



Mobile Optimisation Research 2023: Results

Method

Data from four panel companies based on a common template, were merged into a single sheet. The nine analytics variables were:

- Years: 2016, 2017, 2018, 2019, 2020, 2021 and 2022
- Seven Countries: Australia, Brazil, China, France, Germany, UK and US for 2016-2019
- Three more were added in 2020: Canada, Japan and the Netherlands
- A further three were added in 2021: India, Indonesia and South Africa
- Device types: Desktop (PCs and Laptops), Tablet and Mobile Phone
- Starts % by Device: defined as participants entering surveys, whether or not they complete.
- Abandoned % by Device: defined as participants dropping out of surveys for reasons other than being screened out or actively terminated
- Completed % by Device: defined as participants who completed fully and submitted surveys
- Age bands: 18-24, 25-29, 30-39, 40-49, 50-59, 60+
- Gender: male and female only

The base for analysis was participants starting surveys open to all devices. Percentages only were submitted to protect anonymity of the individual company data. Accordingly, the merging was given equal weighting to each panel company, and to each country within the company.

Panel data was received from Cint (Lucid data only), Dynata, Kantar and Toluna.

Top line Outcomes

Starts and Completes - TOTAL

- In 2021 the percentage of starts on a mobile phone for the original seven countries was 54%. The percentage of Desktop starts declined at a faster rate in the original seven countries with 43% of starts in 2022 compared with 50% in 2021 and 55% in 2020. There has been an increase in the percentage of completes on mobile phone in the original seven countries with 54% in 2022 compared to 47% in 2021 and 37% in 2010.
- For the ten countries which reported in 2020 and 2021 the overall percentage of starts on a mobile phone is now 53% compared to 47% in 2021.
- All 13 countries from 2021 showed increases in 2022 in both the percentage of starts on mobile phones and the percentage of completes on mobile phones.

Starts and Completes by COUNTRY

- This year China (11%) and France and India (7%) contributed most to the increase in completes between 2021 and 2022.

There is a significant difference between countries in the percentage of starts on a mobile phone. India is the highest at 81%, and Australia continues to be the lowest at 44%. (Though this is an increase in Australia over 2021 when reported starts were 37%). In 2021 further investigations were undertaken to determine the cause of the trends in Australia including discussions with The Research Society in Australia. However, no obvious or significant differences were identified to explain the lower number of mobile phone starts in Australia.

- The largest increase in mobile phone starts is France, which has grown by 8 percentage points from 51% to 59%.
- None of the countries reported a decrease in the percentage of starts on a mobile phone.
- India had the highest % of completes on a mobile phone, as they did in 2021, with 79%. China and Canada had the lowest % of completes on a mobile phone at 47%, although this was a 11%-point increase for China and a 6%-point increase for Canada on the previous year.
- At a total level for the 13 countries in 2022 there is only a marginal difference between the percentage who start on a mobile phone (58.5%) and the percentage who complete on a mobile phone (57.8%). This implies that the abandon rate on each device type has all but equalised as first reported in 2021. In Australia (4%) and China (1%) there are actually more completes than starts.
- The top three countries for mobile phone completions are again the three new countries added from 2021: India, Indonesia and South Africa. In all three new countries the percentage of starts on a mobile phone is higher than the percentage of completes.
- The phone starts vs incompletes by country is highest in Brazil with starts at 73% and incompletes at 65%, an 8%-point difference.
- There continues to be some differences in intra-regional performances. For example, in North America the US has a higher % of completes on a mobile phone at 54% than Canada at 47%. In Europe, the % of completes on a mobile phone is again highest in France at 58%, with the UK at 56%, and the Netherlands and Germany at 51%. In Asia the differences are more significant with two of the new countries for 2021, India and Indonesia, having notably higher % of completes on a mobile phone at 79% and 77% respectively, whilst Japan and China are much lower at 49% and 47% respectively.

Starts and Completes by AGE and GENDER

- The percentage of mobile phone completes analysed by gender continues to show that females are more likely to use a mobile phone (63%) than males (52%), a 6% point increase for both females and males when comparing 2022 with 2021 for starts and for completes.

The cause for this trend is not known, although the working group hypothesised that lifestyle compatibility among females may be a significant factor. It was also noted

that the device choice by participants for participating in research is not the same as the device choice for other lifestyle activities.

- Notable for the gender and age analysis for both mobile phone starts and completes between 2021 and 2022 is that the proportion for both male and females increased across all age bands. Females aged 60+, and males and females aged 50-59 and 40-49 reported the highest increase for both percentages, starts and completes.
- Mobile phone starts and completions continue to decline as age increases, with the over 60s least likely to start or complete by mobile phone.