

DO MOBILE RESPONDENTS DIFFER FROM ONLINE SURVEY RESPONDENTS

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Opinionology

You ask. The world answers.

Before adopting mobile research technology, Market Researchers often want to know how mobile survey respondents differ from traditional online survey respondents. Instead of relying on general pre-conceptions and anecdotal evidence about mobile device users, we explore who is responding to survey research opportunities using mobile devices and how their behavior compares to traditional online panelists.

We began by identifying mobile survey responders within our North American online panel. Roughly 8000 panelists had responded to an online survey using their mobile device in 2010. This mobile survey responder subset represented approximately 1% of the larger parent population of traditional web panelists (figure 1). These mobile survey responders chose to respond to traditional online surveys without being informed about, invited to, or required to complete using their mobile device.

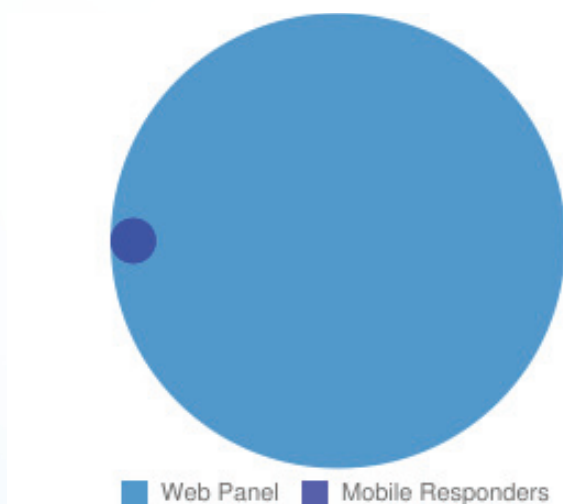


FIGURE 1 - MOBILE SUBSET WITHIN WEB-PANEL

Next, we compared the actual behavior of these mobile survey responders to their stated attitude about using mobile devices for online surveys. Of the roughly 3,000 mobile survey responders who expressed an opinion, almost half (46.9%) stated they were unwilling to participate in a survey using a mobile device (figure 2). Counter intuitively, approximately 80% of those unwilling to complete surveys using mobile research technology later attempted to take a survey on their mobile device. Interestingly, each of these individuals made an average of 5 survey attempts and completed 1.0 survey using their mobile phone. These data seem to suggest that the respondents' natural curiosity in mobile research or the allure of all things "mobile" was a more powerful motivator than their professed unwillingness to participate.

¹For the purposes of this analysis, any device using the Android, Blackberry, or iPhone operating system was treated as a mobile device. None of the surveys were optimized or altered for use on mobile devices.

²Each respondent was asked, "Are you willing to participate in Opinion Outpost mobile device / cell phone SMS (web browser) surveys?"

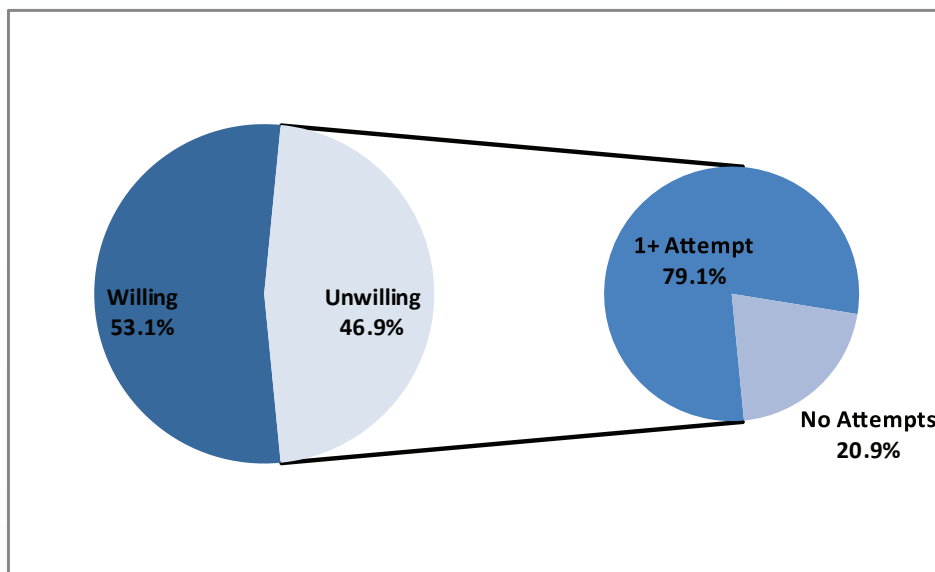


FIGURE 2 - MOBILE SURVEY WILLINGNESS VS. ACTIVITY

Lastly, we examined the demographic composition of this unique population. The mobile survey responders were a subset of a larger traditional online panel; however, they exhibited distinct areas of differentiation from their parent category (figure 3). First, mobile survey responders tended to be younger. In fact, they demonstrated a 22.5% increase in the 18-34 year-old age group. Second, mobile survey responders had a higher representation of individuals who were employed full-time and who have incomes in excess of \$50,000, indicated by respective increases of 8.6% and 5.8%. Third, mobile-responders also showed increases in African-American and Hispanic-American representation at 2.9% and 3.8% respectively.

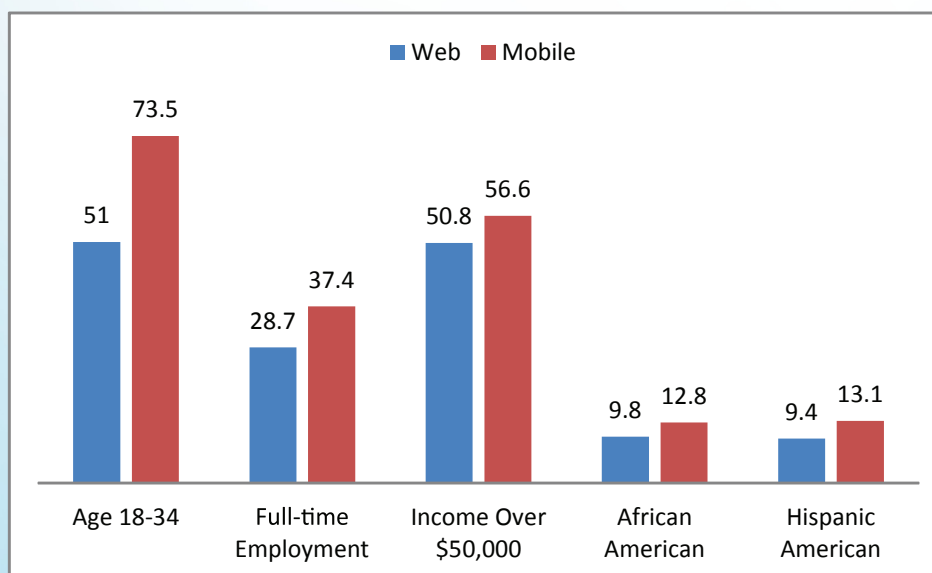


FIGURE 3 - DEMOGRAPHIC COMPARISON OF WEB AND MOBILE POPULATIONS

Although many questions still exist concerning mobile survey responders, we are beginning to understand them and their behaviors more – we know the mobile responders tend to be younger, employed more, higher income and more ethnic. Using these results as a starting point, we can continue to identify and classify mobile survey responders and their behaviors more accurately. More immediately, we can utilize this information to design and administer market research projects more appropriately to mobile device users.