THE SAMPLE LANDSCAPE

The Inaugural Report on the Online Sample Industry

Brought To You By:

emi RESEARCH SOLUTIONS

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EXECUTIVE SUMMARY

The sample industry is complex with a wide variety of sources located around the globe. Some focus on basic consumer sample, some concentrate on business-to-business audiences, some on healthcare professions, and others on different target groups. Many try to focus on *all* of these targets.

In the broader market research industry, many consider sample to be a commodity, where sample is the same, regardless of the source. This is far from the truth. Sample is a complex entity that has a variety of intricacies and specialties.

To explore the sample industry as a whole, better understand the advantages and disadvantages of each source, and identify how they can differ from each other, EMI has traditionally undertaken numerous methods, including:

> *Gauging differences by understanding each panel's collateral – items such as their panel book, ESOMAR 28, and other sell sheets. This understanding is further explored via frequent conversations in order to understand the latest trends for each company, and compared to other sample sources.*
>
> *Performing evaluations in real-time of targeting, service, pricing, and accuracy via working with the vendors personally.*
>
> *Conducting regular multi-wave studies measuring many of the US consumer and business-to-business (B2B) sample providers. This is the focus of this report.*

Overall, we found that sample panels are far from a commodity. Sample providers and the data their respondents provide are very different. The differences in data can be attributed to numerous factors, including:

- Panel Recruitment Method
- Panel Management
- Survey Experience
- Incentive Structure
- Survey Delivery Method
- Panel Make-Up (Demographics, Geography, Tenure, Behaviors, Attitudes, etc.
- Quality Processes

While each sample source is different when compared to one another, the data a sample source provides can also differ over time. These differences can range from minor differences to some significant swings in the data over periods of time as the panels evolve. Some of the differences can be caused by the same factors that make sample panels different from one another, but there are also some additional factors including:

- Number of Surveys Received
- Panel Turnover
- Survey Design
- Current Events

This does not mean that one sample source is better than one another, it primarily means that data consistency will be impacted. When selecting a sample source for a project, the difference and their causes need to be taken into consideration to ensure that they don't unintentionally impact the data and sway results.

BACKGROUND

We have been conducting research on panels and panelists for years to gain a better understanding of the panel landscape. We pride ourselves in not only knowing each sample provider, but how each relates to one another, and overall.

We have completed numerous consumer waves, as panels can change quickly over time. This year we completed 4 waves.

Wave 1: January 31 to February 9

Wave 2: March 6 to March 12

Wave 3: May 5 to May 21

Wave 4: July 31 to August 5

In 2018, for the first time, we fielded a B2B test in the US among IT Decision Makers to determine if there are differences in the B2B space similar to consumer.

As part of our research, we asked a variety of questions, including about specific concepts, ideas, products, services, and other areas where we verify a norm and measure differences over time and among panels.

In addition to these topics, we included numerous special topics including:

Emoji Scaling - Testing Traditional Scale vs. Emoji Scale

Legalization of Marijuana Perceptions

Smartphone Addiction From A Teenage Standpoint

METHODOLOGY

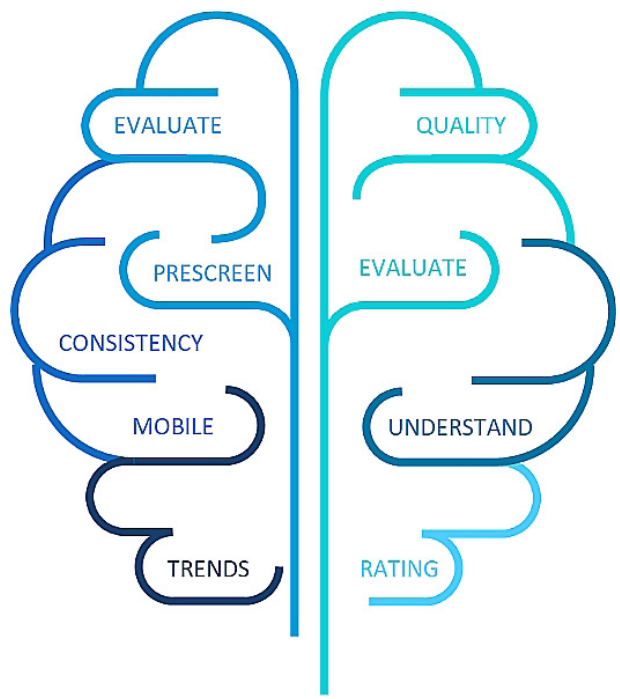
Consumer

Specifications

For the consumer portion of the research, waves were conducted using a number of panel sources.

Depending on the wave, the set of sample providers tested were different, so the number of providers and base sizes may vary.

All findings are presented blinded.



Objectives

The objectives of the study were to evaluate the consumer portion of the sample industry, and understand and analyze for:

- Consistency
- Quality

Evaluation Metrics

- Traps / Open-End Quality
- Consistency
- Behavioral Questions
- Concept and Brand Rating
- Device Usage
- Quality: Cheaters / Open-Ends

METHODOLOGY

Business-To-Business (B2B)

Specifications

For the B2B portion of the research, the details of the research include:

- 908 Completes
- 1 Wave Fielded In May 2018
- 9 Sources Tested
- Approximately 100 Responses/Panel
- Minutes / LOI
- Target: US ITDMs

All findings are presented blinded.

Objectives

The objectives of the study were to evaluate the B2B portion of the sample industry, and understand and analyze for:

- Consistency
- Quality
- Differences Among Sources

Evaluation Metrics

- 3 Trap Questions
- 5 Open-Ends (Quality)
- Consistency
- Behavioral Questions
- Profession Questions
- Concept Rating
- Quality: Cheaters / Open-Ends

CONSUMER

KEY FINDINGS

Through our consumer research, we have identified that panels are very different from each other. Data can be dramatically different from one panel to the next, especially when demographics are kept consistent for a fair comparison.

Not only does the data differ when comparing panels to one another, individual panels can also vary when looking at them over a period of time. The aspects in which panels can vary, either over time or to one another, include:

- Behavioral / Attitudinal Data
- How Panelists View Their Survey Experience
- Device Usage

BEHAVIORAL & ATTITUDINAL

Over the next few pages, you'll notice that panels are extremely diverse in terms of attitudes and stated behaviors. This doesn't mean one panel is necessarily better than another, it is simply that they provide different data.

Panel data can also shift over time and may not be consistent. When comparing data from wave to wave, there are significant differences.

These contrasts are primarily due to how each sample source recruits to their panel and how they mange their panel. Each panel handles this very differently. We show these differences by testing multiple concepts and ideas.

Concepts

All respondents evaulated four concepts on a 10-point purchase intent scale. The concepts that were tested included:

Concept A: Low-Priced Beverage

Concept B: Wireless Charger

Concept C: Theme Park

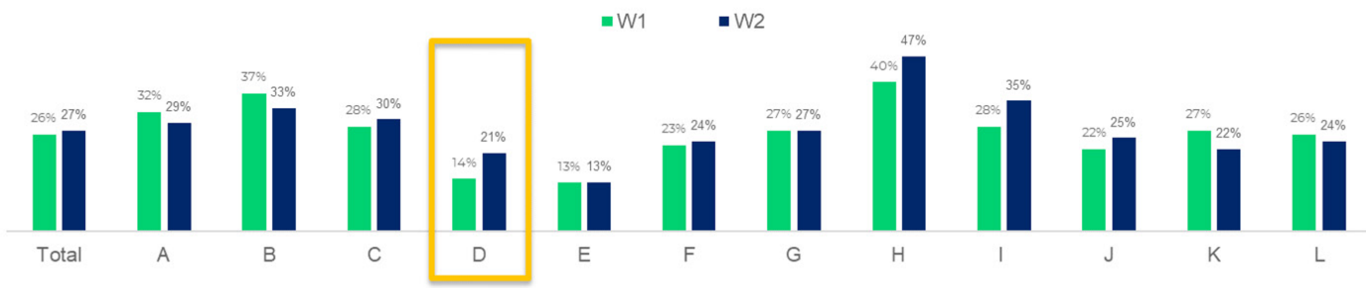
Concept D: Premium Headphones

Multiple concepts are tested to determine if any differences among the sample sources are specific to the type of concept (different price points, consumer-packaged good versus a service concept).

By having respondents evaluate concepts, we can see if there are any attitudinal or behaviorial differences in panels, and through this, gauge any potential hidden bais.

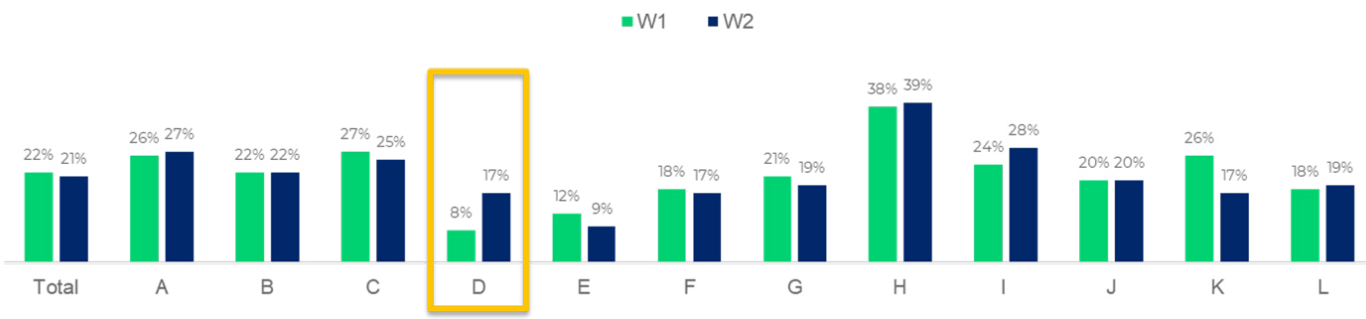
Purchase intent and concept rating differed across each panel sources we studied. We also found there could be differences, sometimes even significant, in the same source over time.

Looking at the concept rating and purchase intent for Concept A, Panel D saw a jump in purchase intent from 14% to 21% between waves.



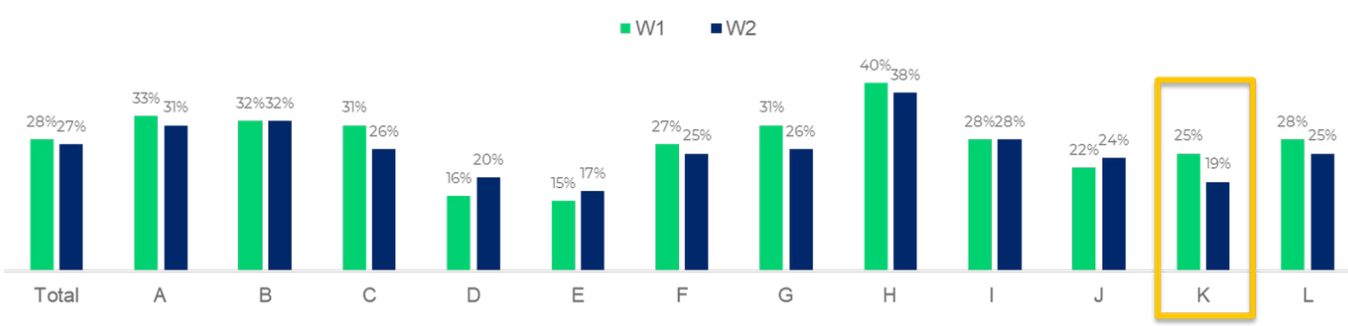
Q. Using the scale below, how likely are you to purchase the product shown?

Panel D had the same jump wave-to-wave when asked about Concept B, increasing to 17% from 8%.



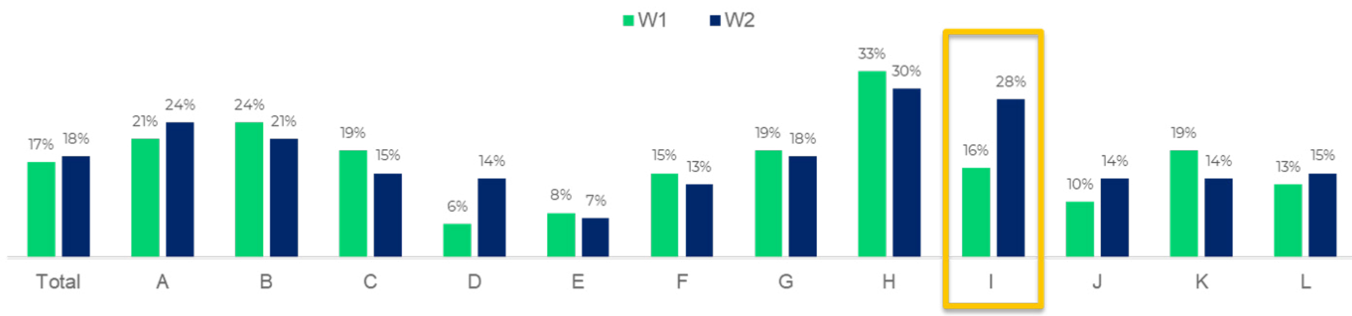
Q. Using the scale below, how likely are you to purchase the product shown?

We also saw a decline in purchase intent wave-to-wave in Concept C, with Panel K dropping from 25% to 19%, while may others remained fairly steady.



Q. Using the scale below, how likely are you to purchase the product shown?

When asked about Concept D, we saw the same trend of large purchase intent swings wave-to-wave, this time with Panel I. We also saw varying results when comparing panels to one another, ranging from 6% to 33% in wave 1 and 7% to 30% in wave 2.



Q. Using the scale below, how likely are you to purchase the product shown?

When looking at the data for Concept A, wave 1 results ranged from 13% to 40%. In wave 2, results ranged from 13% to 47% for a total difference of 34%.

Similar differences can be seen throughout all the other concepts as well. As can be seen in the table below, there is at least a 21% difference between every wave.

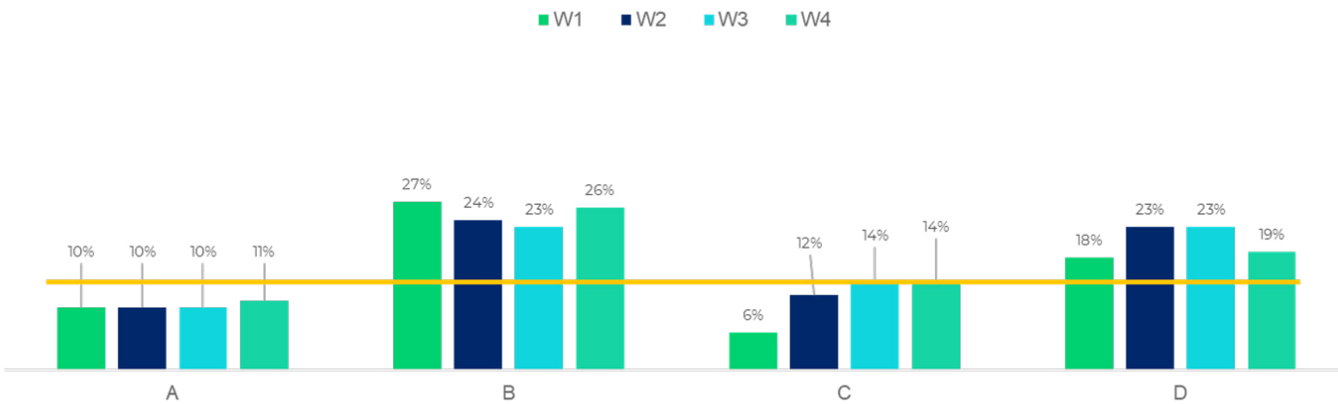
		Lowest rating	Highest rating	Difference
Concept A	W1	13%	40%	27%
	W2	13%	47%	34%
Concept B	W1	8%	38%	30%
	W2	9%	39%	30%
Concept C	W1	15%	40%	25%
	W2	17%	38%	21%
Concept D	W1	6%	33%	27%
	W2	7%	30%	23%

Q. Using the scale below, how likely are you to purchase the product shown?

In additon to the concept testing, we compared attitudes of the various panels on a variety of different topics.

Smoking Incidence

According to the CDC, 15.5% of Americans smoke. While these panels are fairly consistent over time, they are not consistent with this standard. Variance can also be seen between panels. For example, in wave 1, the biggest difference seen was between Panel B (27%) and Panel C (6%).

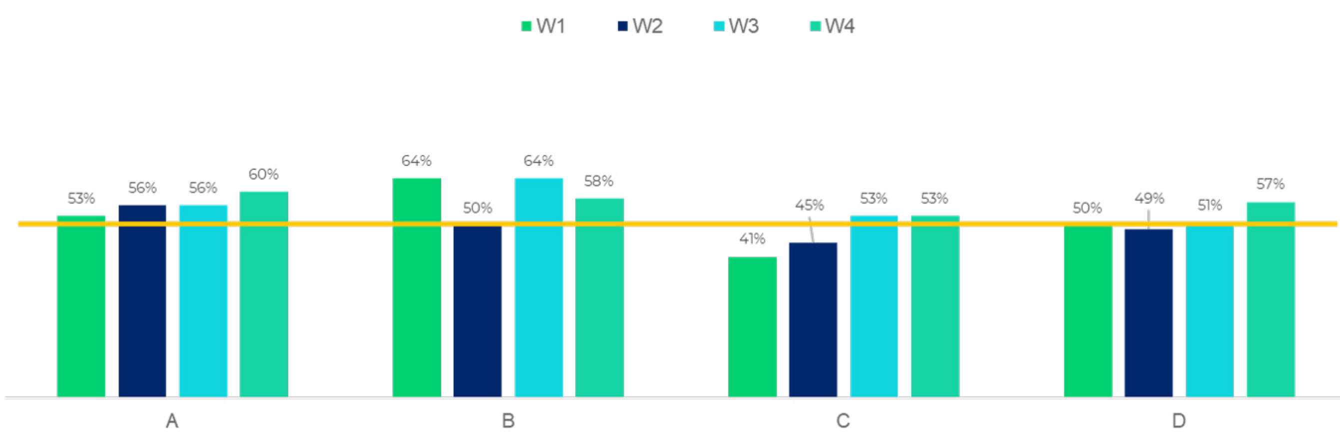


Q. Do you currently smoke cigarettes?

Exercise Incidence

According to Gallup, around 52% of Americans claim to exercise at least 30 minutes 3 or more times per week. however, panels largely vary around that average.

Additionally, between panels, the biggest difference was in wave 1, where 41% of Panel C said they exercised for 30+ minutes 3 or more times a week, and 64% of Panel B said the same. Over time, Panel B dropped from 64% down to 50% and back up to 64% from wave 1 to wave 3. Panel D went from 41% to 53% from wave 1 to wave 4.

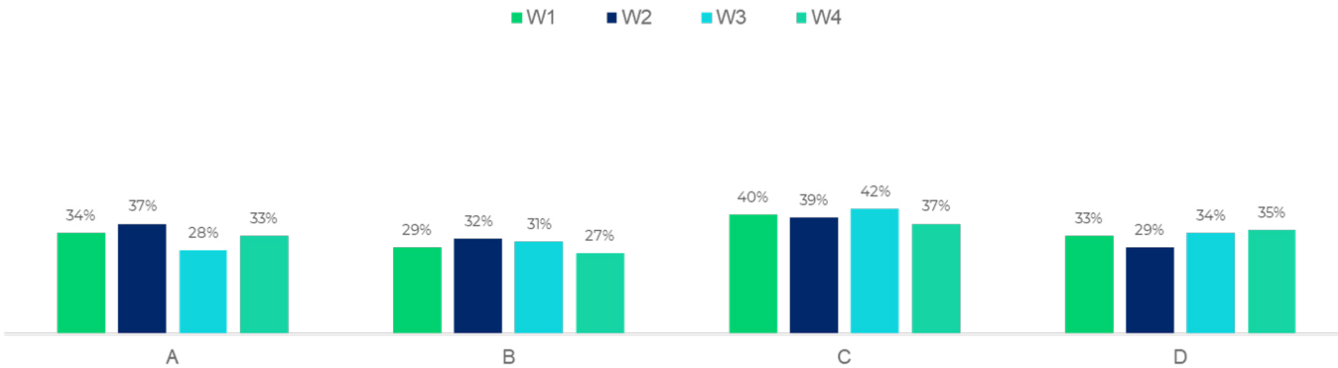


Q. Have you exercised at least 30 minutes 3 or more times in the past week?

Privacy Concerns

The biggest difference between waves around how concerned respondents were about privacy was between Panel A with 28% saying they were extremely concerned about privacy, and Panel C with 42% saying they were extremely concerned.

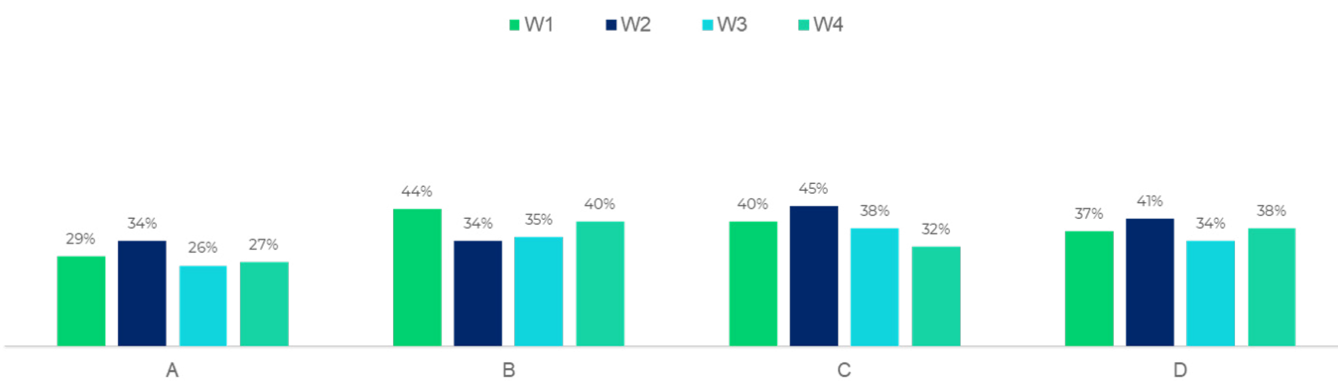
Overall, panels stayed fairly consistent over time. The largest difference was among Panel A, with 37% in wave 2 and 28% in wave 3.



Q. Generally, how concerned are you about online privacy? For example, how concerned are you that information that you provide to websites, apps, and other online sources is going to be shared without knowledge to other companies and websites?

Belief In Alien Life Forms

When asking respondents across each panel if they believed in alien life, the biggest difference across panels was seen in wave 1, where results ranged from 29% to 44% said they did. Panel C had the biggest differentiation over time, with belief dropping from 45% to 32% from wave 2 to wave 4.

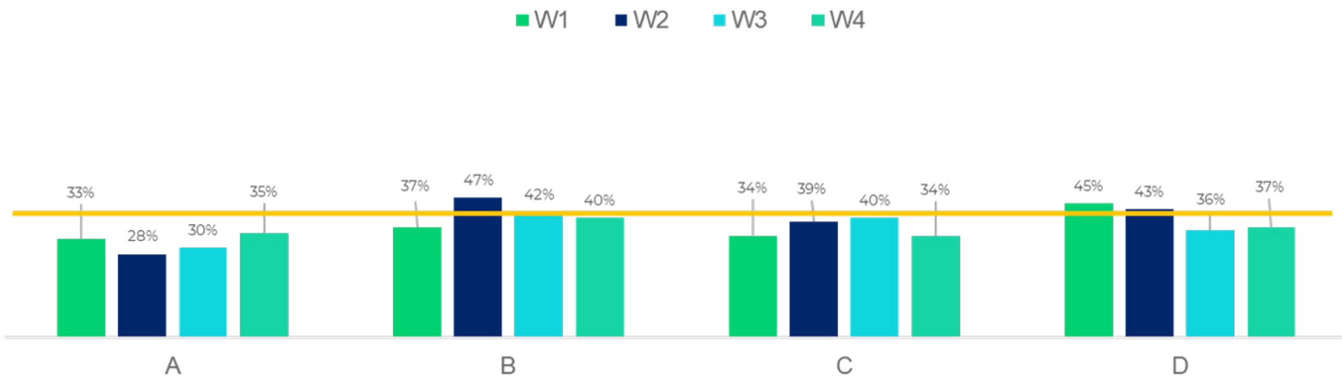


Q. Do you believe in alien life forms or UFOs?

Views On The Wall With Mexico

According to Gallup, 41% of Americans believe that the wall should be built. Among these panels, responses vary around that standard.

Wave 2 had a 19-point difference with 28% of Panel A saying they believe the wall should be built and 47% of Panel B saying the same. Panel B also had the largest differentiation over time, ranging from 37% to 47% between wave 1 and wave 2.

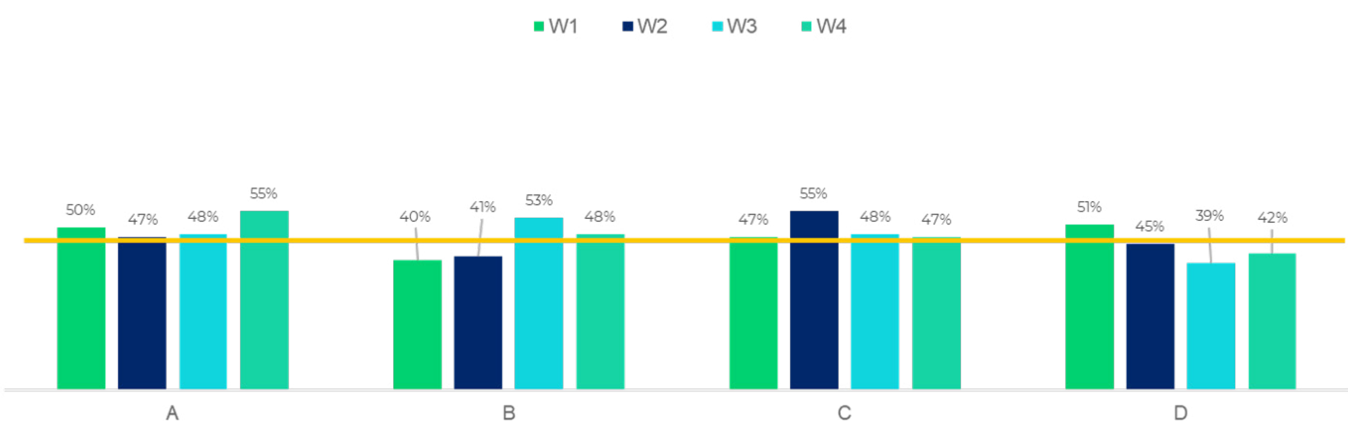


Q. Should a wall be built along the border with Mexico to deter someone from crossing into the US illegally?

Flu Shot Incidence

According to the CDC, 46.8% of Americans received the flu shot during the 2016-2017 flu season.

Both wave 2 and wave 3 had a 14% difference between panels when asked if they received a flu shot. In wave 2, panel B had 41% and panel C had 55% who said they received a flu shot. In wave 3, 39% of Panel D said yes and 53% of Panel B said yes. Panel B and Panel D had the largest differences over time, which ranged 12 to 13 percentage points from wave 1 to wave 4.

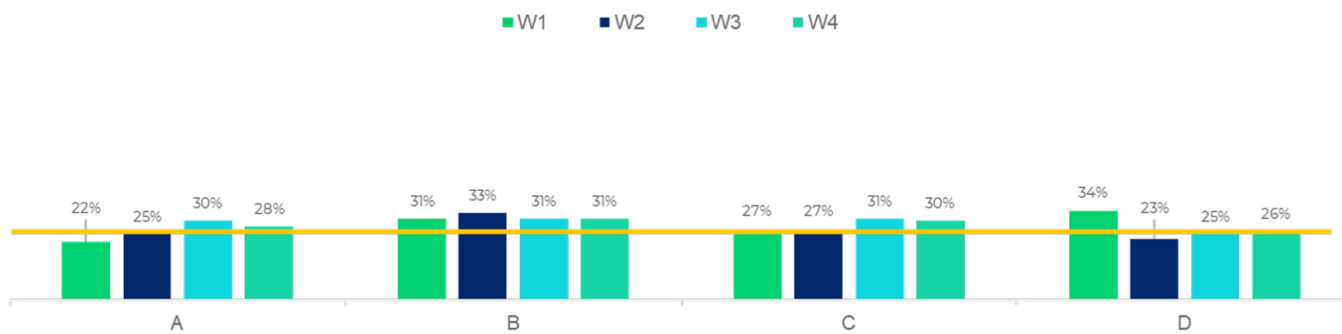


Q. Did you obtain a flu shot this season?

Political Party Membership

According to Gallup, 23% of Americans identify as Republican. There was not an incredible amount of difference over time within each panel when asking about political party membership. The largest difference was in wave 1 between Panel A and Panel D where there was a 12 percentage point difference between the panels.

For the most part, panels varied around the normal rates of political party membership.



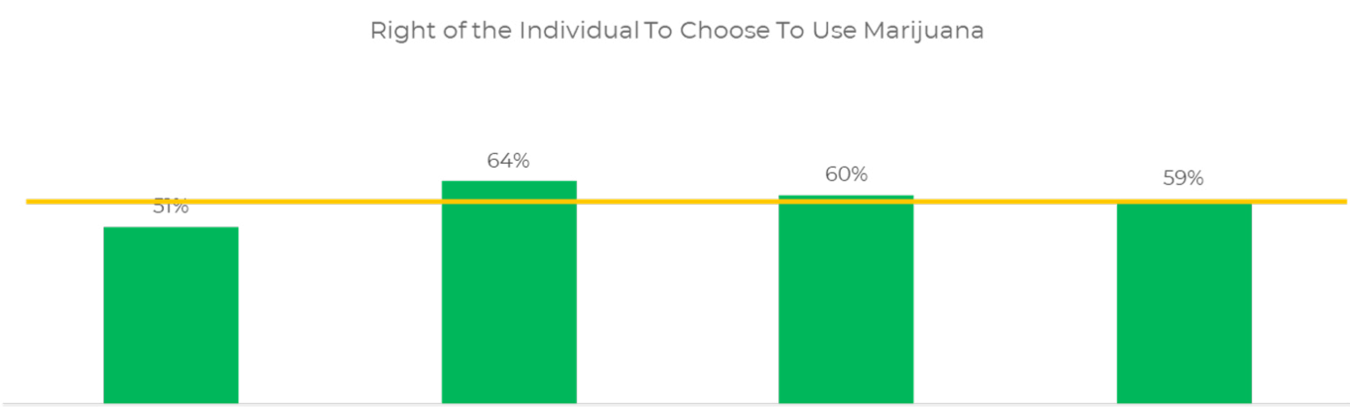
Q. Which of the following best describes your political affiliation? (Republican)

Marijuana Legalization Perceptions

With many forms of marijuana legalization being considered across the country, we felt this was a good topic to examine differences in a sub-segment of the total number of panels we tested.

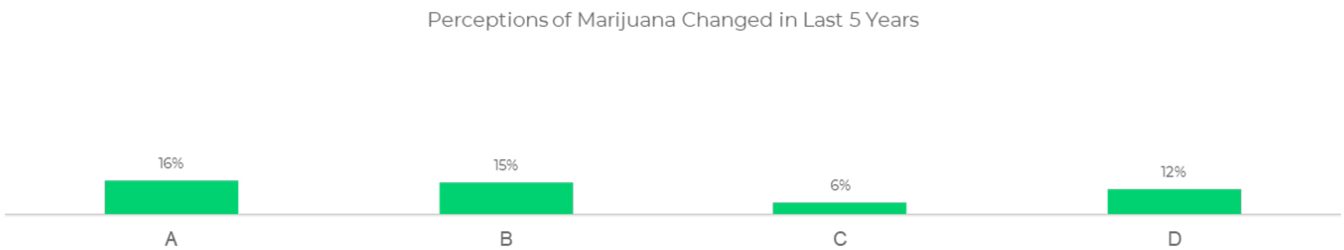
Panel B was significantly more likely to believe that it was the right of the individual to choose whether to use marijuana than Panel A.

According to Pew Research, 61% of people are in favor of the legalization of marijuana. We found that opinions about legalization varied around this norm.

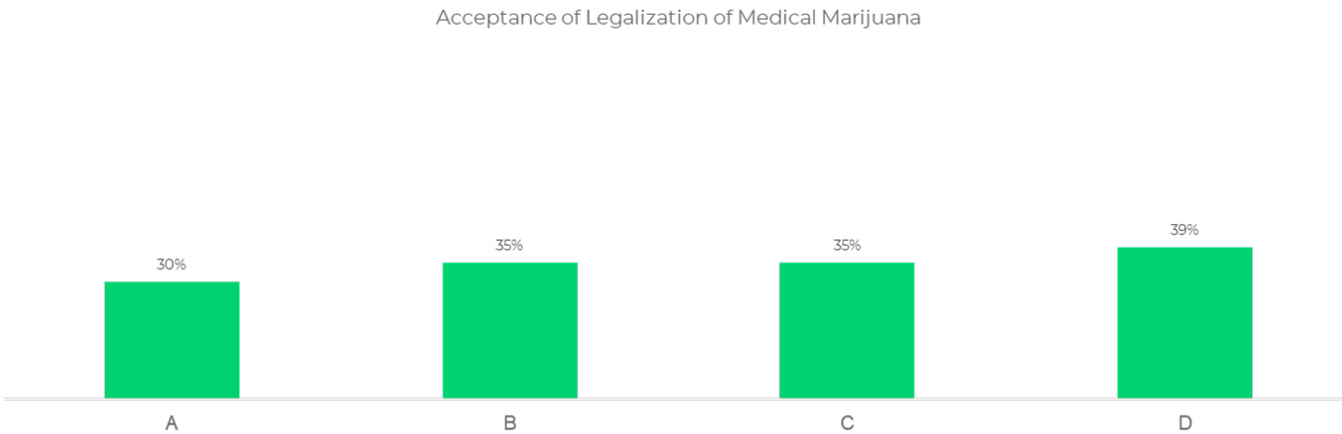


Q. Please indicate how much you agree or disagree with the following statements in regard to marijuana.

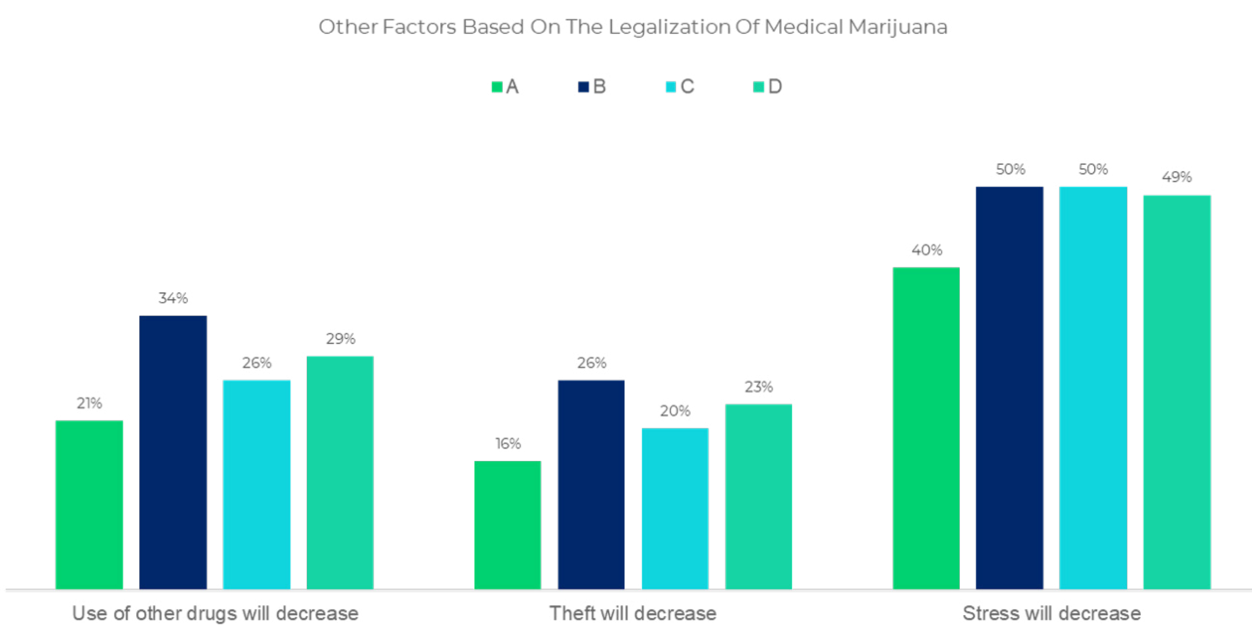
Panel C was significantly less likely to believe that perceptions of marijuana have stayed the same over the past five years than all other panels.



Panel D is significantly more likely than Panel A to believe that people have become more accepting of the legalization of marijuana for medical purposes, but not for recreational purposes.



Panel B and D were both more likely to believe that if marijuana were to be medically legalized, that the use of other drugs, theft, and stress would decrease.



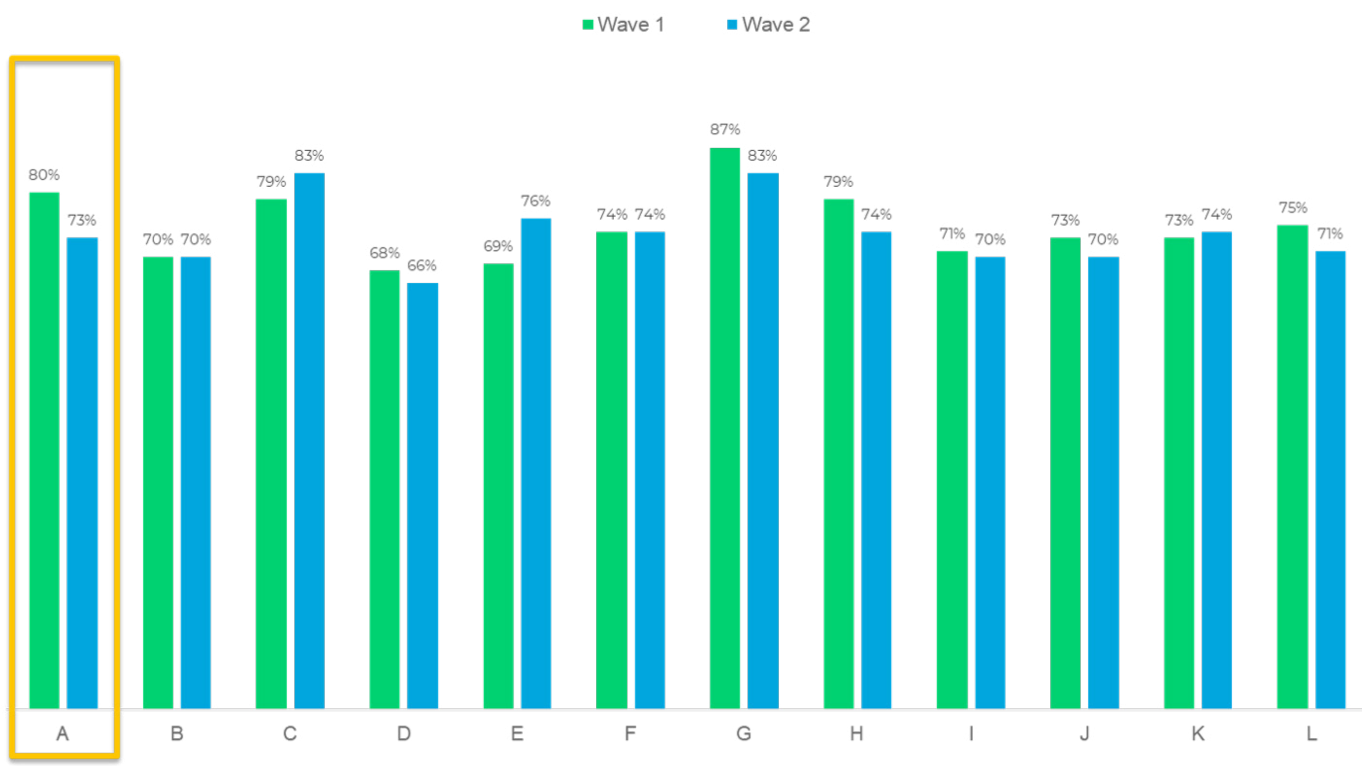
CONSUMER SURVEY EXPERIENCE

Survey experience is a key indicator of respondent data quality, respondent longevity with a panel, and impact on future surveytaking. By studying respondents' views on taking surveys, why they take surveys, what their frustrations are, and what their incentive expectations are, we can better understand how the overall respondent data can be impacted.

Respondent satisfaction with surveys varies as some panels have a more enjoyable experience. Over time and within each other, overall survey experience fluctuates among panels. In addition, the adequacy of incentives differs among panels.

Overall Experience Satisfaction

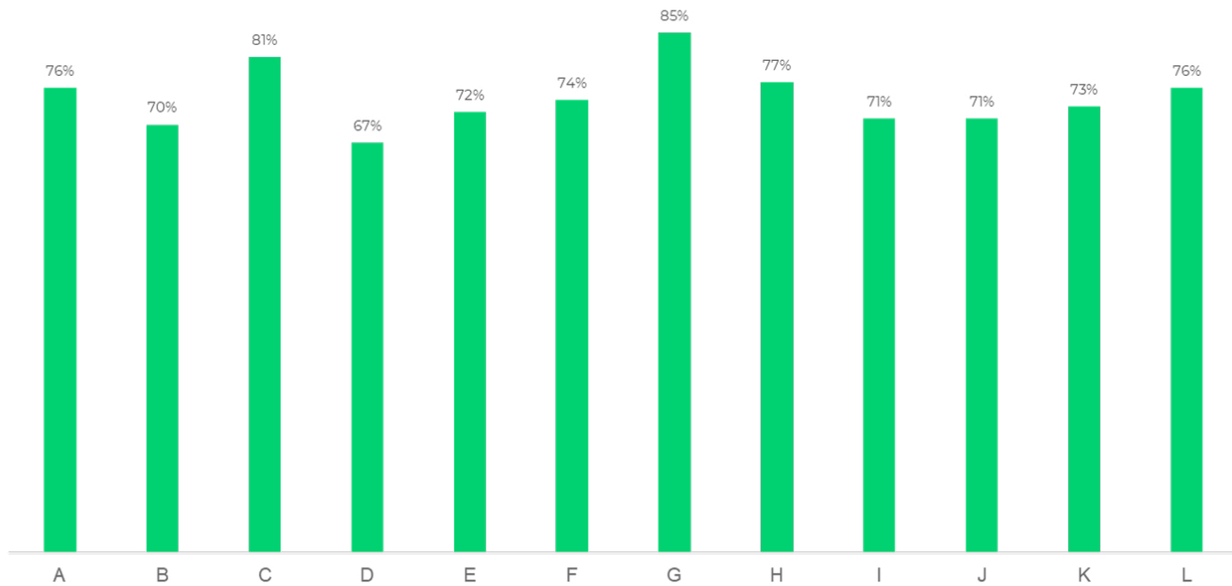
Overall survey experience is fairly consistent over time. The greatest difference between wave 1 and wave 2 was within Panel A, where survey experience dropped from 80% to 73%.



Q. Excluding political polls, what has been your general experience when participating in online surveys?

There was a significant difference between panels when it came to their overall experience taking surveys.

Top 2 Box aggregation of general experience combined from wave 1 and wave 2 ranged from 67% to 85%, which may initially appear to be strong, but may suggest that there is some high turnover and potentially low response rates.

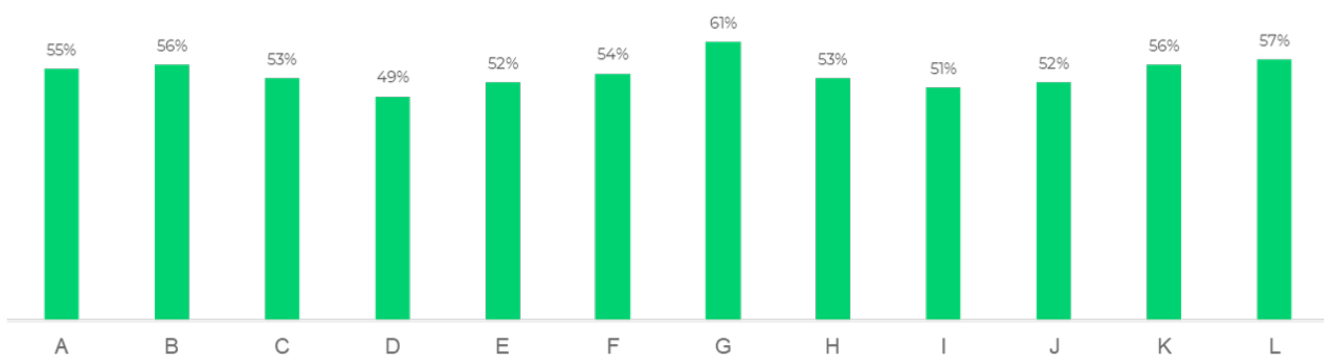


Q. Excluding political polls, what has been your general experience when participating in online surveys?

Incentive Adequacy

We hypothesized that survey experience and incentives may be correlated, as the vendor that had the highest survey experience score also had the highest percentage of respondents believe that their incentives are adequate.

Only 49% of respondents from Panel D felt as if their incentives were adequate, while 61% of respondents from Panel G felt their incentives were adequate when combining Top 2 Box results from wave 1 and wave 2.



Q. Are incentives for surveys adequate?

CONSUMER DEVICE USAGE

Panels have different methods of reaching their respondents through surveys. Respondents can also utilize different devices to take surveys. Traditionally, respondents participate using a desktop or laptop computer, but with the rise in mobile devices like tablets and smartphones, many respondents are choosing to respond using a mobile device.

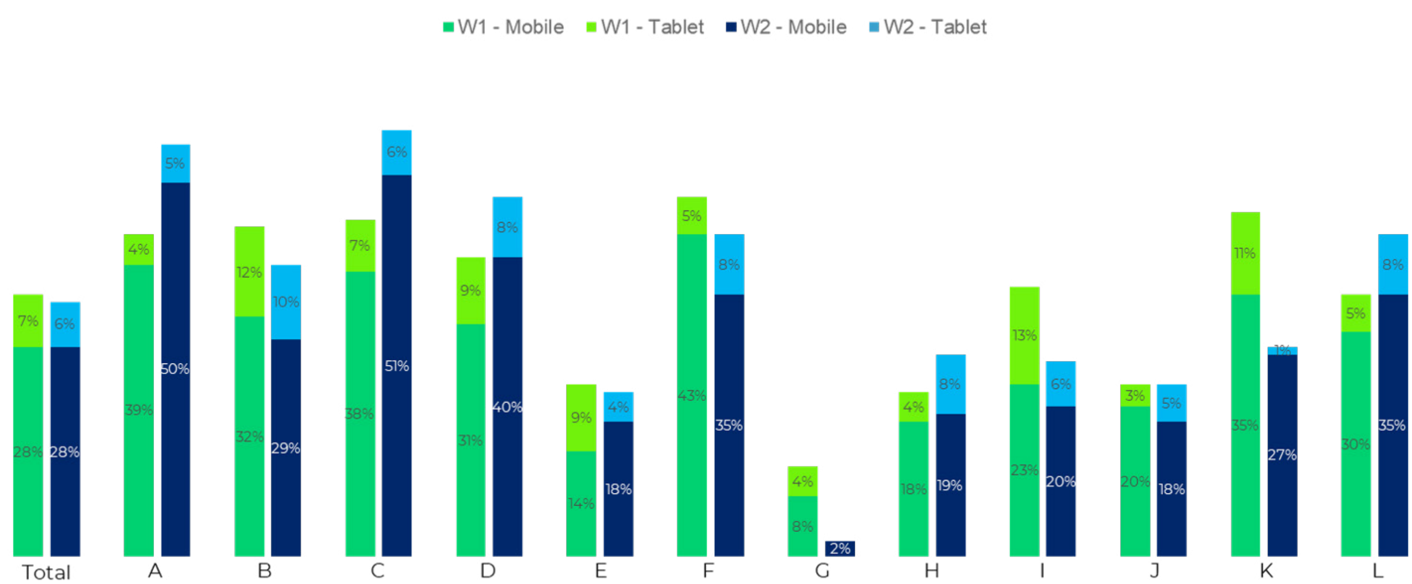
The choice of device for responding to a survey can contribute to differences in data when comparing panel sources to one another, and over time.

We monitor device usage via digital fingerprinting to better understand device distribution by panel.

Device Usage By Panel Varies

Device usage varies by panel. This can be seen below, as 39% of Panel A took the survey on a mobile device in wave 1, while only 8% of Panel G took the survey on a mobile device. In addition, Panel A, with 39% on mobile in wave 1, jumped to 50% in wave 2.

Knowing that device usage can affect responses, particularly purchase intent responses, it is important to be aware of what device respondents are using to take surveys.



Q. Mobile device category

B2B

KEY FINDINGS

Some panels are built with a B2B focus while some panels are consumer-built and simply profile respondents for B2B purposes. It can be difficult to choose the right B2B panel for a study because of how different B2B panels are. The ideal B2B panel for some studies may not be the same B2B panel for other types of studies.

We have recently expanded our research to include B2B targeting. We use this research to better understand each partner, their differences, data quality, consistency, targeting ability, etc.

The focus of the B2B research was on the Information Technology Decision-Makers (ITDM) profession.

The research was exploratory, and we hypothesized that the panels would not vary. However, similar to consumer, B2B panels differ on many different aspects.

Similar to the differences we identified for consumer research, B2B panels differ primarily because of how they are recruited and how they are managed.

We also explored survey experience for B2B respondents and found there was variance among the panels and over time. We did discover that overall survey experience and willingness to complete an activity appear to be related, while overall survey experience and incentive adequacy do not.

B2B PANELS VARY

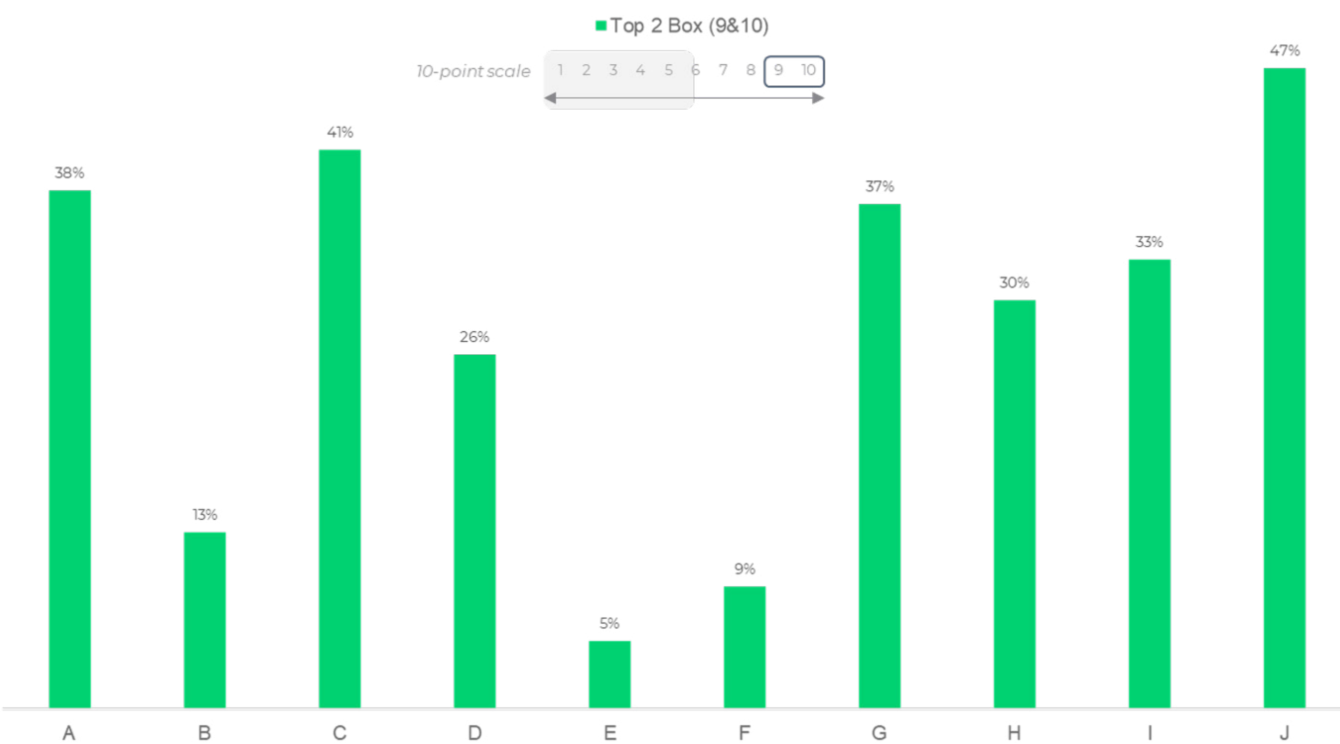
There are many factors in which B2B panels vary. These panels can vary between each other within a single wave, or over time within one panel. Some questions in which we saw variance were:

- Concept Rating
- Survey Topics
- Company Size
- Number of Surveys Taken
- Device Usage
- Demographics (I.E. Age, Gender)
- Completion Time
- Role Level
- Marijuana Perceptions

Concept Rating

All respondents evaluated an ITDM concept on a 10-point purchase intent scale. The concept tested was a new product for wirelessly charging workplace devices.

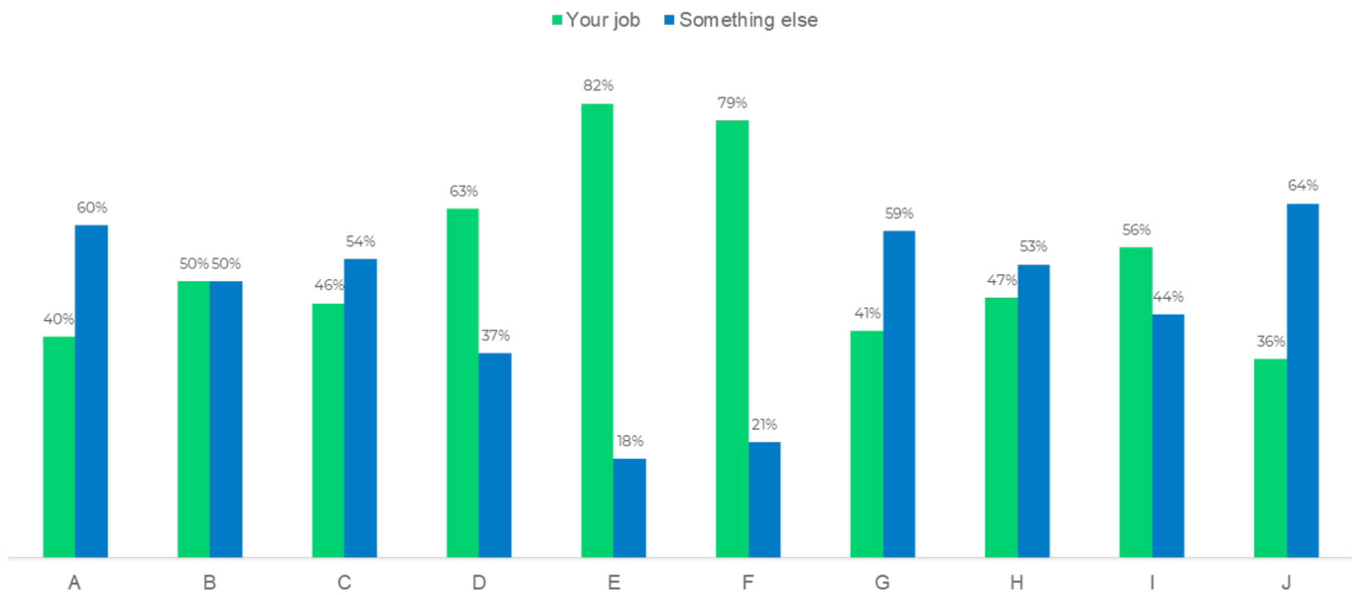
Similar to consumer, we showed B2B respondents a concept and then asked how likely they would be to purchase that product. When comparing Top 2 Box scores, purchase intent ranged from 5% for Panel E all the way up to 47% for Panel J.



Q. Using the scale below, how likely are you to purchase the product shown above?

Survey Topics

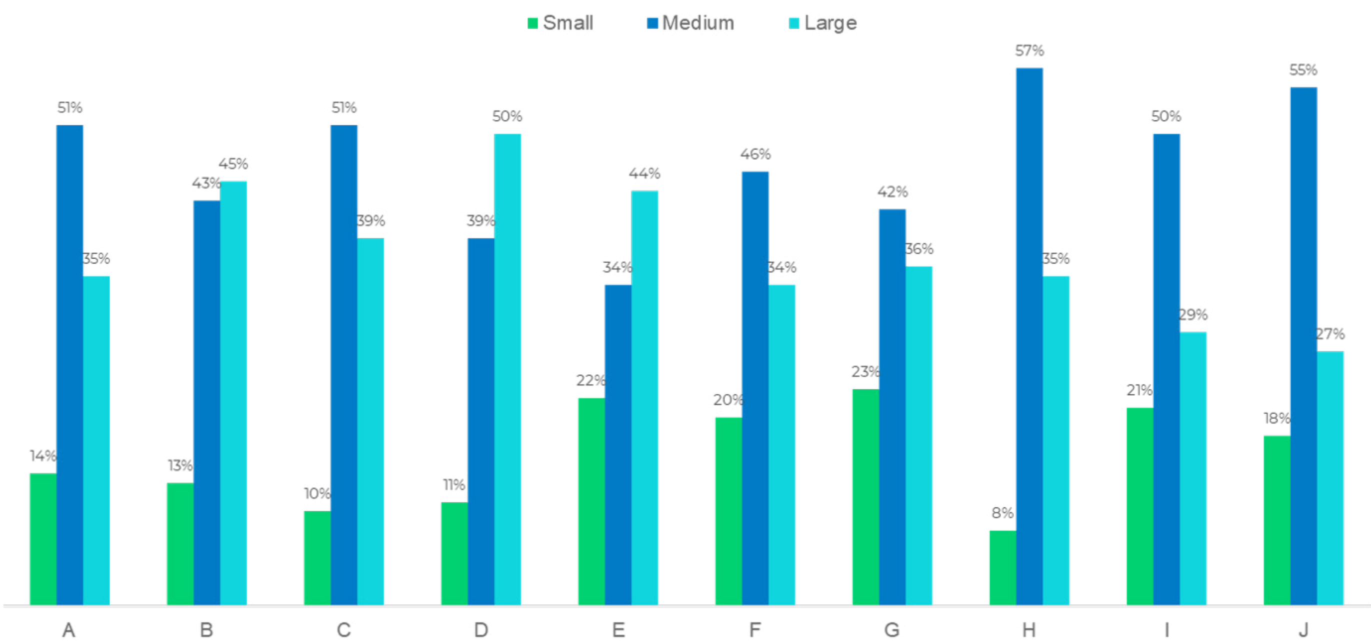
When asked about the topic of the surveys they take, 82% of Panel E respondents said that the surveys are mostly about their job, while only 36% of Panel J said the same. Vice versa, 64% of Panel J said that they primarily take surveys about something else other than their job, compared to 18% of Panel E.



Q. Are your surveys more about...?

Company Size

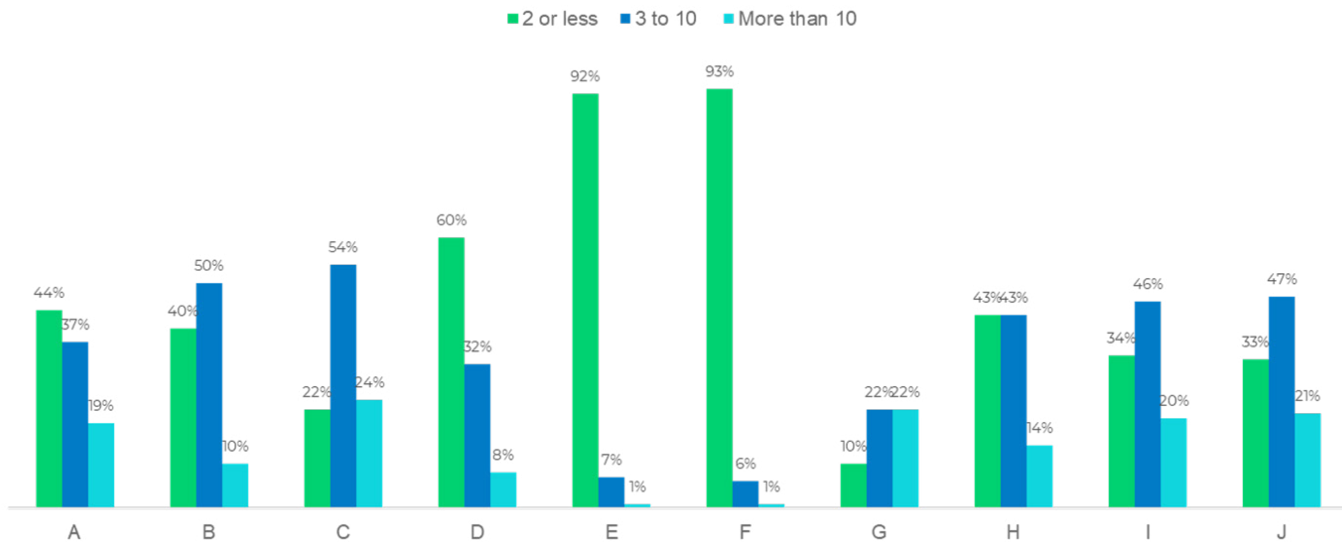
When respondents were asked about the size of company for which they worked, there was a wide difference in responses. 8% of Panel H respondents said that they work for a small company, while 23% of Panel G said they work for a small company.



Q. Which of the following best describes the size of the company for which you work?

Survey Frequency

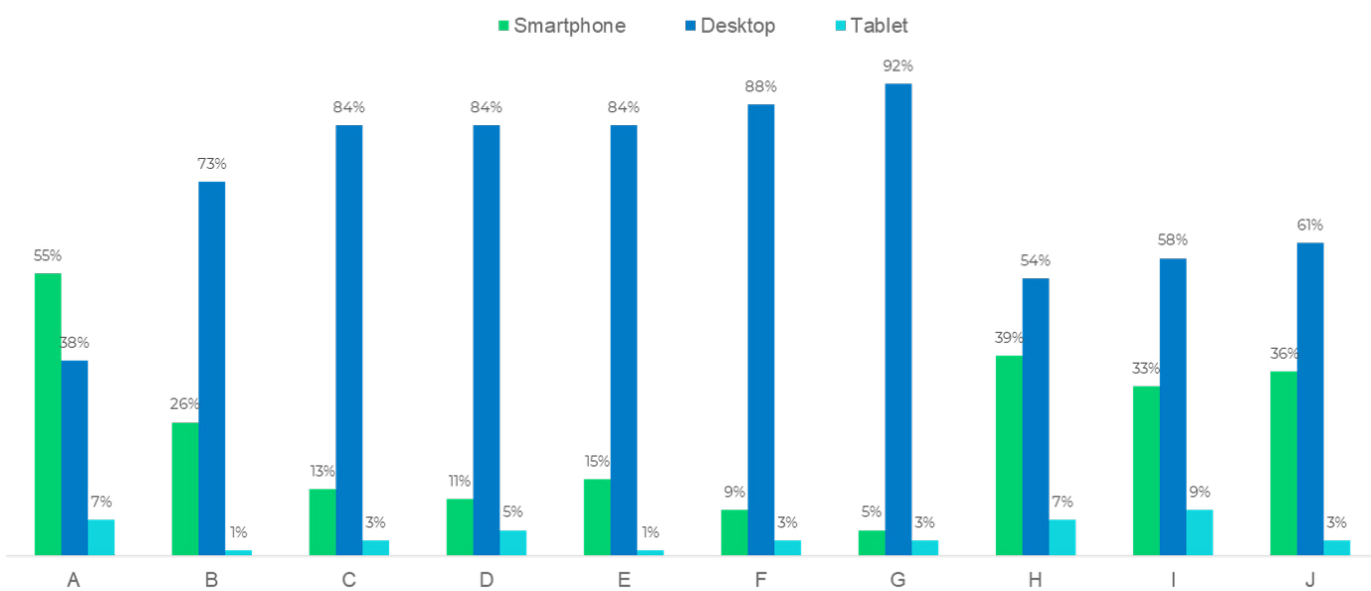
How frequently a respondent takes a survey also differs by panel, where 93% of Panel F respondents said that they take 2 or less surveys per week versus only 22% of Panel C. Only 1% of Panel F said that they take more than 10 surveys per week versus 24% of Panel C. The large differences could mean less activities for some panels, or possibly poor targeting ability by other panels.



Q. How many online surveys do you take each week?

Device Usage

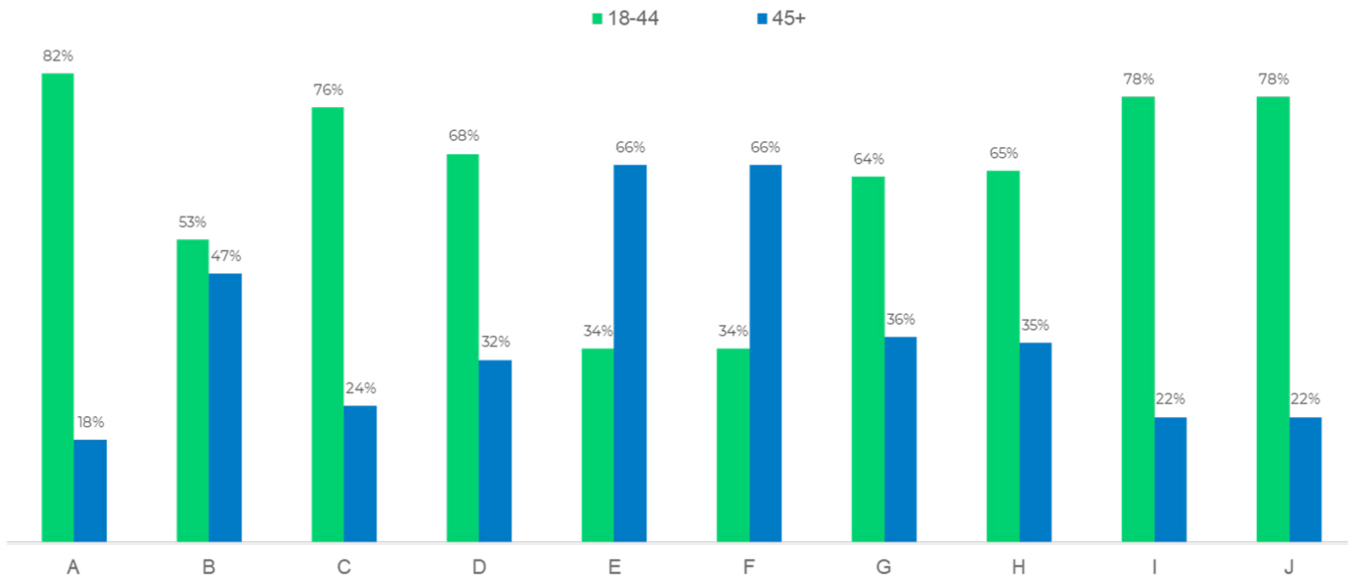
Desktop usage ranged from 38% up to 92%, and smartphone usage ranged from 5% to 55%. This variance should be kept in mind when testing concepts, as it could likely be a contributor to differences in panels.



Device tracked using our proprietary digital fingerprint technology.

Age

Age distribution varied by panel with Panel A having 82% of 18-44 year olds and Panel E only having 34% of this age group. Conversely, Panel E had 66% of respondents that were 45 years or older and Panel A only had 18%. This is important as attitudes and opinions vary in age groups, and you want a good mix to remove age bias from your results.

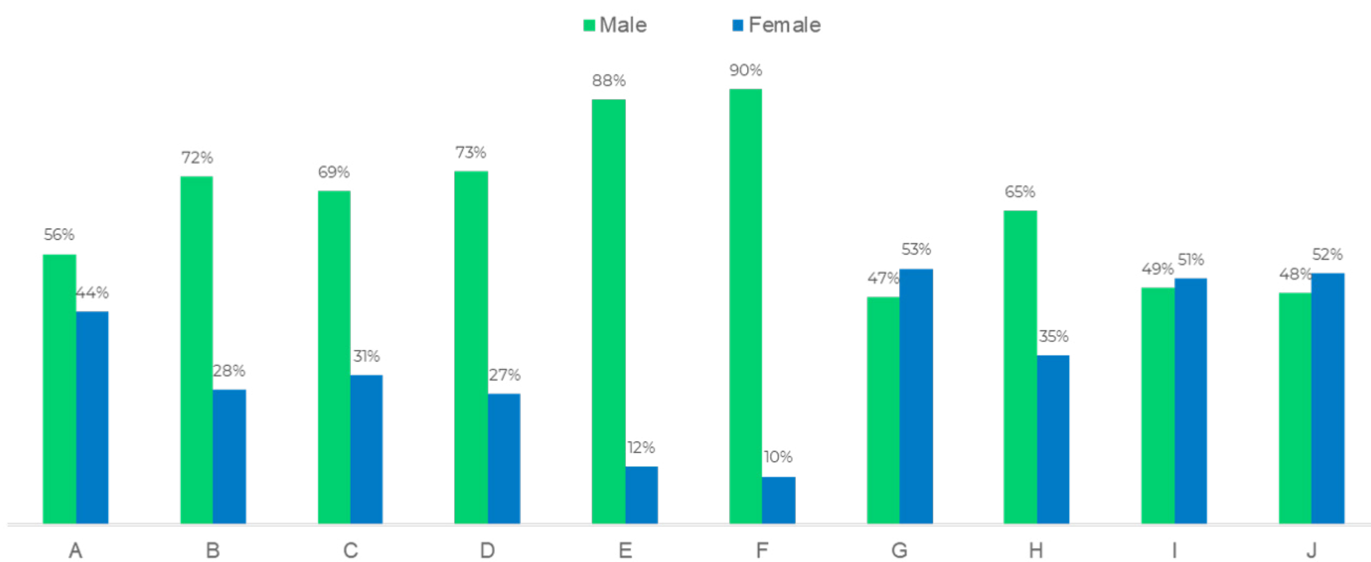


Q. What is your age?

Gender

While some panels had an even split between males and females like Panel I and J, others had huge differences. Panel F had 90% males and 10% females.

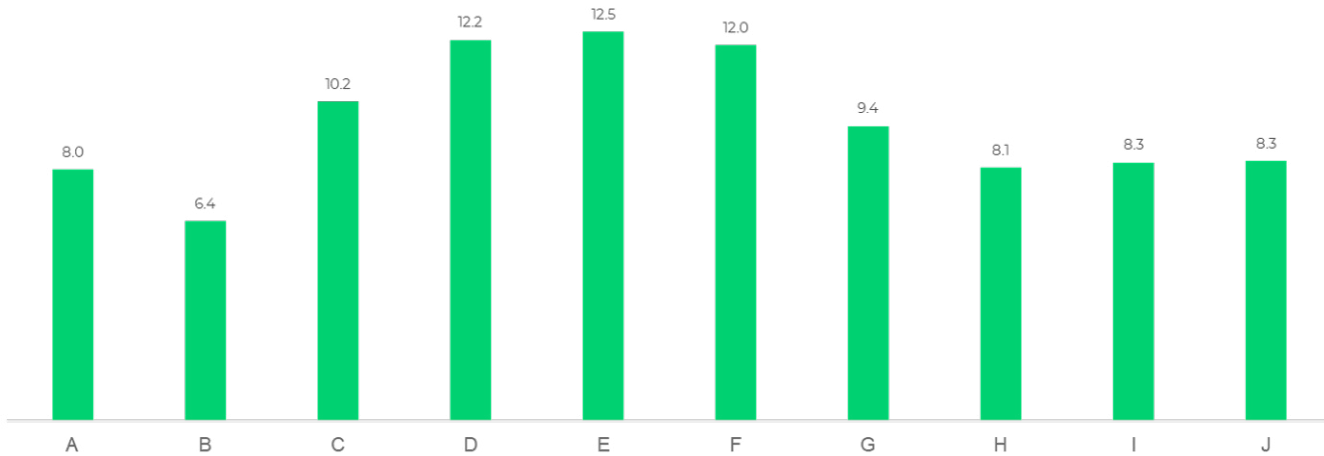
By panel, the percentage of males ranged from 47% to 90%, and the percentage of females ranged from 10% to 53%.



Q. Please select your gender.

Completion Time

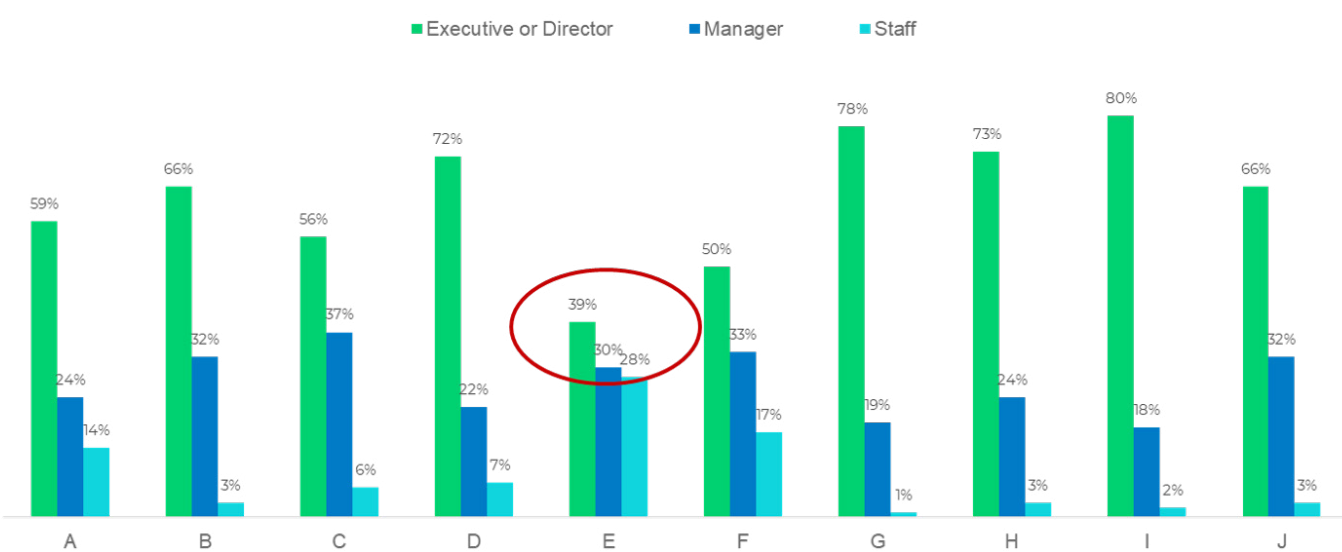
There is a large variance between B2B partners in regard to median completion time. The shortest completion time was 6.4 minutes, while the longest completion time was 12.5 minutes. With short completion times, this can be an indicator of "speeders" in the sample set, leading to poor quality.



Q. Median completion time

Role Level

For the B2B study, we targeted IT Decision Makers, so it was interesting to see so much variance between panels when asked about role level. 80% of Panel I respondents said that they are an executive or director, while only 39% of Panel E said the same.



Q. Which of the following best describes your role level?

B2B SURVEY EXPERIENCE

We typically ask respondents their views on taking surveys, why they take surveys, what their frustrations are, what their incentives are, and their willingness to do certain tasks in order to verify themselves.

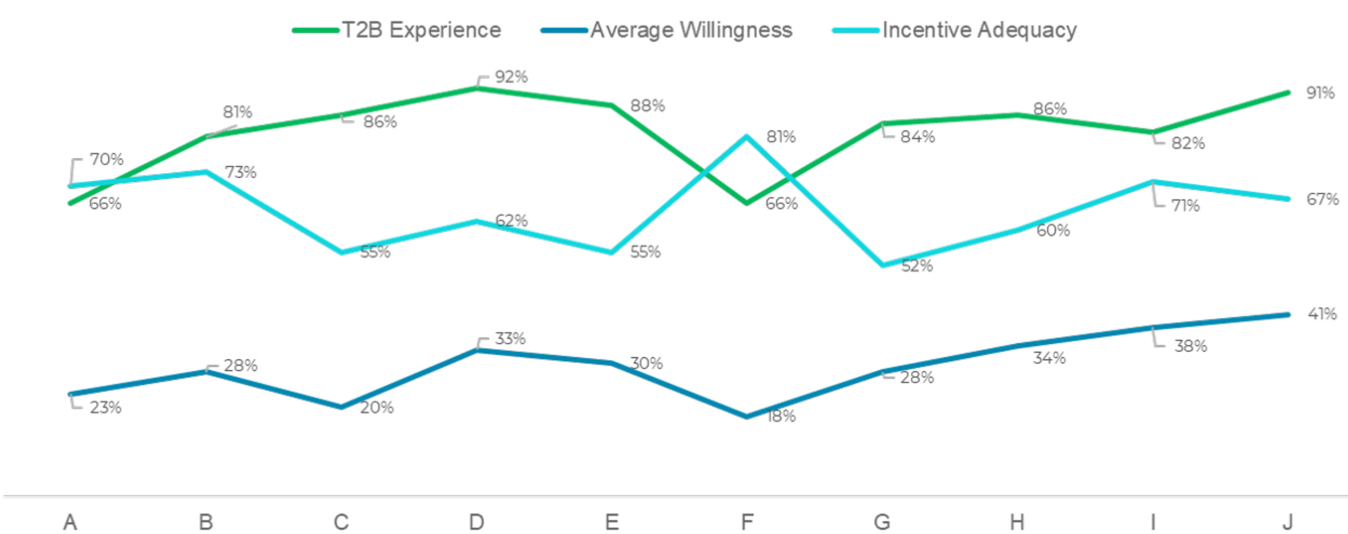
We asked their willingness to do activities to verify themselves as we had a hypothesis that better managed panel respondents would be more willing to undertake certain tasks, such as confirm their work email address, link their LinkedIn account, or other items than poorly managed panels.

Among B2B panels, survey experience, incentive adequacy, and general willingness vary. These panels vary over time and also among each other within one specific time period.

Overall survey experience and general willingness appears to be related. However, incentive adequacy and overall survey experience do not appear to be related.

The lowest survey experience ranking was 66%, while the highest was 92%. That is a very large difference and could affect the quality of data. Similarly, adequate incentives vary by panels. Only 52% of Panel G felt as though their incentives are adequate, while 81% of Panel F felt as though incentives are adequate.

Experience and incentives do not appear to be correlated. Panel F, which had a survey experience rating of 66%, had the highest percentage of respondents say that their incentives are adequate (81%). Additionally, average willingness seems to be correlated with general experience.



Q. Excluding political polls, what has been your general experience when participating in online surveys?

SPECIALTY RESEARCH

INTRODUCTION

In addition to doing research focused on better understanding the sample landscape, we also do specialty research every year that looks at additional topics that are of special interest or are "*hot*" current event topics. This year we covered a wide range of topics from respondent feedback on their survey experience to research on marijuana legalization perceptions.

Other topics we covered include:

Survey Experience Feedback

Consumer Versus B2B

Device Usage

Using Demographhcs In B2B Studies

Emotional Response Testing

Marijuana Legalization

Teen Smartphone Addiction

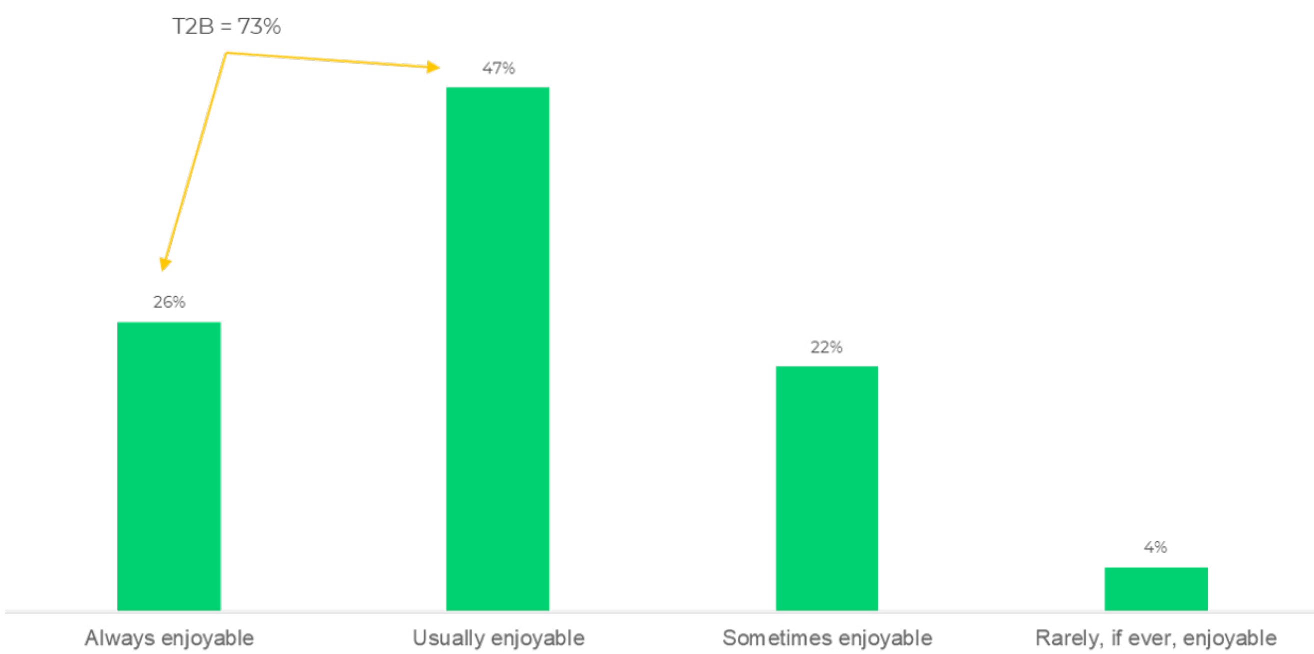
SURVEY EXPERIENCE FEEDBACK

In both our consumer and B2B research, we asked respondents about their opinions on their overall survey experience. They were asked to answer questions regarding their reasons for taking surveys, their pain points when taking surveys, as well as what they are willing to do while taking surveys.

Consumer Survey Experience

Survey experience is incredibly important, as it leads to engaged survey takers and leads to quality data, which can lead to better business decisions.

Surprisingly, nearly three quarters of respondents claimed that their general experience when participating in online surveys is always or usually enjoyable. However, keep in mind that this data is from respondents that actually responded to this survey. While this data is positive, we know there are diminishing response rates in the industry.



Q. Excluding political polls, what has been your general experience when participating in online surveys?

Why Consumers Take Surveys

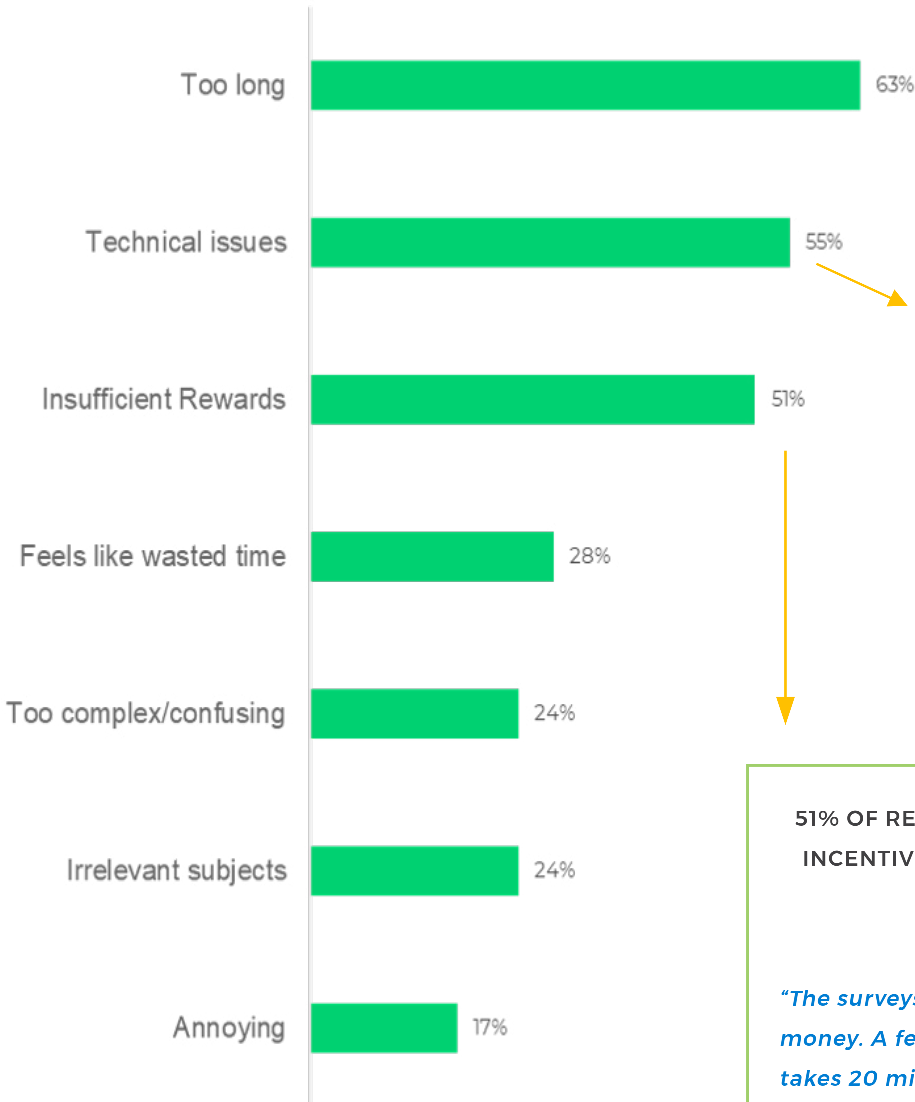
When respondents were asked *why* they take surveys, the number one reason was money whether in the form of cash or points. Less than half admit to taking surveys because they actually enjoy them.

Q. Why do you participate in online surveys?

Negative Consumer Survey Experiences

We know, as an industry, that consumer survey experience is declining, leading to lower response rates. We explored what could be causing the negative survey experiences.

The primary negative experience we found was that the surveys respondents are taking are too long. Many respondents were frustrated with incentives and being disqualified.



"I would take more surveys if they didn't take so long to finish. Usually they take about 20 minutes to finish, which is very long."

A MAJORITY OF RESPONDENTS ARE GREATLY OR SLIGHTLY BOTHERED BY BEING DISQUALIFIED FROM SURVEYS.

"I don't qualify for a lot of surveys, but I keep trying. A lot of them have bugs or get stuck at the end. It's frustrating to complete an entire survey and not get my points."

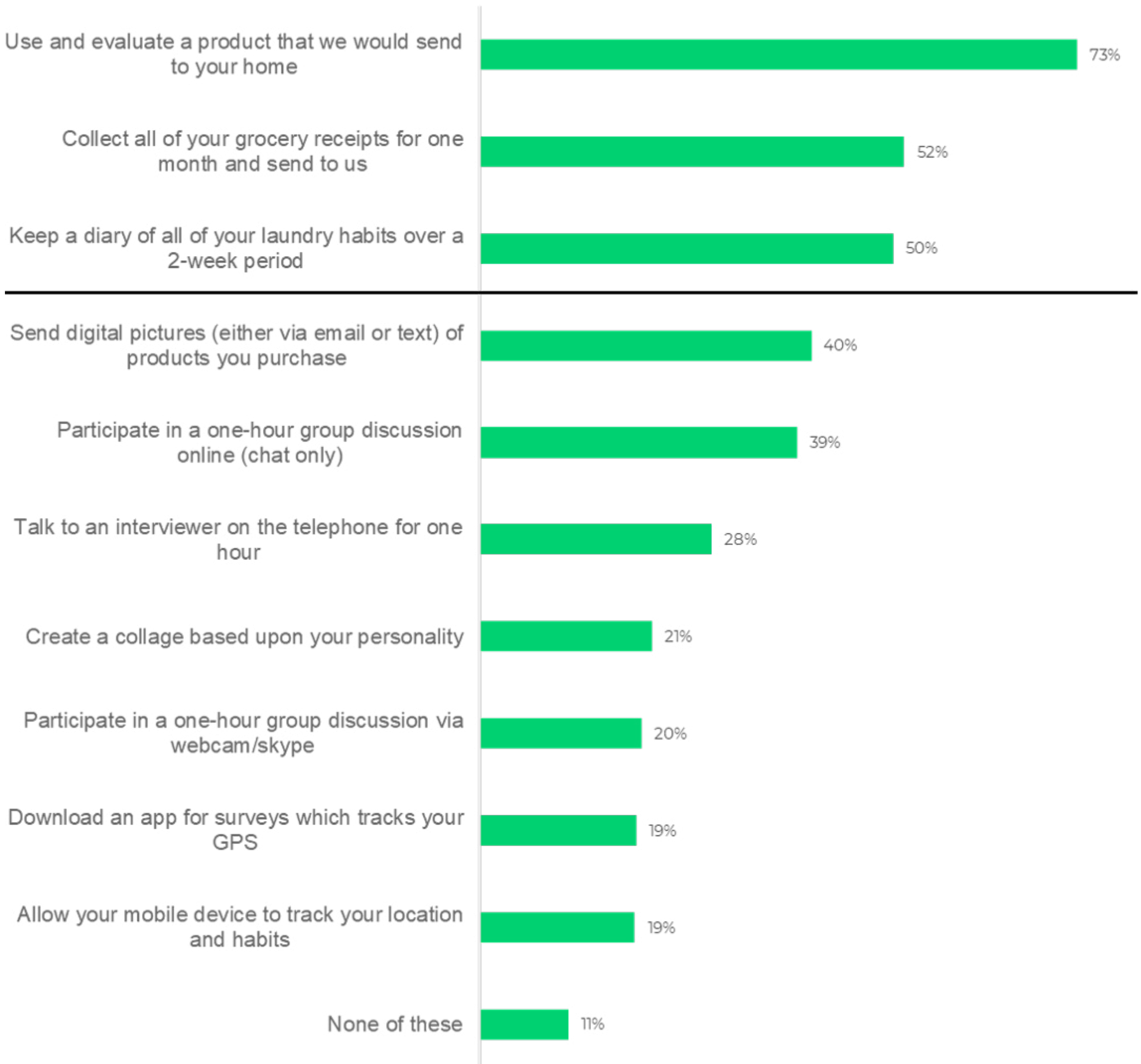
51% OF RESPONDENTS BELIEVE THAT INCENTIVES FOR SURVEYS ARE NOT ADEQUATE

"The surveys need to be worth more money. A few pennies for a survey that takes 20 minutes is not worth my time."

Q. Which of the following negative experiences have you had when taking a survey?
Are incentives for surveys adequate?
What would it take for you to take more surveys?
How does it make you feel when that [being disqualified] happens?

Consumer Willingness To Participate

Respondents are willing to participate in activities that do not interfere with day-to-day responsibilities and do not invade personal boundaries. Perhaps due to trust issues or privacy concerns, most respondents were unwilling to do most of these common market research tasks.



Q. Which of the following would you be willing to do if you were adequately compensated?

B2B Survey Experience

Overall survey experience for B2B respondents is generally high, but respondents still have a plethora of recommendations for how surveys can be improved.

82% of respondents said that their general experience taking surveys is always or usually enjoyable.

When asked, "What would it take for you to take more surveys?" commonly seen points centered around incentives, disqualifications, and survey design. The following are some answers from our respondents:

"More point value in addition to shorter length of surveys. Sometimes surveys take 30 minutes and either you get disqualified or not the promise points or not enough points for the survey. I enjoy learning about products and do what I can to help."

"If I could be assured that my information was protected and the incentives were increased."

"For them to be less repetitive, and less intrusive. Many of the surveys I take seem to ask the same thing multiple times, multiple ways."

We then told respondents to "*Go on a lengthy rant, if you want, and anything goes! Researchers and those that design surveys will read this so here's your chance to really tell them how you feel.*" Our respondents took advantage of the opportunity to tell us what researchers are not doing well. Some responses included:

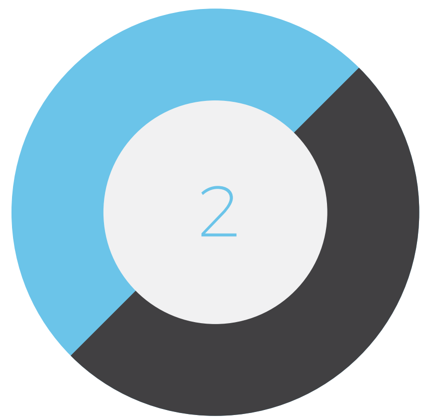
> *"Give us more incentives first of all. I've done so many surveys that are really really long and then it's like hey here is 10 points. 10 points!!!!! Also, the worse thing is if you spend over 20 mins on a survey and it disqualifies u at the end!! What is that???? How do you not qualify after u basically completed the survey. It's crazy. Mic drop"*

> *"I love giving feedback but sometimes your surveys don't work properly due to technical issues or you get booted out with no compensation after answering questions for half an hour. Disqualify people at the start so they don't waste time and make sure compensation is adequate. Make your surveys fun or I get bored and won't bother continuing. Don't be so repetitive. That is all."*

After looking through verbatims and actually having a phone call with one of the respondents, we uncovered three takeaways:

Incentives are not even close to adequate for these highly paid ITDMs.

It is incredibly frustrating to finish a survey, not qualify, and not receive an incentive.

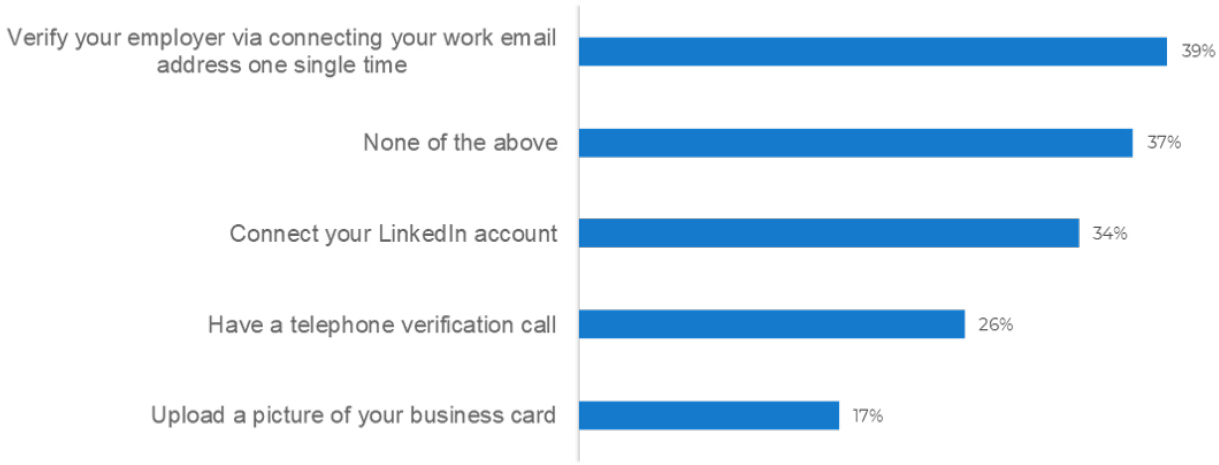


Experienced survey-takers have found ways to get into surveys that they don't qualify for just to receive the incentive, and they absolutely take advantage of that knowledge.

B2B Willingness To Participate

Respondents were asked what they would be willing to do when taking a survey and a large chunk (37%) weren't willing to do anything. Only 39% of respondents were willing to verify their employer via connecting their work email address one single time.

This lack of willingness was likely due to a lack of trust and a concern with privacy.



Q. Which of the following would you be willing to do?

Willingness To Participate For $5

We then asked anyone who responded "*None of the above*" if they would be willing to do these activities for $5. A staggering majority of 59% remained loyal to their first answer and still responded "*None of the above*."

Q. Would you be willing to (xx) for $5?

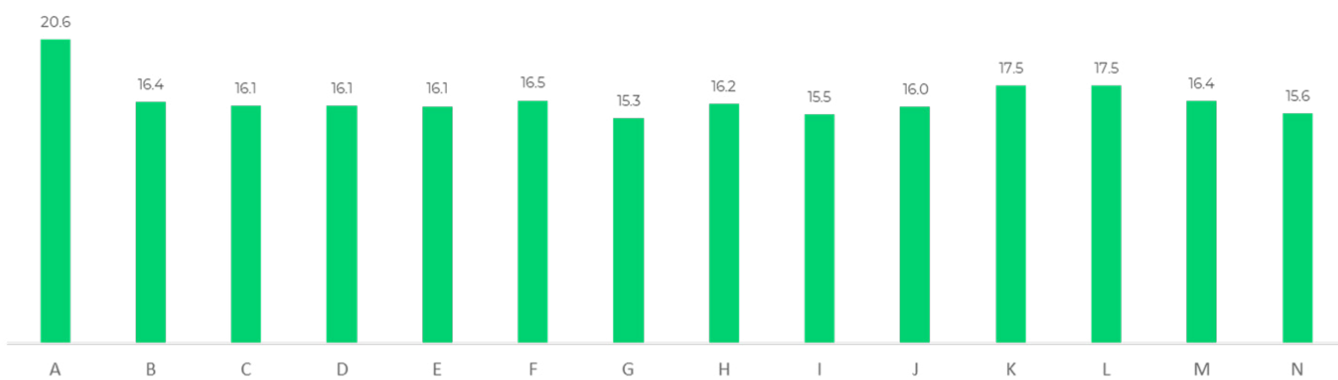
CONSUMER VERSUS B2B

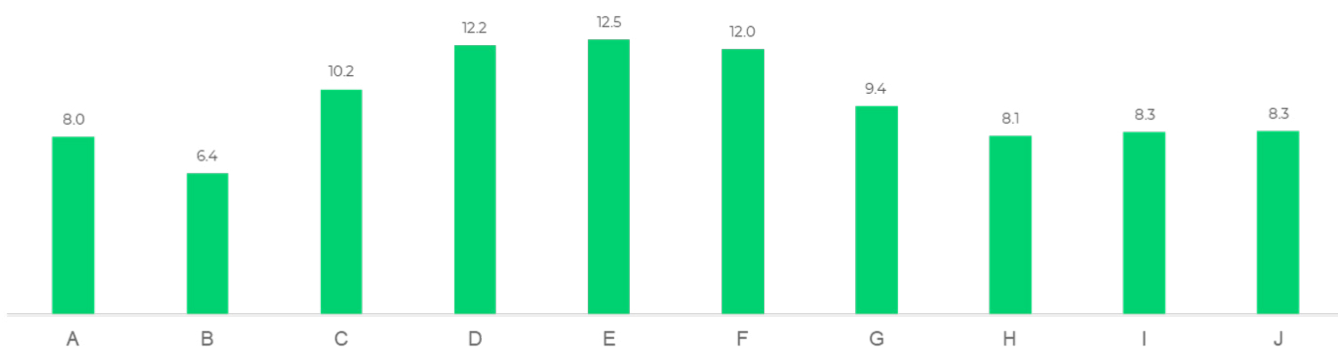
Consumer and B2B sample have similarities and differences. Overall, survey experience for both is fairly good. We discussed the consumer survey experience, where we found that nearly three quarters (73%) of respondents think that their general experience taking surveys is always or usually enjoyable. When asking the same question to ITDMs, the results were similar. In total, 84% of respondents said that their general experience taking surveys is always or usually enjoyable. Another similarity is that neither group of respondents is very willing to do much when taking surveys. This is something that is likely due to a lack of trust in panels and a concern with privacy.

Consumer and B2B panels differ in how they vary by completion time. As mentioned in the B2B section, we saw quite a large variance between panels in how long it took respondents to take the survey. However, the same does not hold true for our consumer respondents. The shortest completion time was 15.3 minutes and the longest completion time was 20.6 minutes (a range of only 5.3 minutes).

Completion Time

Consumer median completion time varies much less by panel than it does for B2B.





Median Completion Time (Minutes)

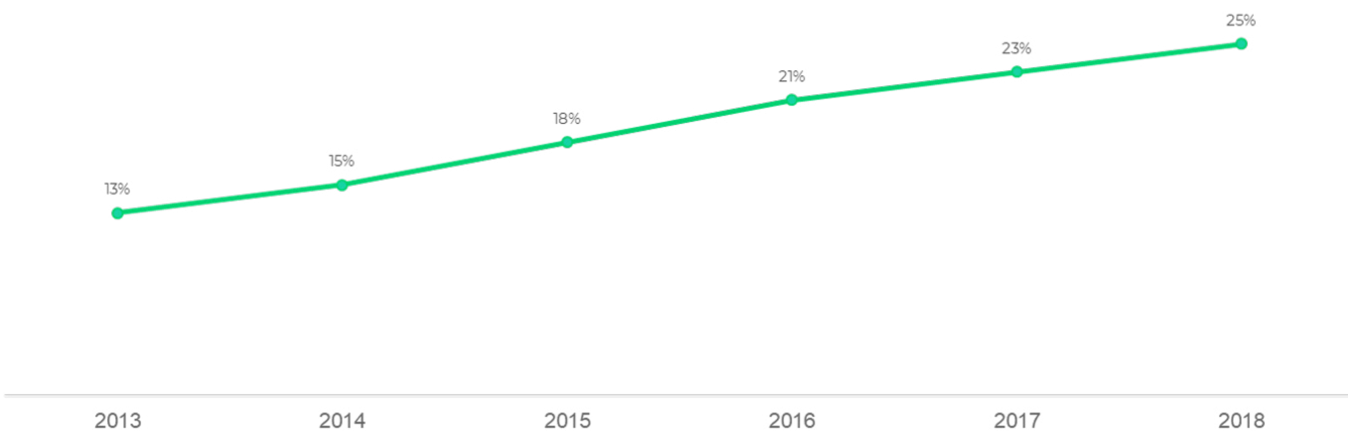
DEVICE USAGE

We use digital fingerprinting technology on all of our surveys to track the device respondents use to take surveys. Through this information, we are able to track how device usage has changed over the years as well as understand how age impacts device usage. Additionally, we also identified how device usage affects responses on questions, specifically concept testing questions.

Mobile Trends

Since 2013, usage of mobile surveys has increased 12 percentage points from 13% in 2013 to 25% in 2018.

While this growth is a large jump, 25% is lagging considering smartphone penetration is 80% or more in most countries.

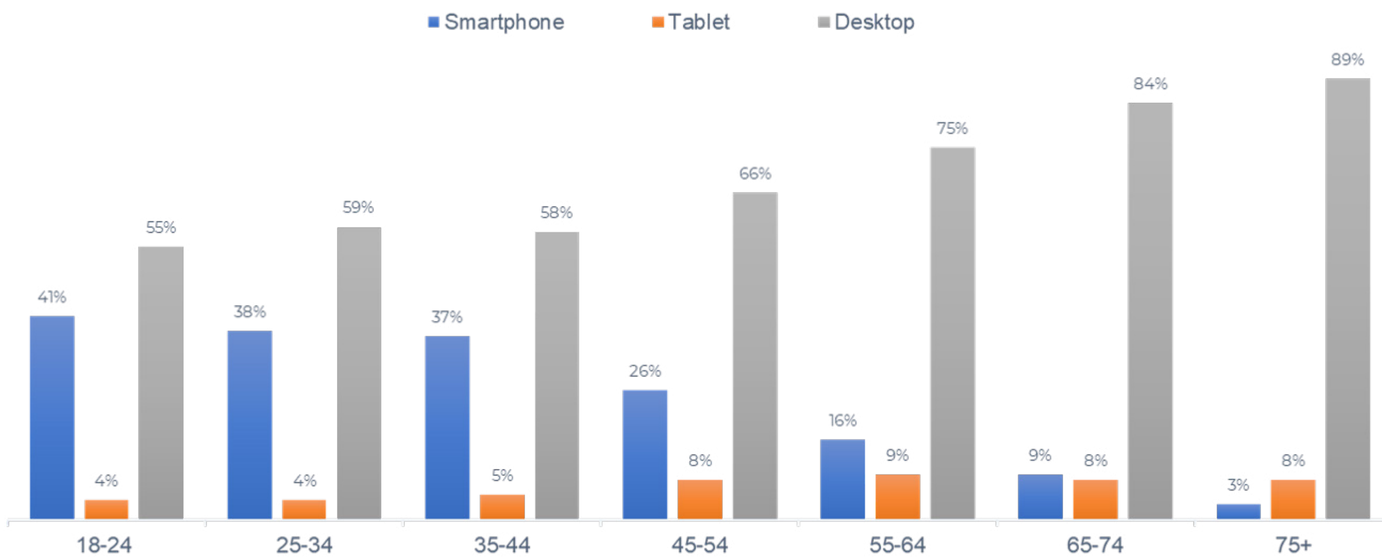


Data From Our Internal Sample Management Platform

By Age

In general, respondents prefer to stick to the traditional desktop to take surveys, even Millennials. This could be artificially inflated by factors, such as long surveys, poorly designed questions, mobile device blocks, question format, or other factors.

Still, 41% of respondents between the ages of 18 and 24 took the survey on a smartphone, which is significantly higher than those age 35 and up.

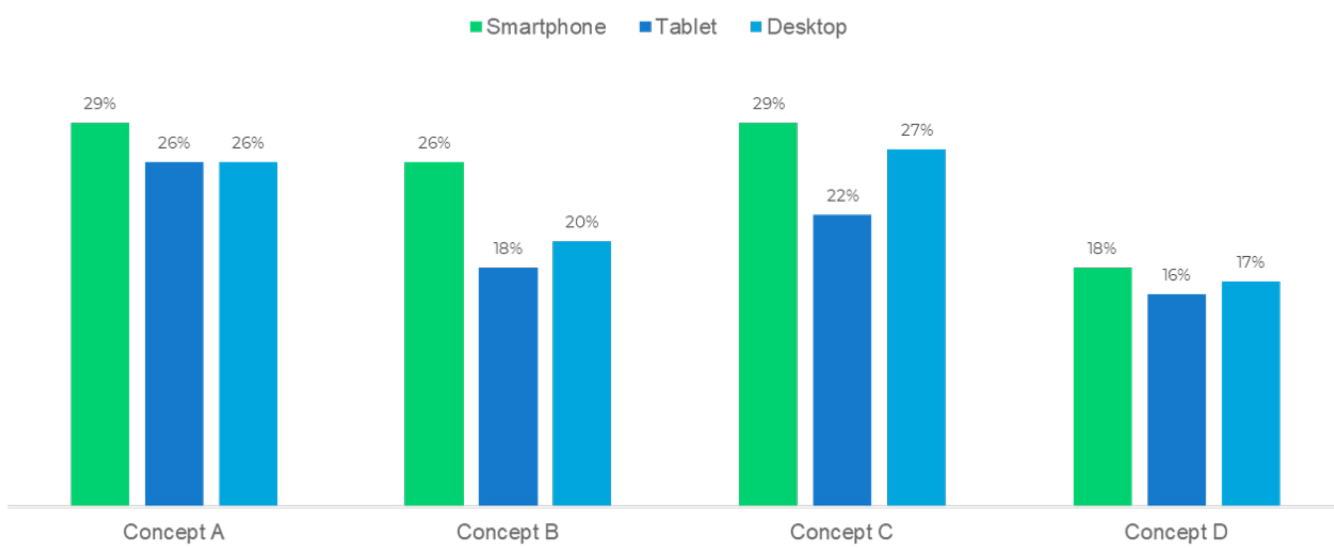


Q. Mobile Device Category

Device Usage Effect On Purchase Intent

The device on which a respondent takes a survey can affect data. For example, we asked respondents to evaluate a variety of concepts and noticed that purchase intent varied based on what device that respondent was using. The underlying factor is likely the difference in survey experience on each device.

Concept A purchase intent on a smartphone was 29%, while purchase intent on a desktop was measurably lower at 26%. Similar findings held true for both Concept B and C. The only concept that did not have significant differences in purchase intent was Concept D.



Q. Using the scale below, how likely are you to purchase the product shown above?

USING DEMOGRAPHICS IN B2B STUDIES

In B2B studies, it is not typical that demographic questions are asked. However, in order to verify identity of key populations like ITDMs, demographics can be helpful. We tested these questions, as well as more traditional consumer questions with the B2B audience.

We found that incorporating demographic questions into B2B surveys can help validate the quality of the respondent. Some recommended questions to ask are:

Age

Gender

Income

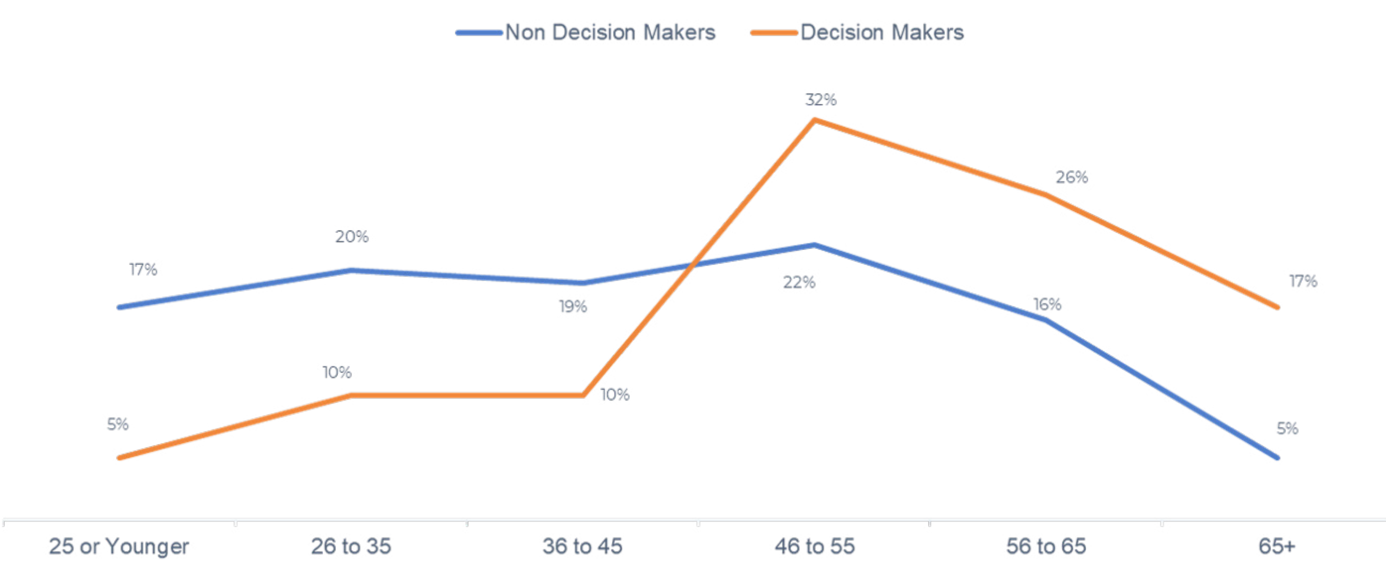
Role

By Age

Asking demographic questions can be a good way to validate the quality of the data you are receiving. It can also be a back-door way to incorporate a trap question to determine fraudulent respondents.

For example, if a respondent indicates that they are 23 years old and they make $20,000 annually, but also claim to be an executive IT decision maker, there is a reason to believe that respondent is not valid.

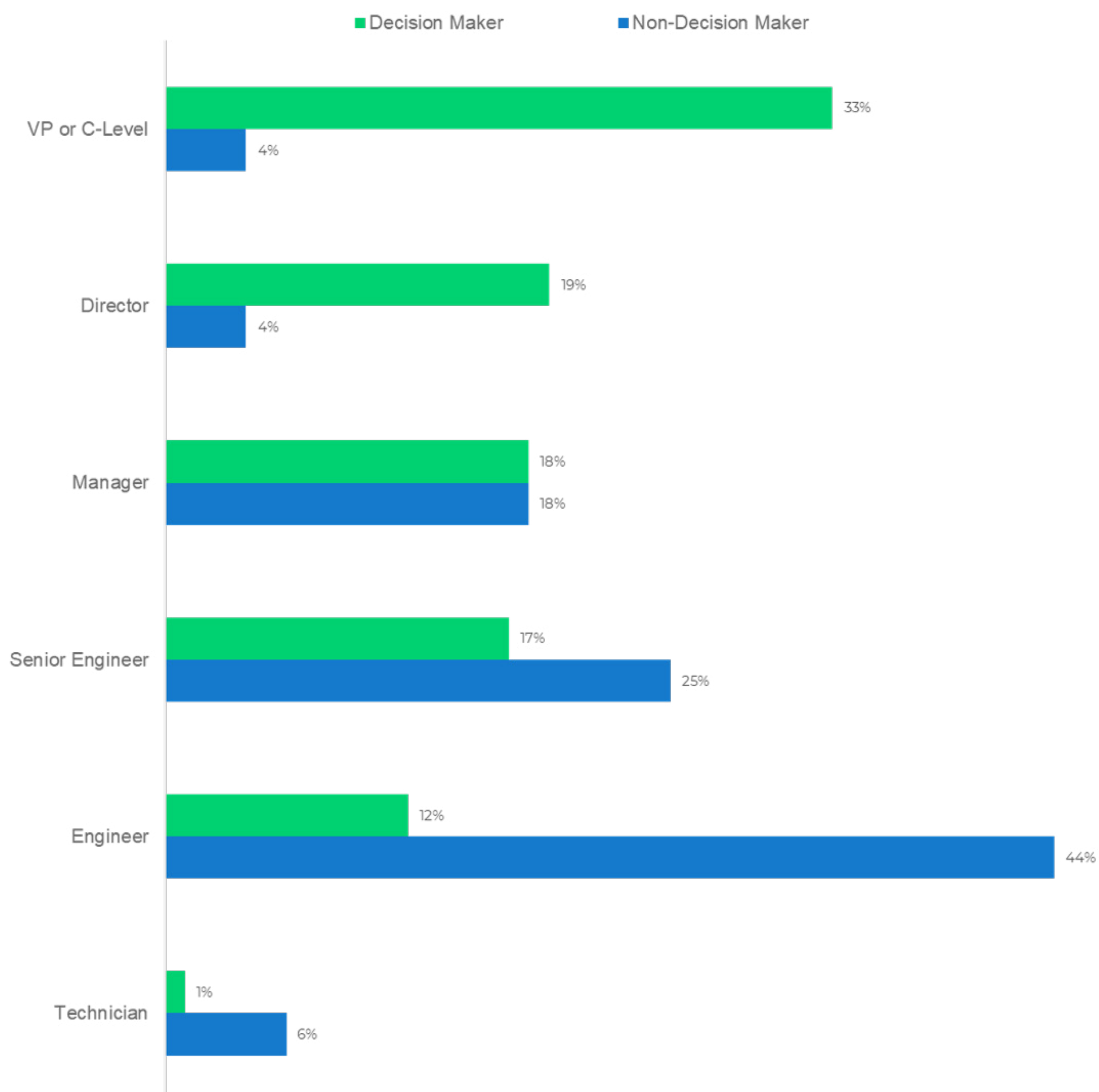
In our data, 35% of respondents were between age 18 and 35, 48% were between age 36 and 55, and 17% were age 56 or older. According to marketing.engineering.com, ITDMs are most likely to be between the ages of 46 and 55. It is safe to say that the age distribution of our study is representative of ITDMs.



Income and Role

The income distribution of our sample is a little bit of a different story. While most (46%) respondents are in the highest income bracket ($100,00 or more), 20% of respondents said their household income was $59,999 or less. Out of that 20%, approximately 6% said they made less than $40,000. Considering we surveyed ITDMs, that percentage is somewhat questionable.

We also asked respondents about their role level, and 91% of respondents said that they are a manager, director, or executive. These people are likely to be true ITDMs. The remaining respondents said they are at the staff level. We would not necessarily expect ITDMs to be at the staff level. However, it is likely that staff could claim to have influence over technology in some respect.

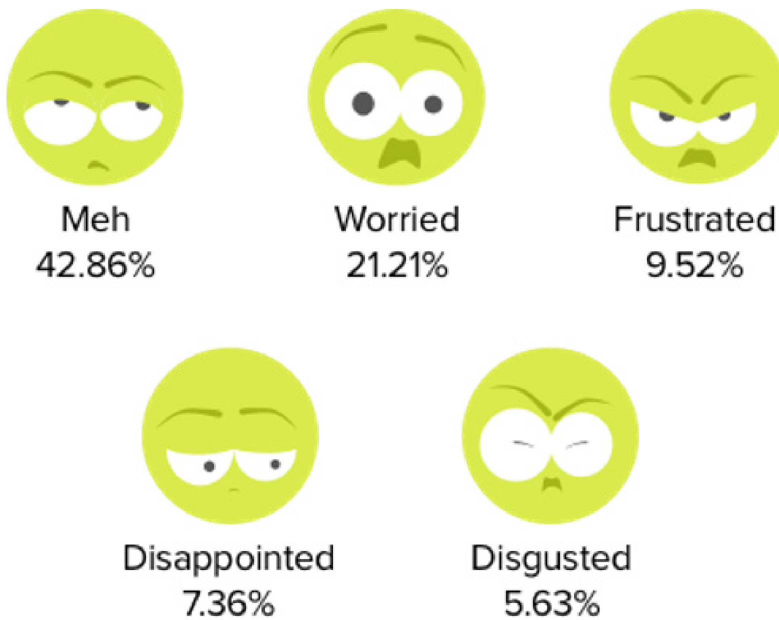


EMOTIONAL RESPONSE TESTING

We partnered with a company that uses emojis to better understand emotions in market research, and to learn how emotions can impact responses to various questions. As written in a blog on the topic, it was found that "*there is a key difference between asking people for their opinions or judgments on a topic, as opposed to asking about their feelings on the same topic.*"

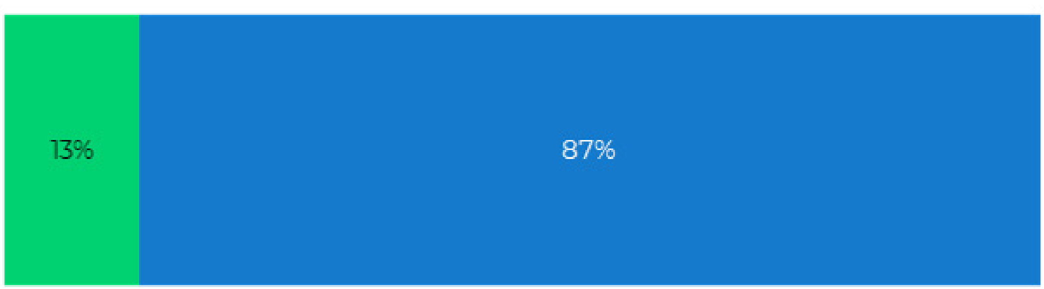
Our goal was to evaluate how their emoji scaling compares to typical market research scaling.

The emoji scaling works well when questions regarding emotion are asked. An example of a good question on which to use emoji scaling is anything centered around politics.



This scale does not work as well for typical market research questions such as purchase intent.

When asked to give feedback about Trump's job performance as President, a vast majority (87%) reported negative feelings, where only 13% reported positive feelings.

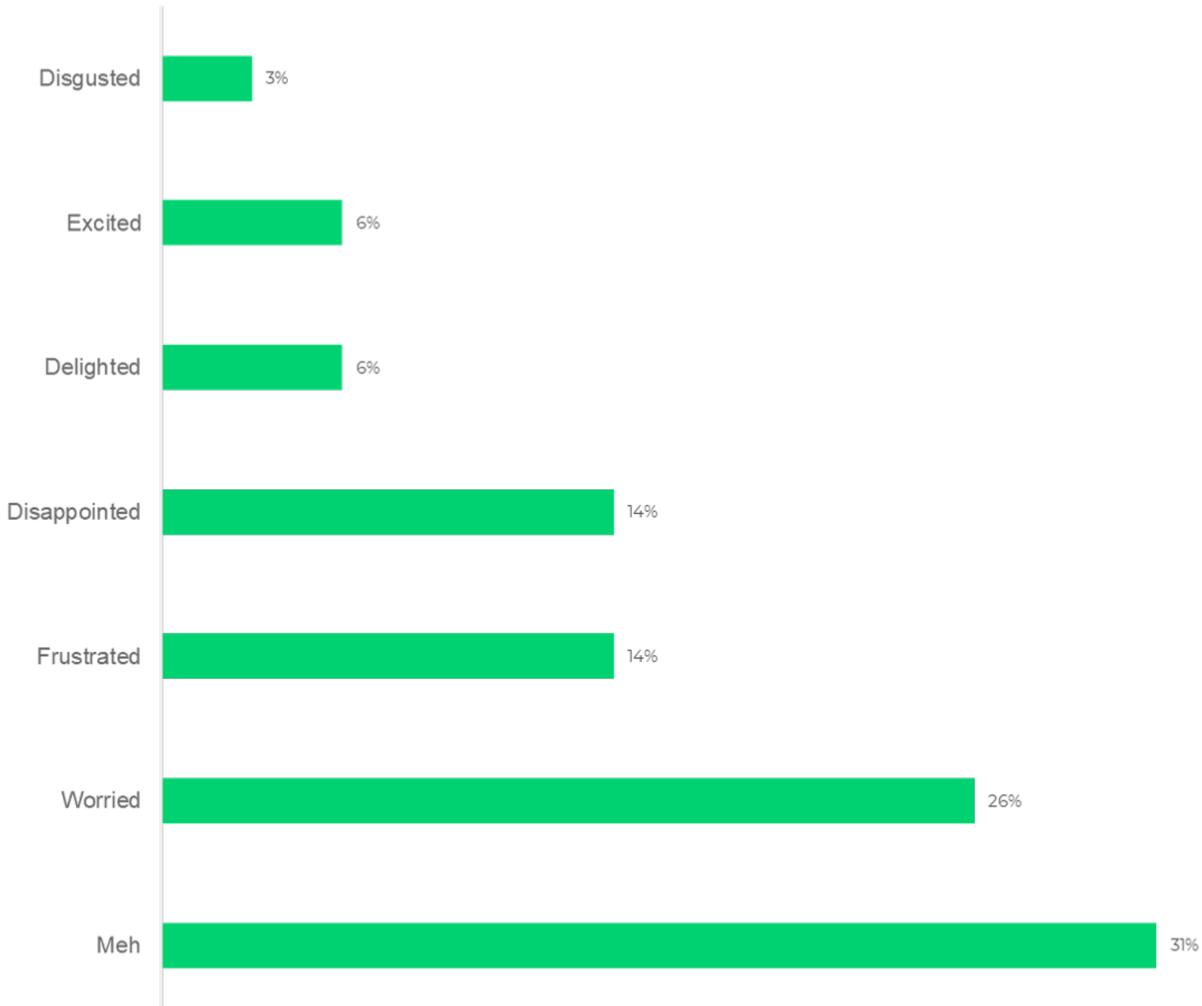


Q. Do you approve or disapprove of the way Donald Trump is handling his job as a president?

We looked closer at respondents who stated that they had no opinion of Trump's job performance as President, and cross-referenced them with respondents who reported they would be voting in the November 2018 elections.

The disappointed and the frustrated groups have the highest average intensity scores (intensity of their feelings), with an 84.9 and an 81.8 respectively. The scores are based on a 100-point scale.

Respondents were asked, "*Do you approve or disapprove of the way Donald Trump is handling his job as a president*," and given the following answer options: Approve, Disapprove, and No opinion. Half of the total sample saw both the original question format and the emoji scale question. When using the emoji scale, respondents were shown the same question, but given the options: Excited, Delighted, Frustrated, Disgusted, Worried, Disappointed, and Meh.



Q. Do you approve or disapprove of the way Donald Trump is handling his job as a president?

There is a lot of emotion that surrounds politics, and in market research, it can be hard to accurately measure emotion using traditional scales. Our goal was to compare the two answer formats and match the feelings of the emoji responses to the traditional scale (approve, disapprove, no opinion). Is emoji scaling the answer to better understanding emotions in market research?

If we were to match up the traditional scale with the emoji scale, it would look something like this:

1 - APPROVE	*EXCITED OR DELIGHTED*
2 - DISAPPROVE	*DISGUSTED*
3 - NO OPINION	*MEH*

We also used the emoji scale images on a traditional market research concept question. We tested the opinion on a popular carbonated beverage. Respondents were asked, "*Using the scale below, how likely are you to purchase the product shown above?*" They were shown a 10-point scale, with 1 being extremely likely and 10 being extremely unlikely. For the emoji scale question, respondents were asked, "*How does the description of the product make you feel?*" They saw the same pictures and answer choices as the Trump question.

If we were to match up the traditional scale with the emoji scale, it would look something like this:

1 - EXTREMELY LIKELY	*EXCITED*
2	*EXCITED OR DELIGHTED*
3	*DELIGHTED*
4	*DELIGHTED*
5	*DELIGHTED OR MEH*
6	*MEH*
7	*MEH*
8	*MEH*
9	*MEH*
10 - EXTREMELY UNLIKELY	*MEH*

Emoji scale responses that did not truly match up with the traditional scale were Disappointed, Disgusted, Frustrated, and Worried. This is understandable, as it would not make much sense for respondents to have these feelings toward this concept.

All in all, we found that the emoji scaling format works best for specific types of questions that elicit strong emotions, such as political polling or public opinion questions. It does not work as well when asking traditional market research questions, where emotions do not play a large role.

MARIJUANA LEGALIZATION

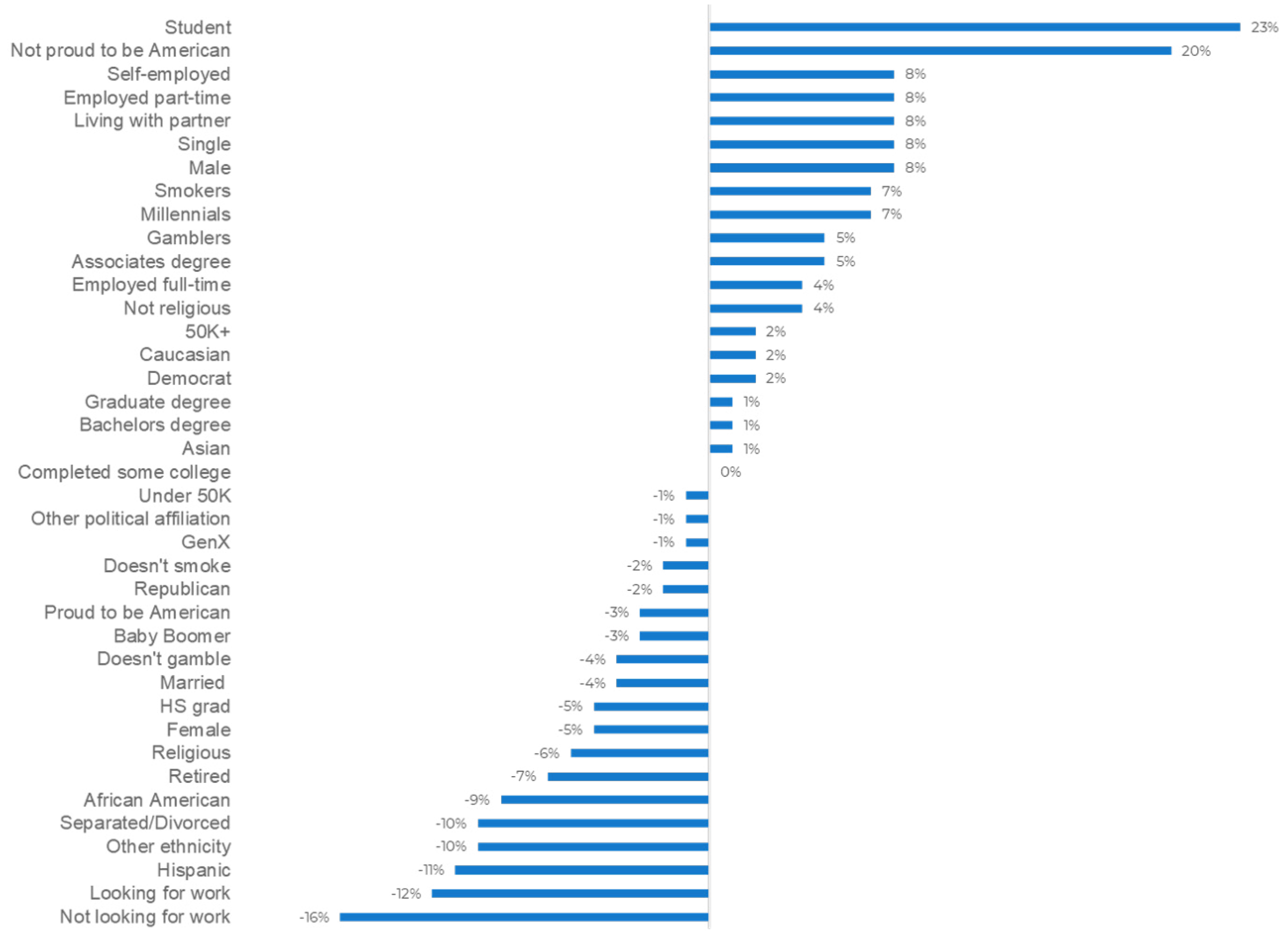
Marijuana legalization has become a controversial topic recently. We wanted to better understand perceptions and attitudes toward the topic, as well as identify how various demographics vary in their opinions. We plan to continue to track this.

We found that a majority of respondents believe that marijuana should be legalized in some form. Of those who are in favor of legalization, 92% think that it should be for medical use, while 70% believe it should be recreational use.

Generationally, it was pretty consistent in favor of legalization with 57% of Millennials, 55% of Gen-Xers, and 52% of Baby Boomers all in favor. The major difference existed with the type of legalization. Three-quarters of Millenials are in favor of recreational legalization, where only 67% of Baby Boomers are.

Across political lines, only 35% of Republicans favor legalization in some form, where 68% of Democrats do.

Among regions, 60% of respondents in the Northeast were in favor of legalization, while only 49% of respondents in the West were in favor. This is somewhat of a surprise as many of the states in the West have already legalized marijuana.

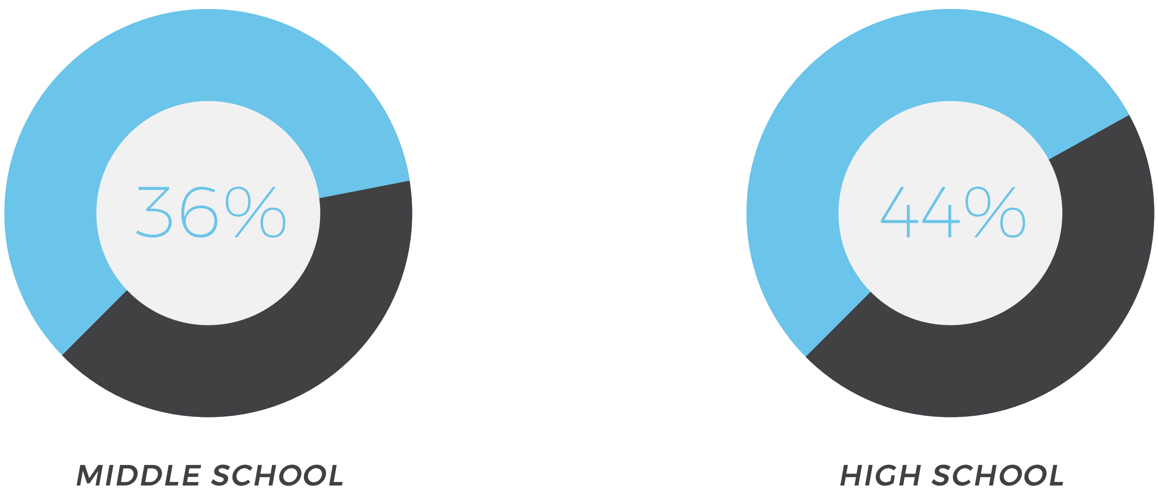


Q. Which of the following drugs, if any, do you believe should be legalized in the United States (Marijuana)

TEEN SMARTPHONE ADDICTION

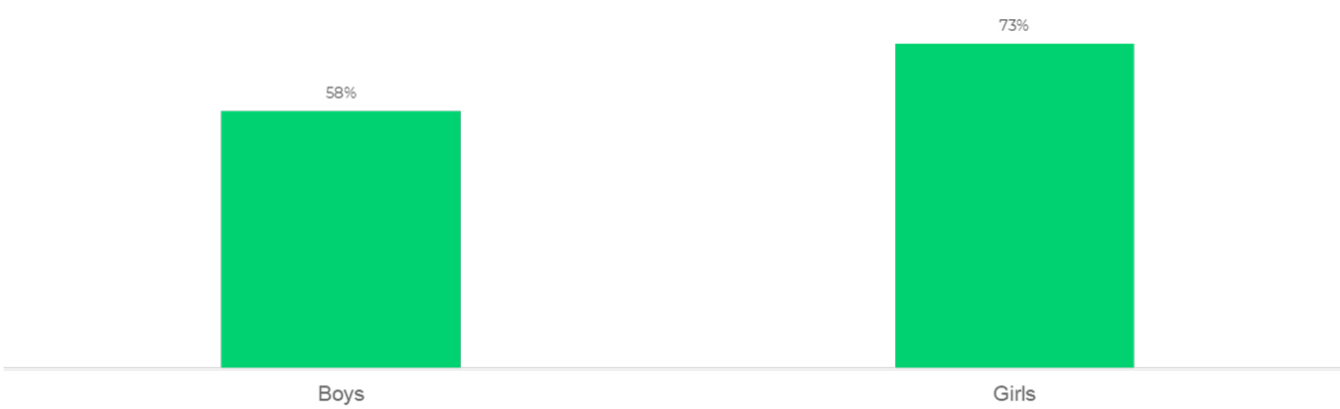
In a partnership with Screen Education, we conducted a survey to validate insights that they uncovered through exploratory qualitative research in regard to teen smartphone addiction. We asked 1,017 teens in middle school and high school questions centered around their smartphone usage, its emotional burden, and its impact on their social and school life.

Knowing that many teens are more willing to provide information on their friends than about themselves, we posed questions about smartphone addiction within their friends and about themselves. We found that teens estimate 60% of their friends are addicted to their smartphones. They also admitted that their smartphones are an obstacle to doing the best they can or accomplshing all they want to do.



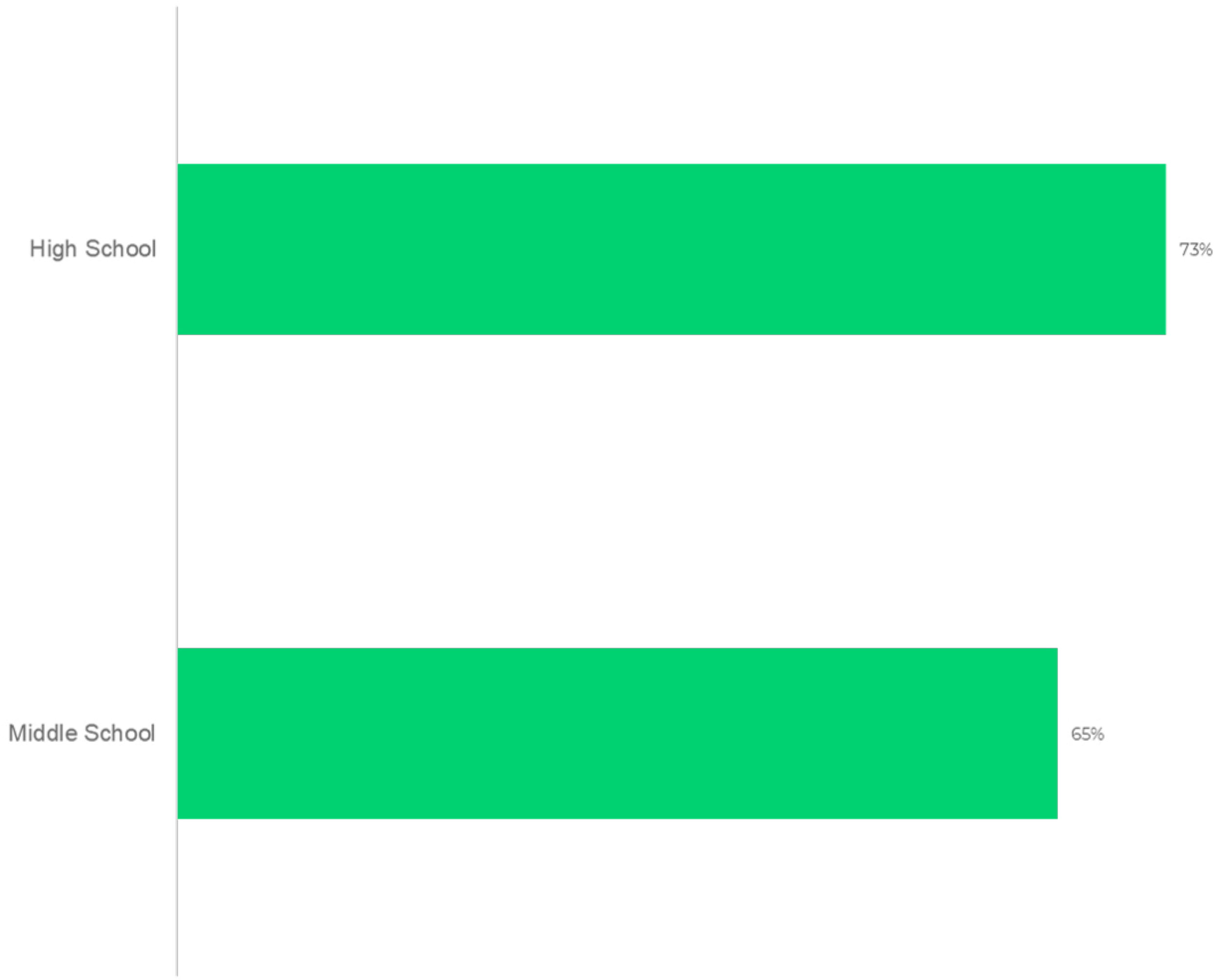
Q. Do you feel that your phone is an obstacle to getting the best grades you can in school?

What was surprising was the teens are aware that they have a problem and are looking for assistance to overcoming the problem. Nearly 70% of teens wish they could spend more time socializing with close friends face-to-face rather than online. A majority of teens wished they had a greater ability to reduce their screen time.



Q. Do you wish you had a greater ability to self-limit the amount of time you spend on your phone?

Teens also realized that Silicon Valley and app designers are part of the problem. More than 70% of all teens we surveyed currently know that apps are designed to be addictive.



Q. Did you know that many of the companies that design apps for teens intentionally design them to be addictive?

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