

In mobile web adoption and survey participation, cost is leading barrier - privacy less important

Study of Mobile Web Adoption

And Mobile Survey Participation – Summer '09

As a data collection group in the digital and emerging media space, it's important for us to help the industry understand whether certain technologies are being adopted. In this case – mobile is examined.

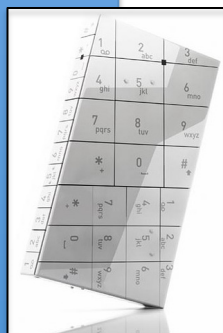
A second, and equally important, role is understanding the confluence of mobile media vehicles and survey sampling. Understanding the profiles of consumers who agree to participate in research efforts on their mobile device is critical as well and was an important goal of this research.

Mobile Web Adoption -

In July, 2009 Safecount designed a research study to help understand what factors play a role in consumer adoption of internet browsing on their mobile device. The study also probed on whether, if given the choice, consumers would opt to complete a brief questionnaire on their mobile device and further examined why or why not. This survey research application will be discussed in the latter half of this report.

About 5,000 survey invitations were sent to a sample of the Safecount Viewpoint Community whose demographics mirrored those of the general US population. Over a two week fielding period, 696 survey completions were registered (14% overall cooperation rate). Respondents were offered the choice of completing the survey on their computers (web browser) or on their mobile device by easily receiving an SMS survey link. A four minute survey asked questions pertaining to how often, and for what activities, consumers accessed the internet via their mobile devices. The questions expanded into their mobile pricing plans, perceived advantages/disadvantages of mobile

web access (including surveys) and thoughts about privacy and mobile services.

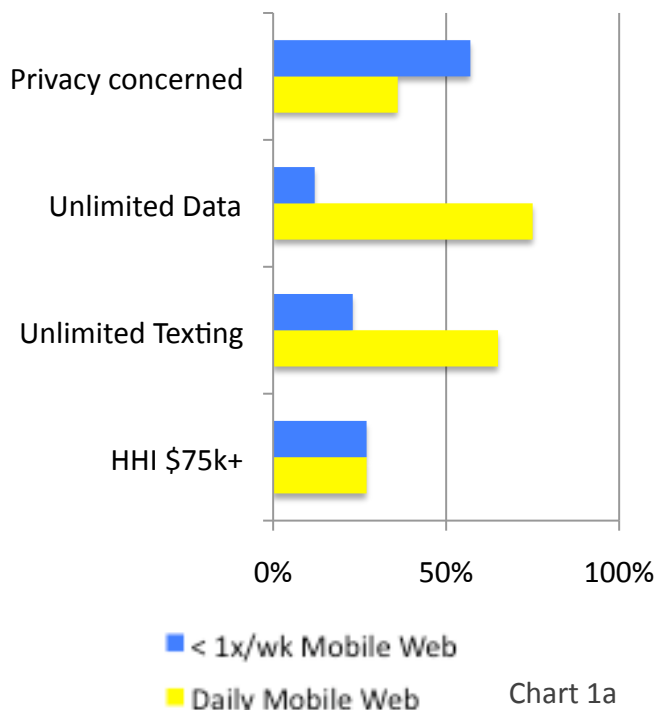


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Almost half (46%) accessed the web via their mobile device at least once per day or more. Of these frequent mobile web users, two attributes stand out:

- They're 60% more likely to be male
- Median age is 11 years younger (39 vs. 48) than less frequent mobile web users

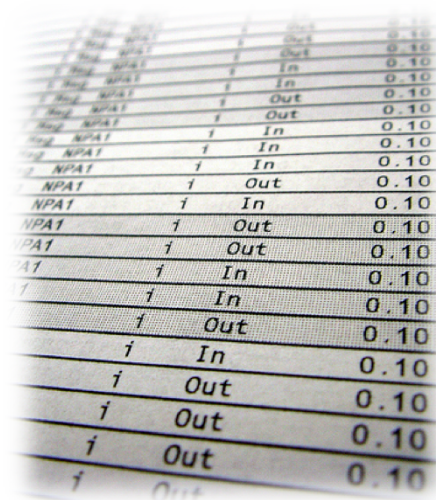
Additional comparison points are in the table below:



Subscription to unlimited mobile text/data plan appears to encourage mobile web adoption. Obviously the unlimited mobile data/text plan seems to be a dependant variable of gender and age – where younger male skewing consumers proved to be the primary adoptees.

To a large extent, household income does

not appear to be a factor in mobile web use. However, while income does not appear to be a factor, cost certainly does.



Of daily mobile web users, only 19% say the cost of data access is a primary disadvantage compared to 69% of those who access the mobile web less than once per week. The fact that there's virtually no difference between the household incomes of the respective groups suggests mobile web adoption is most directly tied to gender and age which in turn correlates to the type of mobile data plan one has.

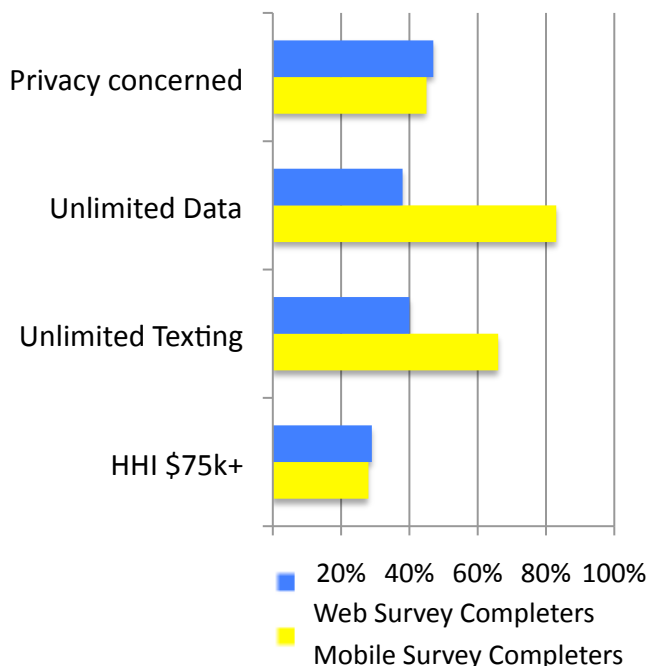
What about privacy?

While chart 1a suggests substantial privacy concerns among less frequent mobile web users, data comparing the respondents who chose to take the survey on their mobile device versus those who completed the survey on their computer suggest the gap is not that wide.

Mobile Survey Participation –

One of the challenges the marketing research industry faces today is declining cooperation rates. Theoretically, allowing consumers to manage their survey experience should positively impact cooperation rate. Choice of flash or standard questionnaire and choice of incentive for completion are two examples. A critical component of this study was to gauge if respondents would choose to complete a survey on their mobile device instead of on their computer when given the choice. The emailed survey invitation provided the respondent the convenient option of having the survey link sent directly to their mobile device via SMS.

Only 4% of the respondent pool chose to complete the survey on their mobile device. While this is a surprisingly low number, it is an indicator of whether it's worth the investment to provide the choice of WAP or WEB in your survey platform.



When comparing web survey completers to mobile survey completers we continue to see a skew towards younger males, and a household income equivalence. Similar to the mobile adopter comparison we also see a large variance on the data and texting plan. Of the web survey takers, 52% cited “cost of data access” as a disadvantage in mobile web use, versus only 17% of mobile survey takers.

Interestingly, we see little difference in privacy concern among these two groups. This suggests that privacy is less of a real issue when consumers consider accessing the mobile web, leaving us with cost of mobile data plan as the primary driver of adoption.

So what did we learn?

- Younger men still over-index on mobile web adoption
- HHI not a factor in mobile web use
- Marketers – if you want to promote your mobile data plans, cost matters most
- When given a choice of the two - Web wins out over WAP with few people choosing to complete a survey via the latter
- Privacy is not a major factor for most people participating in mobile surveys
- Researchers – get ahead by proving that the user won't be charged for their mobile survey participation