Core Research via Mobile | Key Facts & Figures

- Q1 2017 was the first wave of GWI research where some respondents completed a shorter version of the Core survey via mobile.
- Respondents for the shorter version answer around **43 questions from the full Core survey**, all of them carefully adapted to be compatible with mobile screens.
- Globally, over **31,000 respondents are now taking the shorter mobile version of Core** each quarter, with the other 114,000 answering the full version of the survey (mainly via PCs, laptops or tablets). That means almost **20% of respondents complete the shorter mobile version**.
- **Sample sizes for the shorter mobile version range from 250 to 1,000 per market.** To determine these sample sizes, we ran pilot research in 2016 among 80,000 internet users – allowing us to quantify mobile behaviors in each country. Based on these results, we have collected the largest mobile samples in emerging/fast-growth markets across Asia, LatAm and MEA.

MARKET	CORE	MOBILE	TOTAL
Argentina	1,000	500	**1,500**
Australia	3,500	500	**4,000**
Austria	1,000	250	**1,250**
Belgium	1,000	250	**1,250**
Brazil	4,000	1,500	**5,500**
Canada	4,000	750	**4,750**
China	20,000	4,000	**24,000**
Colombia	1,000	250	**1,250**
Denmark	1,000	250	**1,250**
Egypt	1,250	500	**1,750**
France	4,500	500	**5,000**
Germany	4,500	500	**5,000**
Ghana	—	1,000	**1,000**
Hong Kong	1,500	250	**1,750**
India	12,500	1,000	**13,500**
Indonesia	4,000	1,000	**5,000**
Ireland	1,000	250	**1,250**
Israel	750	500	**1,250**
Italy	4,500	500	**5,000**
Japan	2,500	750	**3,250**
Kenya	—	1,000	**1,000**
Malaysia	1,000	500	**1,500**
Mexico	3,5000	750	**4,250**
Morocco	—	1,000	**1,000**
Netherlands	1,000	250	**1,250**
New Zealand	1,000	250	**1,250**
Nigeria	—	1,000	**1,000**
Philippines	2,000	1,000	**3,000**
Poland	1,500	250	**1,750**
Portugal	1,000	250	**1,250**
Romania	1,000	250	**1,250**
Russia	3,000	500	**3,500**
Saudi Arabia	750	750	**1,500**
Singapore	2,250	500	**2,750**
South Africa	1,000	500	**1,500**
South Korea	1,000	250	**1,250**
Spain	4,500	500	**5,000**
Sweden	1,000	250	**1,250**
Switzerland	1,000	250	**1,250**
Taiwan	2,000	250	**2,250**
Thailand	2,250	1,500	**3,750**
Turkey	1,500	500	**2,000**
United Arab Emirates	1,250	500	**1,750**
United Kingdom	9,500	500	**10,000**
USA	23,000	2,000	**25,000**
Vietnam	1,750	750	**2,500**
TOTAL	141,250	31,000	172,250

Launching a version of the Core survey on mobile has allowed us to extend our research into **Ghana, Kenya, Morocco and Nigeria**. In these markets, conducting the full Core survey (answered mainly via PCs, laptops and tablets) is not feasible because mobile phones are so integral to internet behaviors. The samples available via PCs, laptops and tablets are not big or accessible enough to be robust and representative, and hence in these four markets we have run the shorter mobile version of the survey only.

The mobile version of the survey focuses on key questions about **demographics, lifestyle, attitudes, device usage, social media, apps and purchase journey**. The questions in the platform where mobile data is available are as follows:

DEMOGRAPHICS

- Audience Size
- Gender
- Age *(Groups)*
- Age *(Individual)*
- Income *(By Segment)*
- Income *(By Household)*
- Education
- Country
- Country Local Regions
- Survey Language
- Regions *(World)*
- Regions *(Economic)*
- Urban Context
- Household Living Arrangement
- Relationship Status
- Number of Children
- Age of Children
- Ethnicity *(Malaysia, New Zealand, South Africa, UK, USA Only)*
- Nationality (*KSA / UAE Only)*

ATTITUDES & LIFESTYLE

- Car Ownership
- Type of Savings / Investments
- Value of Savings / Investments
- Employment Status
- Personal Interests
- Interests Segmentation
- Values & Perceptions*

DEVICE OWNERSHIP & ACCESS

- Device Ownership
- Number of Devices Owned
- Devices Used to Access Web
- Number of Devices Used to Get Online
- Device Importance
- Mobile Operating Systems
- Mobile Brands: Current Ownership
- Number of Mobile Brands Owned
- Mobile Handset Models: iPhone Models
- Mobile Purchase Timeframe
- Mobile Actions in Last Month

MEDIA CONSUMPTION

- Time Online via Mobile
- Time Spent on Social Media
- Second-Screen Devices
- Second-Screen Activities

SOCIAL MEDIA

- Reach: Members
- Reach: Visitors / Users
- Reach: Engagers / Contributors
- Number of Social Media Services Visited / Used
- Time Spent on Social Media

APPS

- App Types Used
- Named Apps Used

COMMERCE

- Digital Content Purchased
- Mobile Payment Services Used

MARKETING TOUCHPOINTS

- Brand Discovery
- Online Product Research

* This question is asked to mobile respondents only, and is designed to act as a proxy for the longer "Attitudes" question asked in the full version of the Core survey

The introduction of Core surveys via Mobile has allowed us to profile **mobile-only internet users** for the first time. We have employed a very strict definition for this, with respondents needing to meet both of these conditions:

- Have accessed the internet in the last month via a Smartphone or Feature Phone, and not via any of the other devices tracked by GWI (Personal PC / laptop, Work PC / laptop, Tablet, Smart TV, Games console)

- Do not own any of the following: e-Reader, Games console, PC / laptop, Smart TV, Smart wristband, Smartwatch, Tablet, TV streaming stick / device, VR headset / device.

In some definitions of mobile-only internet users, people are allowed to own other devices as long as they say they have not used them to access the internet. In our definition, however, respondents cannot access or own any other device.

Note that a mobile-only respondent does not have to personally own a phone. Respondents in this group can pick "Smartphone", "Feature Phone" or "None of the above" in the Device Ownership question. This ensures that we capture people who are accessing the internet via someone else's handset.

Also vital to note is that **not all mobile respondents are mobile-only internet users**. As with most respondents who complete the full version of the Core survey via a PC, laptop or tablet, the majority of respondents who complete the mobile version of the Core survey are multi-device internet users. That is, most people who take our mobile survey also have access to other internet devices (PCs, laptops, tablets, Smart TVs, smart wearable devices, connected games consoles etc).

On the GWI Platform, you can now segment respondents into three groups based on their usage of mobiles:

- **Mobile-Only Users:**
  Access the internet via a Mobile (smartphone or feature phone), and do not own/use any other devices

- **Multi-Device Users:**
  Own/Access the internet via a Mobile, as well at least one other device (PC, laptop, tablet, e-reader, smartwatch, smart wristband, smart TV, games console, VR device)

- **Non-Mobile Users:**
  Do not own or access the internet via a Mobile.

At a generalized level, mobile-only respondents are more likely than average to be:

- Male
- 16-34
- In emerging markets
- In the lower income quartile
- In the very lowest household income bracket
- Secondary educated
- Living alone or with their parents
- Single
- Non-parents (but among those who do have children, to just have younger ones)

To reflect the fact that we are now able to track and represent mobile-only internet users at scale, we updated our **quotas and universe projections in Q1 2017**. Typically, this led to an increase in our millions figures in emerging/fast-growth markets, where mobile-only internet users are most likely to be found. It also meant that our samples in some fast-growth markets became younger and more likely to have secondary rather than tertiary education.

Regardless of which version of the Core survey a question appears in, and how many people answer it, responses are weighted to **consistent Age, Gender and Education quotas** in each market.

Globally, that means we are weighting questions on the following sample sizes:

- Core questions which feature in the full *and* shorter versions of the survey – c. 145,000 respondents per quarter

- Core questions which feature in the full version (answered mainly via PCs, laptops and tablets) but *not* in the shorter mobile version – c. 120,000 respondents per quarter

- Core questions which feature in the shorter version of the survey but *not* the full version – c. 25,000 respondents per quarter

- Core questions about Media and Brands – c. 70,000 respondents per quarter. These questions are answered by a representative sub-set of the respondents who complete the full version of the survey.