SEVEN SHADES OF MOBILE

The Hidden Motivations of Mobile Users
Surface level view = surface level insights

AOL has recently adopted a “mobile first” strategy for product development. As a content publisher, whose business is primarily ad-driven in the online space, AOL is quickly repositioning its organization to fully understand the cross-platform consumer and successfully execute its vision in the mobile space. At the same time, more of AOL’s B2B customers like BBDO are looking for integrated cross-platform solutions from their media partners, and at a more basic level, guidance on how they should move their own brands into mobile.

While mobile is a fast-growing market with many opportunities, there are significant challenges. The industry takes a too superficial view of mobile behavior, based on the discrete things that people do on their smartphones: they use their phone to compare prices, they check the weather, they order food, and so on. It’s easy to view the mobile landscape using these smartphone features/capabilities as topographical landmarks – all of which characterize the surface view. This narrow view of mobile behavior means that publishers and advertisers have not adapted their methods or their messages to be fully optimized for this medium. This is evidenced by the fact that while consumers spend more than 10% of their media time on mobile (eMarketer 12/11), only 1% of ad spend is allocated to mobile (IAB 2011).

For AOL to be truly mobile first, and for BBDO to effectively deliver mobile brand interactions, each must change the organizational mindset from a development perspective of mobile to a consumer mindset. Shaking up the perceived notions of how and why people turn to their mobile devices will help “crack the code” on mobile publishing and advertising.

So we wondered, if we mine deeper, beyond what’s on the surface, can we unearth anything of greater value for advertisers and brands? We know that people use their phones for a lot of things, across all sorts of different moments in life. In these moments, brands must engage consumers through mobile apps, sites and advertising. We realized we needed a way to process these innumerable moments so that we could determine whether there was value beneath what we normally see on the surface.
What we did

We partnered with InsightsNow to implement a unique three-phase approach that looked at consumer usage of mobile from qualitative, quantitative and ethnographic perspectives. We started by asking smartphone users to fill out a seven-day diary; making video recordings of the times they used their smartphones. We followed up with in-depth interviews, which allowed us to determine the what, when, where and why for the variety of mobile interactions.

Informed with the learnings from this first step, we then deployed a two-pronged quantitative methodology where we asked 1000 smartphone users to record in a survey three different moments in which they used their phone (excluding voice calls, email, and texts); at the same time we also tracked their mobile behaviors across a 31-day period using metering technology provided by Arbitron Mobile Oy, a subsidiary of Arbitron Inc. This groundbreaking combination of survey and metered data allowed us to gather data on over 3000 user interactions with their phones, capturing the landscape of mobile phone touch points, or *mobile moments*, and the deep motivations that spur each moment. We then segmented these mobile moments into “Moment Markets,” to get a unique snapshot of the mobile usage landscape.

We found seven Mobile Moments, where each segment represents moments that share similar underlying motivators. The seven segments we identified are:

1. **Accomplish** – In this moment users are managing their activities and lifestyle to gain a sense of accomplishment
2. **Socialize** – Active interaction with other people
3. **Prepare** - Active planning in order to be prepared for upcoming activities
4. **Me Time** - Seeking relaxation and entertainment in order to indulge oneself or pass the time
5. **Discover** - Seeking news and information that open the mind to new things
6. **Shop** - Focusing on finding and purchasing a product or service
7. **Express Myself** – Expressing passions and views to others
**When is shopping more than shopping? Weather more than weather? Pizza more than pizza?**

Traditionally the industry tends to view mobile behaviors superficially, based on the discrete things that people do on their smart phones: they use their phone to compare prices, they check the weather, they order food, and so on. So at the surface, we would expect to find apps like Amazon, Target, Safeway and Walmart in the “Shop” moment and apps like Angry Birds and Netflix in “Me Time.”

But our analysis revealed something deeper: that the exact same app / site can fulfill different needs in different moments. In other words, consumers are using apps to fulfill non-intuitive needs.

So when is shopping more than shopping? Weather more than weather? Pizza more than pizza? It’s when people are using these apps and websites to fulfill needs other than buying something, checking the local weather forecast, or getting food. While these users look like they are doing different things...

...they are actually all doing the same thing:
And what shopping, weather, and pizza have in common is they are things people use to fulfill the same need, in this case, **Me Time**. While games and music might come to mind first for **Me Time**, users are also turning to websites and apps not traditionally thought of as **Me Time**. There are dozens of examples of this, but some that we observed in the research include: checking out the latest tech gadgets on Amazon just for fun; viewing the weather in other places because it’s entertaining to think about what it’s like someplace else; ordering pizza on the way home to get some much needed me time (e.g., to quickly settle in on the couch and watch their favorite TV show without wasting time figuring out what to do for dinner).

The takeaway for brands and publishers is to think more deeply about the brand messaging and content you are showing to consumers. Users may be taking different paths to your mobile experience. Are you thinking of mobile behaviors superficially instead of thinking of common motivators or varied paths? What other mobile behaviors or motivations could we fuel?

The first step in answering this question is to quantify the size of the moments in the marketplace. Intuitively you might think utilitarian and social moments like **Accomplish**, **Prepare** and **Socialize** account for the greatest share of mobile moments since conventional wisdom says the phone is used on the go to get things done and for social. As such many smart phone apps are centered on utility – helping people get something done. However, while utility moments are important, it’s **Me Time** that is by far the biggest Mobile Moment.

**Me Time rules**

**Me Time** reaches 60% of smartphone users and averages 864 minutes per month. It accounts for 46% of all smartphone app and website moments.
In short, **Me Time** is when a person is relaxing or watching TV with a goal of having fun or indulging.

<table>
<thead>
<tr>
<th>Me Time Motivators</th>
<th>Me Time Smart Phone Roles</th>
<th>Me Time Activities</th>
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<tbody>
<tr>
<td>Relax</td>
<td>Time killer</td>
<td>Relaxing</td>
</tr>
<tr>
<td>Pass the time</td>
<td>Gaming buddy</td>
<td>Entertaining myself</td>
</tr>
<tr>
<td>Entertain or amuse</td>
<td>Personal entertainment genie</td>
<td>Watching TV</td>
</tr>
<tr>
<td>Fill spare time</td>
<td>Friend</td>
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</tr>
<tr>
<td>Alleviate boredom</td>
<td></td>
<td>Listening to music</td>
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<tr>
<td>Indulge myself</td>
<td></td>
<td></td>
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<tr>
<td>Engage my mind</td>
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People select apps/sites that help them pass the time and relax, where the smartphone is playing the role of time killer, gaming buddy, or personal entertainment genie.

**Me Time Mobile Websites & Apps**
Despite its size, advertisers and brands perform poorly in Me Time. It is the largest mobile moment, but brands perform worse here than all other moments, except one.

This underperformance is primarily because ads were irrelevant, easy to ignore, forgettable or got in the user’s way. When it comes to cracking the code on mobile, it is essential that advertisers learn how to play better here. Me Time cannot be ignored given the amount of time people spend in this moment. In order to improve performance, brand messaging should align with the motivators of Me Time. Marketers need to stop interrupting and start enabling Me Time by developing messaging that entertains, makes people laugh, and is relevant to their interests.
In addition to tapping into what motivates users during Me Time, brands must also take into account where it is happening.

**When mobile isn’t mobile**

According to conventional wisdom, mobile is on-the-go and, as such, the industry has been focusing on this opportunity by developing messaging and apps centered around on-the-go and geo-targeting. The opportunity to combine personalized information with location-based data to connect with consumers via an always-on, always-on-you device currently represents the holy grail of marketing.

But when we looked beneath this surface view, we found that Me Time, the biggest mobile moment, most often occurs at home. 74% of Me Time is at home.

In fact, when we looked across the moments, we found that 60% of ALL mobile moments and 68% of ALL mobile minutes occur in the home – flying in the face of conventional wisdom.

“I don’t look at my phone when I am out and about shopping; I’m at home when I shop on my phone.”

People Shop, Accomplish, Socialize, and get Me Time on mobile from the comfort of home. If marketers don’t capture that point of experience, they may lose the battle for the mobile consumer before they even realize it started.
Prescriptions for brands

These findings provide strategic clarity as to why consumers behave the way they do—across the moments of life—with respect to mobile apps and sites. By mining beneath the surface of “what” people are doing with their smartphones to better understand “why” they are doing those things in various moments, we unearthed insights that counter the traditional view of the mobile space and will help marketers, agencies and brands improve mobile interactions with consumers:

• Mobile is part of something bigger. While the conventional surface view looks at mobile actions as discrete behaviors, we uncovered the underlying motivators that the industry may be missing. Marketers and publishers can improve user engagement by aligning messaging and content with the psychographic drivers that propel mobile interactions.

• There is more than one path to an app. Different people have different motivations for going to the same app or mobile website. As an example, one person might go to a shopping app for the purpose of conducting a transaction like buying a new pair of jeans. Another person might go to that same shopping app when they are in a mood to relax even though they have no immediate intention of purchasing anything, just because it’s fun to look at the latest styles. By understanding the variety of motivators that can lead consumers to their brands on smartphones, marketers can create more engaging mobile experiences.

• Despite the huge industry focus on creating branded apps that are utilitarian, utility is a minor motivator for users. “Me Time” – which is about entertainment, indulgence and relaxation – is by far the largest smartphone motivator, yet mobile advertising and brand sponsorships prove ineffective in “Me Time.” This represents an untapped opportunity for smartphone content and messaging to enable entertainment and indulgence rather than just helping people get stuff done with utilitarian apps.

• Mobile is usually NOT mobile. In fact, the majority of time spent on smartphone apps and mobile websites happens at home. While the industry has focused much of its attention on developing on-the-go, hyper-local smartphone strategies, it lags when it comes to engaging with consumers during the biggest chunk of time they spend on their smartphones: at home.

“Me Time” is one of seven Mobile Moments that our research identified. In the coming months we will release a comprehensive report to provide further detail on “Me Time” and the motivators for the other six moments that brands can tap into to increase engagement with consumers on mobile.
ABOUT AOL:
AOL Inc. (NYSE:AOL) is a brand company, committed to continuously innovating, growing, and investing in brands and experiences that inform, entertain, and connect the world. The home of a world-class collection of premium brands, AOL creates original content that engages audiences on a local and global scale. We help marketers connect with these audiences through effective and engaging digital advertising solutions.

ABOUT BBDO:
BBDO’s mantra is “The Work. The Work. The Work.” Every day, people in 289 offices in 81 countries work job by job and client by client, to create and deliver the world’s most compelling commercial content. BBDO was named 2011 Global Agency of the Year by both Adweek and Campaign magazines and, for the past six years in a row, has been recognized as the world’s most creative agency network in The Gunn Report. BBDO is also the number one ranked network across all marketing communication platforms in the Directory Big Won and has been named Network of the Year at Cannes five times. In 2011, BBDO was named the world’s most Effective Agency Network in the inaugural Effie Effectiveness Index.

BBDO is part of Omnicom Group Inc. (NYSE-OMC) (www.omnicomgroup.com), a leading global marketing and corporate communications company.

ABOUT INSIGHTSNOW:
InsightsNow, Inc. takes a behavior-driven approach to understanding consumer wants, needs and desires, and applies this to support many of the world’s largest consumer brands. Through its BehaviorLens Framework (www.BehaviorLens.com), InsightsNow works with brands to establish go-to-market strategies for both positioning and innovation, grounding cross-functional teams with a common, actionable view of the market. This is applied across initiatives, as brands execute behavior-driven strategies. Learn more at www.InsightsNow.com

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