



Seven Shades of Mobile

BBDO


proximity


Aol.



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As soon as the alarm goes off

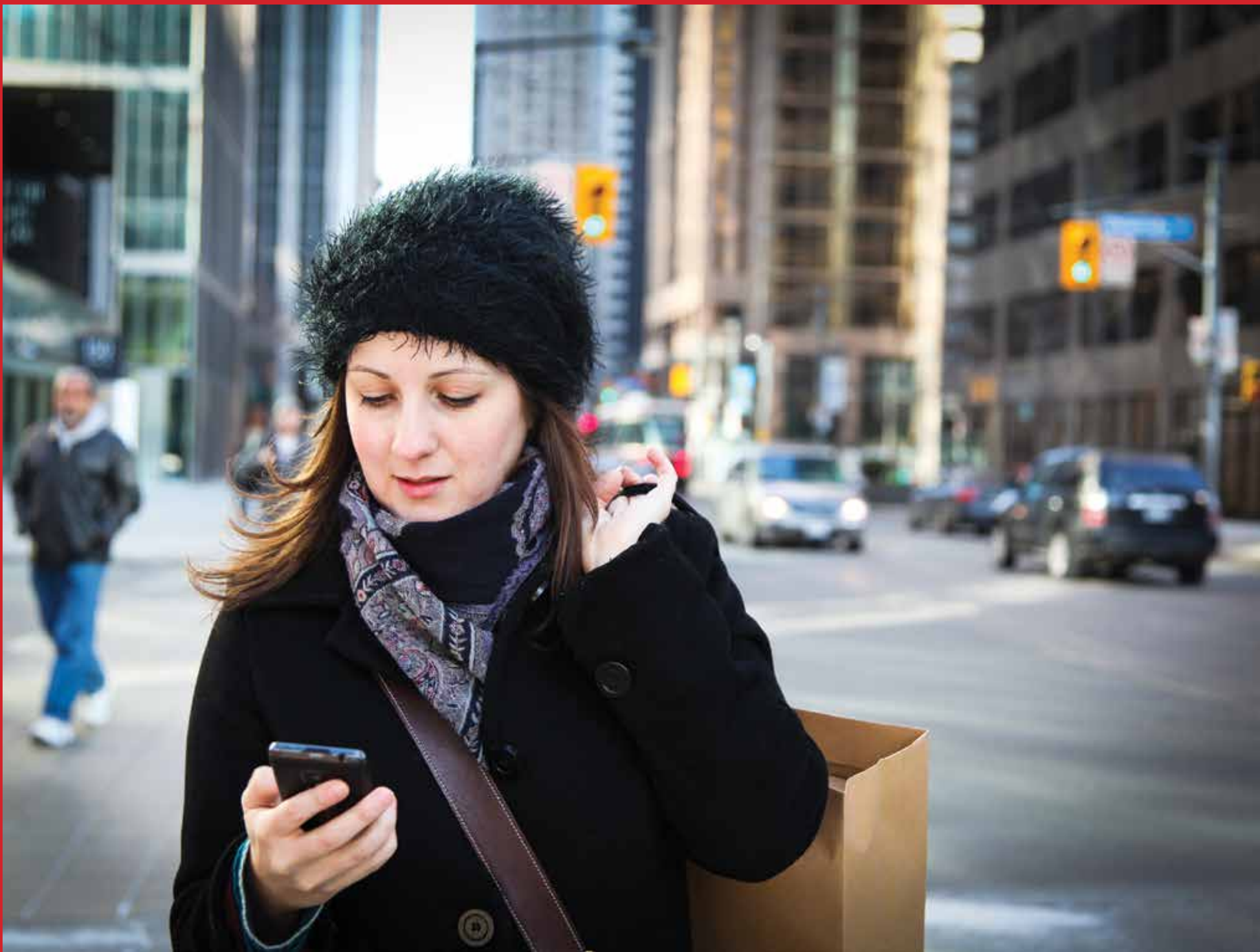
What's the first thing you do in the morning?

Do you embrace your spouse, make a cup of coffee or brush your teeth? Nope.

All of that has to wait until you check your email, post a Facebook status, and read breaking news stories on Twitter. Oh, and it's never too early for a quick Instagram of your dog buried under the covers.

Your morning breath is just going to have to linger a little longer.





The smartphone is indisputably transforming all of our lives. It's an indispensable device that's always on, and always on us—we simply cannot live without it. From mapping our travels via plane, train and automobile, to watching our favorite TV shows, to online shopping... it allows us to seamlessly connect with the world at any time, at any place.

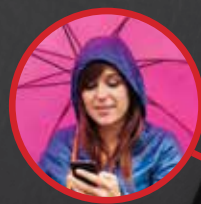
This device has irrevocably changed
how we interact with the world around us.

Mobile by the numbers



1/4

check their mobile devices every 30 minutes.



1/5

check their mobile devices every 10 minutes.



1/3

respondents admitted feeling anxious when being without their mobile phones for even short periods.



2/3

of respondents would pick their phone over their lunch if forced to choose.



3/4

of 25-to-29-year-olds sleep with their phones.

*From a recent *Time* Magazine study.



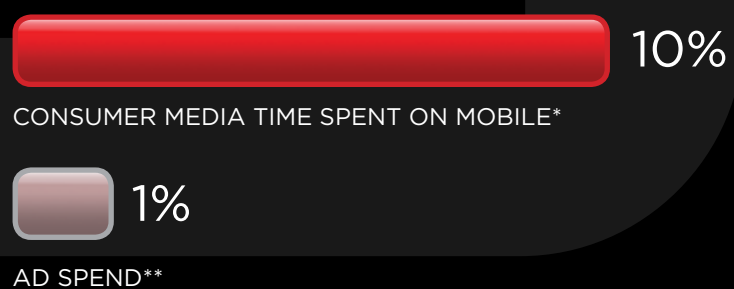


Performance problem!

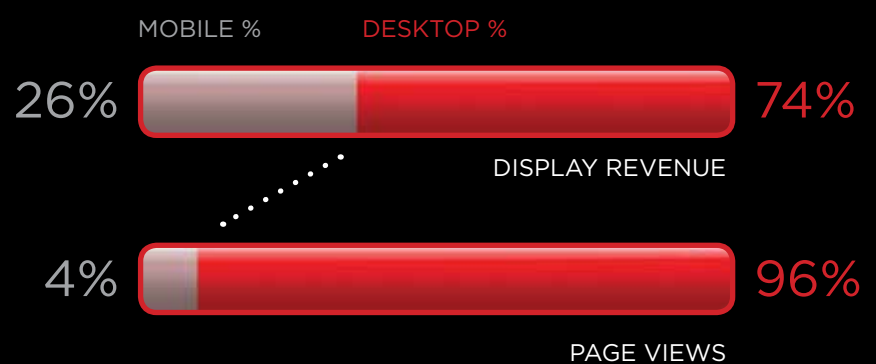
For marketers and advertisers the mobile market presents an incredible opportunity to reach consumers. Given the critical importance of the mobile device, why is it underperforming as a communications platform? Consumers spend 10% of their media time on their phones, but mobile only comprises 1% of total ad spend in the U.S. market.

What are we missing when it comes to mobile behavior?

Disparity between time spent and media dollars



Mobile



AOL Site Sample

Sources: * Time spent and ad spend share data eMarketer, 12/11, **Internet and mobile ad dollar spent amount in 2011 per IAB





What gives?

One possible explanation for the disparity between mobile use and mobile ad spend is that the way we think about mobile is all wrong or at least incomplete. Traditionally, we assess mobile behavior superficially, based on the discrete behaviors performed on a smartphone. But perhaps we should look beneath the surface and dig deeper to uncover what drives the behavior of consumers when they use apps or surf the Web on their mobile device.

To better understand the gap among the marketing opportunity, the media spend (or lack thereof), and the consumer's increased reliance upon the device, BBDO and AOL joined together in an award-winning study to uncover insights about mobile usage and learn how we can more effectively leverage the mobile opportunity.



WEEKENDS 24 HOURS



Our study

First we asked 1,051 smartphone users ages 13 to 54 to fill out a 7-day diary and make video recordings each time they used their smartphones. This was followed by in-depth user interviews to determine the what, when, where and why for the variety of their mobile interactions.

To give more context to their behavior, we also asked our smartphone users to record three different moments in which they used their phone (excluding voice calls, email and texts). At the same time, we tracked their mobile behaviors for 30 days through the Arbitron metered panel. This combination of survey and metered data allowed us to capture over 3,000 examples of user interactions, which we like to call “mobile moments.”

We then conducted a segmentation analysis of these moments and found seven mobile moment segments. Each segment provides a unique snapshot of the mobile usage landscape, the activities users engaged in, the apps and websites they used, their satisfaction with those products, their goals, the value of brand messaging in that moment, the deep motivations that spurred each moment, and their physical location during each moment.

Groundbreaking data collection



QUALITATIVE

AGES 13-54



QUANTITATIVE

TOTAL SAMPLE: 1051



METERED

MOMENTS MEASURED: 3010





Mobile isn't mobile

Given that location is a key factor in determining the optimum content, it was critical to determine, specifically, where the major volume of usage was taking place.

To our amazement we found that **MOBILE ISN'T MOBILE**...at least not the bulk of it. In fact, 68% of all smartphone minutes, take place in the home.

This flies in the face of conventional wisdom that would have us believe that consumers use their smartphones for utility-based needs on the move. The reality is that smartphone users actually use their time at home to plan, evaluate, research and determine what they are likely to do when they eventually are on the move. Even online shopping, an activity that you might think people only do on a PC, is often done using a mobile phone.

68% of all smartphone minutes take place in the home.

Seven Shades of Mobile

The discovery that mobile use most frequently occurs at home is true across all seven of our segments. Next, we needed to examine the details of our seven discrete segments in order to understand the nature of these mobile moments.

These Seven Shades of Mobile represent the specific where, when and why and thus represent a consumer's underlying motivators in smartphone usage.

Accomplish

Managing activities and lifestyle to gain a sense of accomplishment when those activities are completed.

Socialize

Active interaction with other people, sharing information in order to maintain and grow relationships.

Prepare

Active planning in order to feel ready and prepared for the upcoming activities and conversations.

Me Time

Seeking relaxation, entertainment in order to indulge oneself or pass the time.

Shop

Decision making focused on finding a product or service.

Self-Express

Social participation through self-expression of passions and interests.

Discover

Seeking news and information in order to learn something new or be educated.


Most attempts to shape content for apps and mobile ads have assumed a single motivation for each mobile activity. But these moments give us a more dynamic look at why consumers engage with their mobile devices.



60%

Reinforcing the point of mobile not always being mobile, a full 60% of these moments happen in the home.

Accomplish



Location	Percentage
Outside of home	42%
At Home	58%



20%

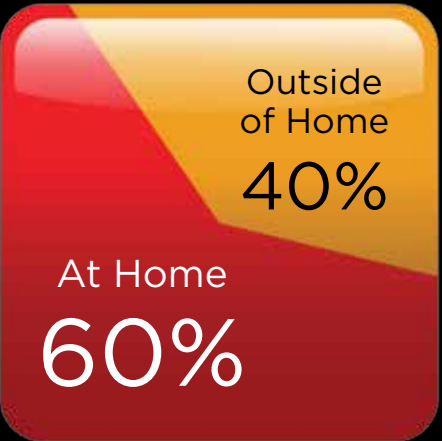
RELAXING	32%
WATCHING TV	28%
WORKING	24%

BE PRODUCTIVE / MAKE GOOD USE OF MY TIME	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>	20%
BE IN CONTROL	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>	18%
BE PREPARED, ORGANIZED	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>	17%
ENTERTAIN OR AMUSE MYSELF	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>	17%
TRACK ACTIVITIES	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>	16%
FINISH A TASK	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>	15%
RELAX, PASS THE TIME	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>	15%
DO IT EASIER	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>	14%
SAVE TIME, DO IT FASTER	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>	13%
MAKE A DECISION	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>	13%

AT HOME

Socialize

In this moment, people use their smartphones to interact and share things with their friends and loved ones. The phone plays the part of a social manager to help make plans, connect with others and pass the time, interacting with the user almost in the role of surrogate friend.



CONNECT WITH OTHERS

34%

ACTIVITIES

RELAXING	28%
WATCHING TV	24%
HANGING OUT WITH FRIENDS AND FAMILY	19%

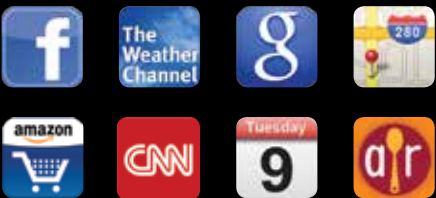
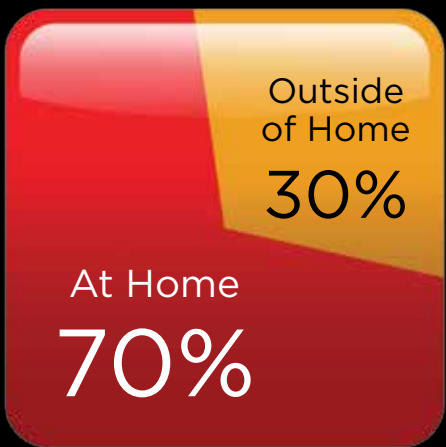
MOTIVATORS

CONNECT WITH OTHERS	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	34%
ENTERTAIN OR AMUSE MYSELF	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	30%
RELAX, PASS THE TIME	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	27%
SHARE WITH SOMEONE I KNOW	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	20%
FILL SPARE TIME, DEAD TIME	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	16%
ALLEVIATE BOREDOM	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	16%
SATISFY OR FEED MY CURIOSITY	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	15%
GET NEWS OR INFORMATION	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	15%
ENTERTAIN OTHERS	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	13%
EXPRESS MYSELF	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	12%

AT HOME

Prepare

Prepare moments primarily occur in the morning, when people are getting ready for the day ahead. This is when people check the weather, get directions before heading out, counting on their smartphone device to help in time-saving decision making. In the morning and in all these moments throughout the day, productivity is the goal.



BE PREPARED/ORGANIZE 31%

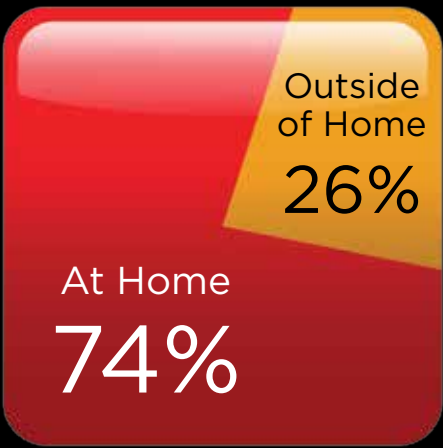
ACTIVITIES	
WAKING UP	34%
MULTITASKING	17%
GETTING READY/ GROOMING	15%

MOTIVATORS	
BE PREPARED / ORGANIZED	31%
SATISFY OR FEED MY CURIOSITY	21%
GET NEWS OR INFORMATION THAT IS	21%
MAKE A DECISION	17%
SAVE TIME / DO IT FASTER	16%
BE PRODUCTIVE / MAKE GOOD USE OF MY TIME	13%
DO IT EASIER	10%
NOT LOSE TRACK OF ANYTHING	10%

AT HOME

Me Time

Me time also occurs most frequently at home. It consists of those moments when people want to simply pass the time, relax or indulge themselves and do so by using their smartphones as a form of entertainment.



RELAX, PASS THE TIME

41%

ACTIVITIES

RELAXING	36%
ENTERTAINING MYSELF	23%
WATCHING TV	21%

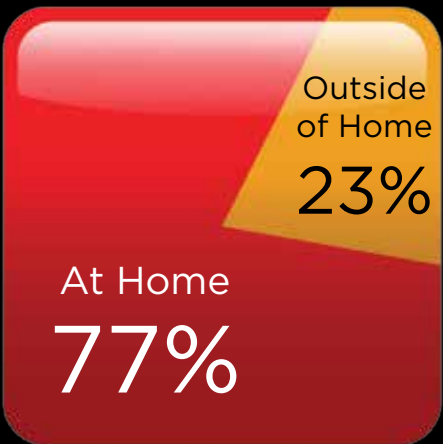
MOTIVATORS

RELAX, PASS TIME	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	41%
ENTERTAIN OR AMUSE	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	40%
FILL SPARE TIME / DEAD TIME	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	28%
ALLEVIATE BOREDOM	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	22%
INDULGE MYSELF	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	19%
ENGAGE MY MIND	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	18%
CONNECT WITH OTHERS	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	12%

AT HOME

Shop

The Shop moment not only includes the act of shopping itself, but also researching and understanding products and services. Here the smartphone plays the role of researcher, expert and advisor dedicated to helping make a better, smarter purchase decision.



FIND A DEAL / BEST PRICE / SAVE MONEY 27%

ACTIVITIES

WATCHING TV	40%
RELAXING	37%
SHOPPING IN PERSON AT A STORE	15%

MOTIVATORS

FIND A DEAL / BEST PRICE / SAVE MONEY	27%
SAVE TIME / DO IT FASTER	20%
DO IT EASIER	14%
MAKE A DECISION	14%
MAKE THE RIGHT CHOICE	14%
RELAX, PASS THE TIME	12%
BE PRODUCTIVE / MAKE USE OF MY TIME	11%
GET NEWS OR INFORMATION THAT IS	11%
BE PREPARED ORGANIZED	10%

AT HOME

Self-Express

In this moment, the smartphone becomes an agile and dedicated tool for self-expression. Whether it be editing new photos in Instagram or posting a status about what you're doing, the smartphone is an important tool which can encourage, enable and enhance a person's passion and interest.



RELAX, PASS THE TIME 53%

ACTIVITIES

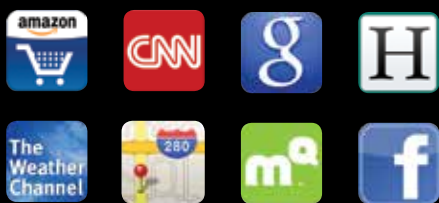
RELAXING	53%
WATCHING TV	47%
FILLING DEAD TIME/ KILLING TIME	5%

MOTIVATORS

RELAX, PASS THE TIME	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	53%
PURSUE MY PASSION(S), INTERESTS	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	32%
BE PRODUCTIVE / MAKE GOOD USE OF MY TIME	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	26%
EXPRESS MYSELF	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	26%
DO IT EASIER	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	21%
ENTERTAIN OR AMUSE MYSELF	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	21%
GET NEWS / INFORMATION	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>	21%

Discover

22



34%

ENTERTAINING MYSELF 21%

[illegible]

The reason we use or engage with what we do on mobile is not a one-dimensional proposition.







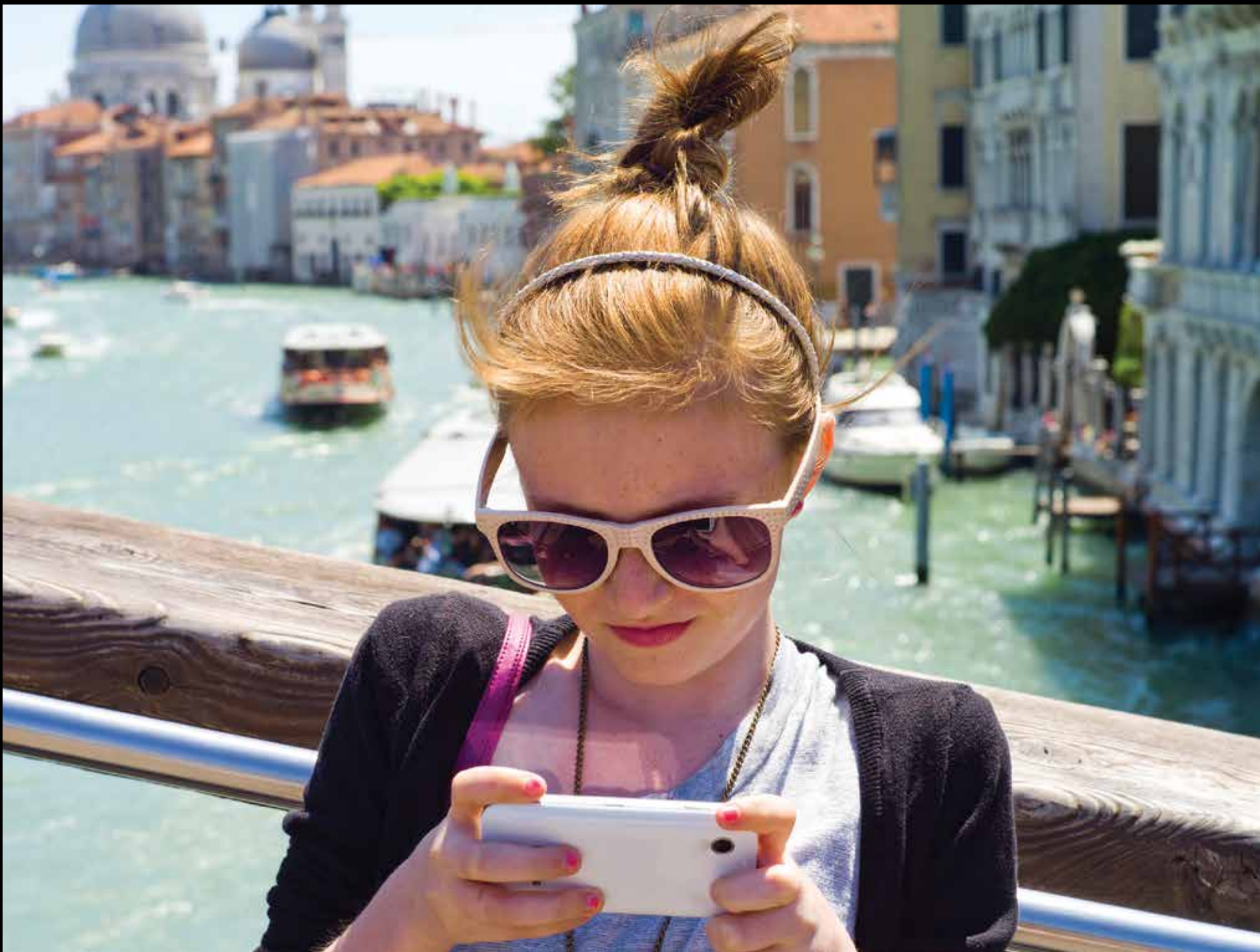
App-lication of the Seven Shades

Amazon

It may seem intuitive that apps and mobile sites would fall neatly into one of the seven shades. However, that is not always the case. For example, our study revealed Amazon's mobile app to be the most popular for shopping. But what's interesting is that usage also appears in other moments such as Accomplish and Me Time. This reveals that despite the obvious functional use of a particular app, there are different underlying motivations that drive consumers to use this app across a number of behaviors.

In this case, one consumer might use the Amazon app to shop, but another may use it to buy a gift, thus falling into the Accomplish category. Yet another consumer may simply use the app to browse products and pass the time while they also watch TV—this counts as Me Time.

This is an important example of how an app can fulfill the needs of more than one moment.



The Weather Channel

Many apps that seem to only fit into one category are also used to fill non-intuitive needs. Weather Channel's app usage, for instance, appeared prevalently in Accomplish, as well as—surprisingly—Me Time and Shop. Consumers indicated that they sometimes use the app to check the weather in other locations just to fantasize about what it's like to be there. Some use the app to plan out what to wear when they're going shopping, or to determine the best day and time to go out to the store.

Again, this proves how critical it is that marketers do not jump to conclusions about the usage of a particular app. One app could potentially fill a variety of behavioral needs, and multiple apps may serve just one. This means that marketers and advertisers must learn to craft different advertising for different moments, and learn to integrate messages when there are multiple moments linked by the use of one app.

Many apps that seem to only fit into one category are also used to fill non-intuitive needs.

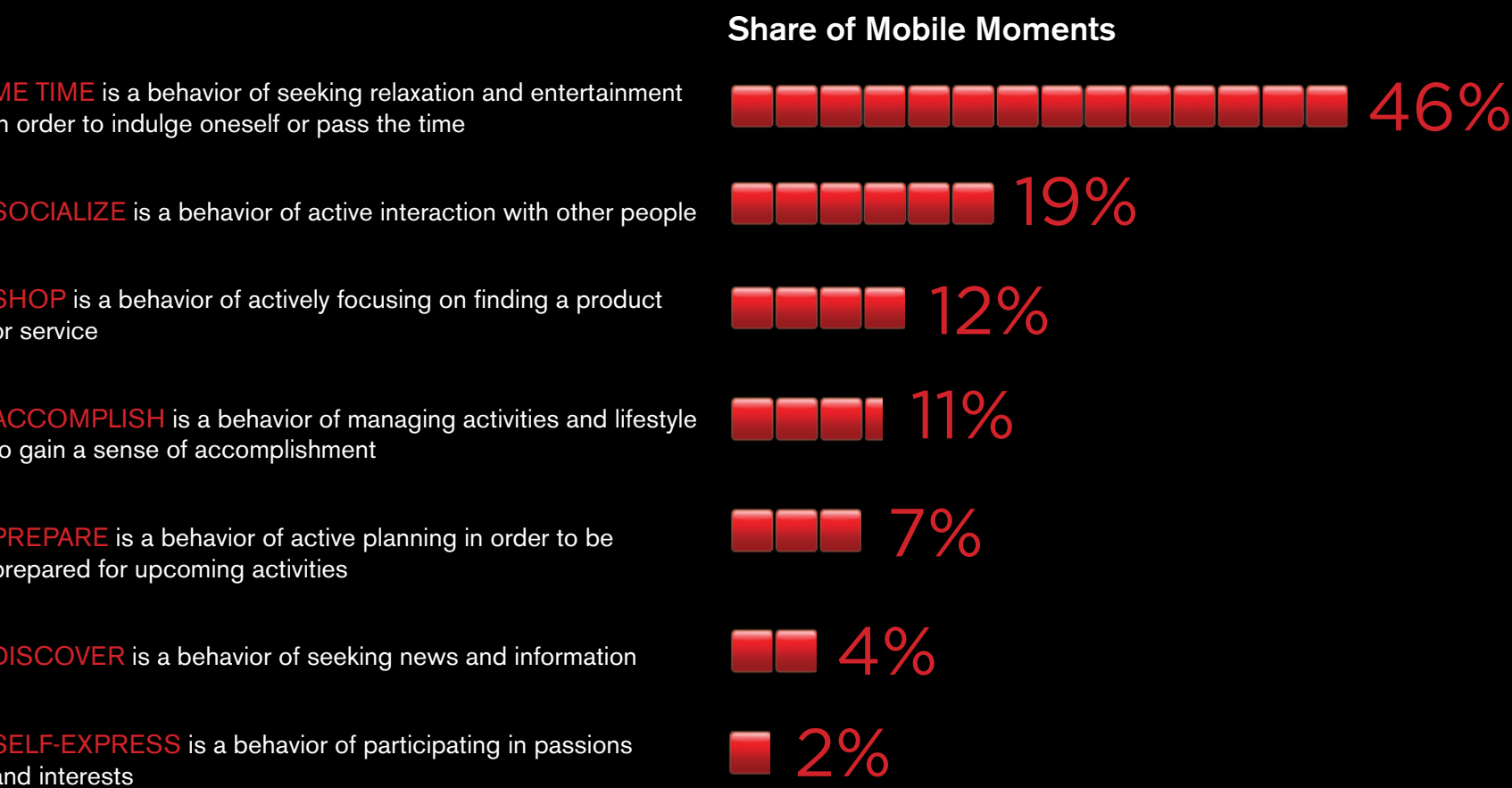


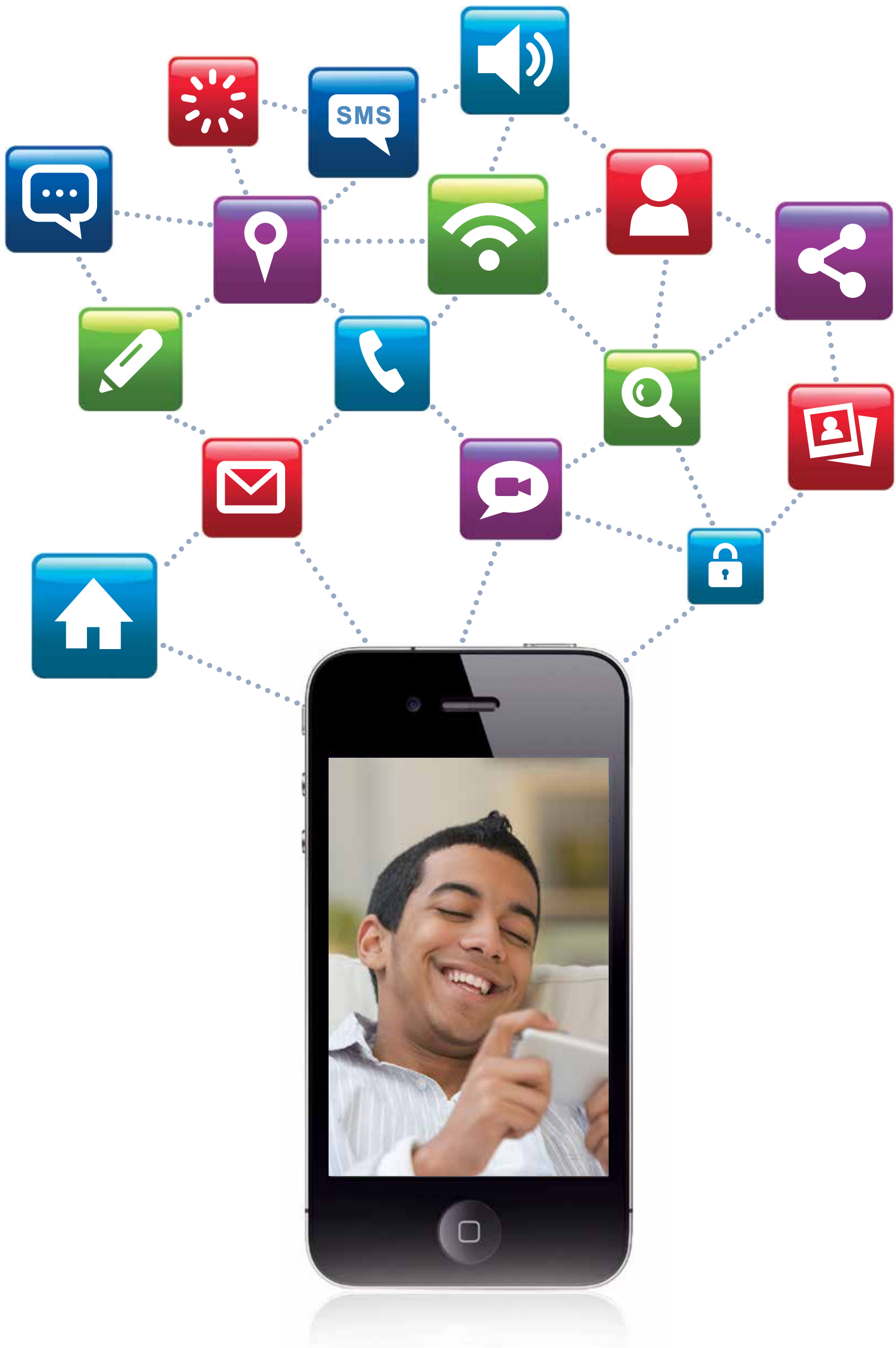
Different paths to one mobile experience

When we look beyond the surface-level insights, what we see is that people take different paths to get to each app or mobile website. Each of these different paths is a motivator for that particular mobile moment. If marketers only see one motivation to use a particular app, they miss the underlying behaviors behind why people choose to use that app at that moment. In addition, they also miss the various shades of mobile usage in which apps such as Amazon and the Weather Channel can play, and, in fact, where they are already playing. This has major ramifications for marketers and how they target their marketing and design for their apps.

Sizing up the shades

Seven unique smartphone behaviors exist. Each behavior lends itself to a unique opportunity for brand touch points, content development and product innovation.









It's all about Me Time

In addition to understanding the texture and dynamics behind our Seven Shades, we also determined the relative size of these moments. We measured the occurrence of each moment and found that one of them accounted for the largest amount of mobile activity—Me Time. It accounted for 46% of all smartphone app and mobile website moments. Me Time was also enjoyed by 60% of all smartphone users, occurring once a day on average. And when a person engages in Me Time, they are in it for the long term, as Me Time accounts for 68% of all minutes currently spent on smartphones.

People use a surprising variety of apps to fulfill Me Time. Games and music are most often associated with Me Time, but users also turn to websites and apps that don't traditionally seem like Me Time moments. For example, a person might use Amazon to look through the latest tech gadgets for fun or check the weather in other cities to imagine being somewhere else.



Are we scoring in Me Time?

Despite the size of this mobile moment, advertising and brands are performing poorly in Me Time. Compared to other moments, advertisements in Me Time are some of the least effective. Only 1 out of 4 people took action when an ad was seen during this moment.

What's going on?

Me Time advertising actions

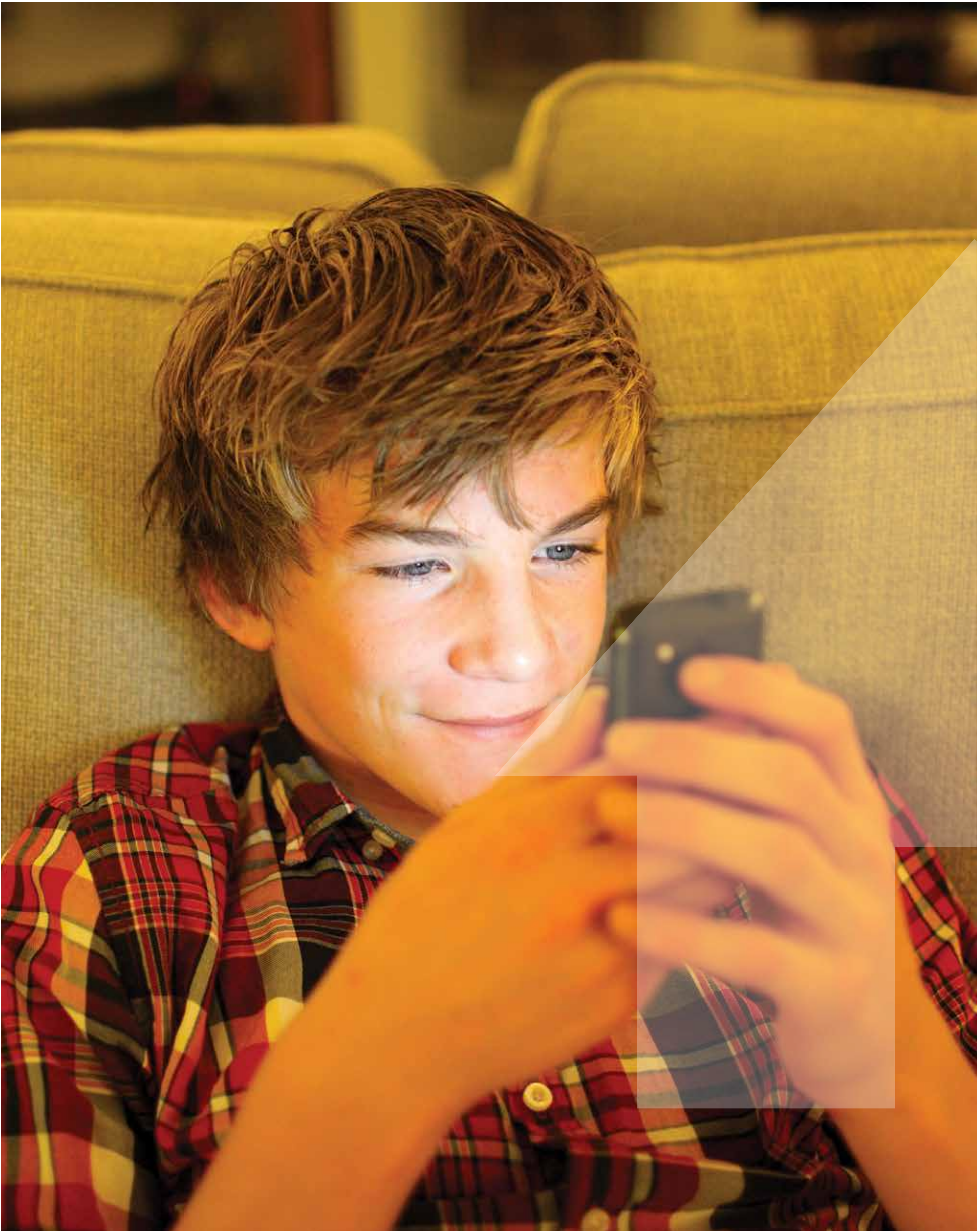
AD EFFECTIVENESS



AD EFFECTIVENESS INDEX



Advertisements in Me Time moments are some of the least effective (compared to other mobile markets). A person took action only 1 in 4 times when an ad was seen.



A new approach

Mobile usage should not be looked at superficially—it's part of a bigger picture. It fits into a consumer's life in many ways, whether he or she is on the go or at home, looking to relax, or looking to get things done. At-home use, in particular, may seem counter to what marketers have believed so far. But it is important to realize that when you catch a person in a particular "mobile" moment, they may actually be at home, and they may be multitasking while using their mobile phone at the same time. Advertisers need to create campaigns and messaging that incorporate the bigger picture including out-of-home and home use, taking into account the different reasons for use.

Focus on Me Time

Mobile usage is not one-dimensional. A surface view of the mobile landscape can hold advertisers and brands back. We need to dig deeper and see that mobile engagement is driven by seven underlying behavioral factors. Consumer moments are much more rich and complex than they are simple and functional. The Seven Shades of Mobile spectrum provides a rich platform for advertisers and brands to extract more value out of consumer mobile behavior.

This study has unveiled what could very well be the key to creating a successful mobile campaign, and hopefully will result in more media dollars flowing over to mobile so the opportunity to make real connections with consumers is not missed. Effectively closing the gap between mobile and the consumers can thereby result in bigger ad spending in the mobile arena.



For more information, please contact:

Simon Bond

Chief Marketing Officer
BBDO and Proximity Worldwide
1285 Ave of the Americas
New York, NY 10019
Tel: +1 212 459 5878

Grace Chang

BBDO
Tel: +1 212 459 5951

Book Design:

Teresa Dillon

Sources:

eMarketer
InsightsNow
Time

BBDO


proximity


Aol.

