Then let's approach the new frontiers – there is much to learn!

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From mixed-mode to multiple devices
Web surveys, smartphone surveys and apps: has the respondent gone ahead of us in answering surveys?

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At the beginning of web survey methodology the main assumption was that the respondent was answering the survey either with a desktop or with a laptop. Now the situation is very different. An increasing number of people own multiple devices capable of browsing a website and therefore answering a web survey. For example, in the UK in mid-2012, 49% of those aged 16 and older owned a smartphone, while 12% of households owned a tablet and 17% an ebook reader (Ofcom 2012). In the same reference period, 45% of US adults owned a smartphone, 25% a tablet and 18% an ebook reader (Pew Internet and the American Life Project 2012).

Are respondents taking a survey from the smartphone or tablet computers? There are few published data points available. In the US, Kinesis (2012) reports that 25.5% of web surveys served by its platform were initiated from either a smartphone or a tablet during the first quarter of 2102, reaching 30.7% in Q3 2012. For Europe the numbers are much lower: 4% in Q1 and 7.4% in Q3 2012. Peterson (2012) shows how the percentage of studies being started from a mobile device really varies by the target population and the topics, from a maximum of 30% to a minimum of 1%.

When respondents are accessing a web survey from devices other than desktop or laptop computers, is the survey optimised for these devices? The answer is, unfortunately, not really. According to the Meaning Ltd 'technology survey' of 230 companies in 36 countries, 62% of companies do not take any action or modify the survey to be taken from a device other than a desktop/laptop computer (Macer 2012). Only 15% of companies modify their surveys to be taken from smartphone devices.

If a survey is not optimised for multiple devices, the effects on data quality are not trivial. For example the literature has reported higher breakoffs (Callegaro 2010; Stapleton 2011; McClain, Crawford & Dugan 2012), and higher item non-differentiation (Guidry 2012; McClain *et al*. 2012) for surveys started on a smartphone when compared to surveys started from a desktop/laptop. At the same time, discouraging respondents to take the survey from a smartphone, for example, does not seem to work, as Peterson (2012) and McClain *et al*. (2012) showed in their experiments as respondents continued to fill the survey regardless of the message.

Respondents have gone ahead of us. The *unintentional mobile respondent*s (Peterson 2012) answer or attempt to answer a survey from their smartphone

that was not designed for that device. There is no shortage of web survey platforms capable of handling different devices – for example, Quirk's (2012) listed 31 vendors specialising in mobile web surveys.

If web survey platforms can optimise the questionnaire for multiple devices, they can do it to a certain point because some decisions are to be taken at the *survey design stage*. For now, and according to the work of Tarkus (2009), Zahariev *et al*. (2009), Pferdekaemper (2010), Callegaro and Macer (2011), and Luck (2011), the suggested designer driven considerations are as follows.

- Keep the subject, the content and the survey link of the email invitation short.
- Remove or reduce all non-essential, non-question content. Logos, disclaimers and help links can be placed on separate pages so they do not reduce the space available for questions. The progress bar, for example, takes a lot of space and time to load.
- Avoid grids. Some survey platforms automatically convert grids to single questions when displaying them on a smartphone (Pferdekaemper & Batanic 2009).
- Use basic question types, such as multiple choice, checkboxes and open ends, because advanced question types just do not work on a small screen (e.g. card sorting).
- Consider branching for questions with seven or more response options. It is very difficult to show more than five points of a scale on a smartphone, so branching can be a solution.
- Consider not repeating the response options in the question stem.

- Multimedia is very tricky to handle on smartphones – lots of testing is required on different OSs and devices.
- Almost all authors recommend keeping the survey short, if possible. We do not have data on this last recommendation. Time will tell us the optimum length of smartphone surveys.

Many of the above considerations coincide with usability guidelines for mobile websites – as delineated, for example, by Nielsen and Budiu (2013).

There is however another way to administer surveys to smartphones and tablets: applications, or apps. Tim Macer (2011) highlights the advantages and disadvantages of apps-based surveys as follows.

Advantages
- The survey does not need a permanent stable internet connection to collect data and function.
- The app can fully access the capabilities of the device such as GPS, pictures, video, voice recording and barcode scanning.
- The app can prompt, send messages, trigger alarms and be 'active' on the device at all times (e.g. vibrate or beep).
- There is more certainty in terms of how the survey is going to be displayed and interacted with.

Disadvantages
- The app must be downloaded and installed on the device prior to beginning to answer the survey(s).
- Apps need to be programmed and designed for specific operating systems, which increases cost and development time.

- It might be more difficult to administer the same survey both via an app and via a web browser, depending on the survey platform(s) used.

From the trends in smartphone and tablet adoption, we have seen that respondents will (and do) answer a survey from whatever device they have in their hands, 'without asking for our permission'. It also seems clear that attempts to stop or redirect respondents to another device do not work. The only viable solution for now is to plan for multi-device web surveys. This paradigm shift is a combination of survey-platform-driven design decisions and, very importantly, survey designer decisions in terms of questionnaire design, content and email invitation.

In order to provide respondents with the best survey experience, different skills are required, and only a multidisciplinary approach can provide good and viable solutions. Software engineers should work together with survey scientists, market researchers, web and mobile usability designers.

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A fresh look at consulting and collaboration

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Background

The debate

Whether to adopt a consultancy approach has long been talked about by market research agencies. Some argue that it is not necessary, that they are delivering what is required anyway through good client servicing. Others say it should be left to management consultancies, that agencies are not suitably equipped or skilled to deliver it, and cannot afford the right sort of people … the arguments are well rehearsed.

But we felt that the landscape of market research had changed so dramatically it was time to re-examine the consultancy model with an open mind. With profitability squeezed so much, consultancy disciplines seemed more relevant than ever, with push and pull factors coming sharply into focus. We saw considerable threats ahead if research agencies carried on being managed in the usual way, and significant opportunities to increase margin by entering the consulting space.

What we did

What did industry insiders have to say about this? P&W Consulting invited them to explore the changes driving the need for consultancy and the benefits of building a consultancy approach, and to share their successes in adapting to address this need.

We conducted candid, in-depth interviews with MR industry leaders and specialists, and their clients, and – using all their insights – identified some key strategies to adopt, as well as recommended practical next steps to take, to help researchers learn more from consultancy.

Research agency representatives, client-side researchers, research buyers, management consultants, freelance researchers, journalists, commentators and industry bodies all provided valuable views (see the list of participants' employers at the end of this article). Structured in-depth interviews were conducted over four months. Most were face to face, lasted one to two hours, and allowed detailed questioning to take place.