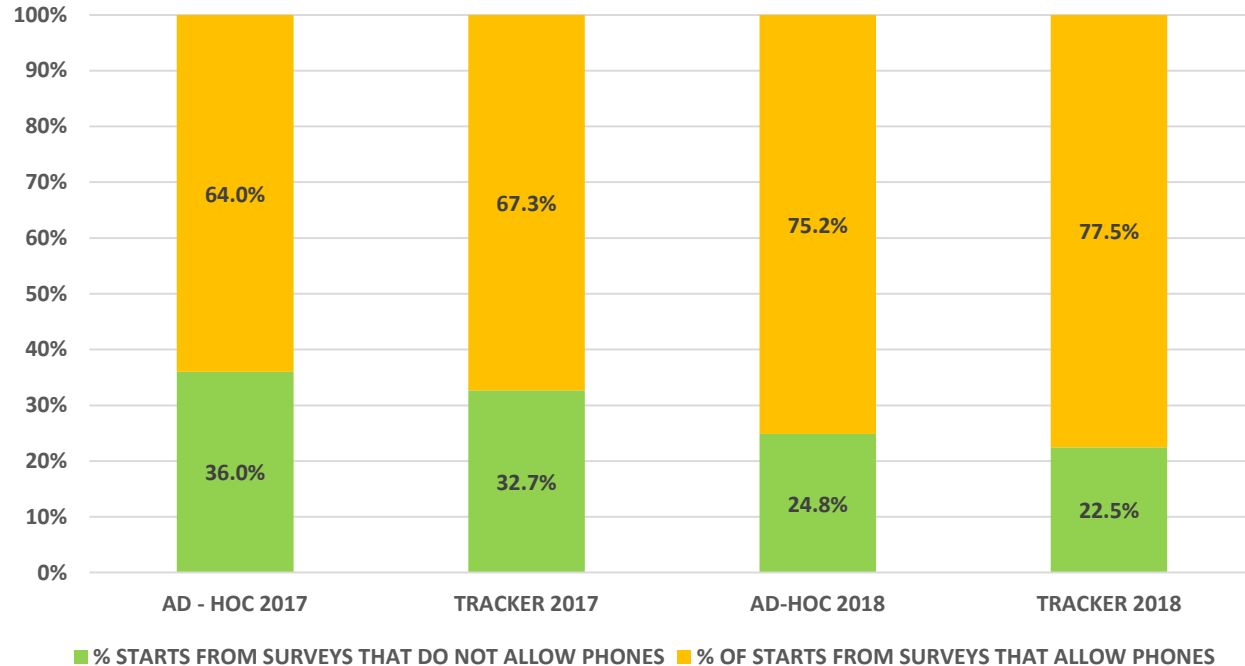
## Topline Outcomes:

- Participants more likely to not complete on a mobile phone than PC
- This has a knock on impact on capacity as incomplete rates are a major driver of overall respondent and panel attrition

# Tracker v. Ad-Hoc Contrary to belief trackers are not solely main issue



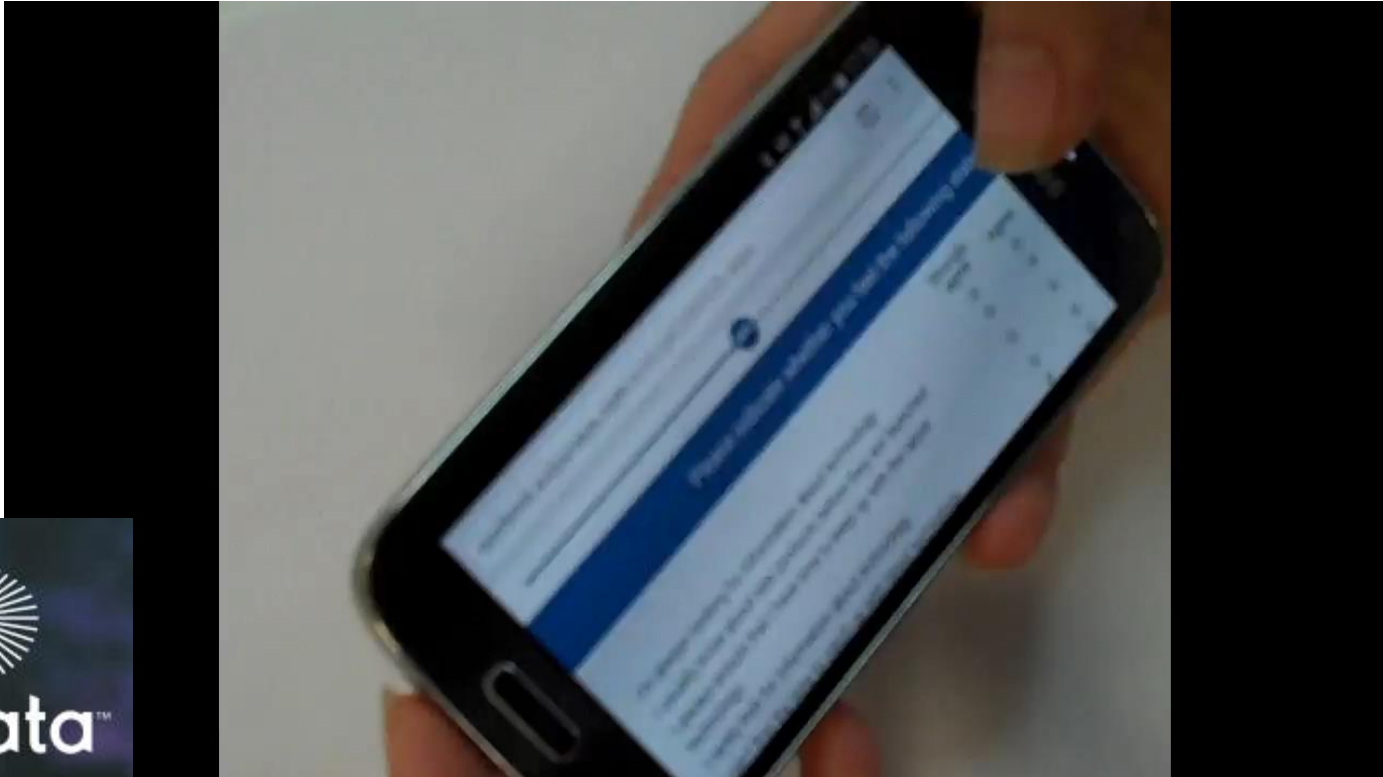
### Ad-hoc v. Tracker



## Topline Outcomes :

- Improvements in Ad-hocs and trackers
- Ad-hoc and tracker levels fairly even
- Still 20-25% of survey responses are from surveys that do not allow phones

This is not the only problem ....  
Mobile design/optimisation



# Lots of work in this area... 2013 CASRO Panels Conference



**Mobile Research Risk:**  
*What Happens to Data Quality When Respondents Use a Mobile Device for a Survey Designed for a PC*

Advancing the Business of Research  
**CASRO**  
COUNCIL OF AMERICAN SURVEY RESEARCH ORGANIZATIONS®

The CASRO Online Research Conference  
March 7 and 8, 2013  
San Francisco, California

**MARKET STRATEGIES**  
**Burke**  
The Fine Art of Marketing Research



Maritz RESEARCH  
results influence knowledge clarity  
possibilities confidence understand enable  
vision confidence clarity  
enable storytellers

**Optimizing Surveys for Smartphones:  
Maximizing Response Rates While Minimizing Bias**

**2013 CASRO Online Research Conference**

Kevin Lattery  
Gloria Park Bartolone



**Solving the Unintentional Mobile Challenge**

CASRO Online Research Conference – March 2013

**Gregg Peterson**  
Senior Vice President, Research Operations

ISO 2025 Certified



**Online Research CONFERENCE**  
CASRO  
The Voice and Pulse of Research  
March 7-8, 2013  
The Westin San Francisco, Market Street

**MARKET STRATEGIES**  
RESEARCH CONSULTING

Lots of work in this area...  
continues



# Mobilize Me!!!

*Mobile Survey Design Recommendations  
Based on 2019 Research on Research*



Roddy Knowles



Zoe Dowling



Ted Saunders

June 13<sup>th</sup>, 2019

## RoR Tests

### Test 1 – Grids

- Standard
- Grid Bars
- Progressive

### Test 2 – NPS

- Standard
- FocusVision (grid bar)

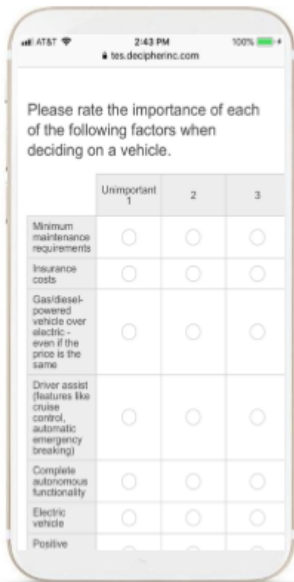
### Test 3 – Lists

- Standard
- OE text

### Test 4 – Pagination

- Single question per page
- Multiple questions per page

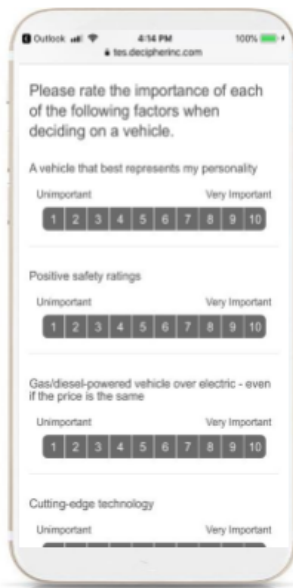
## Grids - Mobile



Please rate the importance of each of the following factors when deciding on a vehicle.

	Unimportant 1	2	3
Minimum maintenance requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Insurance costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gas/diesel-powered vehicle over electric - even if the price is the same	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Driver assist (features like cruise control, automatic emergency braking)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Complete autonomous functionality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Electric vehicle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Positive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Standard



Please rate the importance of each of the following factors when deciding on a vehicle.

A vehicle that best represents my personality

Unimportant Very Important

1  2  3  4  5  6  7  8  9  10

Positive safety ratings

Unimportant Very Important

1  2  3  4  5  6  7  8  9  10

Gas/diesel-powered vehicle over electric - even if the price is the same

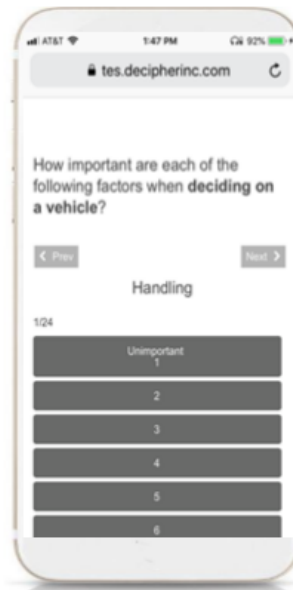
Unimportant Very Important

1  2  3  4  5  6  7  8  9  10

Cutting-edge technology

Unimportant Very Important

Grid Bars



How important are each of the following factors when deciding on a vehicle?

< Prev Next >

Handling

1/24

Unimportant 1

2

3

4

5

6

Progressive

## Hypotheses

Yes

Standard grid presentation will be the least comparable across devices

Yes

Standard grids will negatively impact data quality and completion rate

No

Progressive grids will be faster and yield a more positive experience...but they are still the top recommendation

No

Grid bars will be the most consistent across devices



What is going on? And where do we go from here?

Panel

Justin Bennett, Vice President,  
Global Sampling, Toluna

Pete Cape, Director, Global  
Knowledge, Dynata

Chris Stevens, CQO, Kantar

Courtney Williams, Executive  
Director, Quality, Lucid

