



IMAGINE_{the} POSSIBILITIES

Respondents today, tomorrow and in the future



Pete Cape
Global Knowledge Director
October 2015



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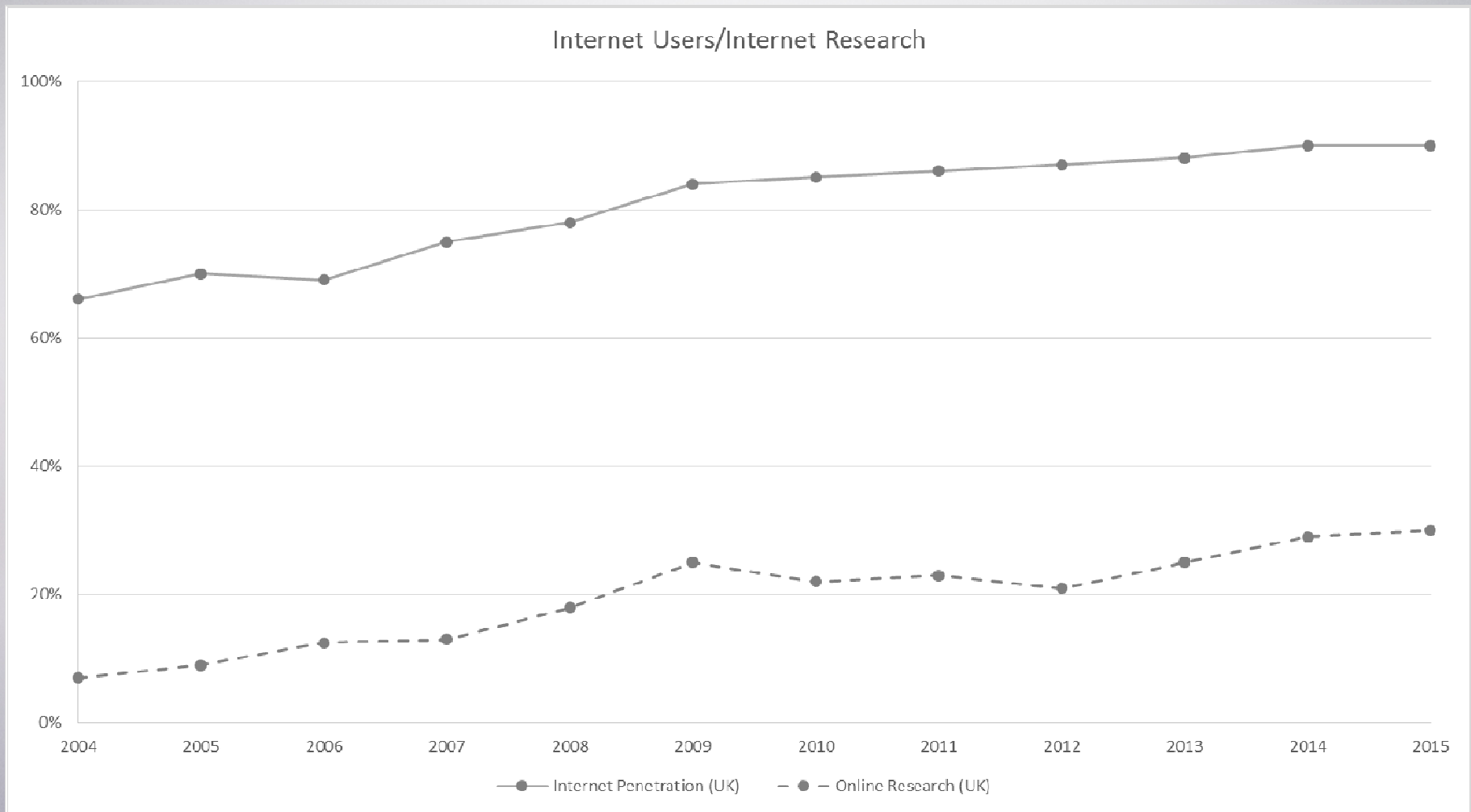
2014

- Research in a mobile future

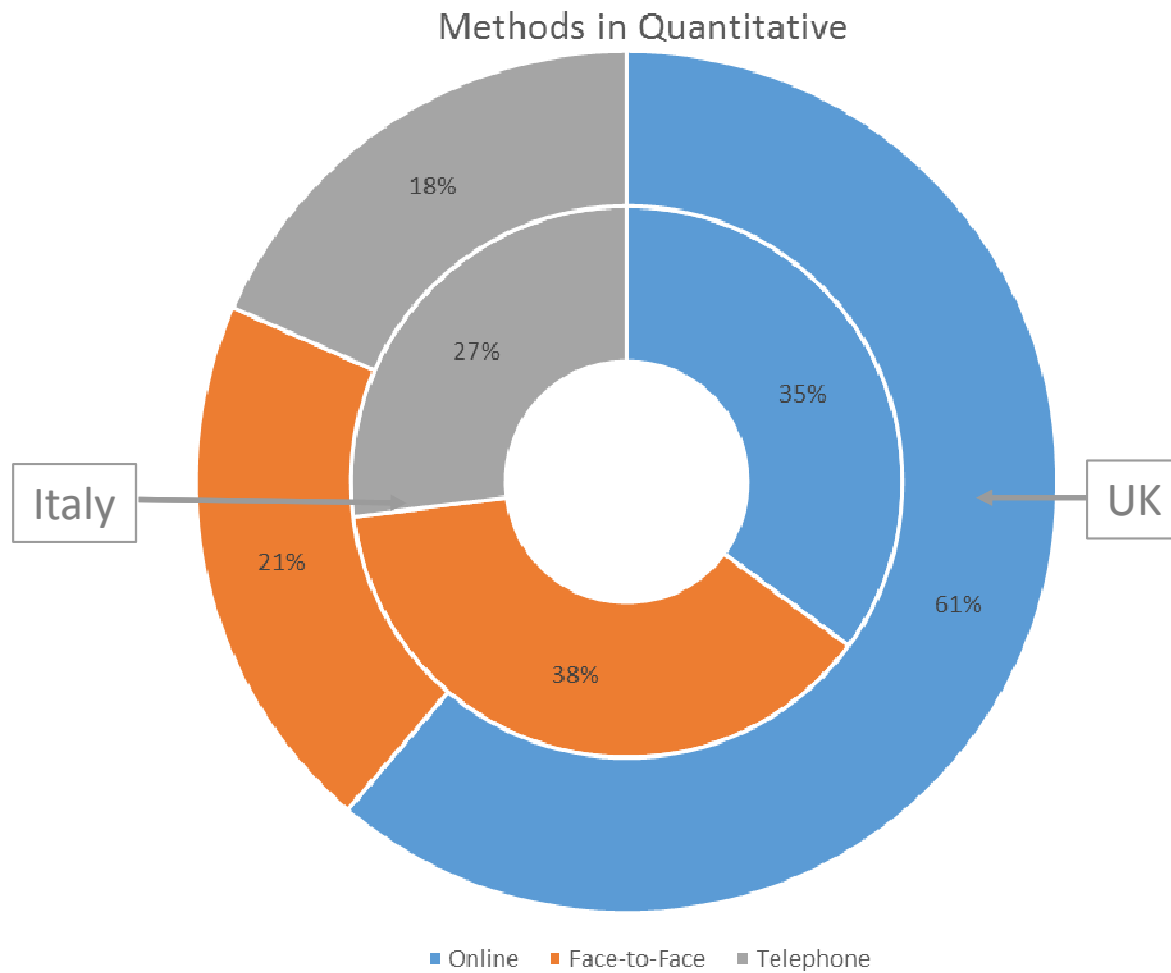
2015

- Respondents in this mobile future
- But what about the now, here in Italy?

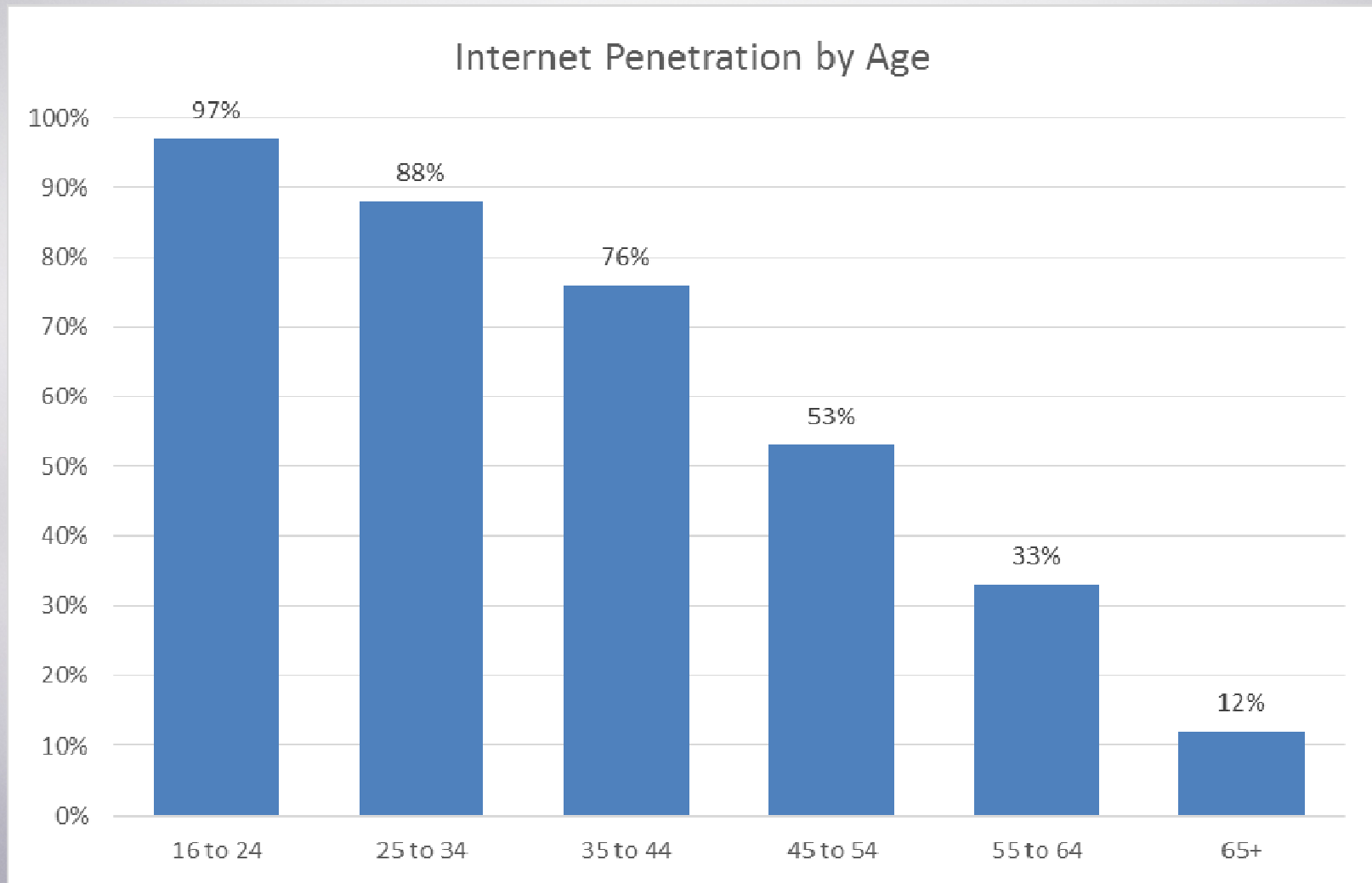
Evolutions – UK and Italy



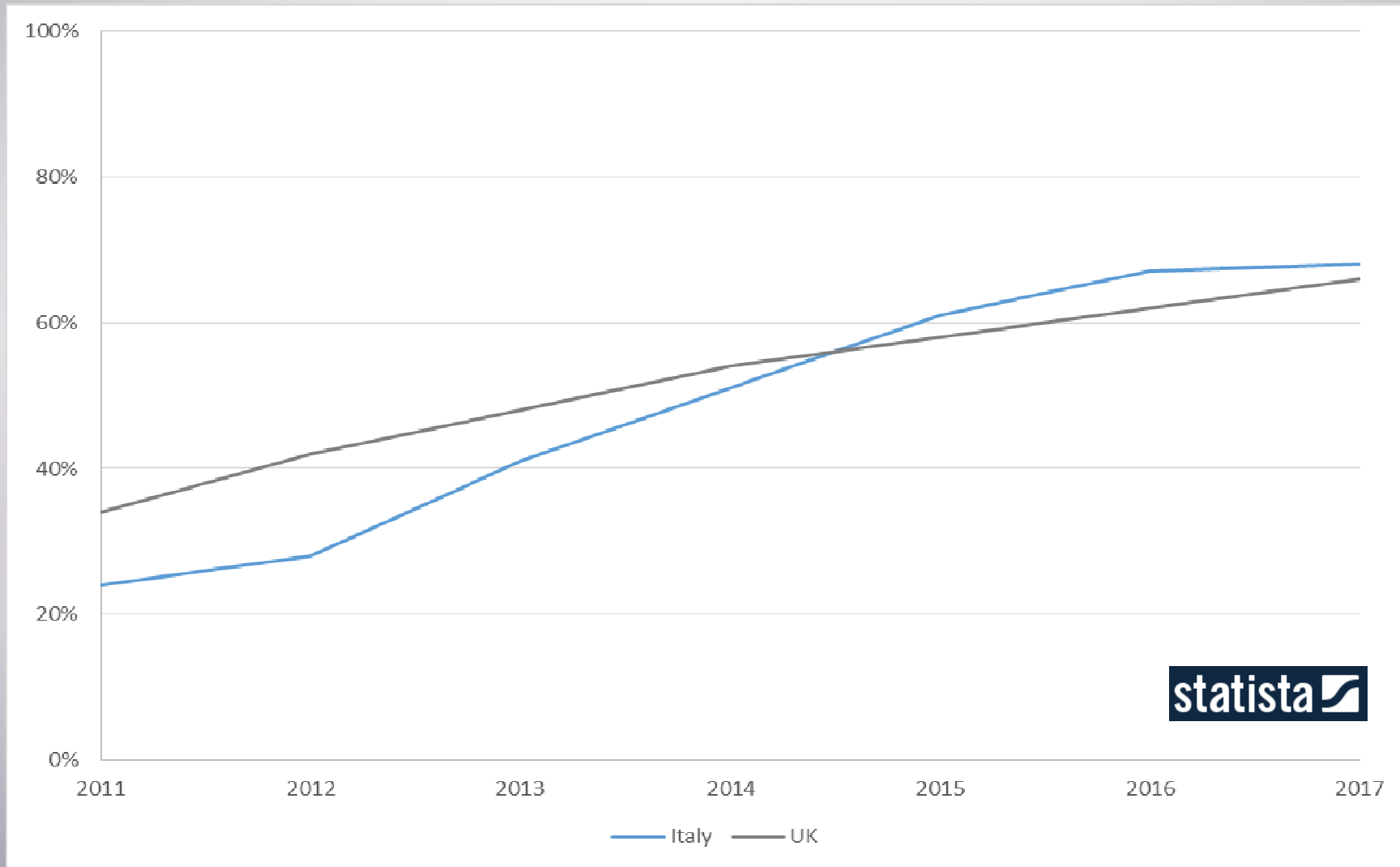
UK and Italy - Quantitative



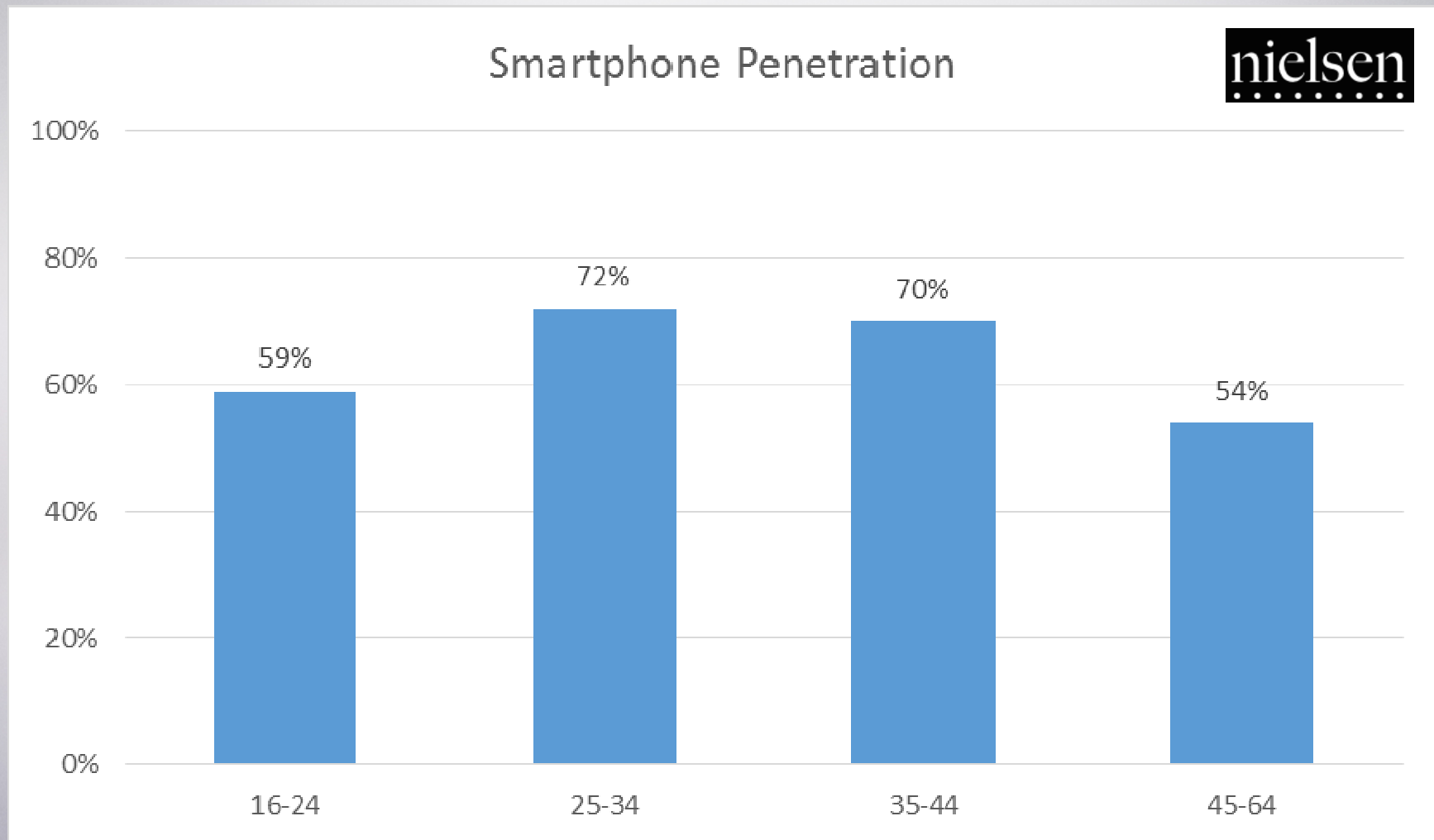
The big worry?



UK and Italy – Smartphone penetration



Smartphone Penetration by Age



Italy

- Equal opportunity (now) with other countries
- Less experience than other countries
- Mobile research is a bit harder than PC/Laptop
- But you have fewer bad habits!



- A question of design

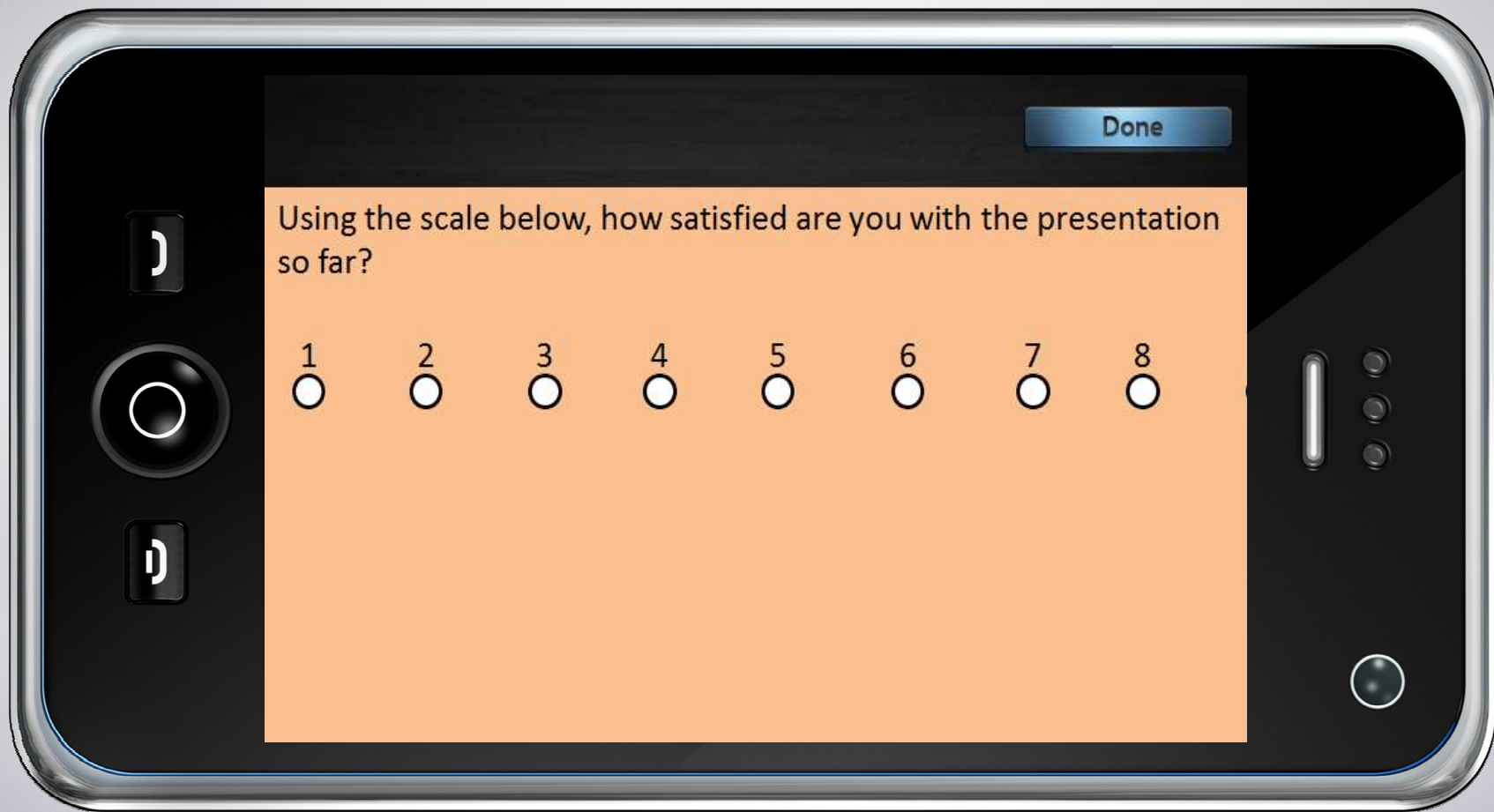
The Real Estate Problem



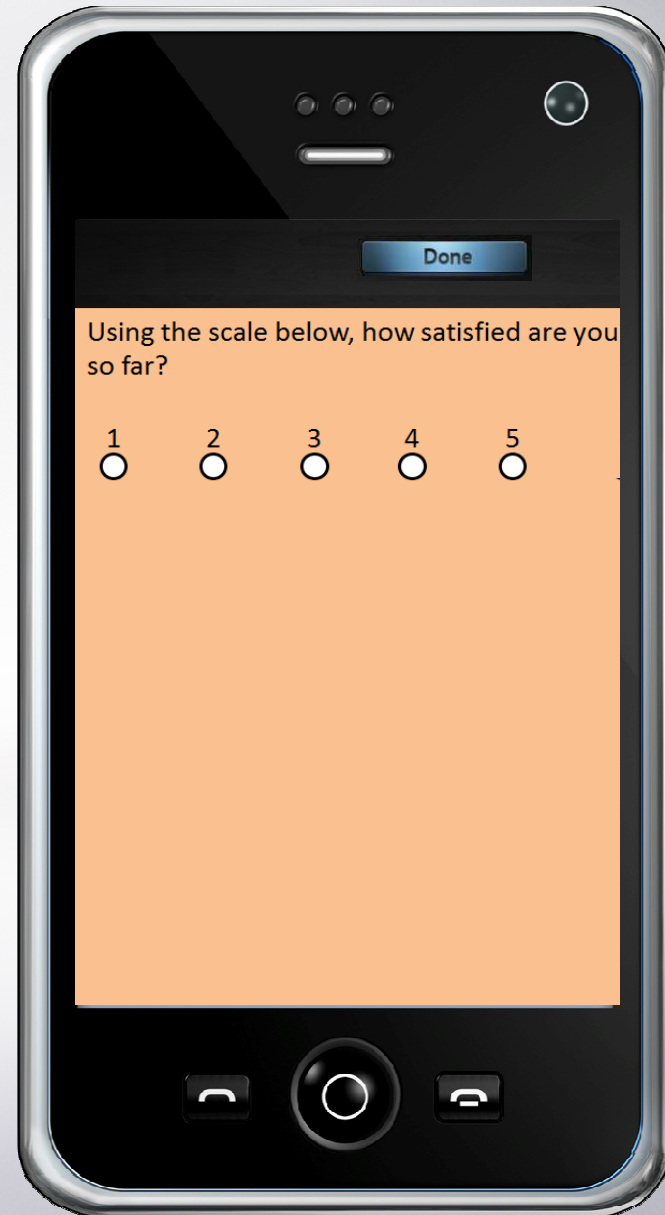
Question Type Issues

- Open question: no problems
- Yes/No: no problems
- Single/Multicode: no problems
- Scales: problem with longer scales

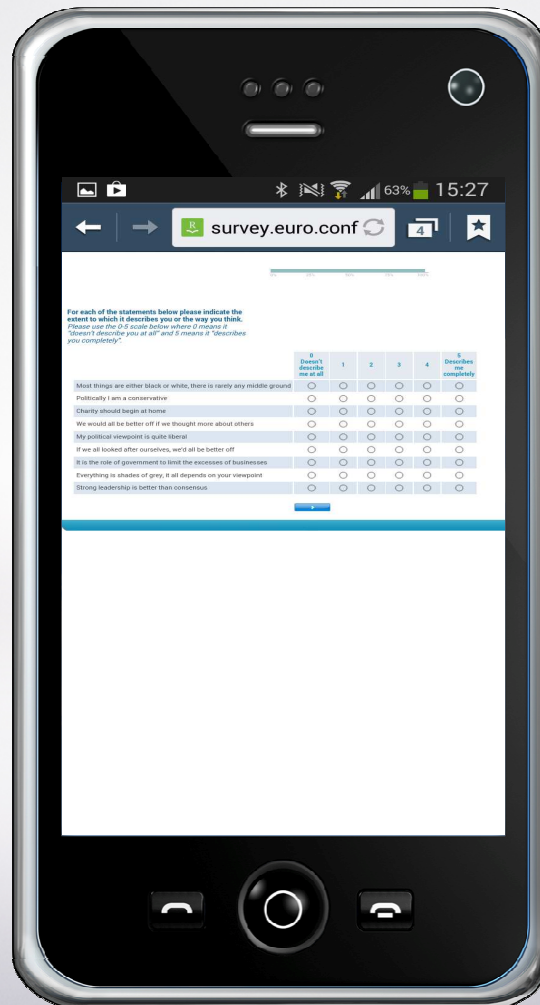
Design issues - Scrolling



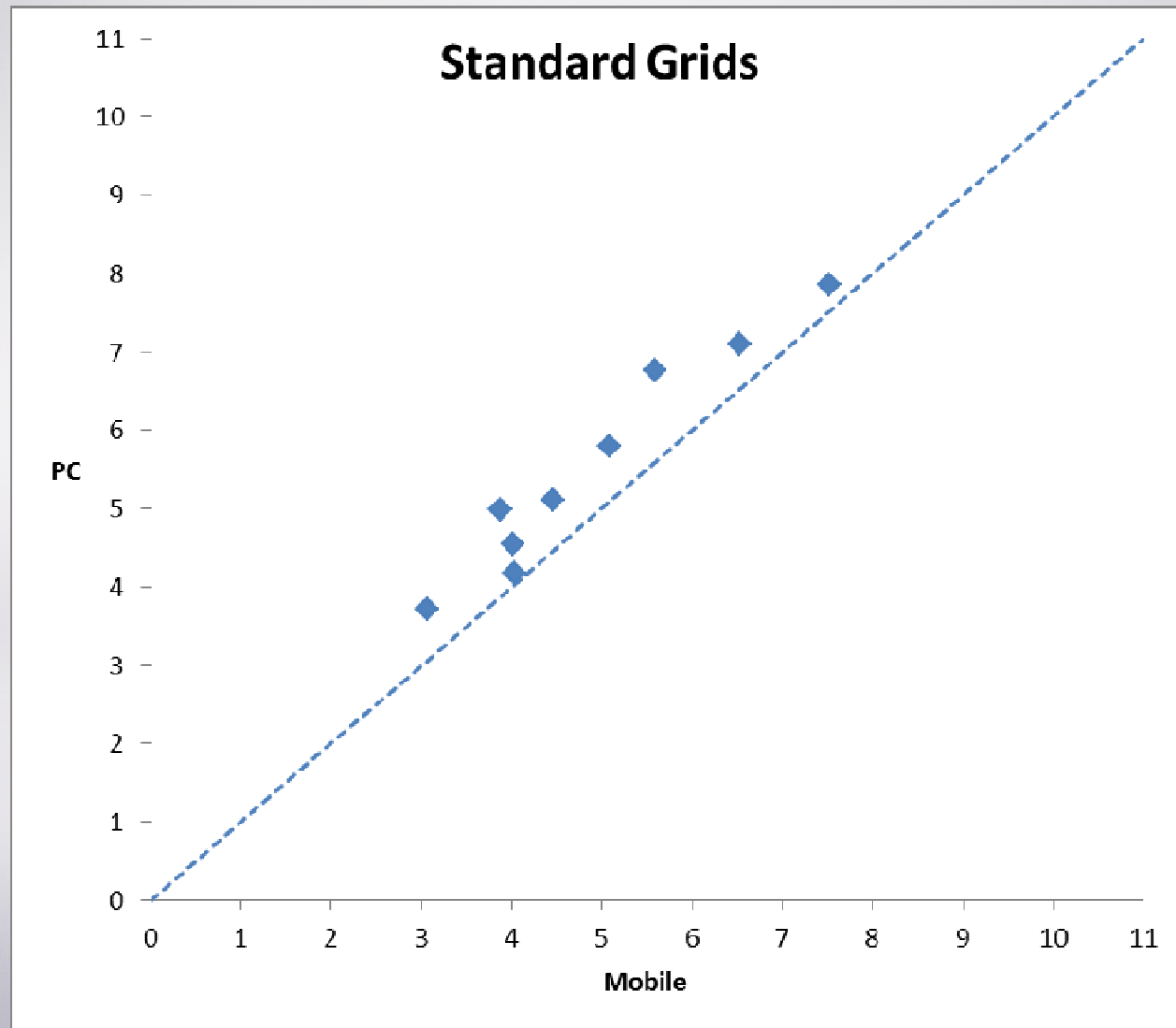
Design issues - Scrolling



Practical problems



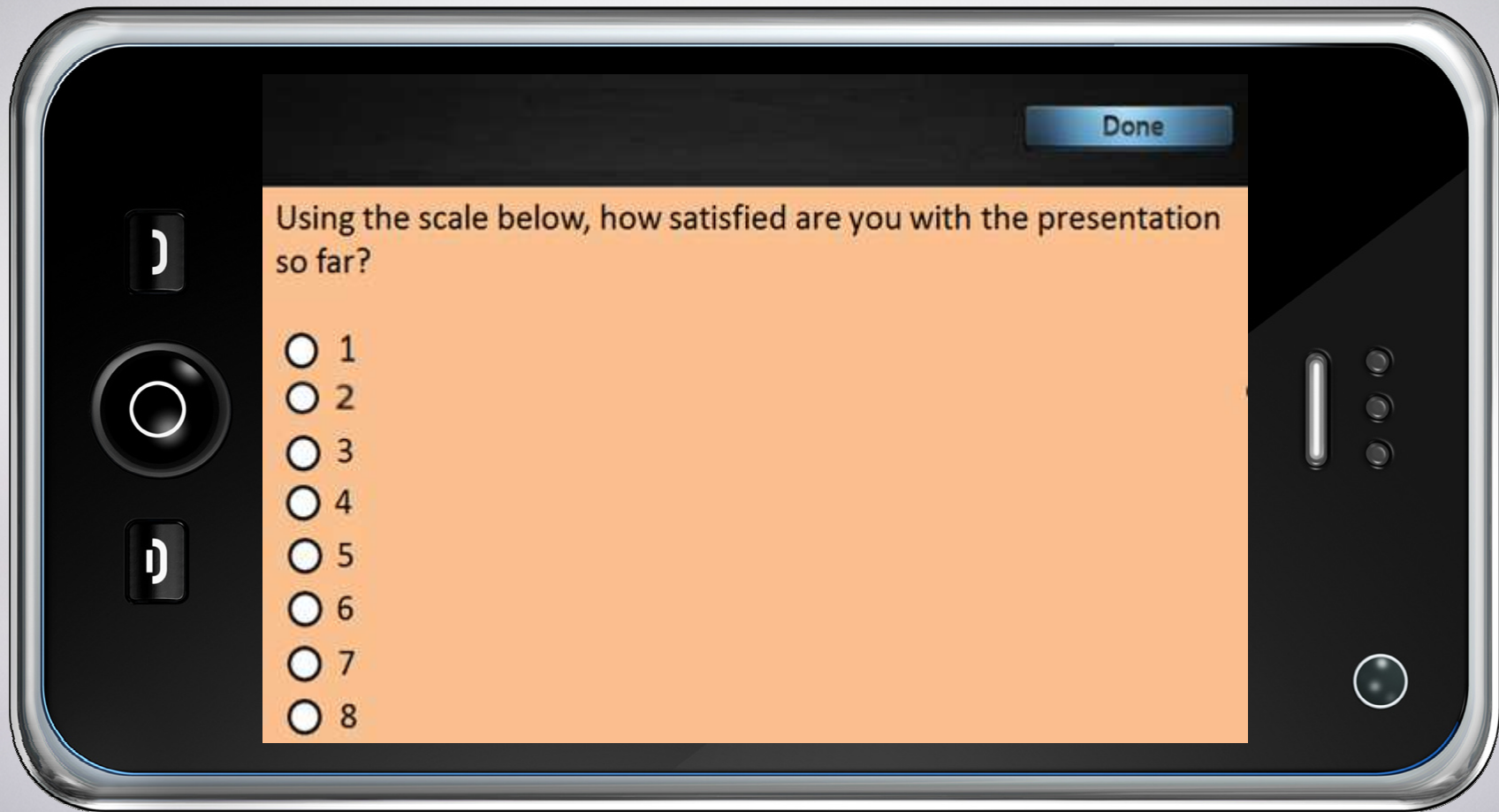
11 point scale



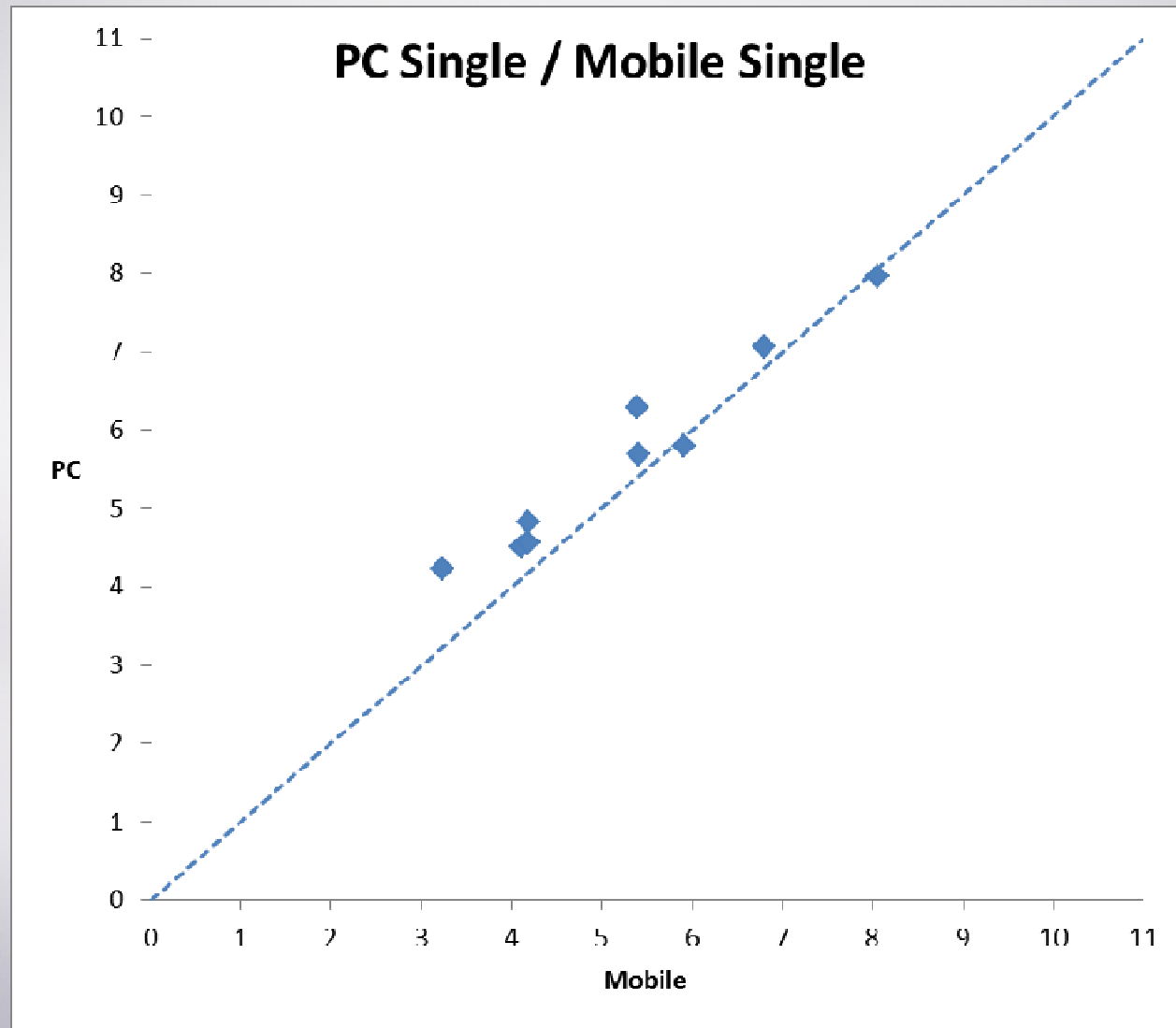
Solution?

- Separate questions

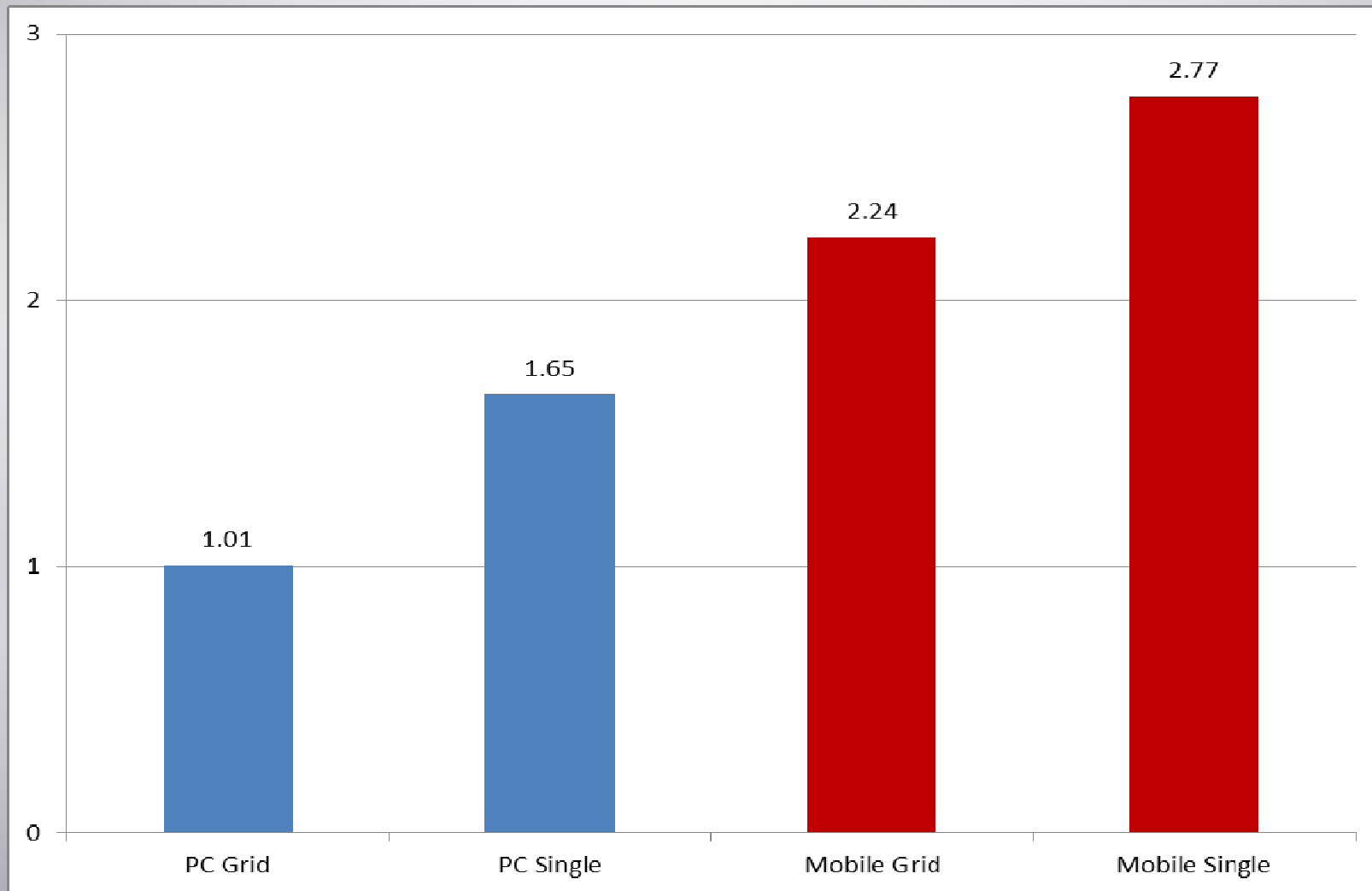
Design issues - Scrolling



11 point scale



And adds another problem



Question Type Issues

- Open question: no problems
- Yes/No: no problems
- Single/Multicode: no problems
- Scales: problem with longer scales
- Grids: problem with long answer lists

The Role of Design

Jacob Nielsen says....

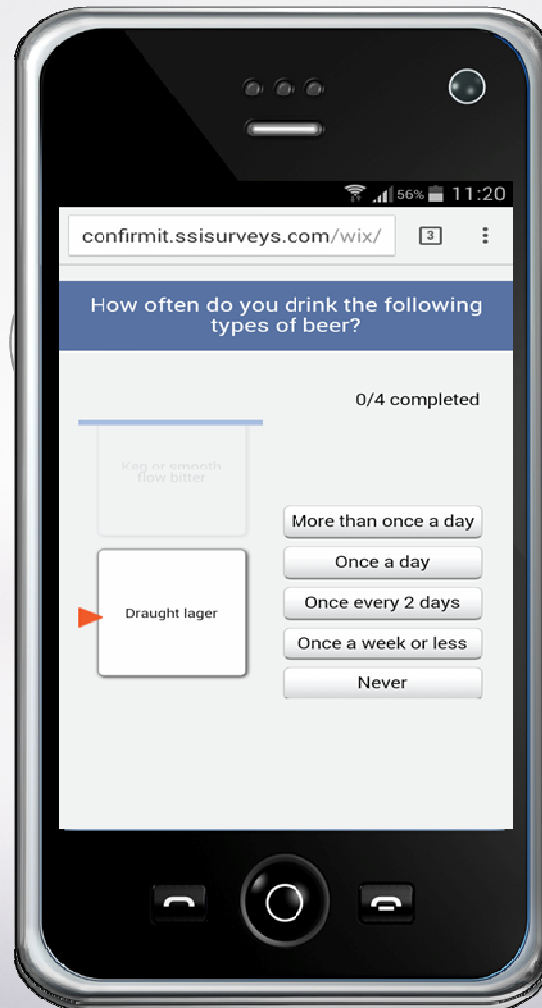
“Mobile optimization is about much more than simple formatting—rather, it involves fundamental changes to content and design, and usually includes fewer words, fewer images and simpler interfaces.”



- What if we start with the 5% device....?

Grid/Scale Options

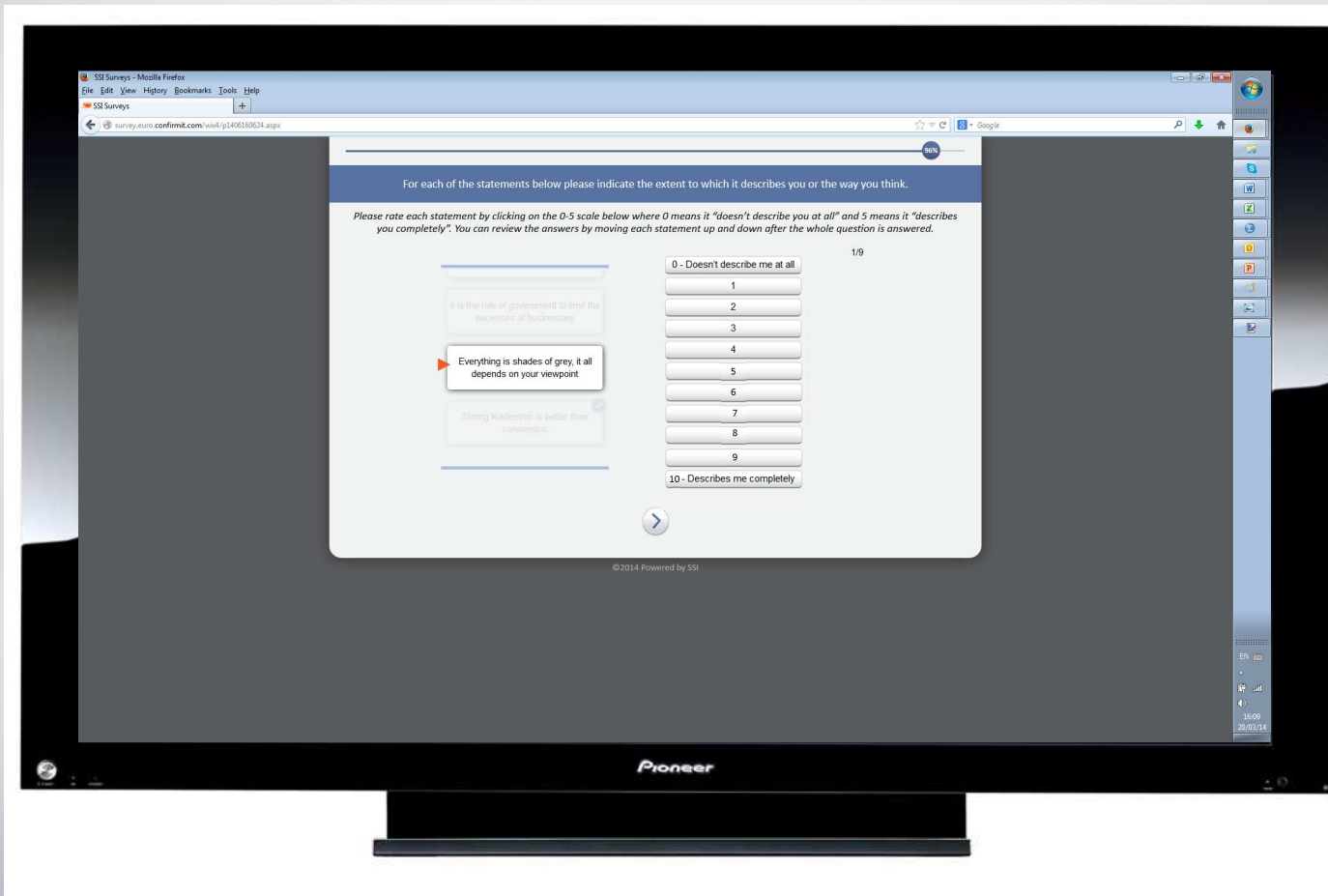
Mobile Redesign



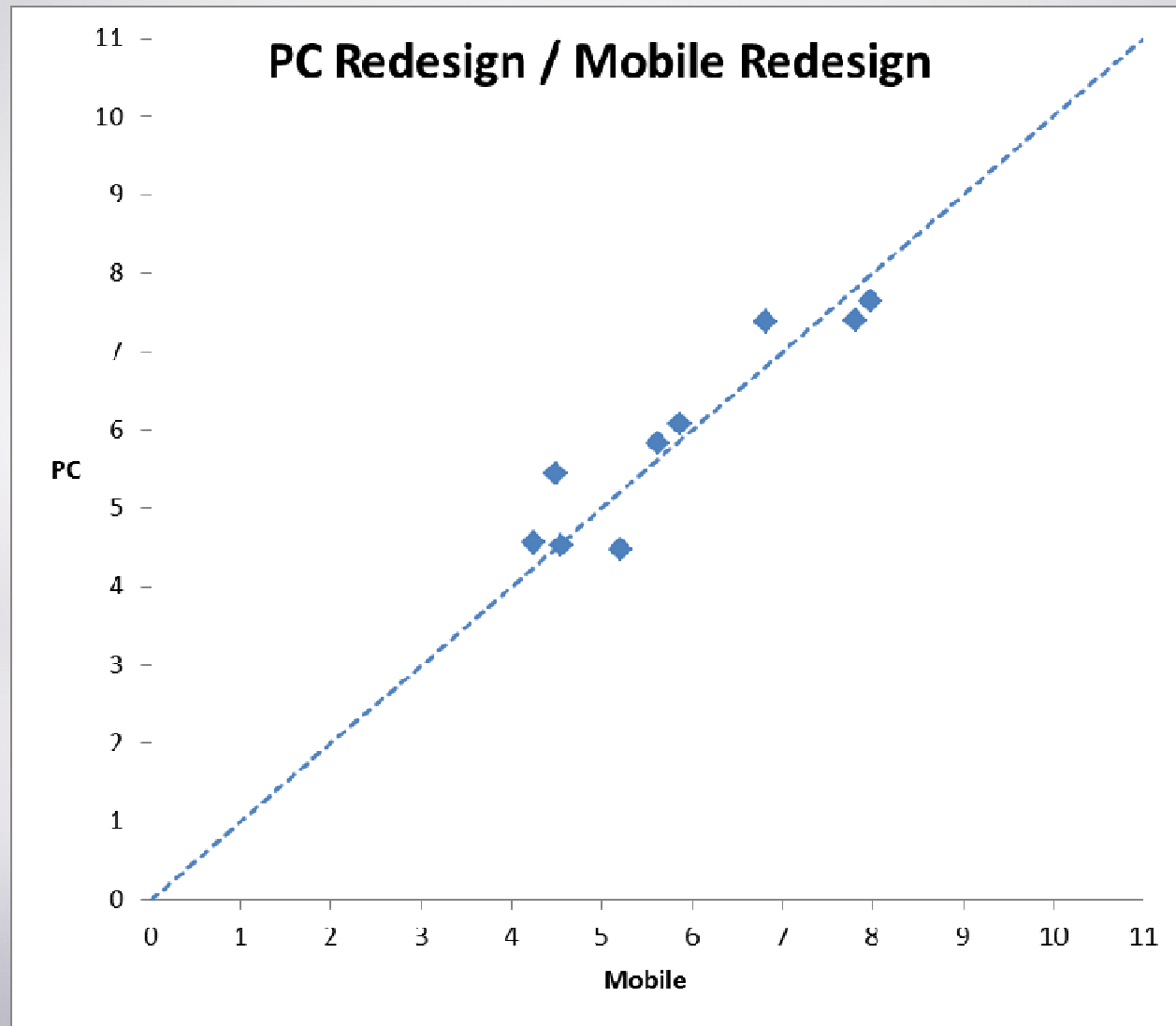
too many words....

Grid/Scale Options

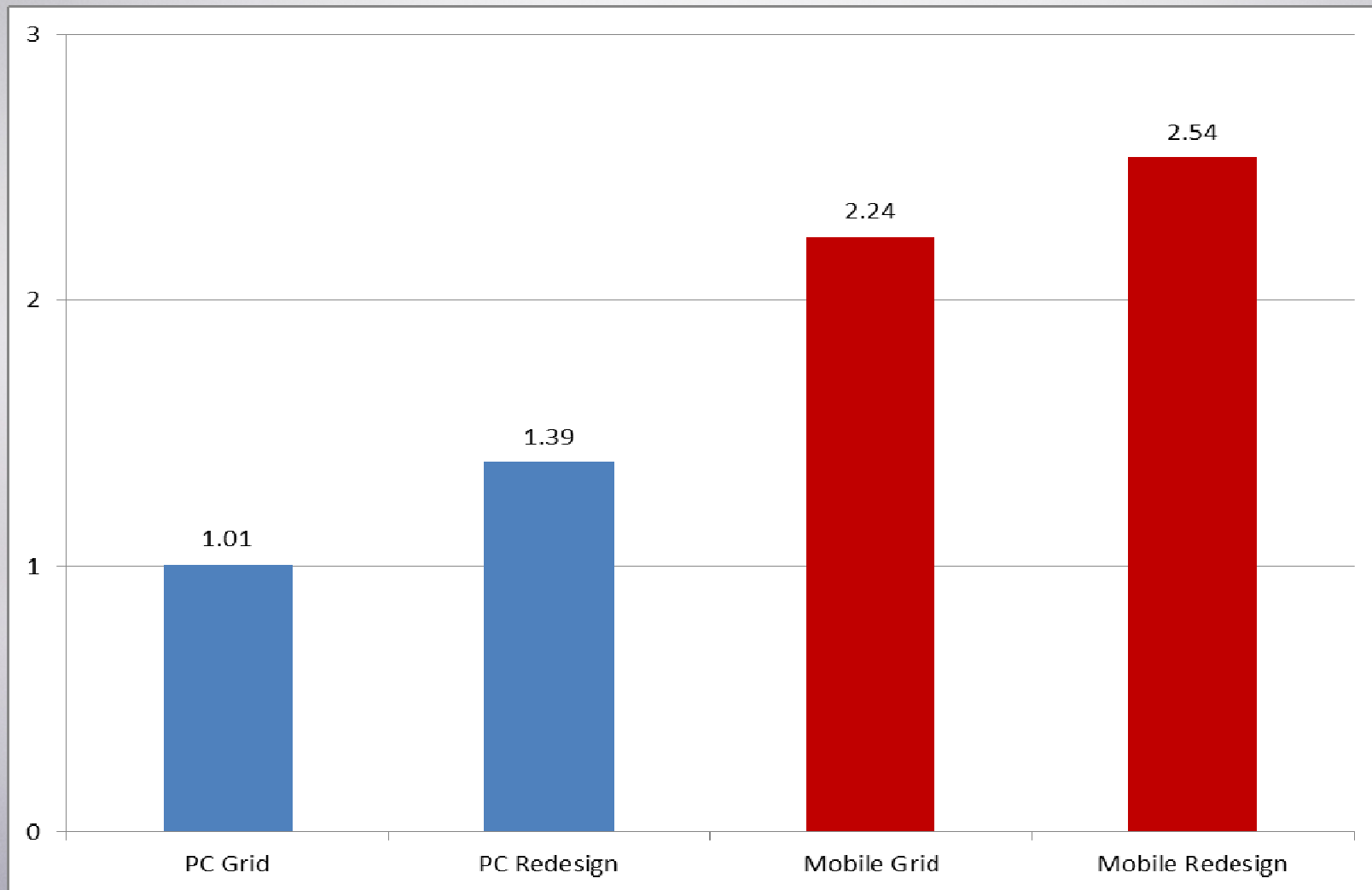
PC Redesign



11 point scale



Survey Lengths



And some added benefits

- Respondents prefer Redesign
 - Enjoyment, Ease and Interest scores higher
 - Respondents break off less
 - > 13% drop in Mobile “Legacy” vs 5% Mobile “New”
- New Style is faster
 - 9 mins Mobile “New” vs 11 mins Mobile “Legacy”


MARKETSTRATEGIES
INTERNATIONAL

Peterson, Mechling, et al.
CASRO Online, 2013

SINCE 1931
Burke

Baker-Prewitt & Miller
CASRO Online, 2013





😊 Now is the time to
try something new. 😊

■ Well, why not?

Why does this have potential?



- It is always on
- It is always with us
- It is full of “stuff”
- It has lots of connectivity
- And some things we currently do, we don't do well



- It's always on



■ It is always with us



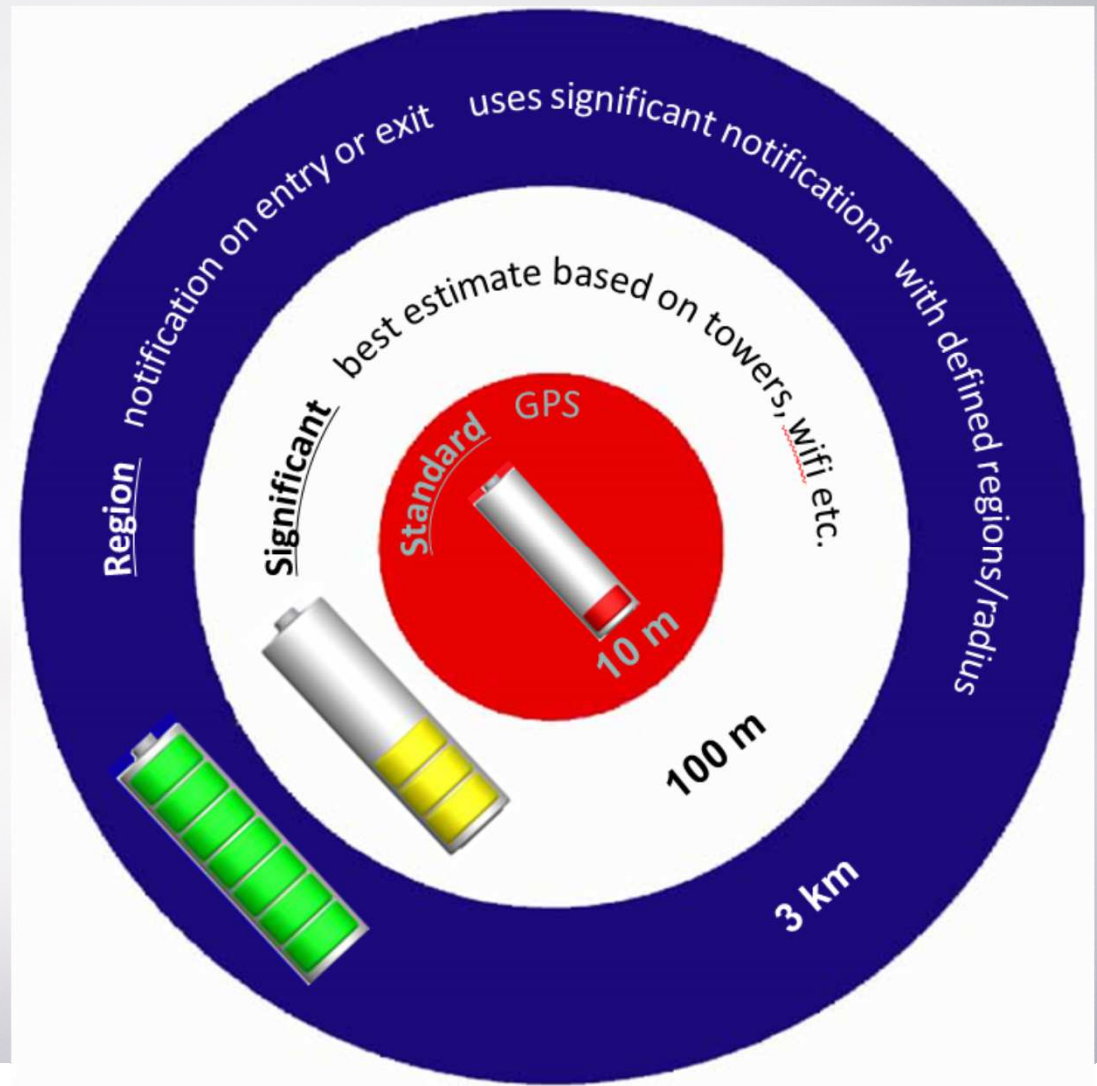
■ Is full of stuff

Like GPS

- So it knows where you are....



As long as you have battery



Sort of...



Harveys
The Furniture Store

bensons
for beds

33 feet / 10 metres

Why isn't this man dying?



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What might this be?



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But it works...

Do a survey
about
furniture
shopping?



Sort of....

- Let's do a geo-location study on H&M in Italy
- How many H&M's are there?
- Where will you get the locations from?
- How accurate is their data?
- How big a radius will you put around the location?

How many H&M in Italy?

- 135 according to Wikipedia, 16 October 2015
- 96 on GPS Data Team
- 67 on store-locator.com

Where will we get locations from?

- Someone who can give us Latitude and Longitude
- Like findlatitudeandlongitude.com
- Or GPS Data Team

Let's check it out

- H&M Via Del Corso, Roma

H&M Via Del Corso, H&M site

Servizio Clienti Newsletter
Trova il negozio Cerca nel catalogo

H&M


Il mio H&M Accedi / Crea account Carrello (0)
Italia | €

DONNA UOMO BAMBINO HOME PROMOZIONI H&M LIFE

HM.COM / SERVIZIO CLIENTI / SHOPPING SU H&M / TROVA IL NEGOZIO

SERVIZIO CLIENTI

Shopping su H&M
Acquisti online
Trova il negozio
Pagamenti
Trasporto e consegna
Resi
Gift Card
Guida alle taglie
Prodotti e qualità
Responsabilità aziendale
Nota legale e privacy
Contatti
Informazioni sull'azienda

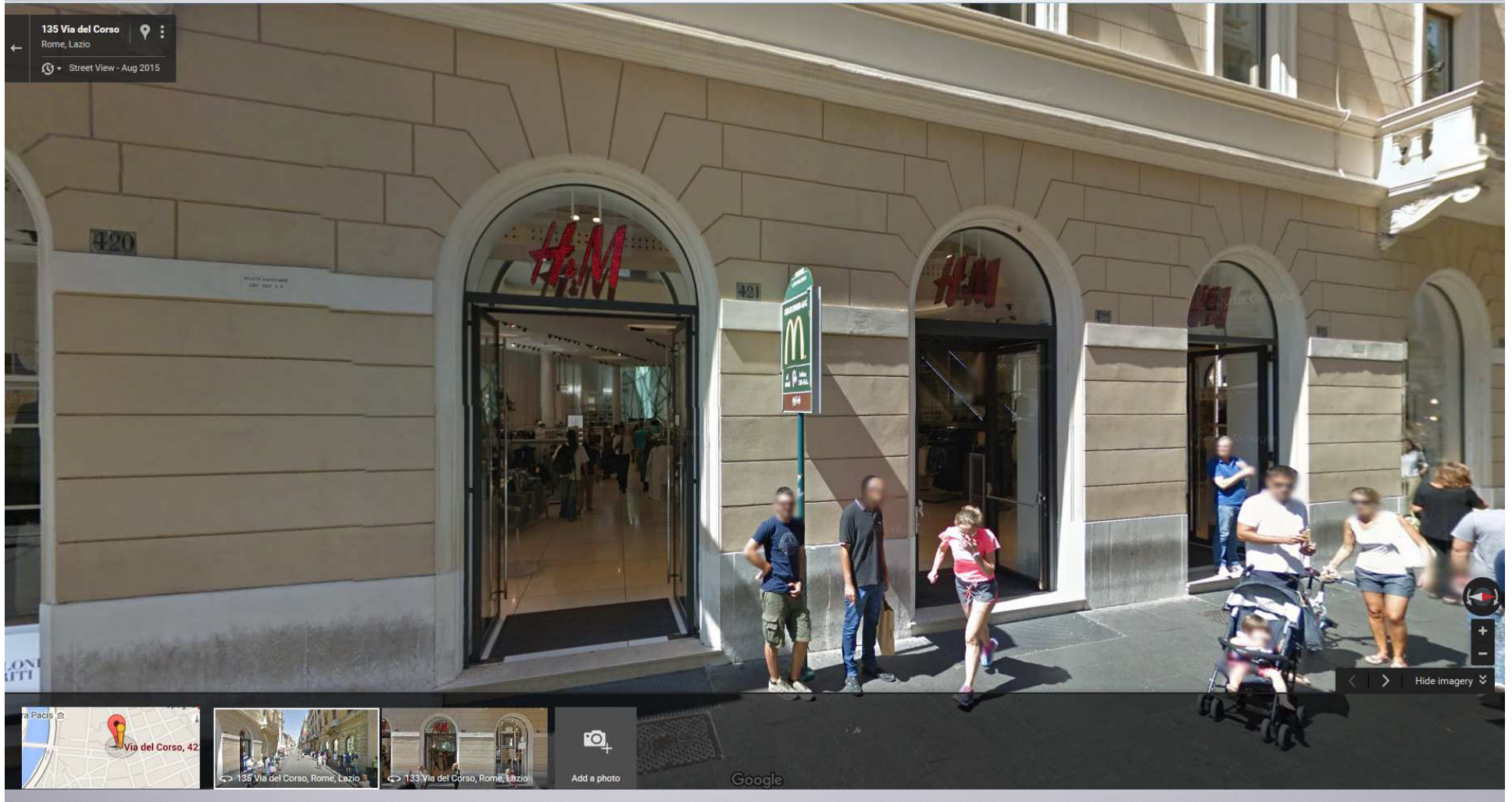


VIA DEL CORSO, 422

DISPONIBILE IN QUESTO NEGOZIO



Proof!



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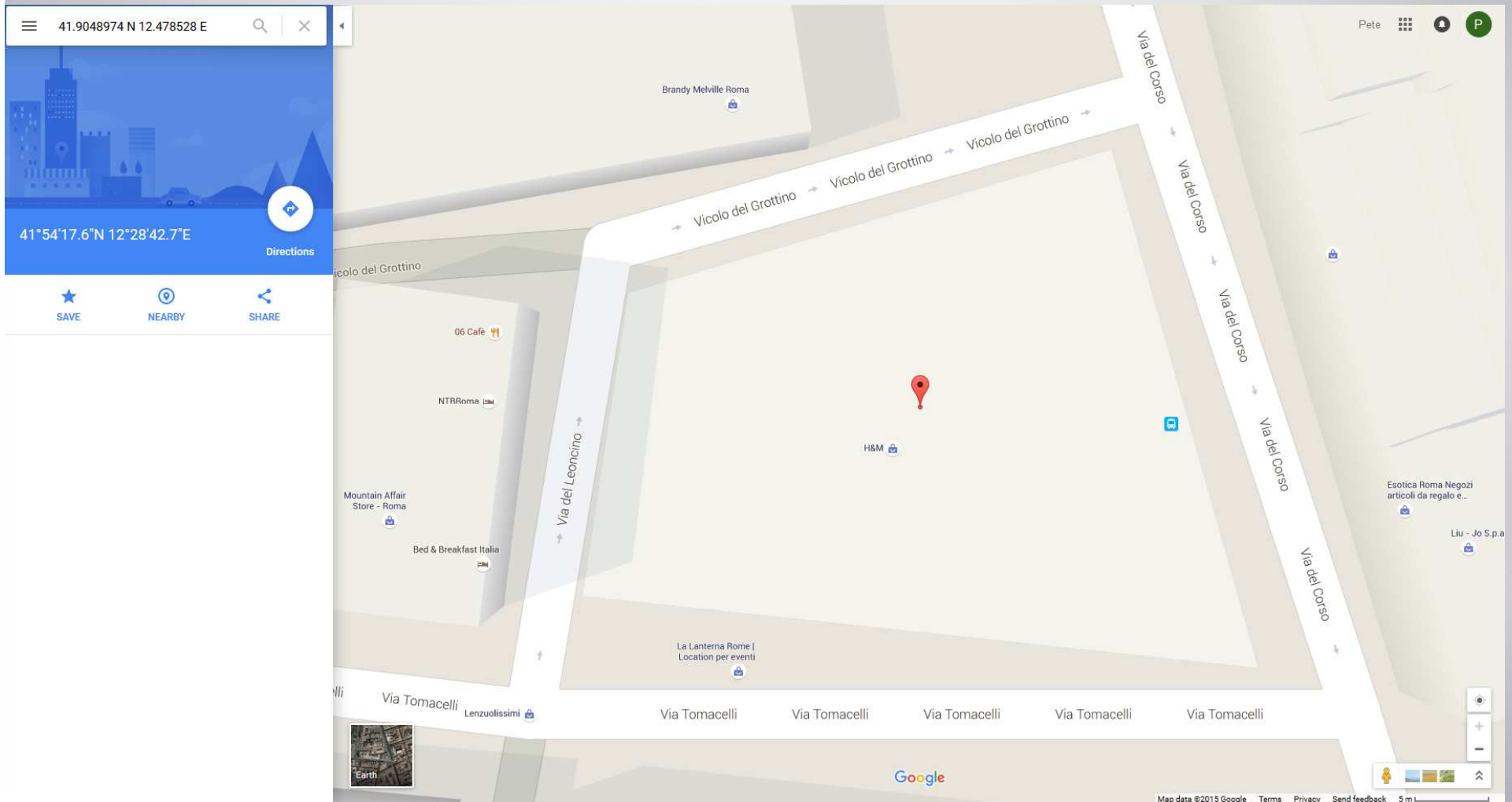
Latitude and Longitude of 422 Via Del Corso?

- www.findlatitudeandlongitude.com

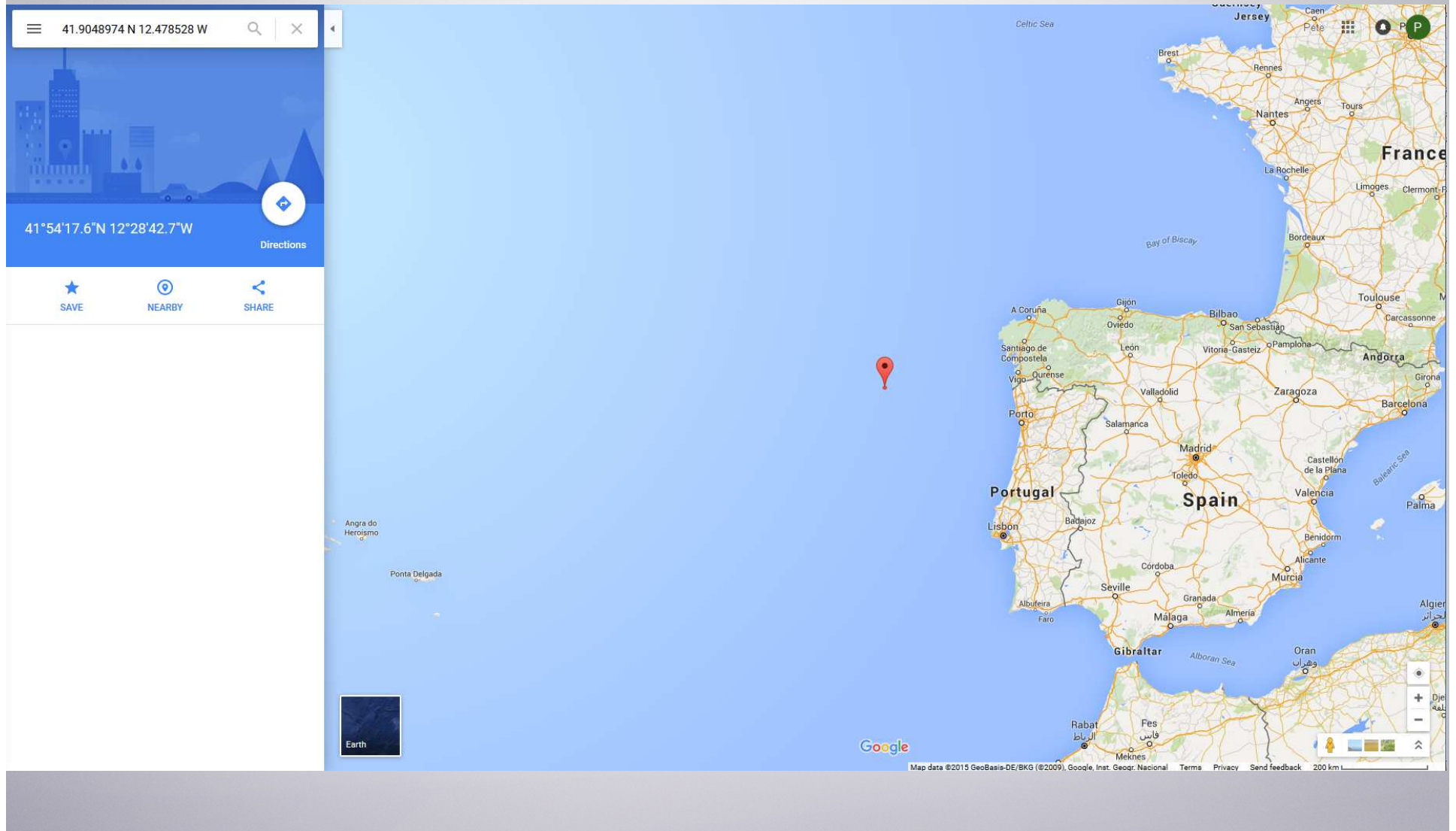
Address Location Finder (input)	Selected Location (output)*
Address: <input type="text" value="422, via del corsa, roma"/> <input type="button" value="load"/>	Address: 422, via del corsa, roma Latitude: 41.9048974 Longitude: 12.478528 Accuracy: 9 Status: 200 Location successfully loaded.

- 41.9048974 N 12.478528 E

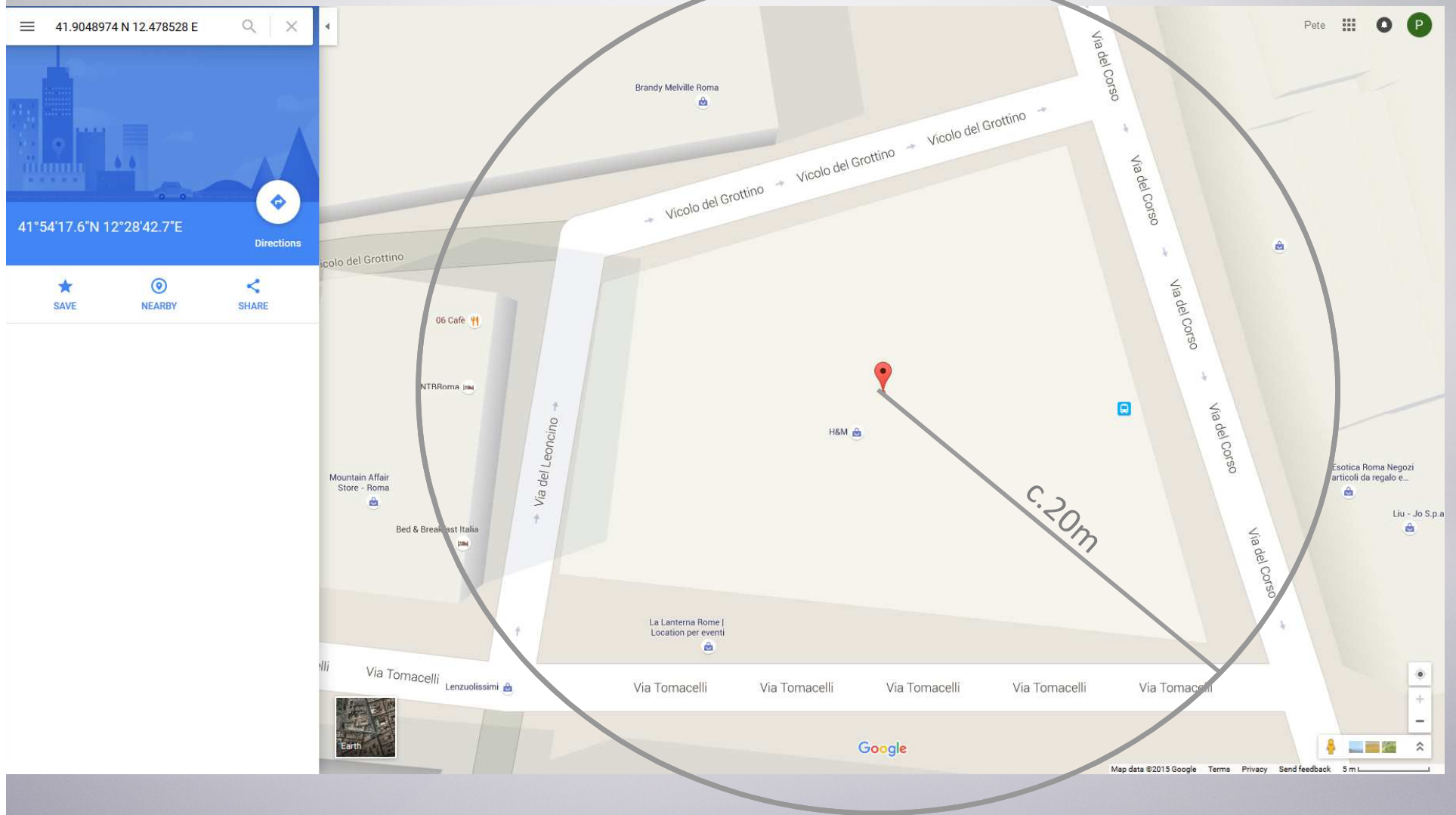
Map of 41.9048974 N 12.478528 E



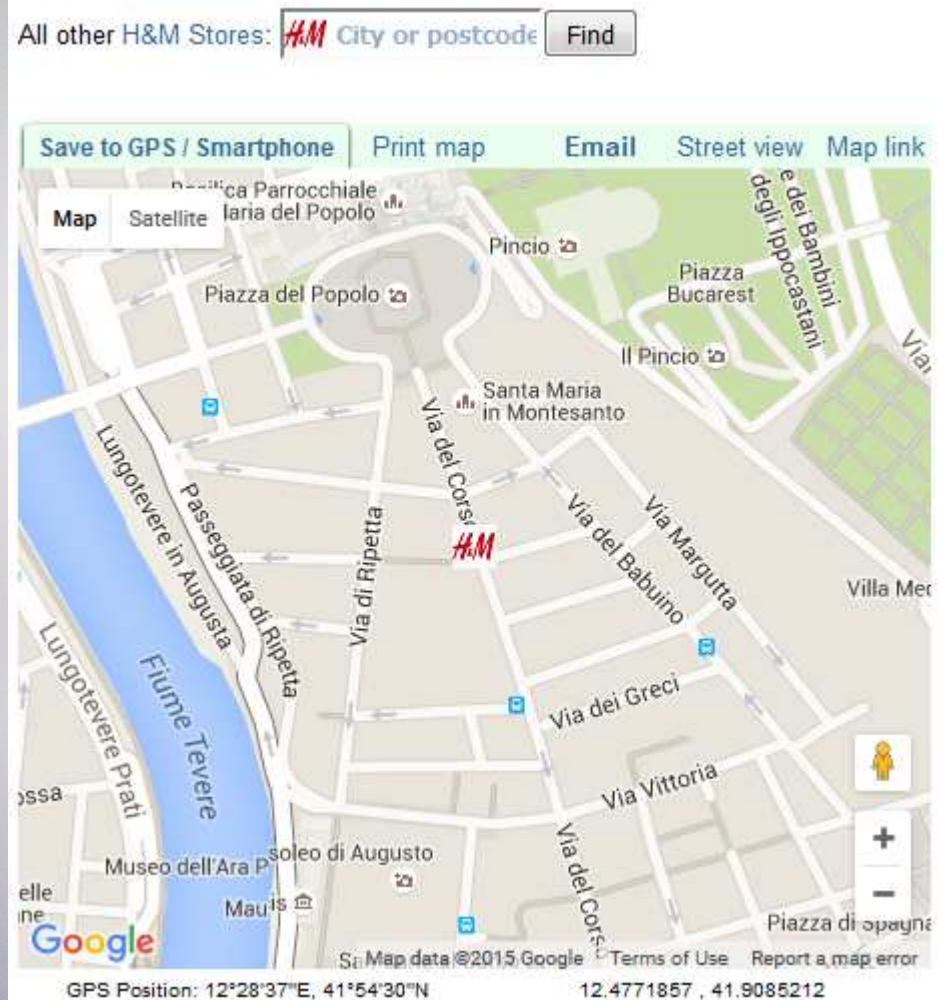
Know your E from your W!



Map of 41.9048974 N 12.478528 E

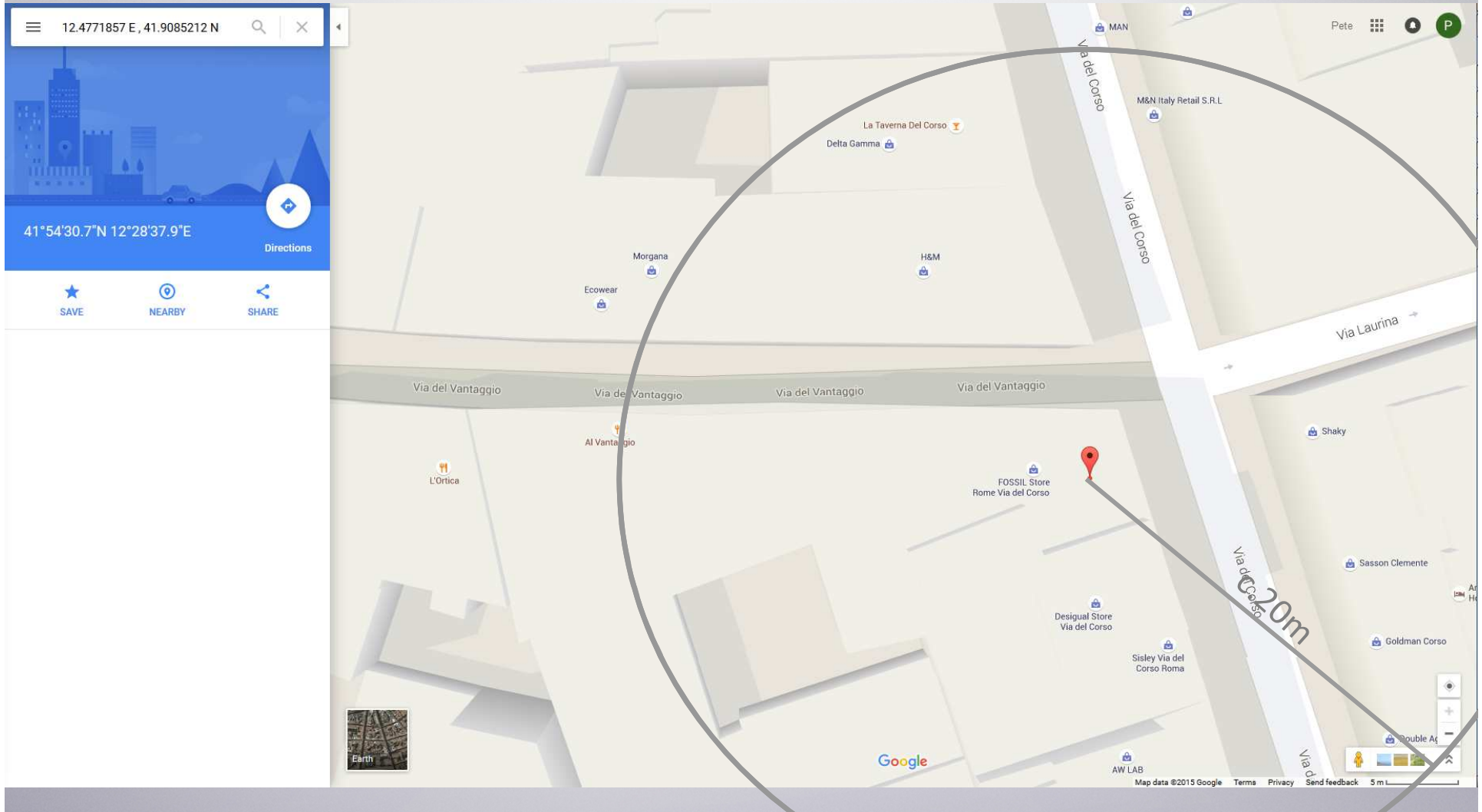


1 down, 134 to go ☹️



- Databases may not be so accurate
- Doesn't have 422 Via Del Corso
- Only has 511/512 Via Del Corso

Map of 12.4771857 E, 41.9085212 N



How many of these people are panellists?



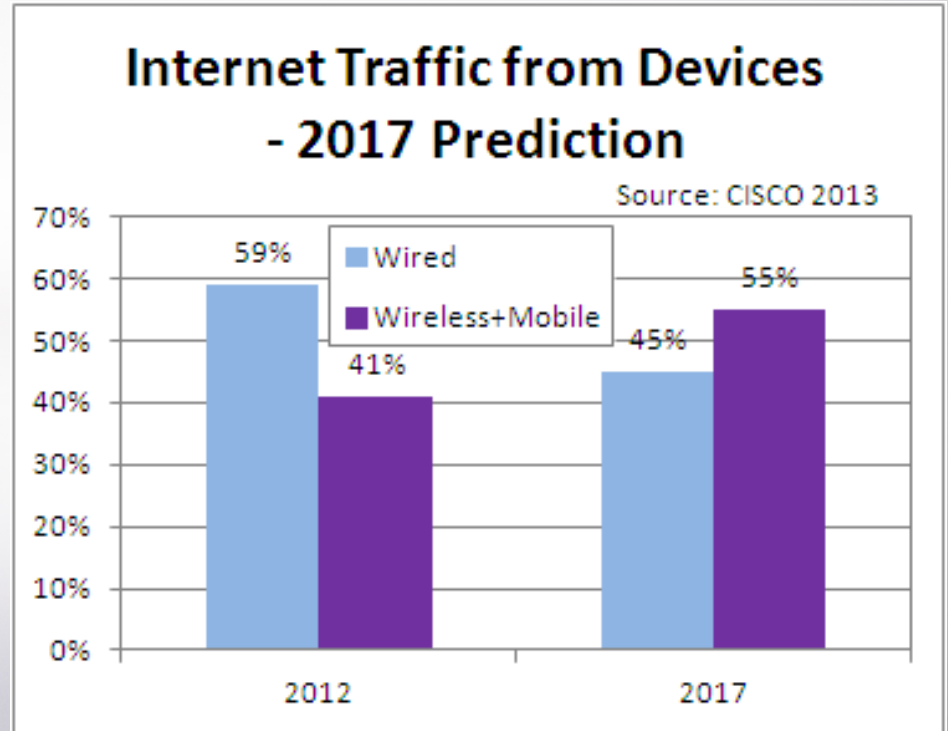
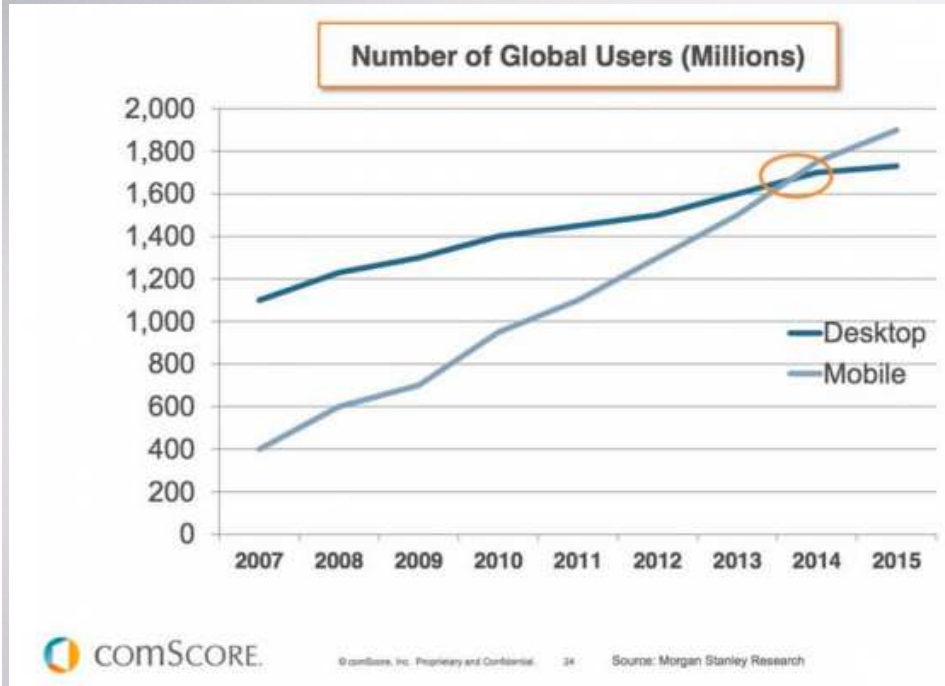
Assuming you can get someone to do it....



Respondents are People



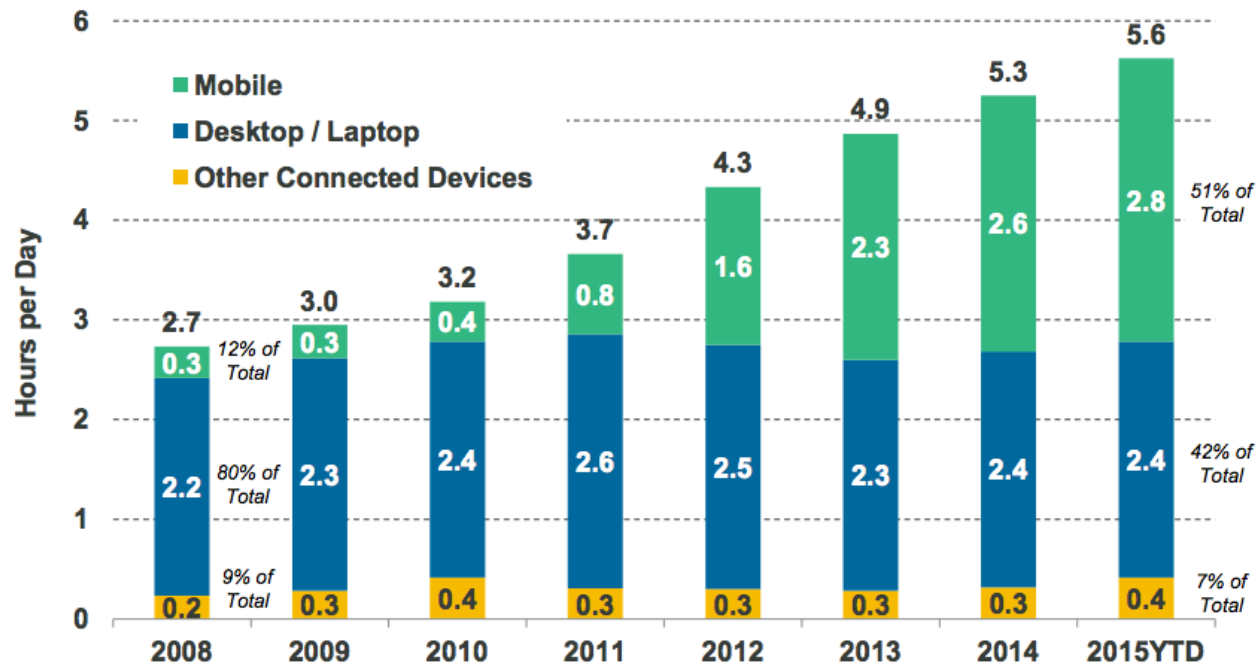
Mobile Web Trends



We love our mobile devices!

Internet Usage (Engagement) Growth Solid
+11% Y/Y = Mobile @ 3 Hours / Day per User vs. <1 Five Years Ago, USA

Time Spent per Adult User per Day with Digital Media, USA,
2008 – 2015YTD



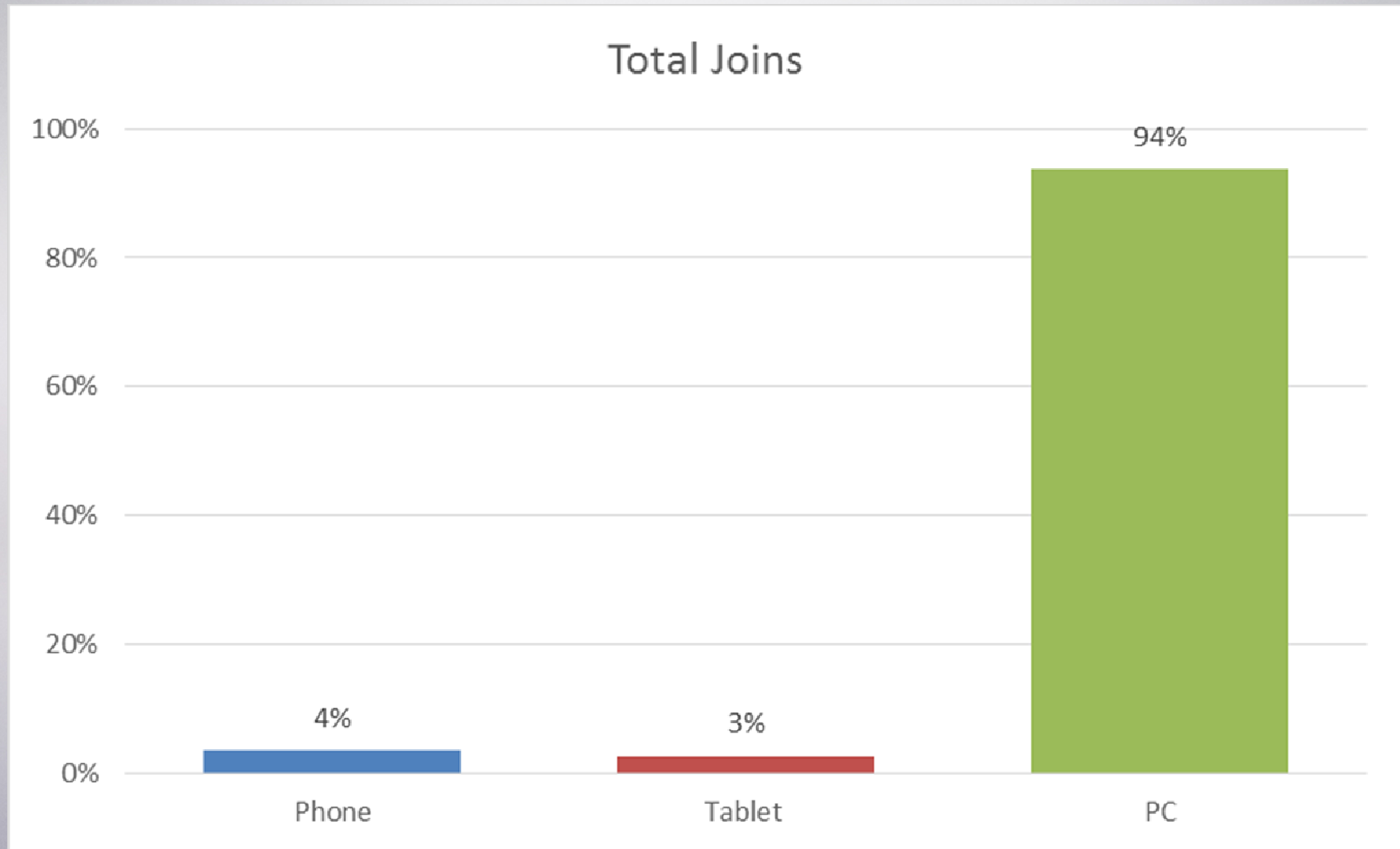
@KPCB

Source: eMarketer 9/14 (2008-2010), eMarketer 4/15 (2011-2015). Note: Other connected devices include OTT and game consoles. Mobile includes smartphone and tablet. Usage includes both home and work. Ages 18+; time spent with each medium includes all time spent with that medium, regardless of multitasking.

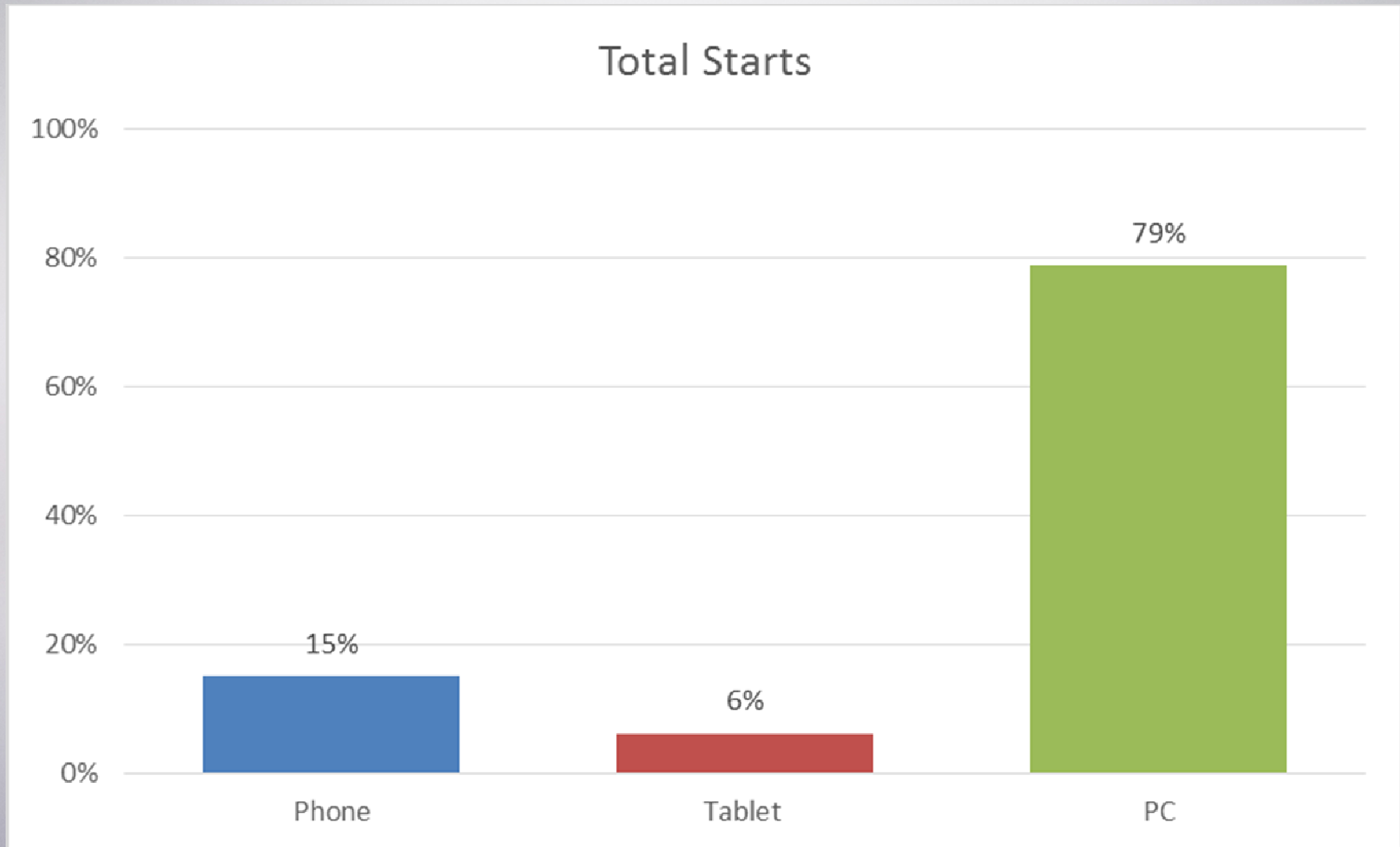
14



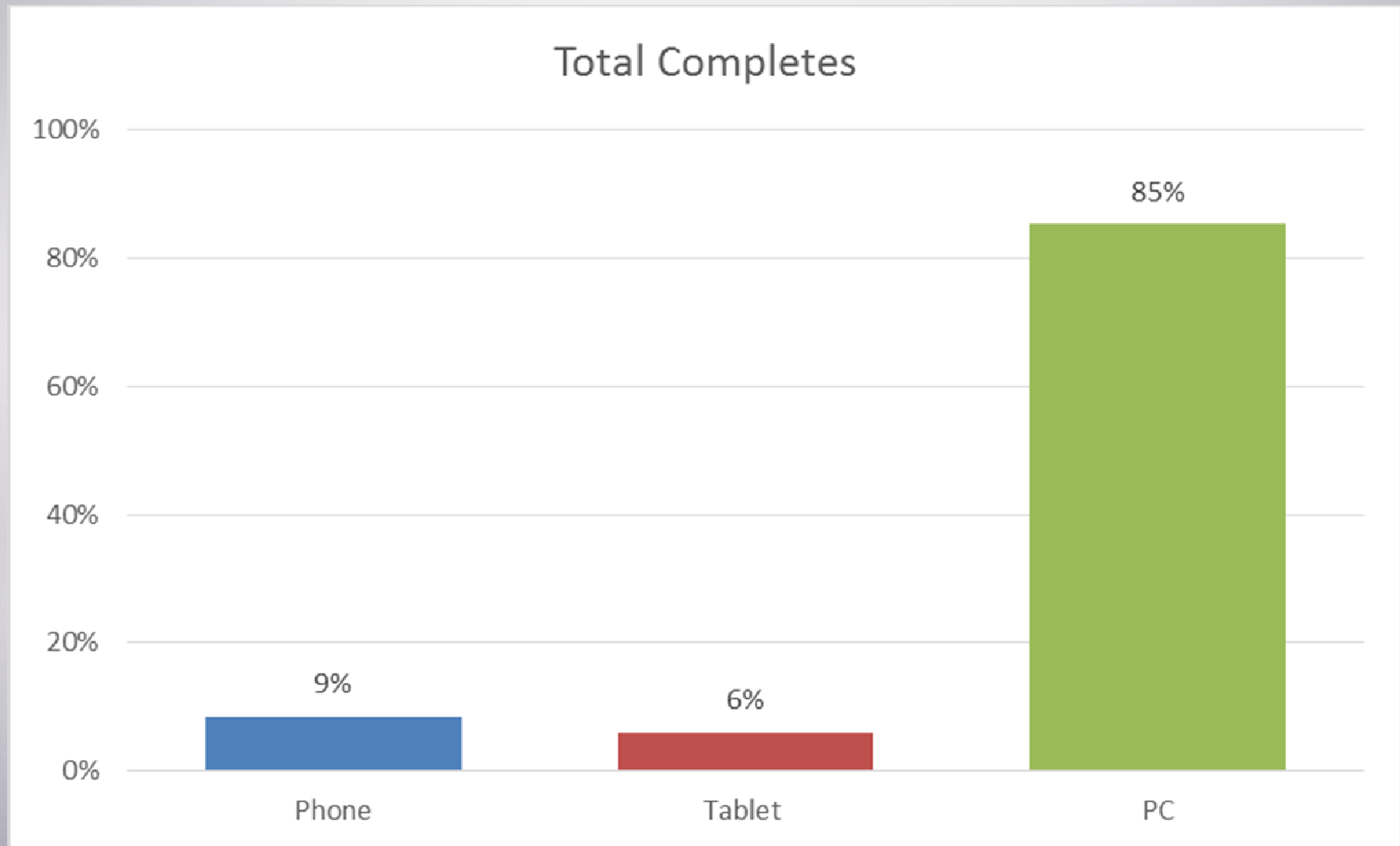
Mobile Panel Sign-ups



Mobile Survey Starts



Mobile Survey Completes



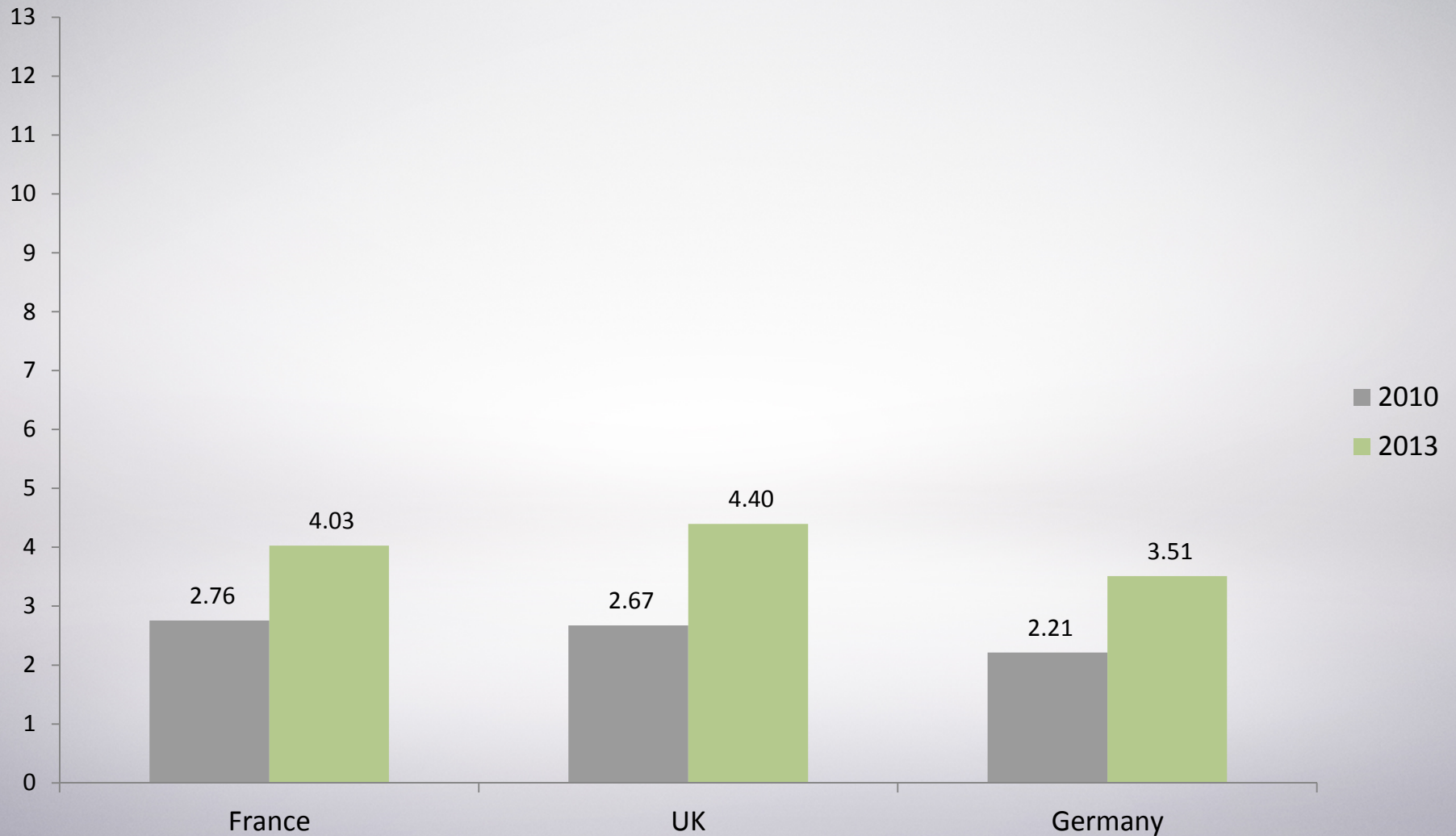
Why do we lag?

MMX Multi-Platform: UK Findings



 comSCORE.

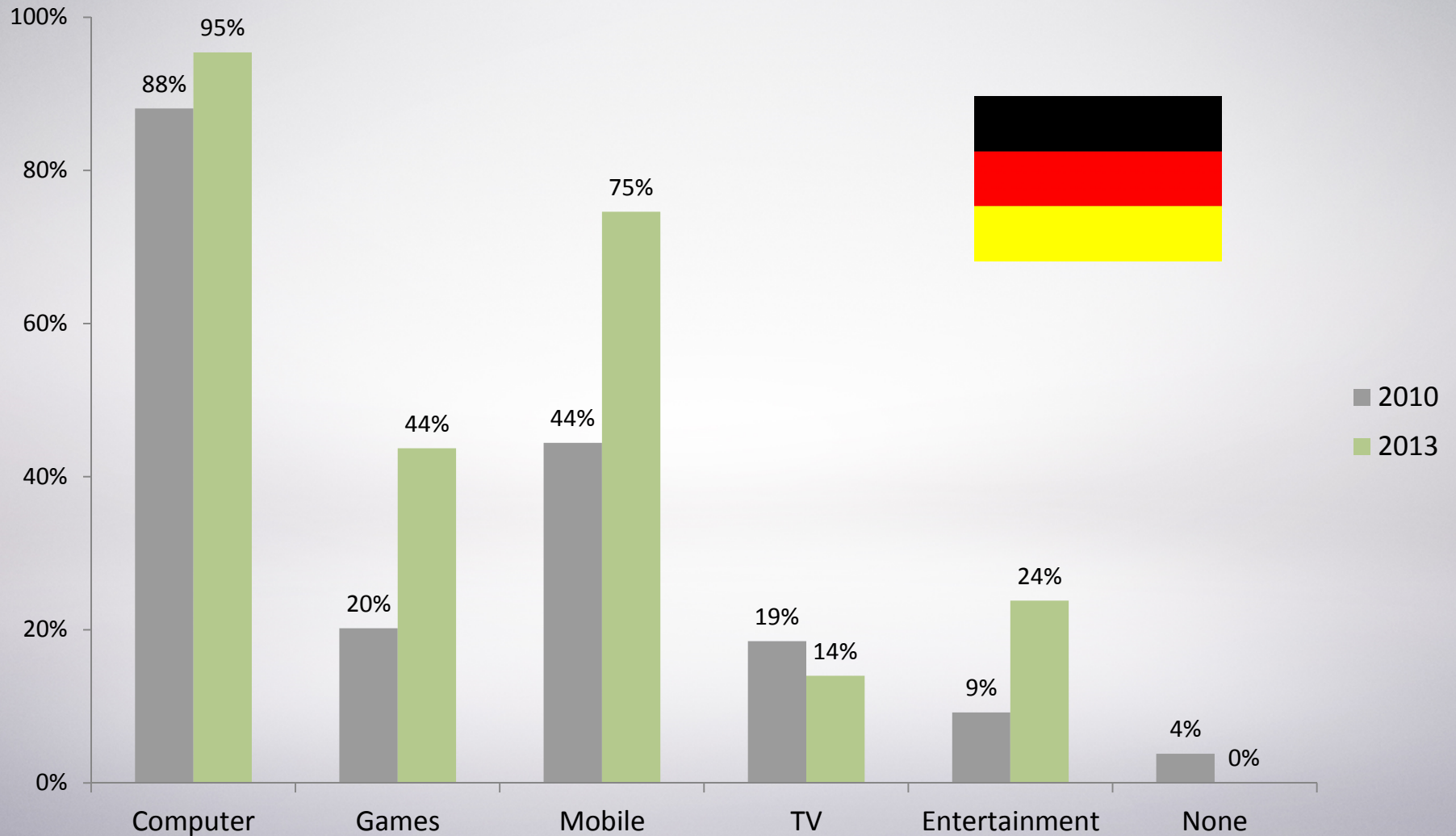
Evolution of Internet accessible devices – 2010-2013



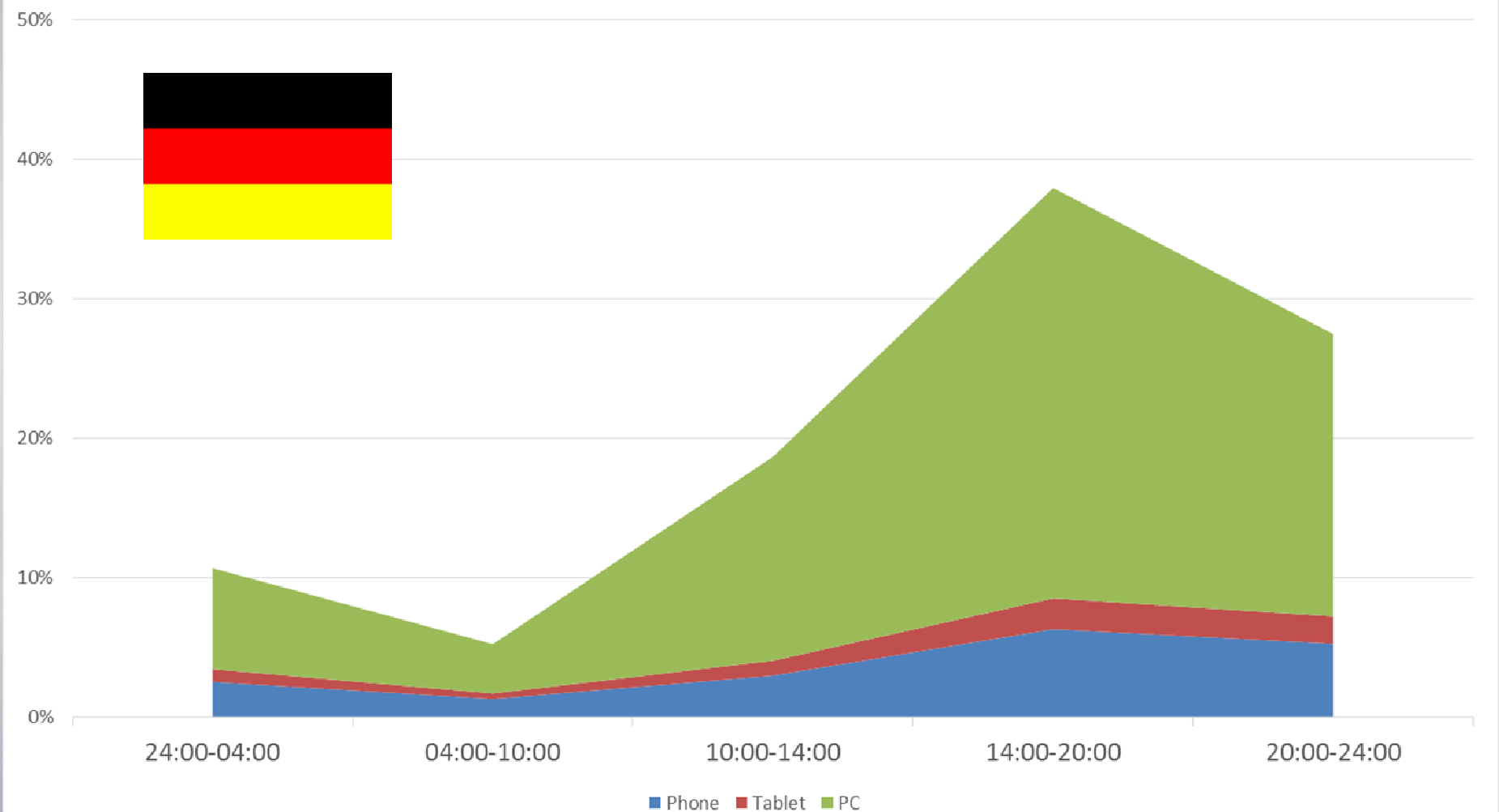
My house (with two kids)

- Mobile Phones (lots)
- Xbox
- PS3
- Computers
- Laptops
- Tablets
- Smart TV
- MP3 player
- Kindle

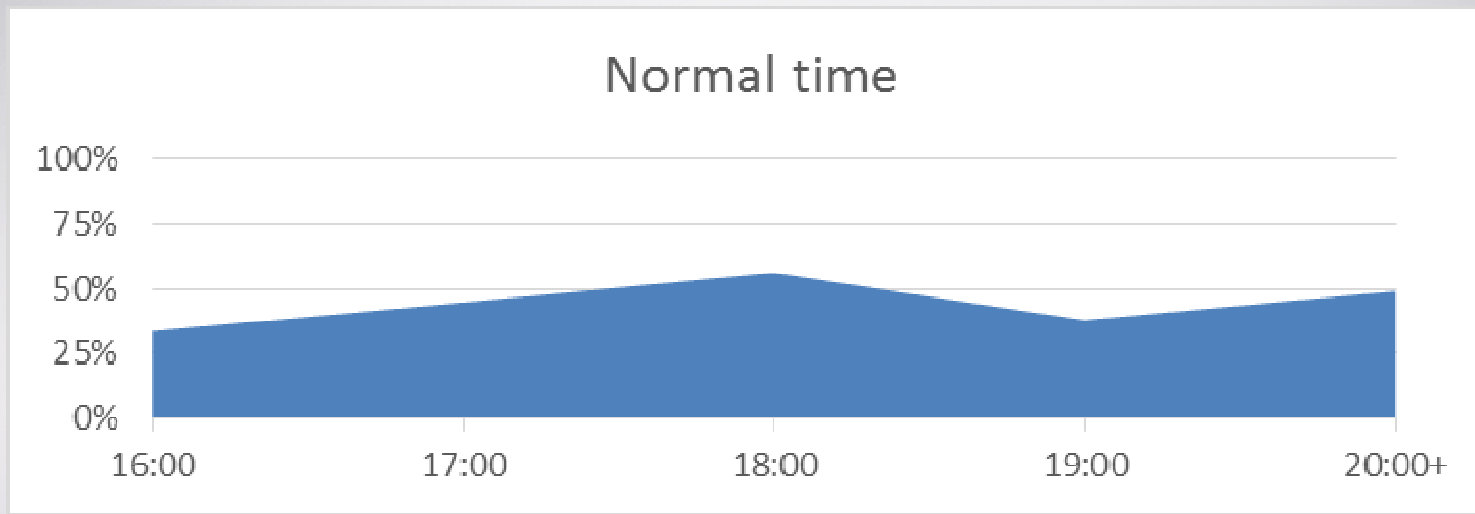
Evolution of Internet accessible devices – 2012-2013



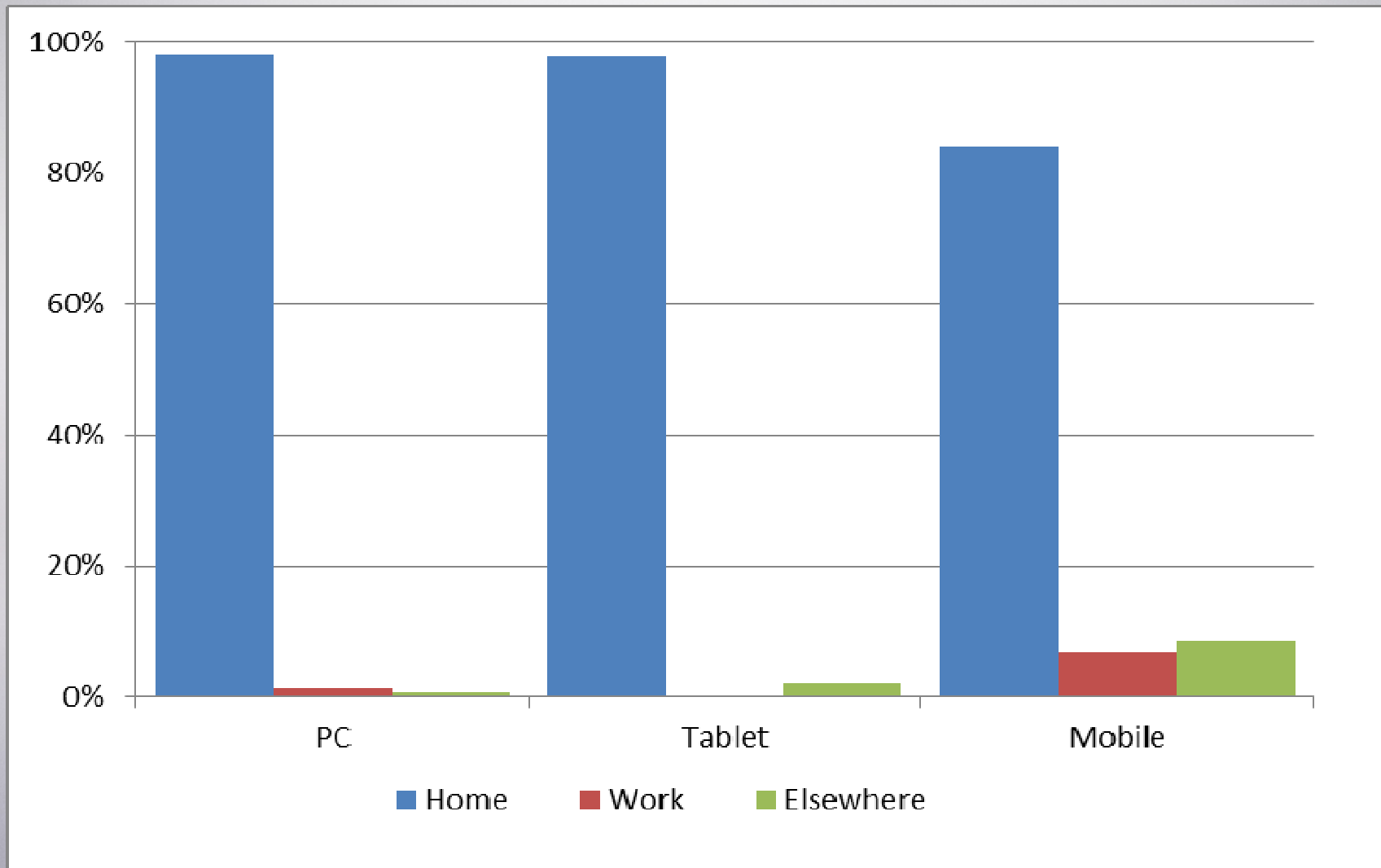
When are surveys done?



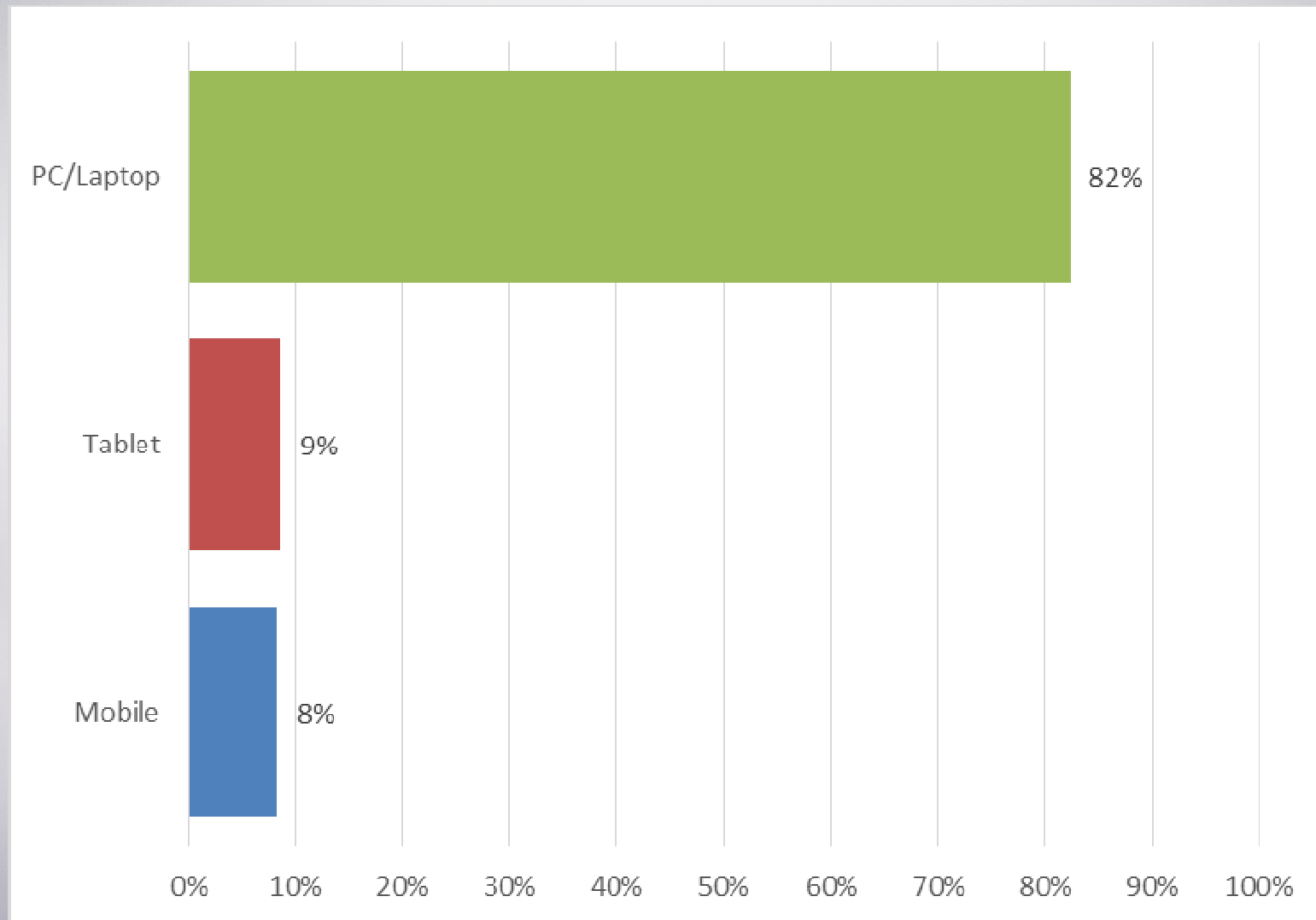
Why then?



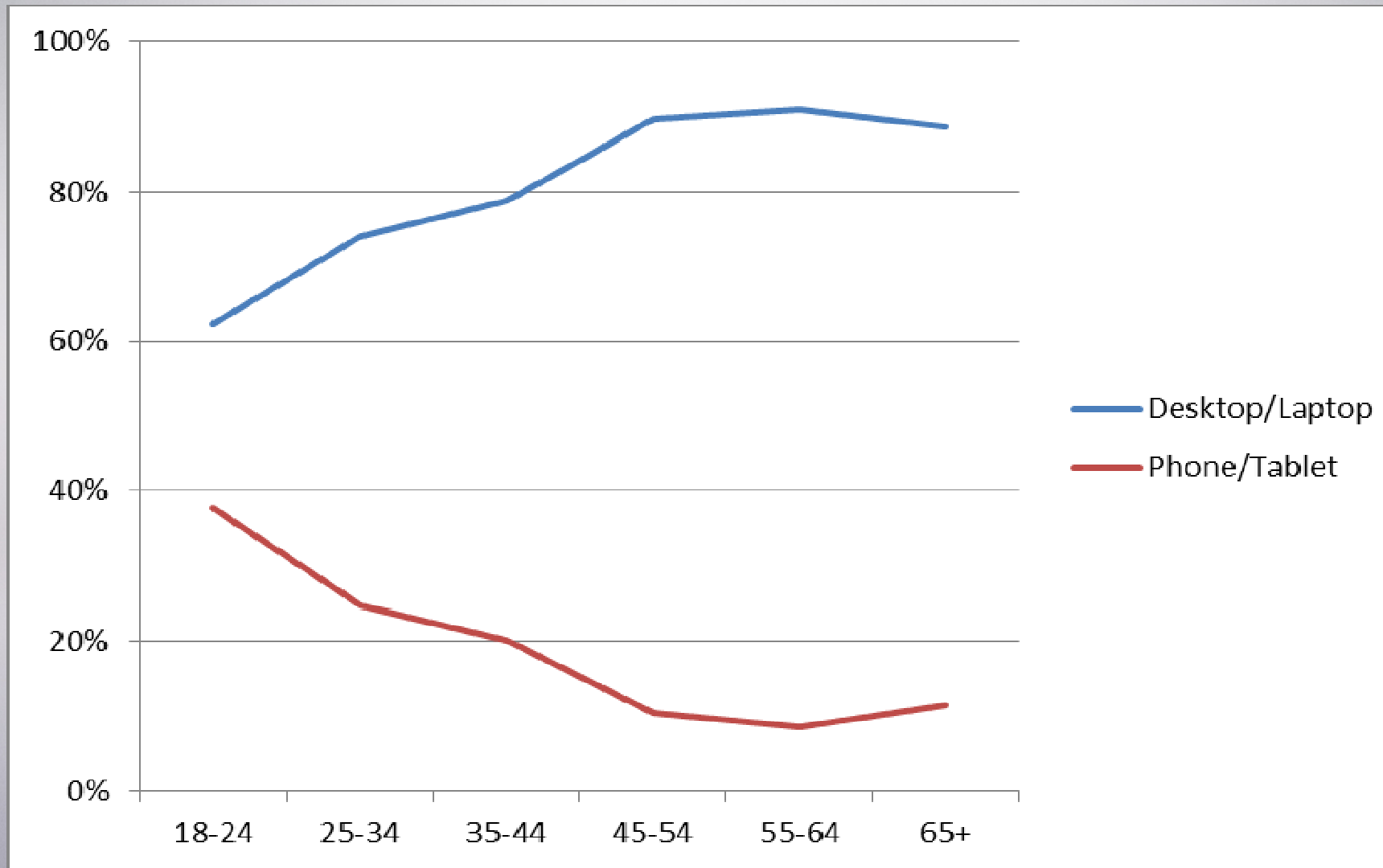
Where are surveys done?



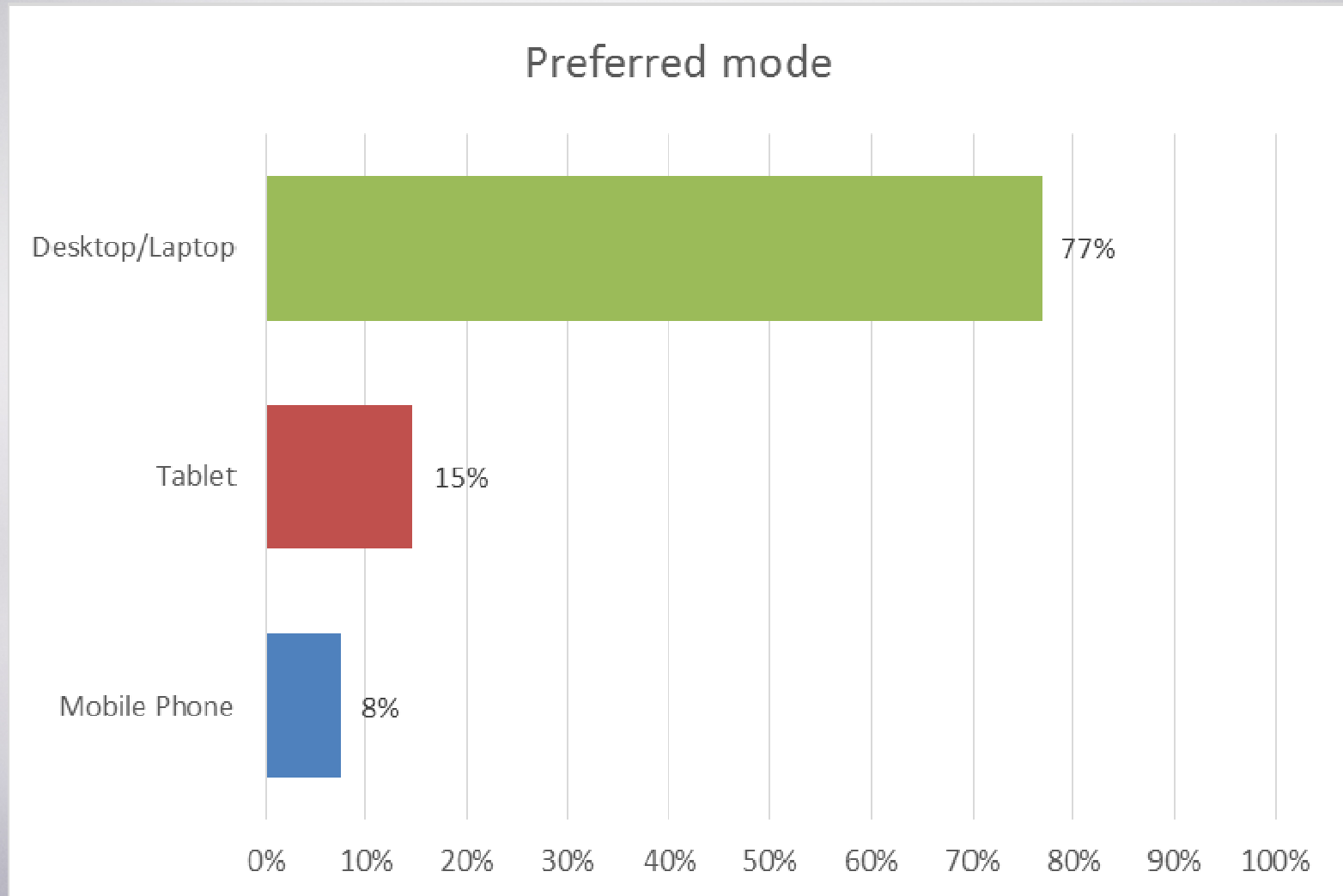
On what?



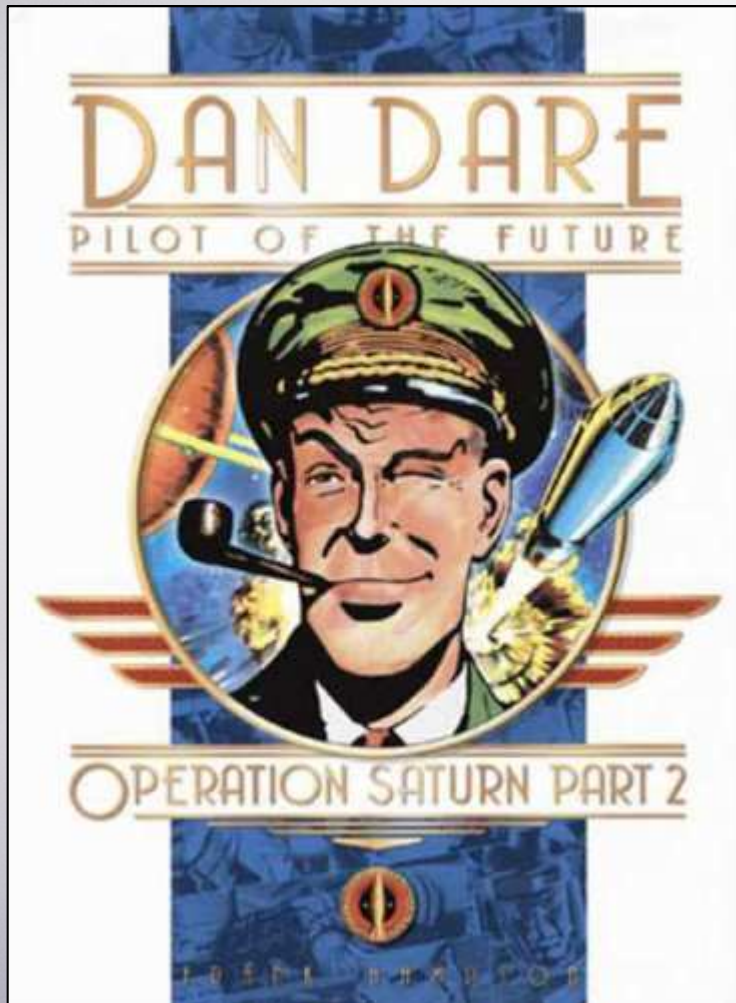
Will this always be the case?



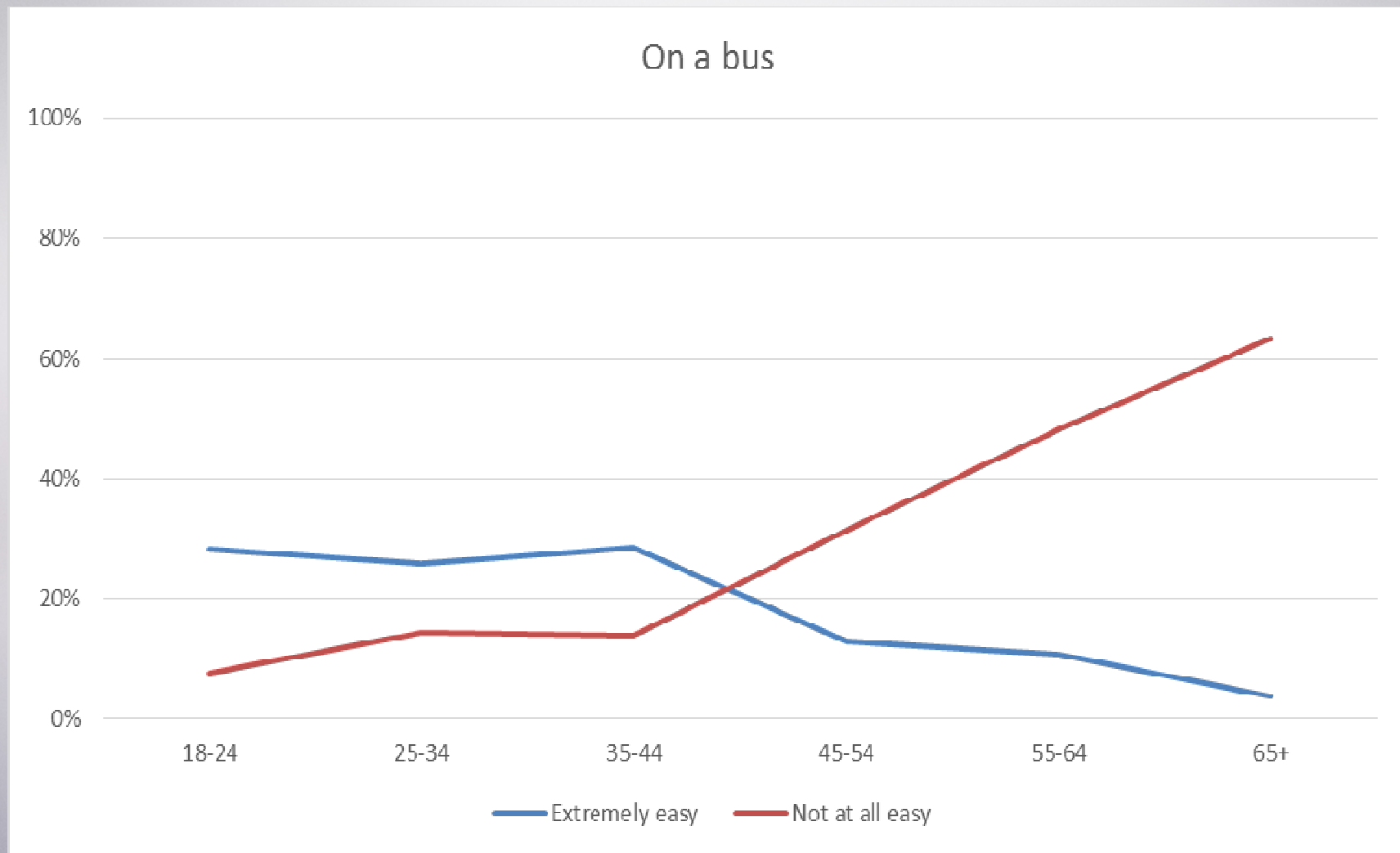
Do we know our future?



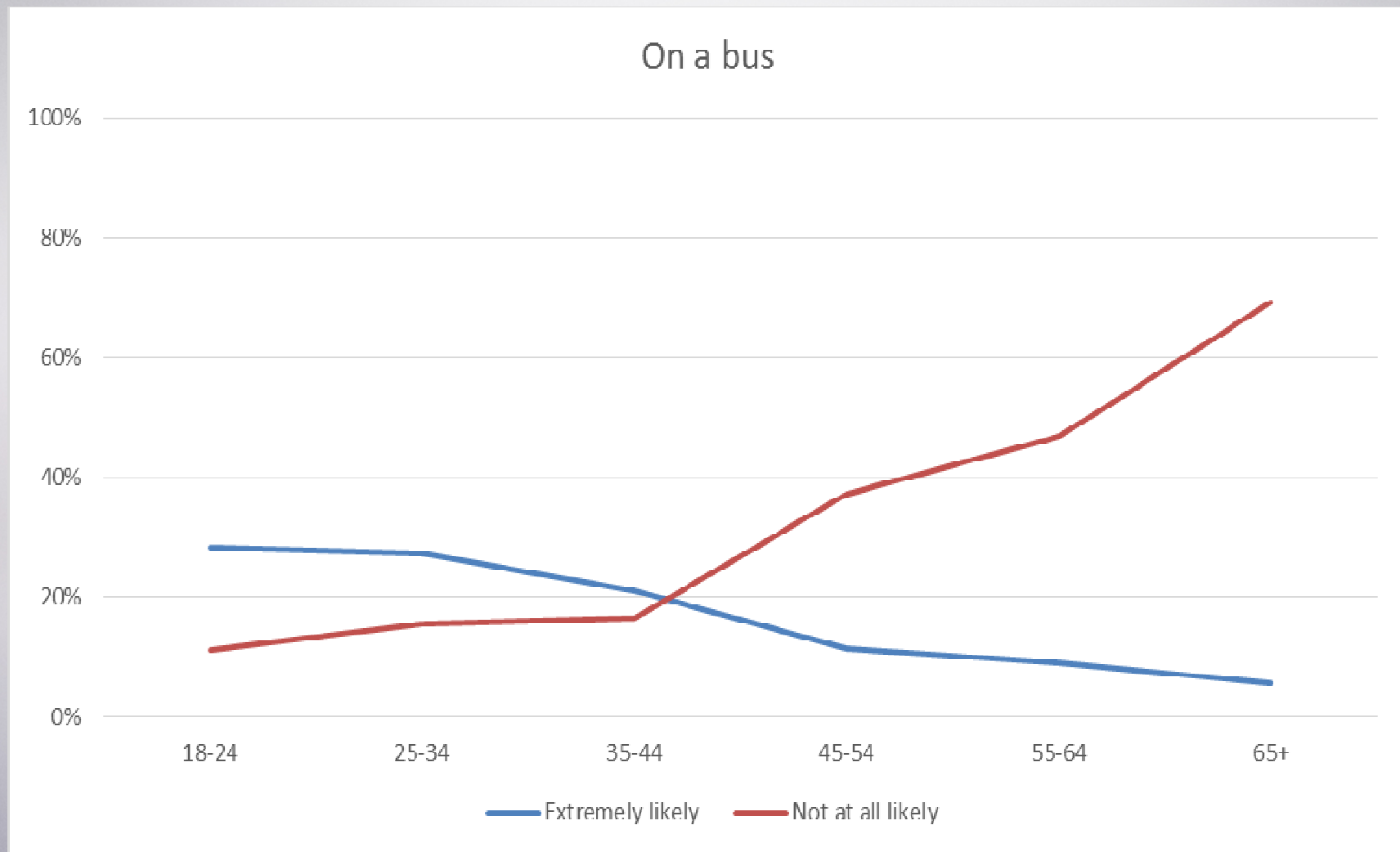
Is our future like our today?



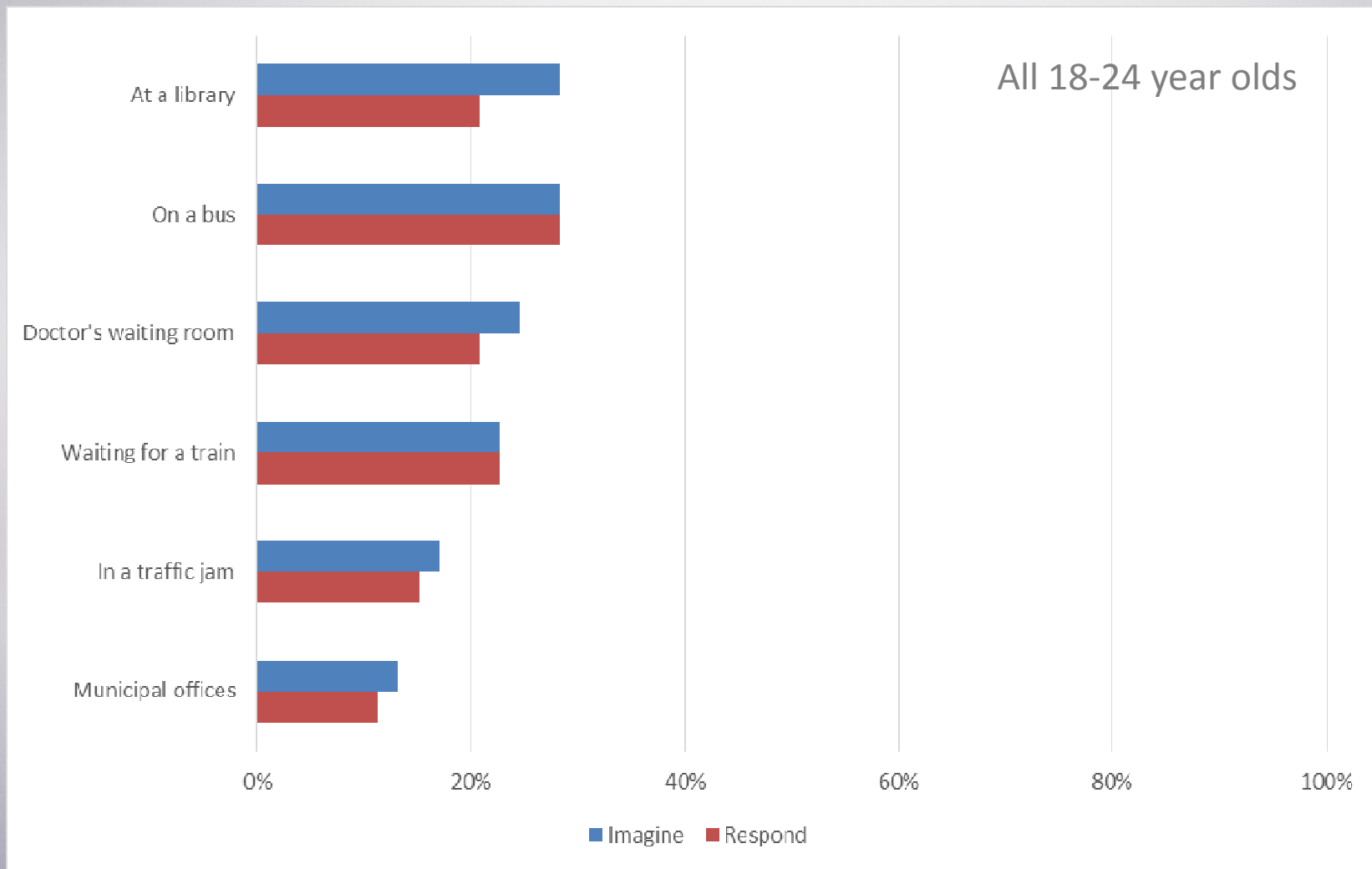
Imagining survey taking outside the home



Doing surveys outside the home



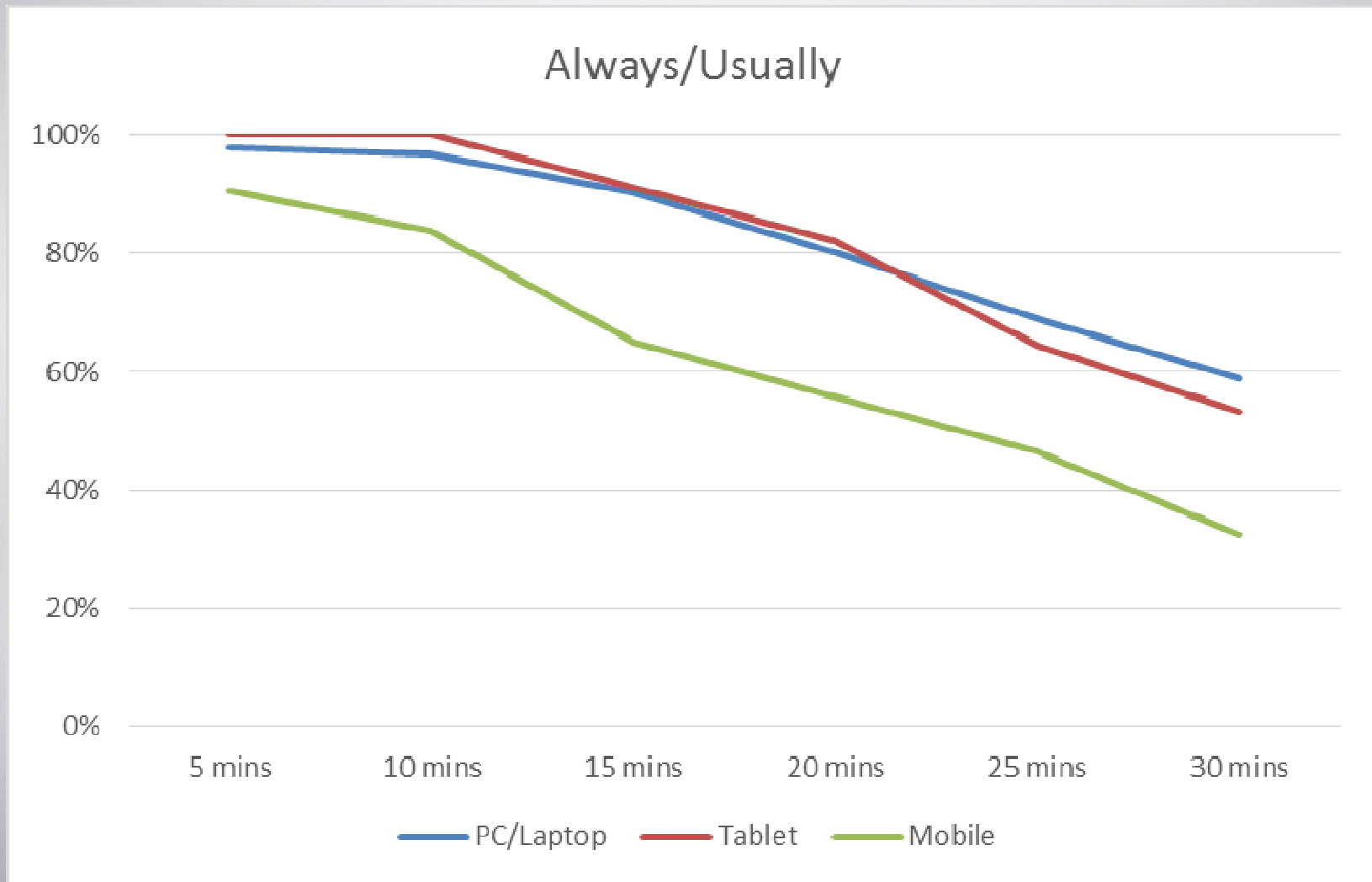
Survey takers of tomorrow



Need to do now

- Recruit via mobile
 - Only 16% of 'PC joins' surveys are on mobile
 - 61% of "Mobile joins" surveys are on mobile (another habit)
- Reward
 - With good, mobile optimised, survey design
- Educate
 - Change expectations of survey taking occasions

Worry about tomorrow



Summary

- Move towards online in Italy is gaining momentum
- Mobile may give the push you need
- (If you won't do it, someone else will)
- Panelists are creatures of habit
 - At home
 - Alone
 - On PC or Laptop
 - At certain times
- Habits are hard to break
- But we must break them
- To do the things you want to do

IMAGINE_{the} POSSIBILITIES

When You Work With SSI

