

Making Leaders Successful Every Day

#ForrMobile



The State Of Consumers And Mobile

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#ForrMobile

Agenda

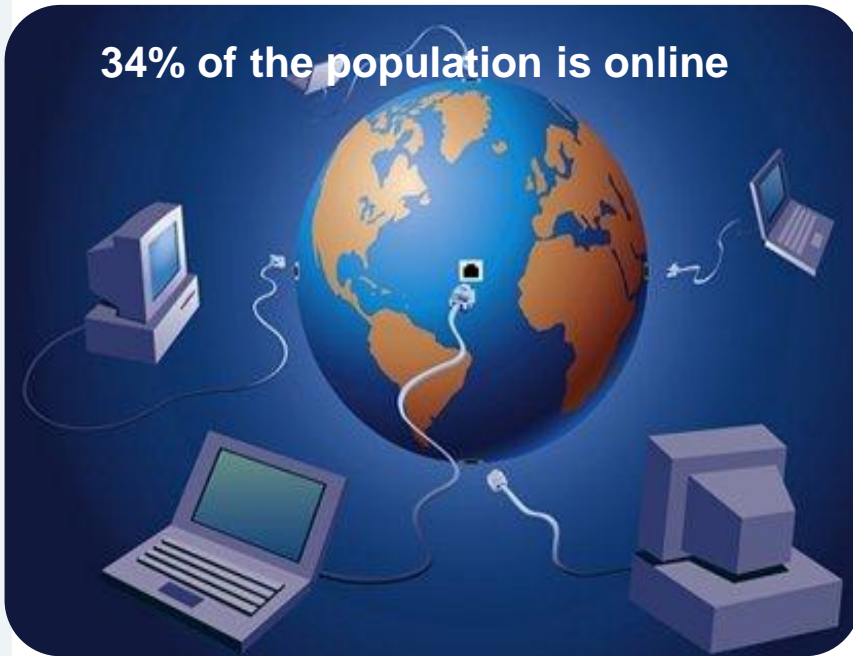
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- › *How are consumers using their mobile phones?*
- › *What does the ultra-connected customer look like in the future?*
- › *What are some best practices for engaging mobile users now?*

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Reaching consumers via the online world has its limitations

34% of the population is online



61% of the population owns a mobile



Sources: Forrester Research World Online Population Forecast, 2012 to 2017 (Global); Forrester Research World Mobile Adoption Forecast, 2011 to 2016 (Global)

And this picture will not change anytime in the foreseeable future

In 2016:

38% of the population will be online

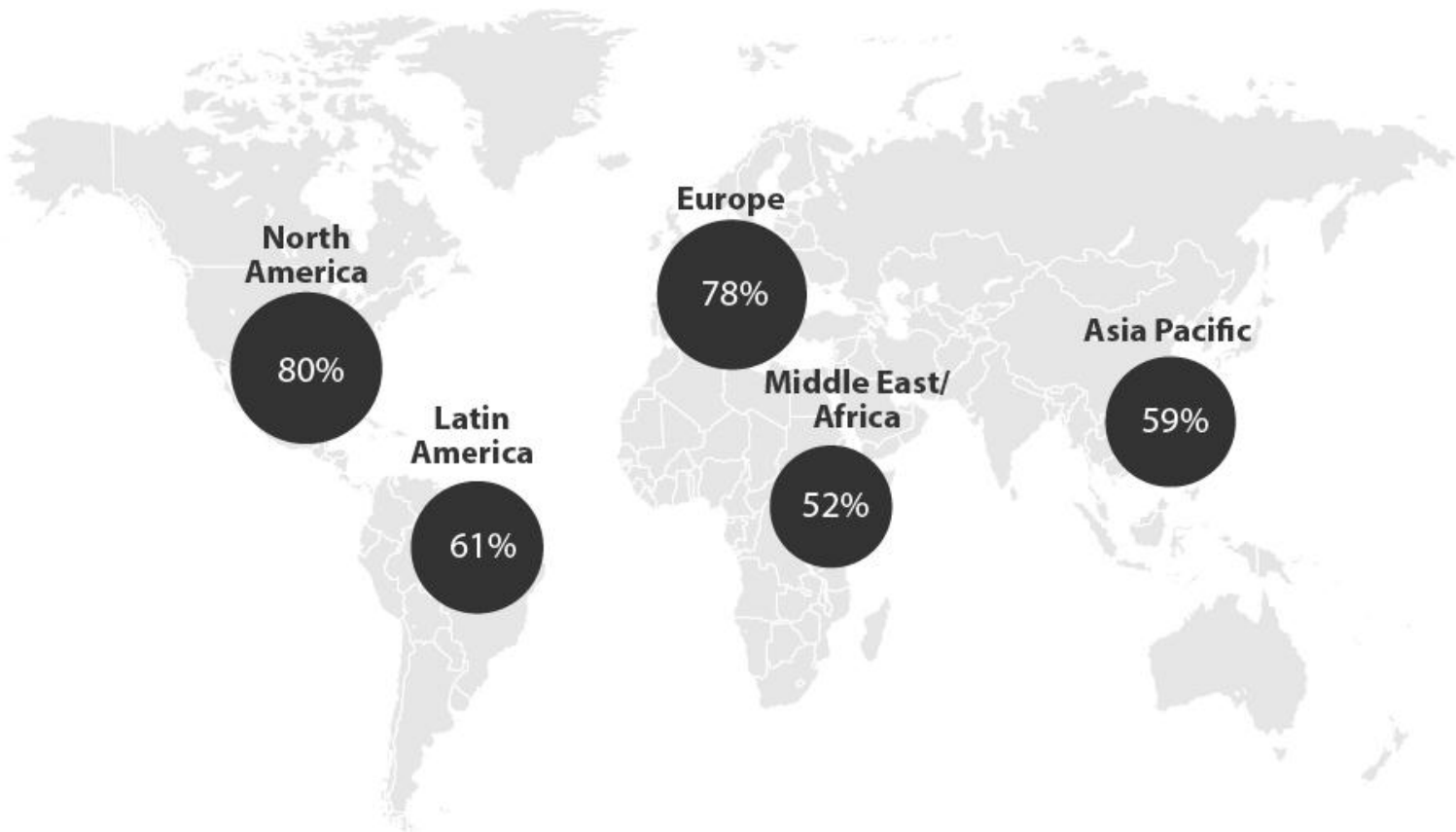


68% of the population will be mobile



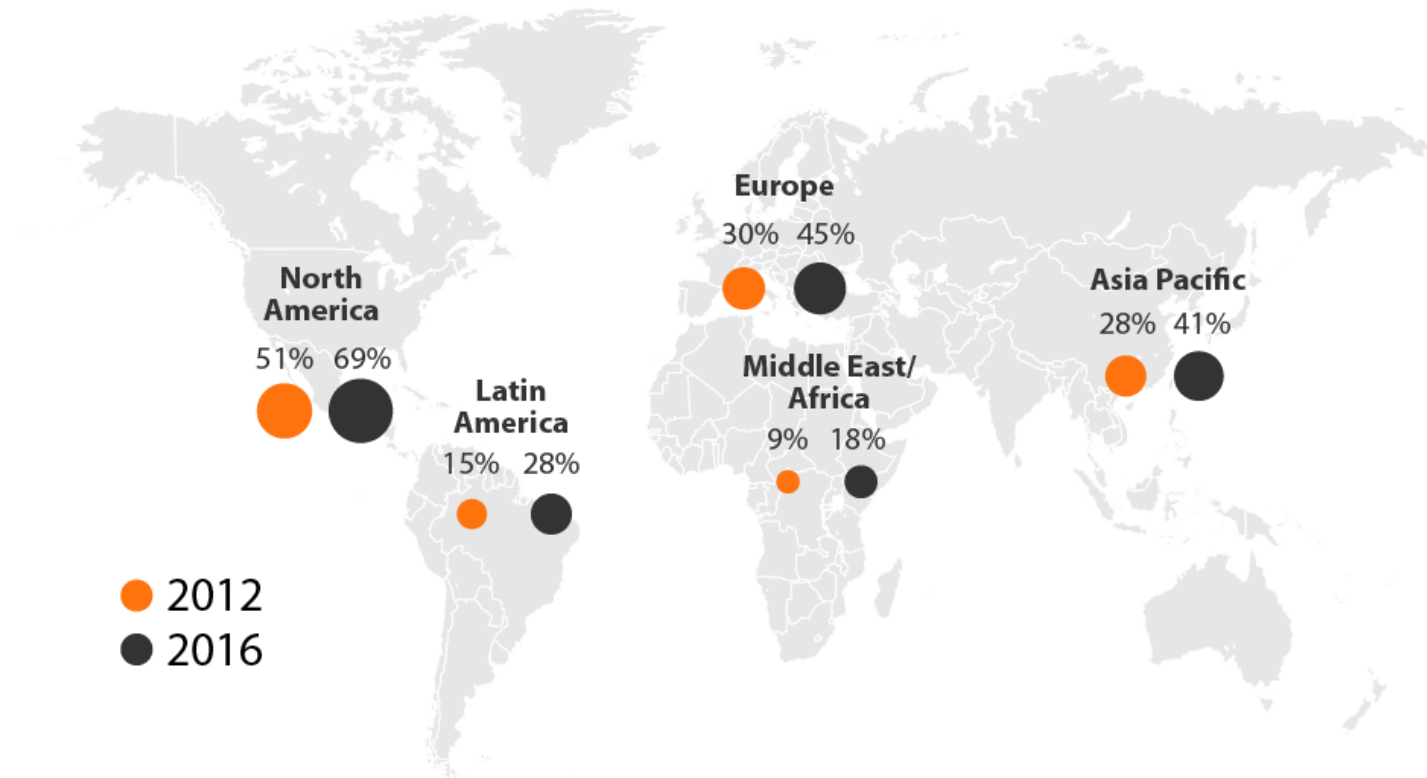
Sources: Forrester Research World Online Population Forecast, 2012 to 2017 (Global); Forrester Research World Mobile Adoption Forecast, 2011 to 2016 (Global)

Mobile phone adoption has exploded globally



Source: Forrester Research World Mobile Adoption Forecast, 2011 to 2016 (Global)

While not as high globally, mobile Internet adoption will grow rapidly in the next few years



Source: Forrester Research World Mobile Adoption Forecast, 2011 to 2016 (Global)



Mobile is becoming the consumer's main digital engagement channel.

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Mobile phones capture a lot of consumers' attention and time

84

Eighty-four percent keep their device within 3 meters of them at all times.

The average person looks at their phone 150 times a day, or once every 6.5 minutes of every waking hour.

150

48

On average, email is read 48 hours after it is sent, while the average SMS is read in 4 minutes.

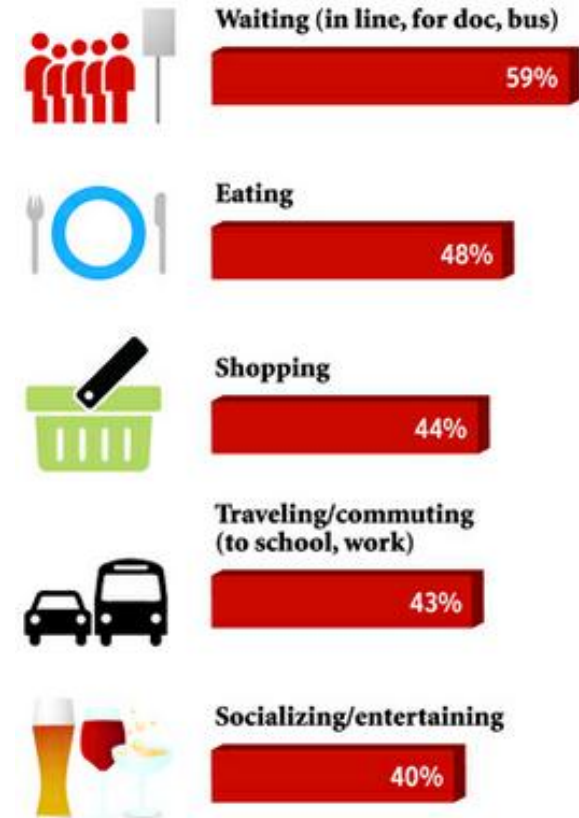
Source: <http://www.intomobile.com/2012/02/09/tomi-ahonen-average-users-looks-their-phone-150-times-day/>; V. Bhaskaran & K. Peterson, *Transforming Customer Feedback Through Mobile*, at Market Research in a Mobile World Conference, Amsterdam 2012

Mobile phones are a huge part of consumers' everyday life

WHERE People use mobile phones everywhere.



WHEN Consumers use smartphones while...



Source: Mobile Movement Study by Google and Ipsos; <http://www.appisaurus.com/597-mobile-device-use/>

In fact, consumers rely on mobile phones so much that anxiety occurs when they misplace them

HOW DID YOU FEEL WHEN YOU MISPLACED YOUR PHONE?



73%
PANICKED



14%
DESPERATE



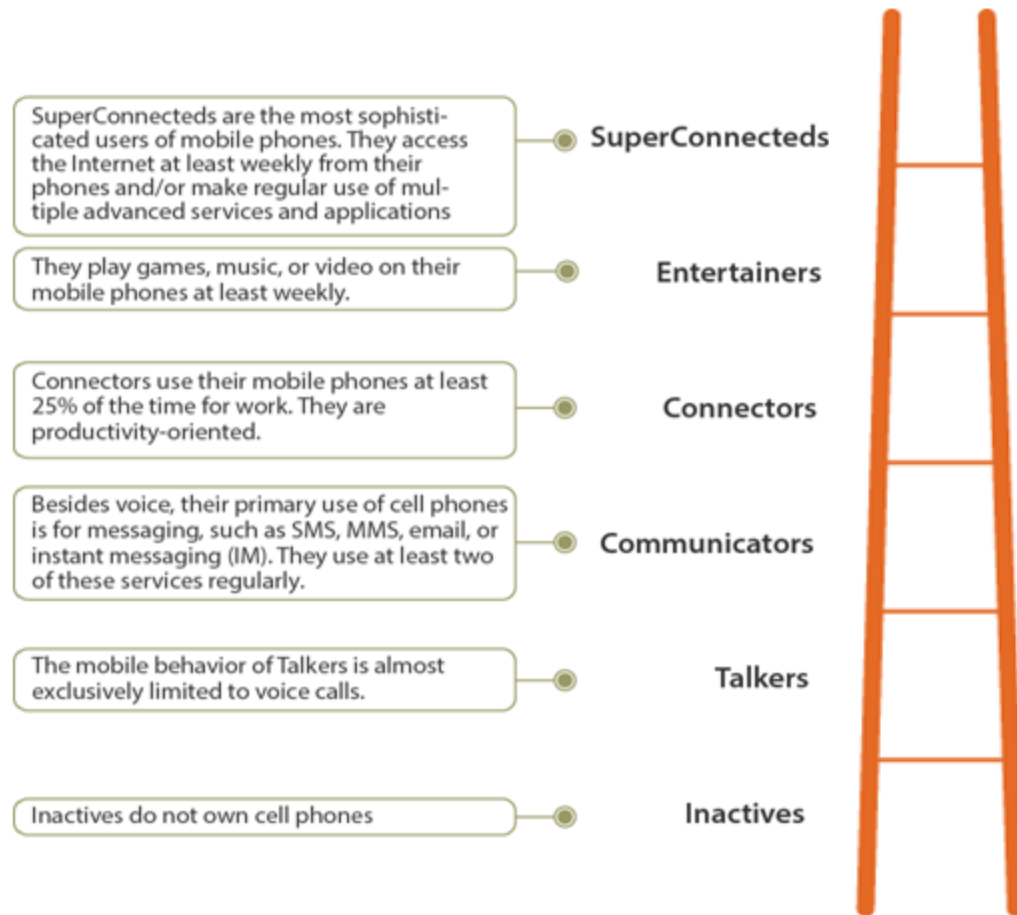
7%
SICK



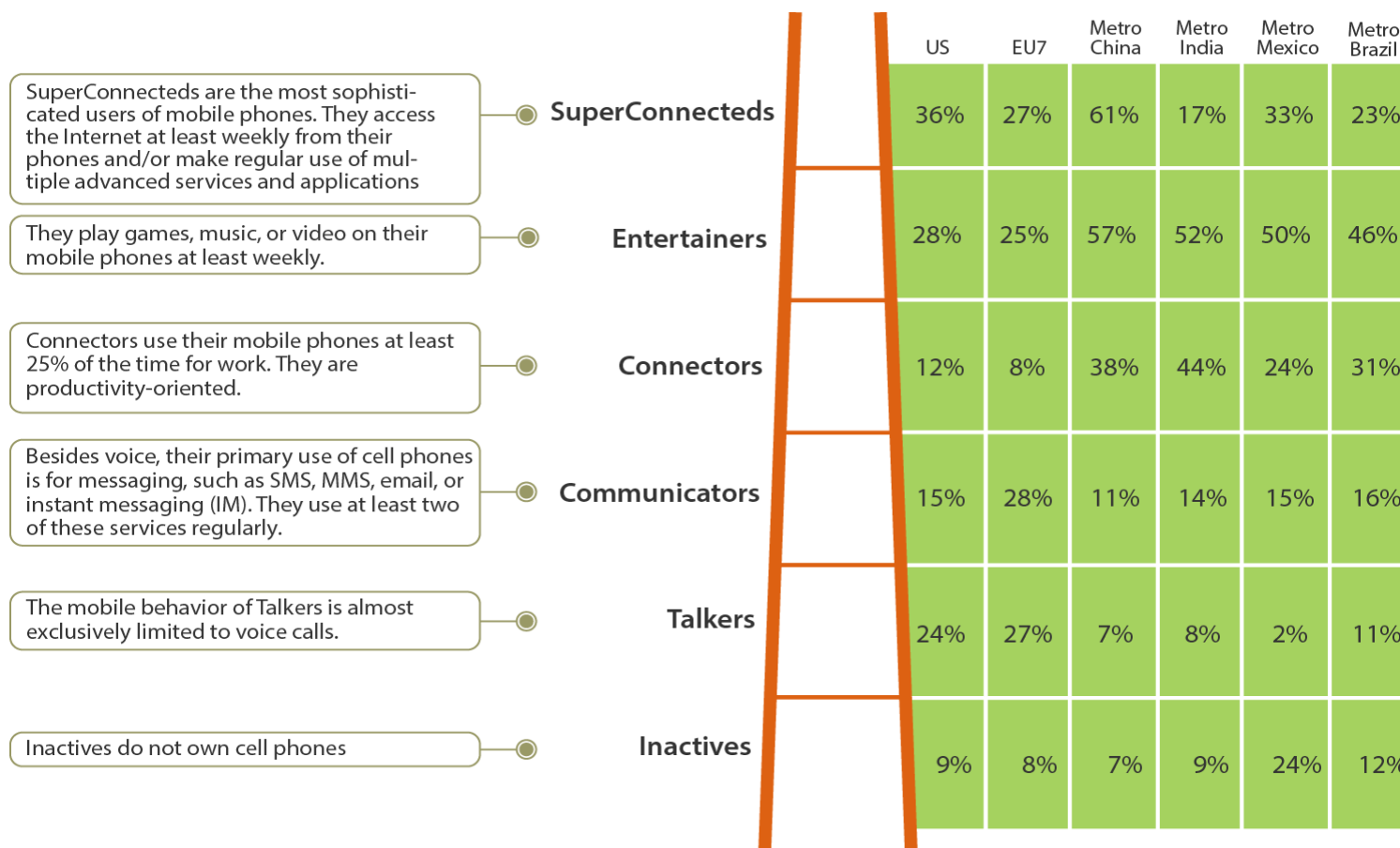
6%
RELIEVED

 lookout

Mobile Technographics® helps us understand the nuances of mobile behavior



Significant geographic differences in mobile usage lead to different types of users



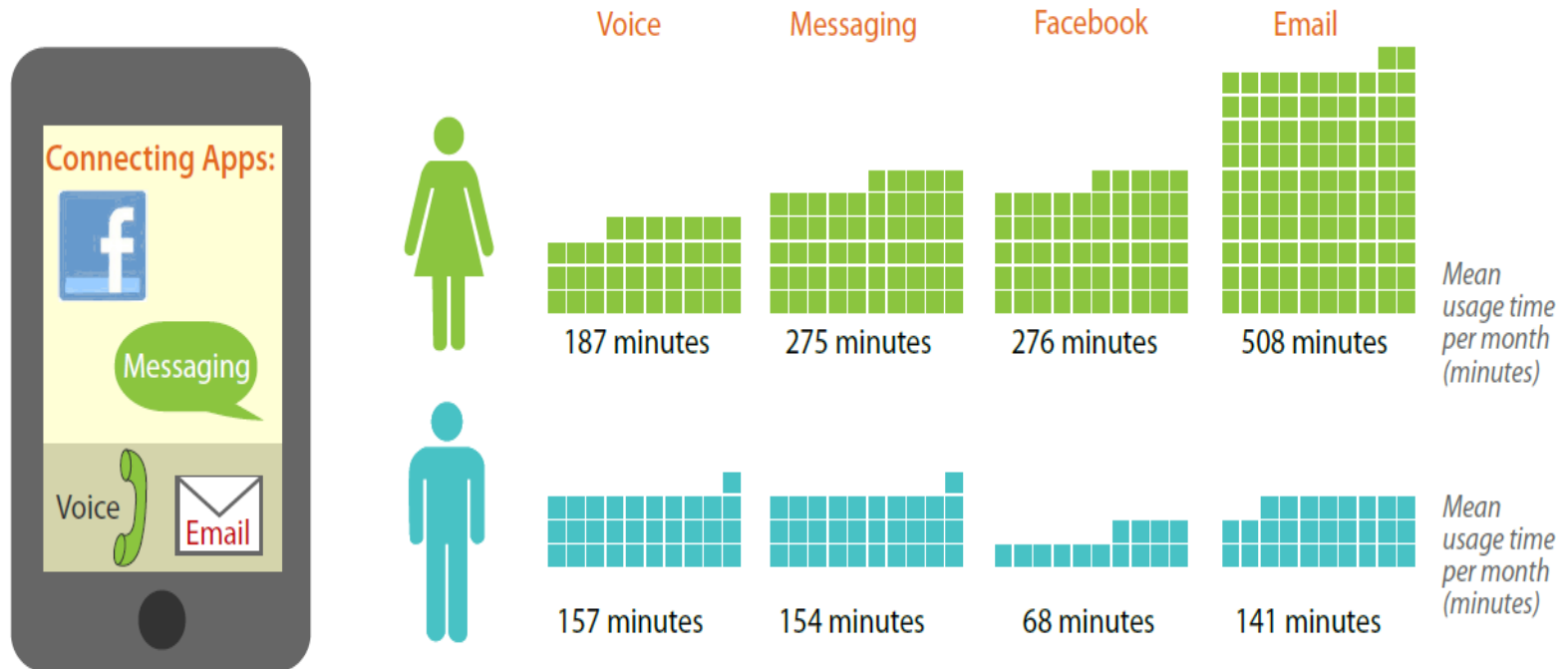
Base: adults who own a mobile phone

Sources: North American Technographics Benchmark Survey, Q3, 2012 (US, Canada); European Technographics Benchmark Survey, Q3 2012; Asia Pacific Technographics Survey, Q3 2012 (China, Hong Kong, India, Japan); Latin America Technographics Survey, Q3 2012 (Brazil, Mexico)

But one must also look at other key factors like gender to understand drivers of behavior

Mean usage time per month :

■ Each block represents 5 minutes

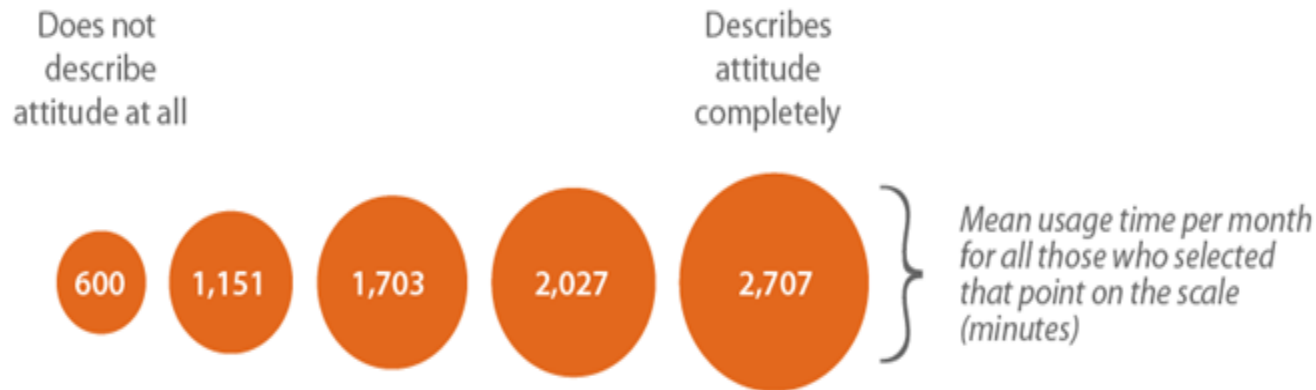


Base: 195 UK respondents were tracked overall; base sizes for each mobile activity vary

Source: June 22, 2012, "A Month In The Life: How UK SuperConnecteds Use Their Mobile Phones" report.

We should also look at psychographics, which can provide much-needed context for mobile behavior

"My mobile phone is the first place I go when I need to find information."



Base: 195 UK respondents were tracked overall; base sizes for each mobile activity vary

Your goal: Gain an intimate understanding of your target customer – both their needs and their behaviors.



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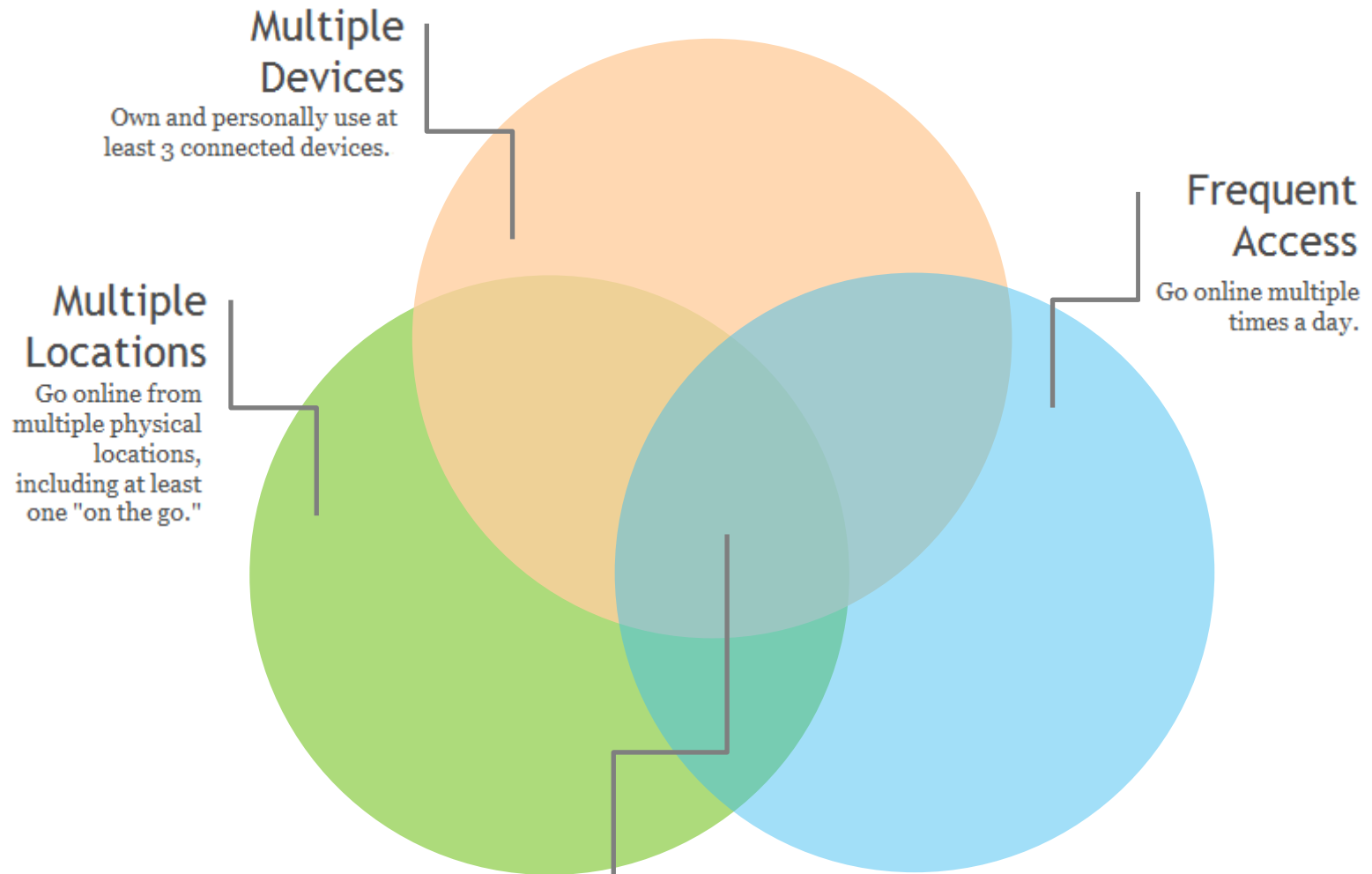
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A woman with blonde hair and sunglasses is sitting on a boat, looking at a tablet computer. The tablet screen shows a home screen with various app icons. In the background, there is a beach with waves crashing onto the shore. The text is overlaid on a dark semi-transparent box.

People are increasingly connected . . .

To each other, to brands, and to places . . .

More often and from more locations than ever before.



**Not enough
data**

2010

**Always
Addressable
Customers 2011**

38%*

**Always
Addressable
Customers 2012**

42%**

*Source: North American Technographics® Online Benchmark Recontact Survey, Q3 2011 (US, Canada)

**Source: North American Technographics® Online Benchmark Survey (Part 2), Q3 2012 (US, Canada)

AAC penetration is growing quickly in Gen X and above

	<u>2011</u>	<u>2012</u>
US online adults	38%	42%
Gen Z (18–22)	60%	59%
Gen Y (23–31)	60%	62%
Gen X (32–45)	46%	50%
Younger Boomers (46–55)	26%	29%
Older Boomers (56–66)	19%	24%
Golden Generation (67+)	10%	15%

Base: US online adults

Source: North American Technographics® Online Benchmark Recontact Survey, Q3 2011 (US, Canada)

Source: North American Technographics® Online Benchmark Survey (Part 2), Q3 2012 (US, Canada)

Always Addressable Customers are:

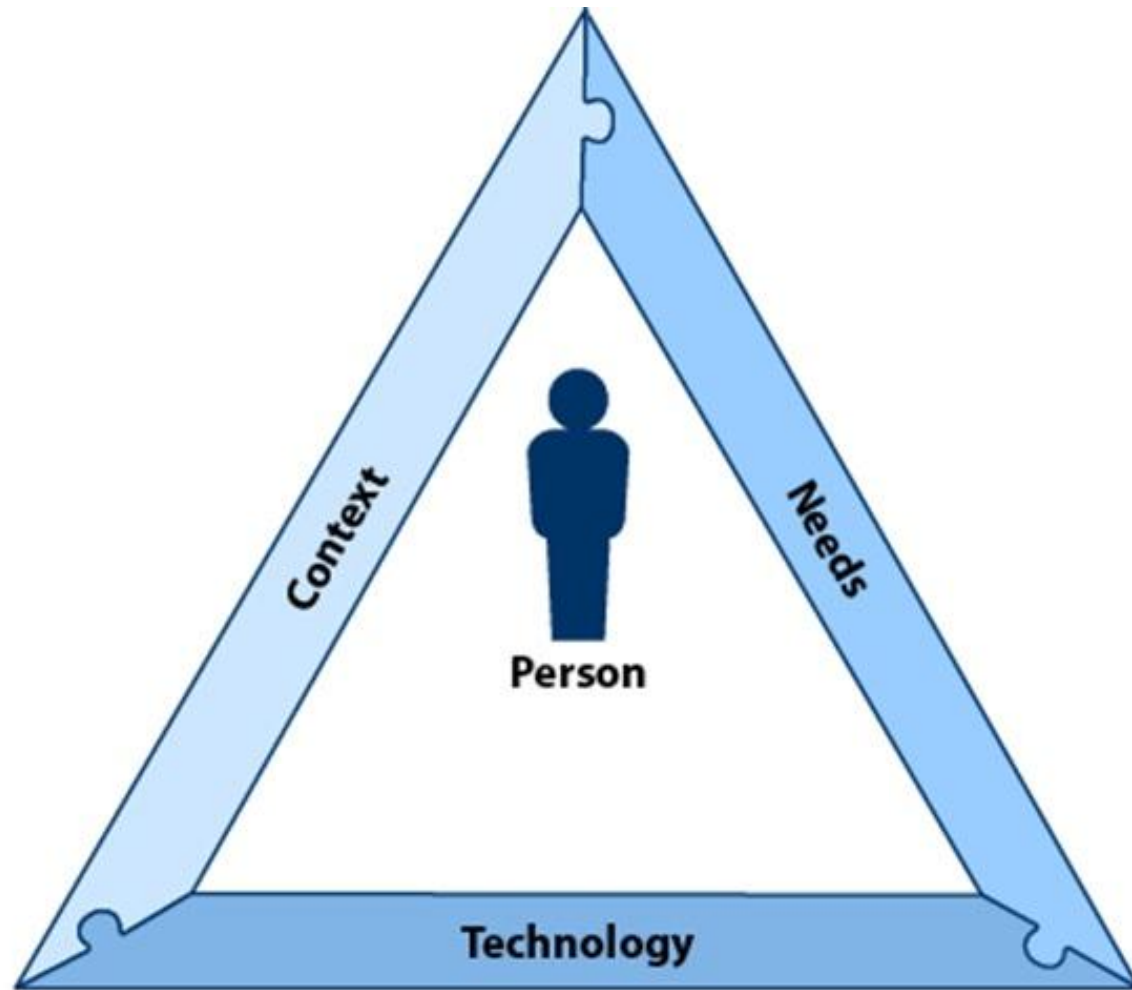
- Male (54%) and female (46%).
- Employed: 60% have full-time jobs.
- Highly educated: 38% have four-year degrees; 23% have postgraduate degrees.
- High-earning: 56% have a household income of \$75,000 or more.

Source: North American Technographics® Online Benchmark Survey (Part 2), Q3 2012 (US, Canada)

Key attributes of the Always Addressable Customer

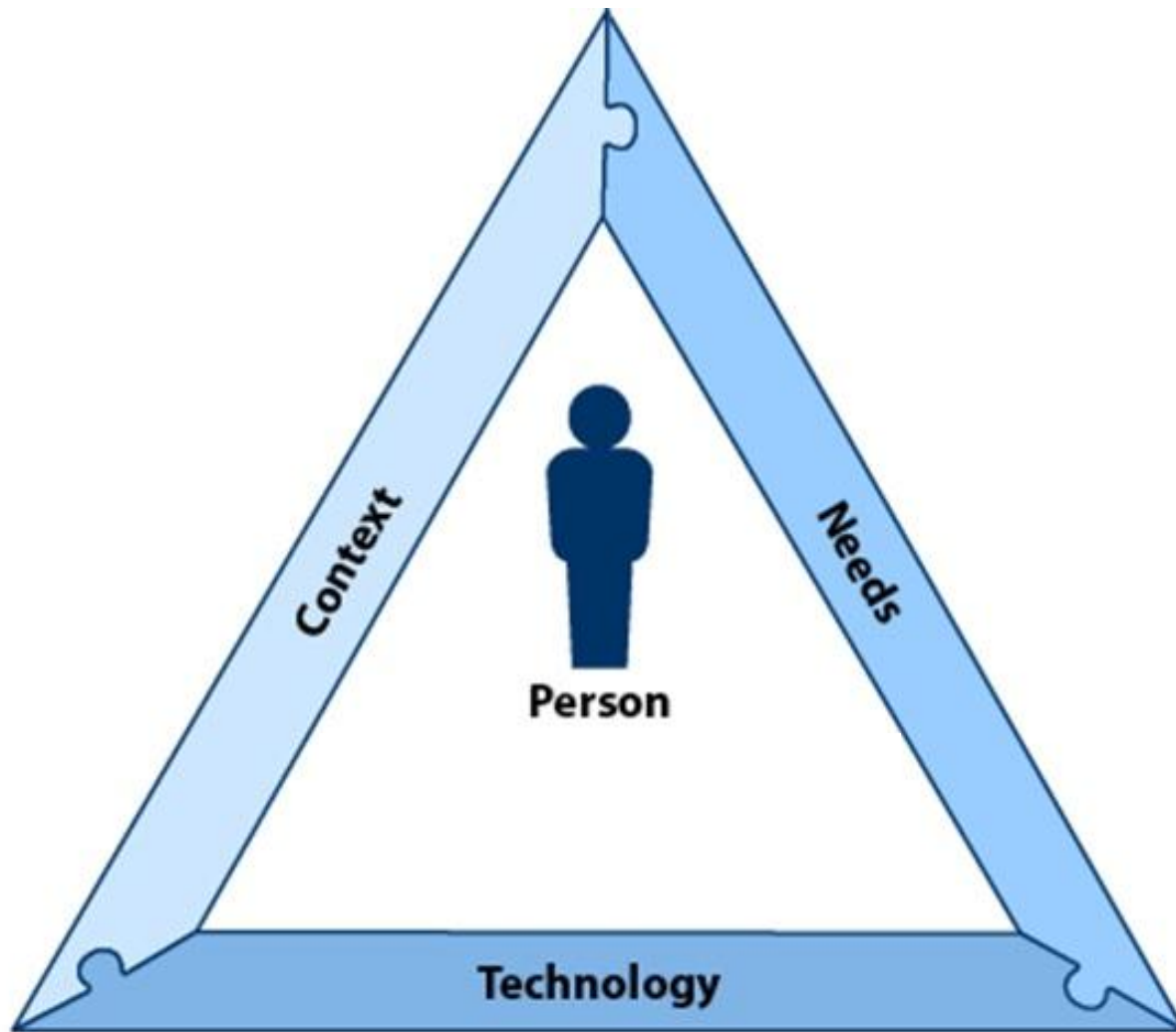
- Smartphones are a key channel on which to reach them. These consumers are always on the go and want what they need at the moment they need it.
- But while smartphones are key, AACs don't *distinguish* among technologies. They simply use whatever will help them do what they need and want to do.
- They're far ahead of most marketers in subverting distinctions in the way they think about technologies and devices, but they don't realize it.

The addressability framework




Krispy Kreme targets loyal customers






Customers can now be alerted when a Hot Now light near them is illuminated


KRISPYKREME.COM


 **HOT LIGHT**online


Take the Hot Light with you wherever you are.


Nothing strikes glee in the hearts of taste buds like the warm glow of the Krispy Kreme Hot Light. Now you can capture that excitement with Hot Light Online. So lookup, download or tweet your way to Hot Light greatness with one or all of the following options.


**IPHONE APP**
Get the Hot Light app on your iOS device.
[DOWNLOAD NOW](#)


**ANDROID APP**
Get the Hot Light app for your Android.
[DOWNLOAD NOW](#)

**DESKTOP WIDGET**
Hot updates straight to your desktop.
[DOWNLOAD NOW](#)

**WEBSITE LOCATOR**
Use your browser to find Hot Lights in your area.
[LOCATE NOW](#)

**MOBILE LOCATOR**
Map the nearest location from your phone.
[LOCATE NOW](#)

**TWEET YOUR ZIP CODE**
We will tweet the nearest Hot Light location to you.
 [Tweet](#)



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Simple goals and creative solutions got results

Krispy Kreme achieved:

- A 175% increase in mobile web traffic.
- A 70% increase in overall site traffic.
- 100,000 app downloads.
- 141,000 notifications *per day*.
- An average of 83,000 notifications *per store* with no added burden to the store or its employees.



New marketing practices aren't built in a day.

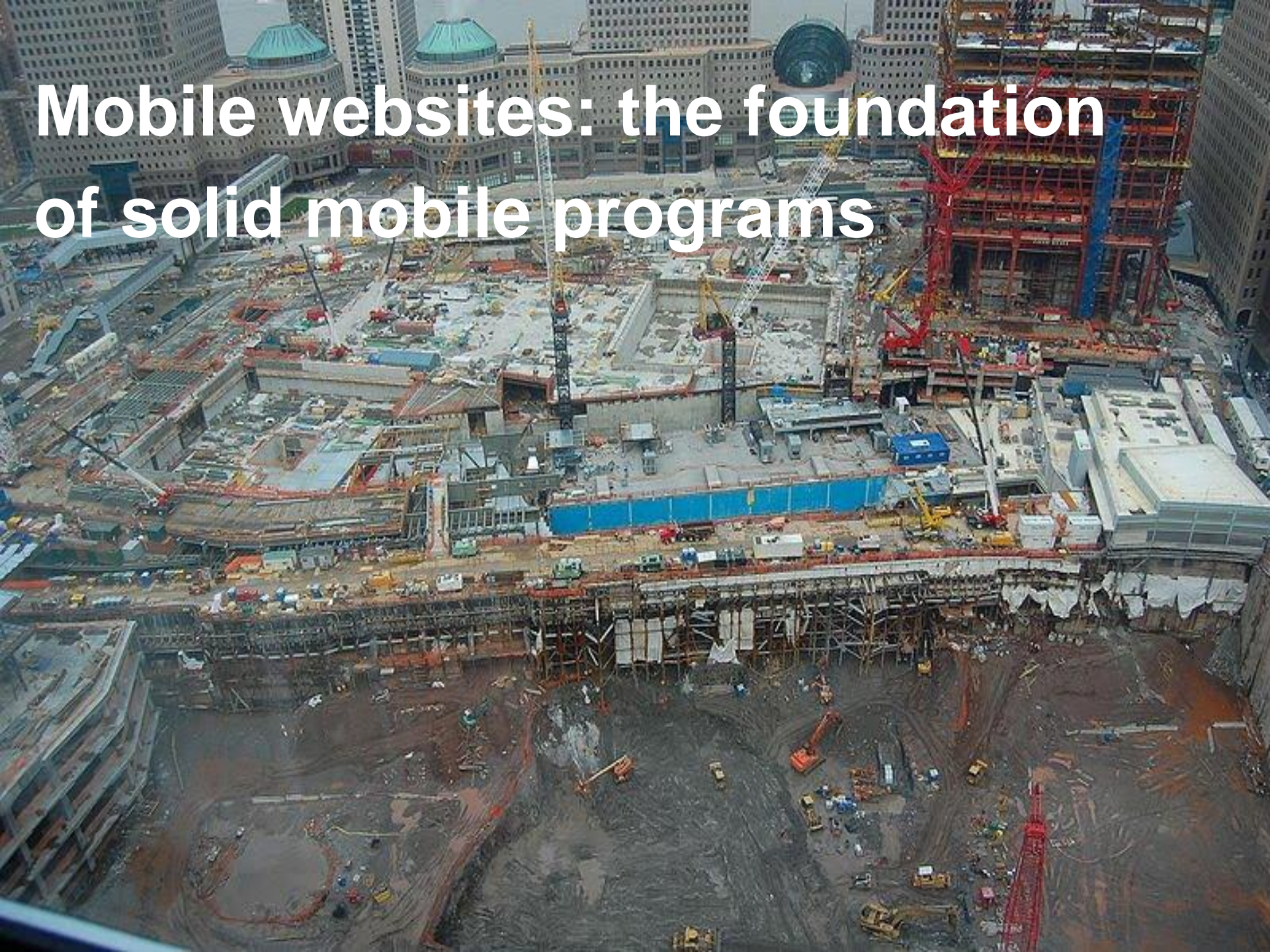
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Best practice No. 1

Have a mobile website.

Mobile websites: the foundation of solid mobile programs



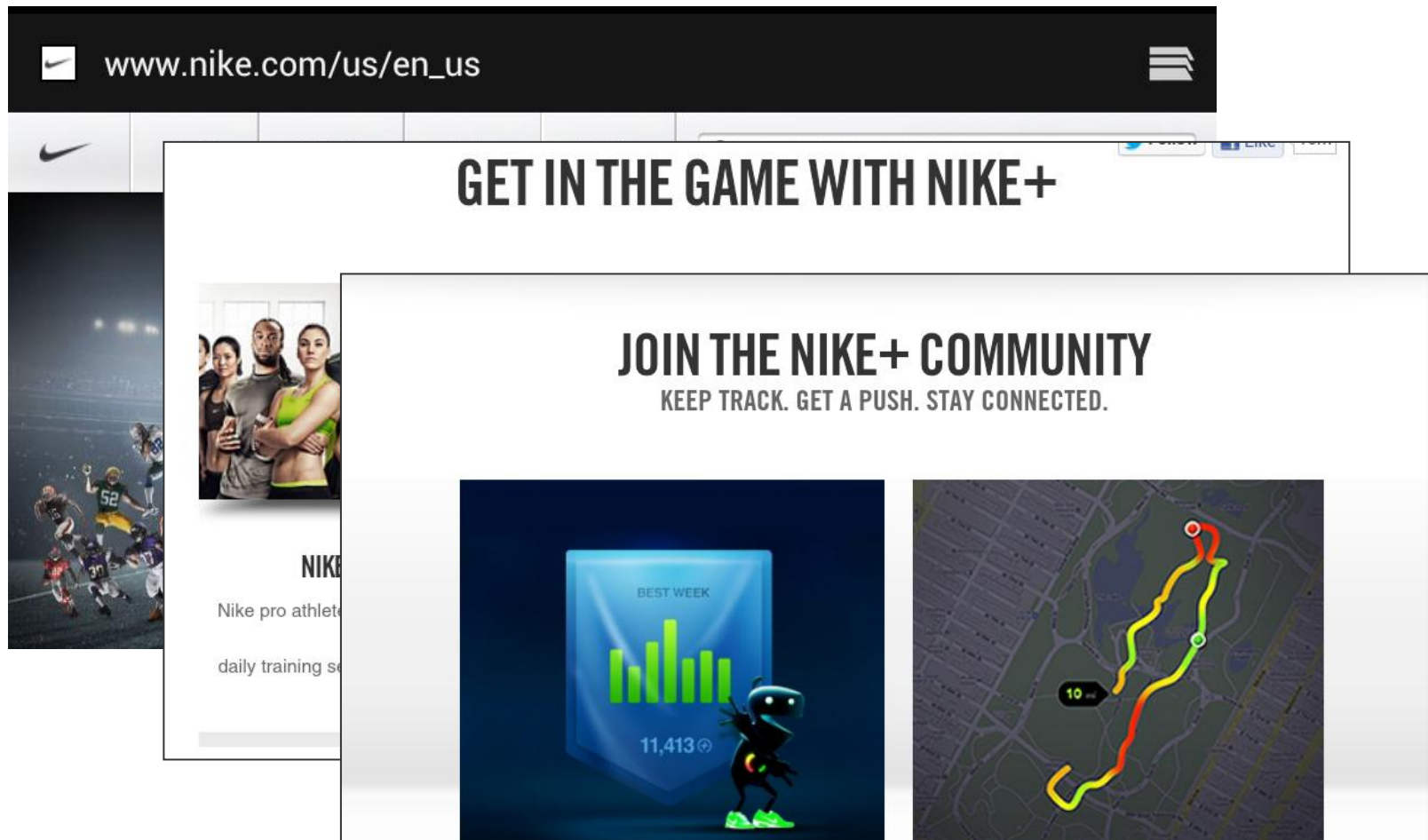
An aerial photograph of a city construction site. In the background, a large, multi-story building is under construction, featuring a prominent circular structure. The foreground shows a large, open area with various construction materials, equipment, and a blue fence. The overall scene is a busy urban development project.

- For brands, a mobile website is table stakes today.

- Most brands see 12% to 18% of web traffic coming from mobile devices – even if they don't intend to serve a mobile audience.

- Mobile websites contribute to discovery and provide depth.

Example: Nike's mobile website shows massive depth, just like its non-mobile one

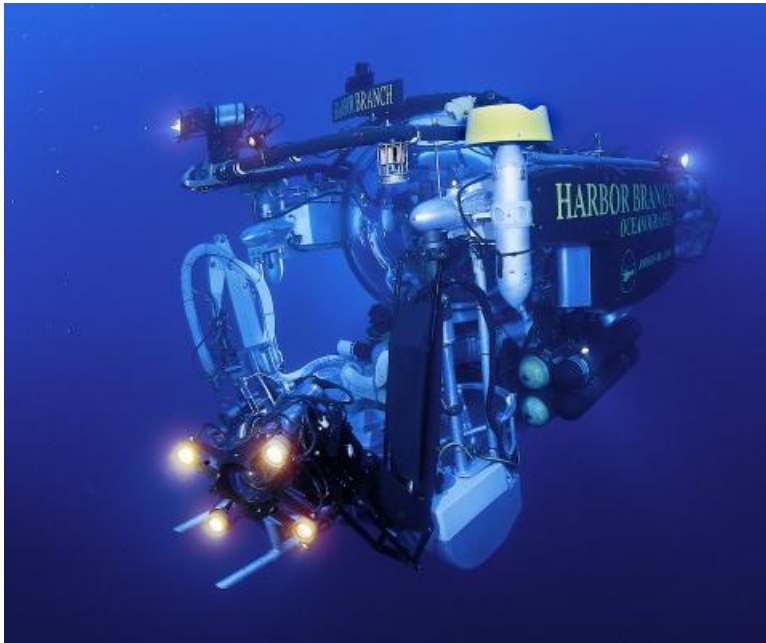


Best practice No. 2

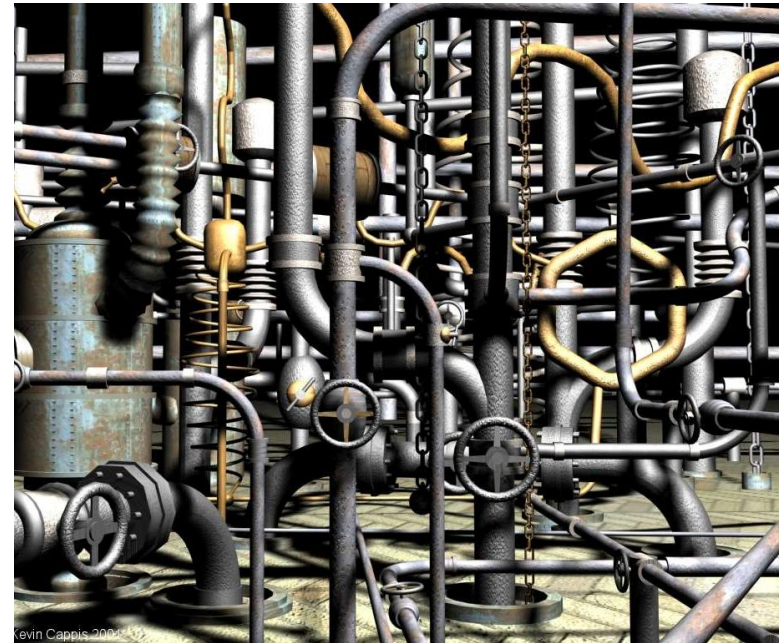
Differentiate between mobile sites and apps.

Mobile sites and apps can co-exist

Mobile sites



Apps



Example: FedEx mobile serves businesses and consumers

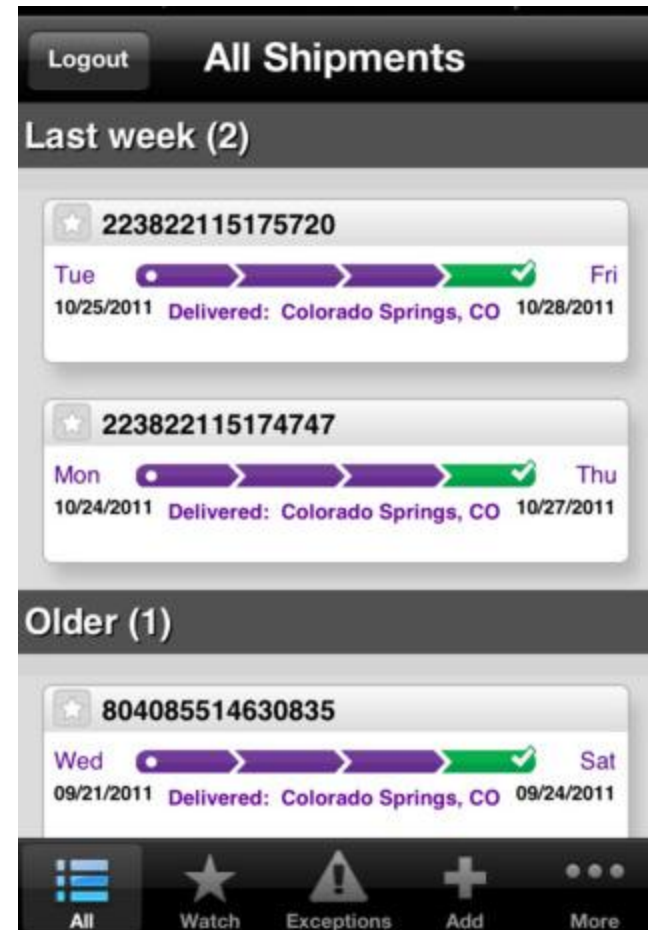


Consumers can track packages via a variety of mobile tools.


FedEx business shippers have immediate access to their accounts on any device – including over the phone – all synchronized with real-time data.

Sales agents have an enterprise app equipped with customer data and sales collateral to answer questions and close deals quickly and efficiently.


FedEx consumer apps focus on the frequent shippers . . .



... while the site focuses on the recipient or the casual customer





[Menu ▼](#)[Login](#)

Your Nearest FedEx Staffed Location

 790 Rte 3 W

Track a Shipment

Track

Create Shipment	
Get Rates	
Schedule a Pickup	
Track a Shipment	

Best practice No. 3

Think immediacy, simplicity, context.

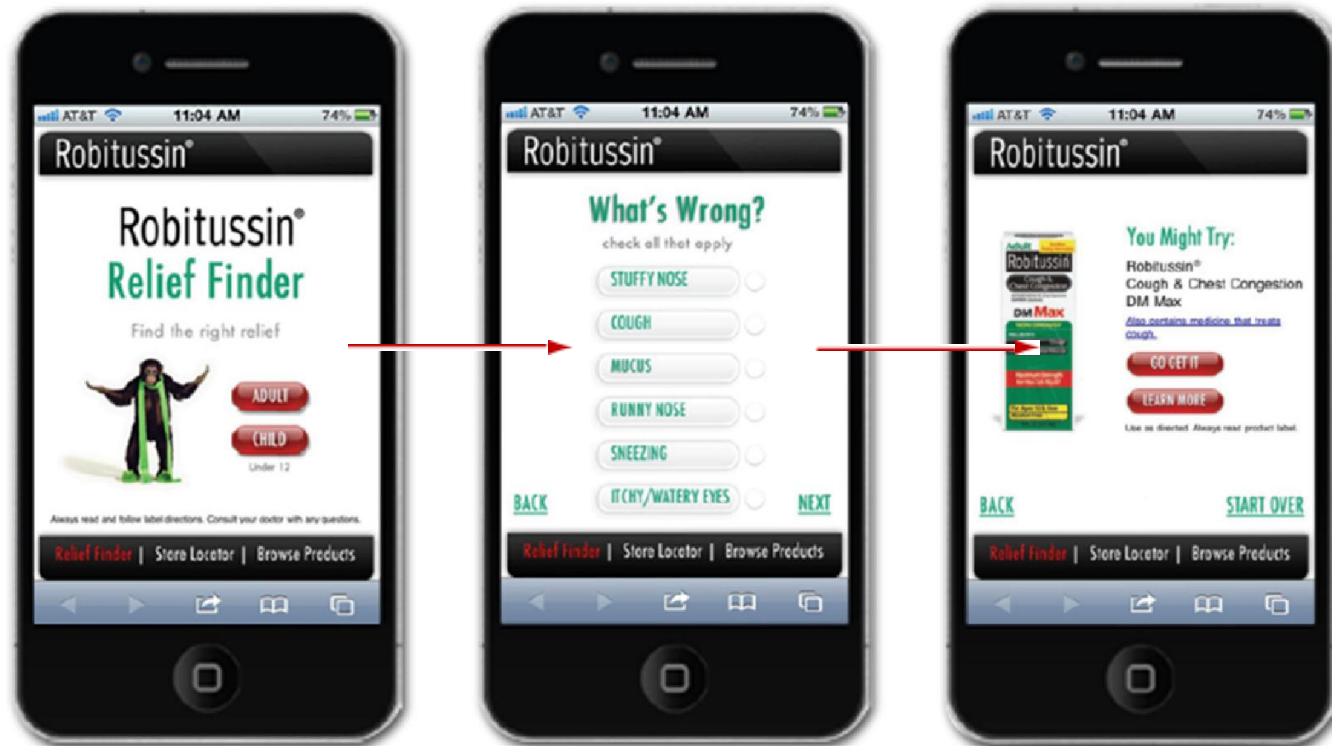
Provide timely and actionable content to boost immediacy

3-2 Mobile apps like shopkick send users actionable content upon entering a physical store



Source: shopkick website

Provide content that is easy to see and navigate to boost simplicity



Robitussin's mobile app is supported by and consistent with other online and offline marketing channels.

Provide contextually relevant content and services to boost relevance



Bravo's integrated "Just Desserts Day" campaign featured real-time updates on dessert truck locations, mobile-social status and picture updates from participants, and mobile app check-ins on foursquare.



@denise10283
Denise G.

i got my #TopChef #JustDessertsDay hat!
can't wait for Top Chef finale and Just
Desserts tonight! xoxo @Bravotv

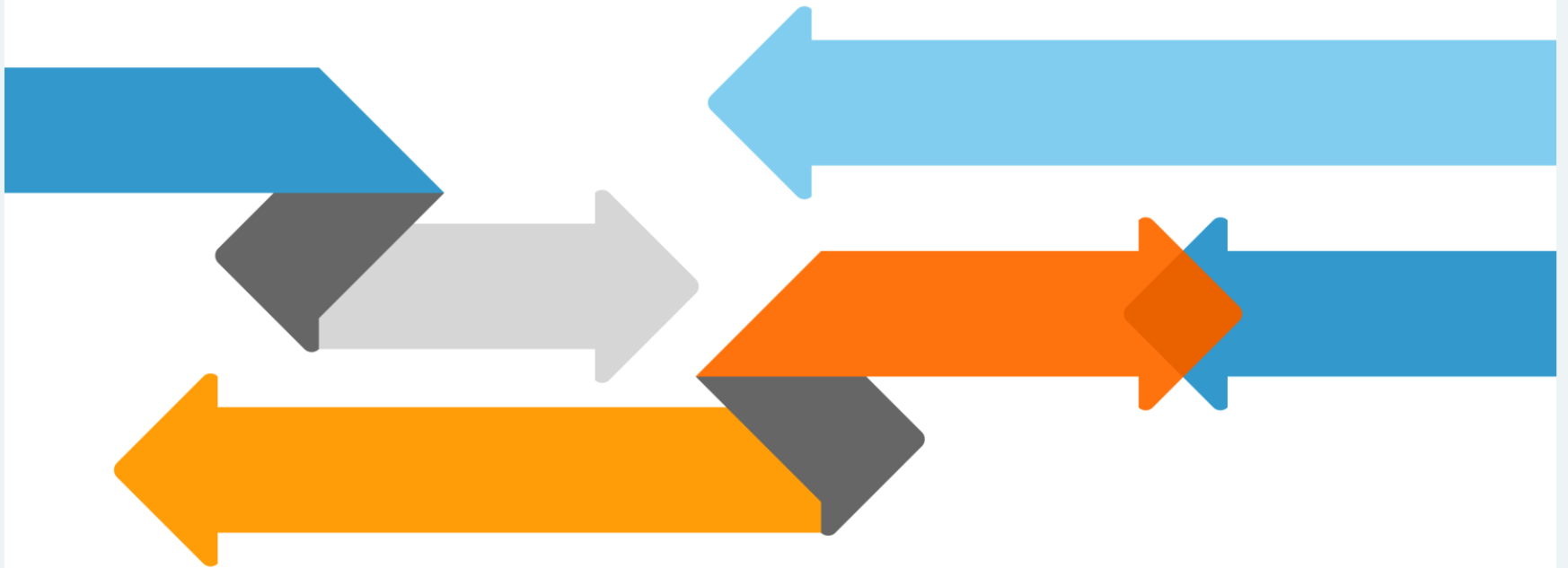
15 Sep via web ☆ Favorite 13 Retweet 4 Reply

Summary

- Mobile is nearly ubiquitous across all markets and plays a powerful disruptive role.
- Your Always Addressable Customers are coming for you. Start thinking about their needs now.
- Mobile isn't about apps *or* sites. It's about offering the best content and services.
- Remember mobile's UVP: immediacy, simplicity, context.

How Forrester can help

We help you make better decisions in a world where technology is radically changing your customers



Forrester understands how customers are changing and what it means for your key decisions

330,000 global consumer surveys

50,000 business surveys

35,000 client inquiries

6,000 technology briefings

2011

36%

2015

48%

2020

68%

ForecastView

Global market projections
of online, mobile and
emerging technologies

When

What



Technographics

The largest and longest running
global consumer study on how
technology impacts consumers'
attitudes, behaviors
and motivations

'Why'



Community Speaks

Qualitative consumer insights
from exploratory discussions
that uncover the real drivers
of behavior

Questions?



Thank you

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