Mobile Optimisation Research 2025: Results

Method

Data from three 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, 2023 and 2024
- 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, Kantar and Toluna. For previous years Dynata had provided data. The data from 2023 have been calculated with Dynata excluded.
The change between 2023 and 2024 for the three participating companies was applied to the published 2023 returns. Overall Dynata's data was assumed to have changed by the same amount as the average of the remaining three participant organisations.

When calculating completes, abandoned calls are those abandoned voluntarily by participants at any point during a survey; these figures do not include surveys terminated by the suppliers e.g. quality terminates, quota full, screen outs, etc.

Top line Outcomes

Starts and Completes - TOTAL

- In 2024 the percentage of starts on a mobile phone for the original seven countries was 63% compared to 59% in 2023 and 54% in 2022. The percentage of Desktop starts declined at a similar rate in the original seven countries with 35% of starts in 2024 compared with 38% in 2023 and 43% in 2022. There has been an increase in the percentage of completes on mobile phone in the original seven countries with 61% in 2024 compared to 58% in 2023 and 54% in 2022.

- For the ten countries which reported since 2020 the overall percentage of starts on a mobile phone has also increased to 61% in 2024, compared to 59% in 2023 and 53% in 2022. The percentage of completes on a mobile phone in the ten countries has stabilised at 60% for 2024 the same as for 2023 and compared with 52% in 2022.

- All 13 countries which have reported since 2021 showed increases over the last three years for the percentage of starts on mobile phones, rising from 58% in 2022 to 63% in 2023 to 66% in 2024. The percentage of completes on mobile phones has also been increasing from 58% in 2022 to 61% in 2023 to 65% in 2024.

Starts and Completes by COUNTRY

- For 2024, Indonesia, the USA and Germany have contributed most to the increase in country starts between 2023 and 2024, with increases of 5% each.

- There is a significant difference between countries in the percentage of starts on a mobile phone. India, last year's highest, remains the joint highest, with Indonesia, at 85%. In a change from previous years, China, replacing Australia, has the lowest number of phone starts at 52%. For China this is an increase of 2 percentage points compared to the previous year, and of all the 13 countries the smallest increase in phone starts. Australia increased by three percentage points from 50% in 2023 to 53% in 2024.

- None of the countries reported a decrease in the percentage of starts on a mobile phone.

- Indonesia has the highest % of completes on a mobile phone with 83%, replacing India which had the highest number of completes in 2023. India was a close second for 2024 at 81%. China had the lowest % of completes on a mobile phone at 49%, a 2% increase on the previous year. None of the countries recorded a decrease in the percentage of completes.

- At a total level for the 13 countries in 2024 there is only a marginal difference between the percentage who start on a mobile phone (66%) and the percentage who complete on a mobile phone (65%). This implies that the abandon rate on each device type has all but equalised as first reported in 2021. In Japan (2%), Australia (1%) and the Netherlands (1%) there are higher starts to completes conversions.

- The top three countries for mobile phone starts to completes conversions are again the three new countries added from 2021: Indonesia, India and South Africa.

- The gap between the phone starts vs incompletes by country is highest in Brazil, France and the UK with a 5-percentage point difference. Overall, across the 13 countries there is a 3-percentage point difference between the phone starts vs incompletes.

- There continues to be some differences in intra-regional performances reflecting the maturity of the research market, the digital infrastructure and the availability and use of mobile devices. For example, in North America the US has a higher % of completes on a mobile phone at 65% than Canada at 56%. In Europe, the % of completes on a mobile phone is again highest in France at 67%, with the UK close behind at 65%, and Germany at 61% and the Netherlands at 59%. In Asia the differences are more significant with two of the new countries for 2021, Indonesia and India, having notably higher % of completes on a mobile phone at 83% and 81% respectively, whilst Japan and China are much lower at 58% and 49% respectively.

<u>Starts and Completes by AGE and GENDER</u>

- The percentage of mobile phone starts analysed by gender continues to show that females are more likely to use a mobile phone (70%) than males (61%), although the gap is narrowing slightly with a 3-percentage point increase for females and a 4-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 (69%) than males (60%), a 3-percentage point increase for females and 4-percentage point increase for males comparing 2024 with 2023 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 is that between 2023 and 2024 the proportion for both male and females increased across all age bands, a repeat of a trend seen between 2022 to 2023.

- Males aged 30-39 reported the highest increase for both mobile phone starts and completes with a 7-percentage point (starts) and 6-percentage point (completes) increase. This is different compared to the 2023 when males 60+ was the age band with the highest increase.

- Mobile phone starts to completes conversions continue to decline as age increases, with the over 60s still the least likely to start or complete by mobile phone.