



Mobile Optimisation Research 2024: 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, 2022 and 2023
- Seven Countries: Australia, Brazil, China, France, Germany, UK and US for 2016-2019
- Three more were added from 2020: Canada, Japan and the Netherlands
- A further three were added from 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, Dynata, Kantar and Toluna.

Top line Outcomes

Starts and Completes - TOTAL

- In 2023 the percentage of starts on a mobile phone for the original seven countries was 59% compared to 54% in 2022 and 48% in 2021. The percentage of Desktop starts declined at a similar rate in the original seven countries with 38% of starts in 2023 compared with 43% in 2022 and 50% in 2021. There has been an increase in the percentage of completes on mobile phone in the original seven countries with 58% in 2023 compared to 54% in 2022 and 47% in 2021.
- For the ten countries which reported since 2020 the overall percentage of starts on a mobile phone has also increased to 59% in 2023, compared to 53% in 2022 and 47% in 2021. There has also been an increase in the percentage of completes on a mobile phone in the ten countries with 60% in 2023 compared with 52% in 2022 and 46% in 2021.
- All 13 countries which have reported since 2021 showed increases in 2023 in both the percentage of starts on mobile phones, rising from 58% in 2022 to 63% in 2023,

and the percentage of completes on mobile phones increasing from 58% in 2022 to 61% in 2023.

Starts and Completes by COUNTRY

- This year the UK (9%) and China and Japan (both 7%) have contributed most to the increase in country starts between 2022 and 2023.
- There is a significant difference between countries in the percentage of starts on a mobile phone. India, last year's highest, remains the highest at 81%, and Australia also continues to be the lowest at 50% (though this is an increase from 2022 when reported starts were 44%).
- 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 2022, with 79%. Indonesia was a close second at 78% for 2023. China had the lowest % of completes on a mobile phone at 47%, a less than 1% decrease on the previous year. China was the only country which recorded a decrease in the percentage of completes.
- 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 (63%) and the percentage who complete on a mobile phone (61%). This implies that the abandon rate on each device type has all but equalised as first reported in 2021. In Australia (3%) and the Netherlands (1%) there are higher starts to completes conversions.
- 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 gap between the phone starts vs incompletes by country is highest in Brazil, the same as for 2022, with starts at 74% and incompletes at 67%, a 7-percentage point difference.
- There continues to be some differences in intra-regional performances also linked to the maturity of the different markets. For example, in North America the US has a higher % of completes on a mobile phone at 61% than Canada at 53%. In Europe, the % of completes on a mobile phone is again highest in France at 64%, with the UK close behind at 63%, and Germany at 57% and the Netherlands at 56%. 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 78% respectively, whilst Japan and China are much lower at 52% and 47% respectively.

Starts and Completes by AGE and GENDER

- The percentage of mobile phone starts analysed by gender continues to show that females are more likely to use a mobile phone (67%) than males (57%), although the gap is narrowing slightly with a 4-percentage point increase for females and a 5-percentage point increase for males.

- The percentage of mobile phone completes analysed by gender shows a similar pattern with females continuing to be more likely to use a mobile phone (66%) than males (56%), a 3-percentage point increase for females and 4-percentage point increase for males comparing 2023 with 2022 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 2022 and 2023 is that the proportion for both male and females increased across all age bands.
- Males aged 60+ reported the highest increase for both mobile phone starts and completes with an 11-percentage point (starts) and 10-percentage point (completes) increase.
- Mobile phone starts and completions continue to decline as age increases, with the over 60s still the least likely to start or complete by mobile phone.