salesforce marketing cloud

2014 Mobile Behavior Report

Combining mobile device tracking and consumer survey data to build a powerful mobile strategy

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Objectives and Methodology

Digital mobility and connectivity grow more important every day. We know consumers keep their mobile devices nearby, check them frequently, and occasionally use multiple devices at once. But what do they actually click on, download, explore, peruse, and avoid on their mobile devices? Survey responses are one thing, but tracking data—based on actual consumer action—helps to further demystify consumer mobile behavior.

We tracked 470 voluntary consumers for a month to see how they used their smartphones and tablets to access the mobile web and mobile apps; we also asked them questions about how they use and view mobile devices in their lives. When we start tracking patterns in mobile behavior and combining that data with users' own insights, brands can begin crafting better experiences for all mobile users.

This report seeks to:

Uncover perceptions and preferences

Find behavioral patterns

Evaluate assumptions

Explore relationships with brands

Assess impact on consumers' lives

We completed this research through tracking, asking, and integrating. As shown in the sidebar, we tracked 470 consumers on smartphones and tablets from December 15, 2013 through January 15, 2014.

To add to the collected tracking insights, we deployed a survey to those consumers, asking more in-depth questions about their mobile usage and adoption. For additional details on respondent profiles, consult the Appendix.

From the role of tablets to recommendations for mobile marketers, read on for our overall and detailed findings from this research.

Track

To discover how mobile devices fit in the day-to-day lives of consumers, we tracked 470 people using Luth's ZQ technology.

Digital tracking occurred from December 15, 2013 through January 15, 2014.

Note: N = 265 tracked on smartphone only;
N = 205 on smartphone and tablet.

Ask

We deployed the survey from January 6-14, 2014. The survey offered one-to-one matching with digital data and measured offline behavior and preferences.

Integrate

Integrated digital data and survey data were combined to gain a holistic understanding of mobile usage behavior, preferences, and perceptions.

The combination of data and survey responses presented a fuller picture of how consumers use mobile devices.

Overall Findings

Like the societal and personal effects of electricity and the Model T, the smartphone continues to revolutionize daily activities and how people perform them. Through analysis of our smartphone and tablet tracking data and consumers' own survey responses, several primary conclusions emerged about the state of mobile behavior.

Just ask the 85% of people who say that mobile devices are a central part of everyday life.

This is Mobile

Marketers often think of mobile as an entire category of non-computer technology: smartphones, tablets, e-readers, and so on. Contrastingly, consumers tend to view mobile as a single device: their smartphones.

Consumers most frequently associate "mobile" with a smartphone/cell phone (54% selected this association), while only 14% said tablets/e-readers. Thirty-two percent also said they associate mobile with ease of use on the go, demonstrating that consumers feel a strong link between that device in their pockets and the connected freedom it brings.

Mobile devices are essential in consumers' day-to-day lives. Consider these findings:

- **85% of our respondents said mobile devices are a central part of everyday life**—and **90% of those aged 18-24 agreed.**
- At an even greater rate, 89% say that mobile devices allow them to stay up to date with loved ones and social events. To that 89%, their mobile device signifies connectivity to all that's going on in their world.
- On average, respondents report spending **3.3 hours a day on their smartphones**.

Mobility is indispensable in the digital age, and our mobile devices are portals through which we connect with everything and everyone. Whether it's a tablet (see "The Role of Tablets") or, more typically, our smartphones, these mobile devices give us access to our social and business lives on demand.

The Role of Tablets

Seventy-three percent of smartphone owners surveyed also owned a tablet.

As mentioned in the preceding section, just 14% of consumers associated tablets and e-readers with the word *mobile*, which is one of several indicators that the tablet isn't truly a mobile device. Instead, it's a largely in-home device that lends itself well to cross-device usage. Of tablet owners, 65% report using their tablet while watching TV at least once per day, while 41% use their tablet and smartphone simultaneously at least once a day.

We see tablets as a companion to smartphones, but certainly not a replacement—they're most often owned by people aged 35+ who can afford the extra technology. Three groups are most likely to own tablets:

- Those earning $75-$100K (81% own tablets)
- Those earning $100K+ (79% own tablets)
- Consumers aged 35-44 (81% own tablets)

Consumers who own both smartphones and tablets don't spend less time using their smartphones, which indicates that tablets complement smartphones, increasing time spent on tech devices and not taking away from it.

Email (69%) and searching for info online (70%) are the most popular activities to perform on tablets at least once a day; for smartphones, it's email (91%) and text messaging (90%). Tablets are used more frequently than smartphones for passive activities like watching videos or movies (40% do this on a tablet, vs. 30% on a smartphone) and reading (57% do this on a tablet, while 43% do this on a smartphone).

While the tablet may not be fully mobile, it's trending toward becoming tablet owners' preferred method of accessing content. We measured ten popular content properties (including Amazon, Twitter, Facebook, and more—see the chart Properties Visited for details), and of all properties measured, consumers used their tablet more often than their smartphones to access all except Yahoo, Pinterest, and weather information.

65%

of tablet owners report using their tablet while watching TV at least once per day

Brands aren't delivering content optimally on mobile devices (including the all-important content-distributing tablets), however—**54% of survey respondents say mobile-optimized websites don't give enough information**. As tablets become a preferred method of accessing content, brands must cater to the user experience required by this device, whether by a separate mobile-optimized site or a responsive site that alters its presentation and interface based on what device is accessing it.

The Door is Open, but Closes Quickly

For brands looking to capitalize on smartphones' closeness to consumers, the numbers indicate that consumers aren't fundamentally opposed to mobile interactions with brands (and, in many cases, they find these interactions useful)—but consumers need to be apprised of why they should opt in to receive messages and what the end result will be.

For example:

- **76% of users agree that location sharing provides more meaningful content**, and 73% believe that location sharing is somewhat or very useful. For those who opted out, 63% simply didn't like the idea of sharing their location.
- Ninety-five percent of those who opt into email messages from brands find these messages somewhat or very useful. And email notifications are effective in converting to sales—**more than 8 out of 10 consumers who signed up for emails from a brand over the past six months made a purchase based on what they received**. But of those who don't use email notifications, 43% find them disruptive.
- Although adoption by consumers is low (54% have actually opted in to receive text messages from a brand), **text messaging is seen as somewhat or very useful by 91% of users** who actually subscribe to a brand's texts. Of those who don't, 52% said it's disruptive; 41% said the content wasn't meaningful.

As the numbers indicate, a large percentage of consumers are cautious (and understandably so) to share location information and personal details with brands. Why would a consumer want to divulge personal details if the brand hasn't explained how that information will be used, nor the personal benefits for that consumer?

Whether it's push notifications, text messaging, emails, or something else, brands must provide overt explanations of forthcoming value, respect time and frequency of consumers' communication preferences, and ultimately be honest about what consumers will receive in return for messaging privileges. Once the opt-in is garnered, consumers will warm up quickly if the benefits are tangible—just look at the 91% of consumers who subscribe to brand text messages and agree that they're useful.

Abundant Room to Lead

Consumers use their mobile devices for connectivity and content. People are looking for improvements in how they consume and experience mobile content, but many mobile experiences are still lagging far behind.

Consider these areas where brands can lead the way in mobile:

- Easy access to content across devices and platforms is increasingly critical to consumers: **More than nine out of ten consumers say that access to content however they want it is somewhat or very important; 59% say it's very important.** Similarly, 83% say a seamless experience across all devices is somewhat or very important.
- Forty-one percent of consumers who don't opt into text messages from brands say it's because they don't provide meaningful content.
- Only 53% say they liked or followed a brand on social media from a mobile device in the past six months. Forty-six percent of consumers report that brands don't provide meaningful content on social media.
- Fifty-four percent of respondents say that mobile websites don't give enough content; 54% also say it's easier to find information on mobile websites—so while mobile-optimized sites are more user-friendly, they're currently insufficient.
- With all these areas of improvement in mind, **two-thirds of consumers (68%) say it is somewhat or very important that companies they interact with are seen as a technology leader.**

Mobile users care most about having seamless, easy access to content across all of their devices. Companies delivering on that content demand will win, yet currently, there's abundant room for brands with high standards for their mobile experiences to lead the way.

These findings point to the need for brands to make mobile communications more helpful, streamline how their mobile content can be found and consumed, and provide just as much content on mobile-optimized websites as they do on desktop sites. Consumers are settling into their mobile habits, and brands that cater to the mobile experience from tap to interaction to purchase will earn future business and traffic.

Detailed Findings

Here, we present detailed data combining both passive tracking and survey responses to paint a current picture of mobile behavior from the ground up.

Device Breakdown

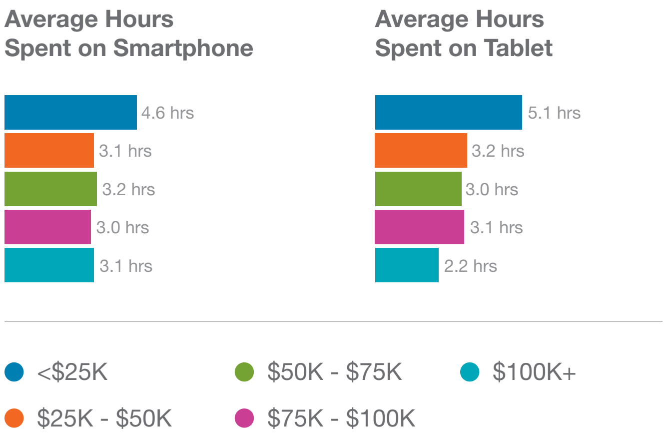
This section looks at both consumer-reported and tracked data regarding which devices consumers prefer to use for various digital activities, including email, watching videos, searching for content, and more.

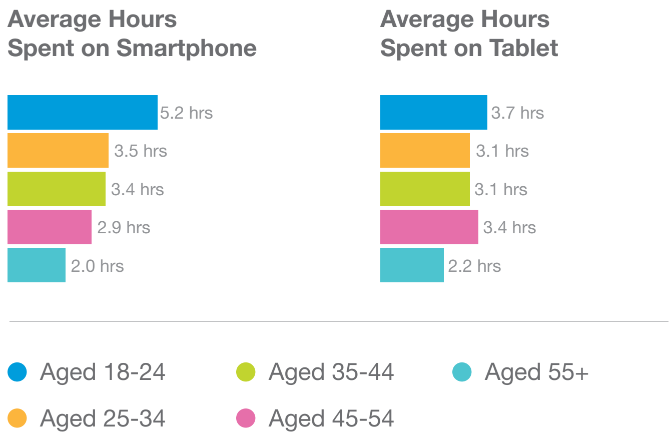
Mobile Devices Owned

Of course, all consumers who participated in this research had to own a smartphone to take part; just 5% of smartphone owners also owned a basic cell phone. Of those consumers who owned a smartphone, nearly three quarters (73%) also owned a tablet, as shown in the chart.

The most noticeable differences reported in time spent on both smartphones and tablets are when comparing consumers making <$25K to all other income levels, as well as comparing consumers aged 18-24 with all other age categories. Across the board, consumers with an income of <$25K spend significantly more time on their mobile devices than those reporting higher incomes.

While we don't see a significant difference in usage across the board when comparing tablet usage of consumers aged 18-24 against all other categories, we do see a significant difference in the average amount of time they spent on their smartphones vs. all other age groups.





Data source: Survey responses based on income and age

Those earning $75-$100K (81% own tablets), those earning $100K+ (79% own tablets), and those aged 35-44 (81% own tablets) were significantly more likely to own a tablet. Those of lower income (<$25K) are significantly more likely to spend more time per day on their smartphones (reporting 4.6 hours a day of use, compared to the average 3.3 hours a day) and tablets (they reported 5.1 hours a day of use, compared to the average 3.1 hours a day) than all other income levels.

Consumers aged 18-24 are significantly more likely to spend more time on their smartphones compared to consumers over the age of 25 (they reported 5.2 hours a day compared to the 3.3 hours a day of consumers overall); however, 18-24-year-olds spend about as much time on their tablets as all other age groups, with the exception of those aged 55+, who use them significantly less (those 55+ report an average of 2.2 hours a day on tablets, compared to those overall who reported 3.1 hours a day).

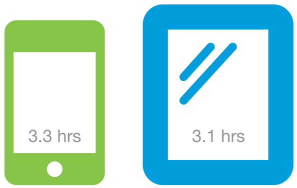
Those consumers with an income of $100K+, as well as those aged 55+, report spending less time on their smartphones (3.1 hours a day for those making $100K+ and 2 hours a day for those over 55, compared to 3.3 hours a day for consumers overall) and tablets (both those making $100K+ and those over 55 report an average of 2.2 hours per day on tablets).

Mobile Devices Owned by Consumers Studied

- Smartphone
- Tablet
- Basic cell phone
- Feature phone

Data source: Survey responses

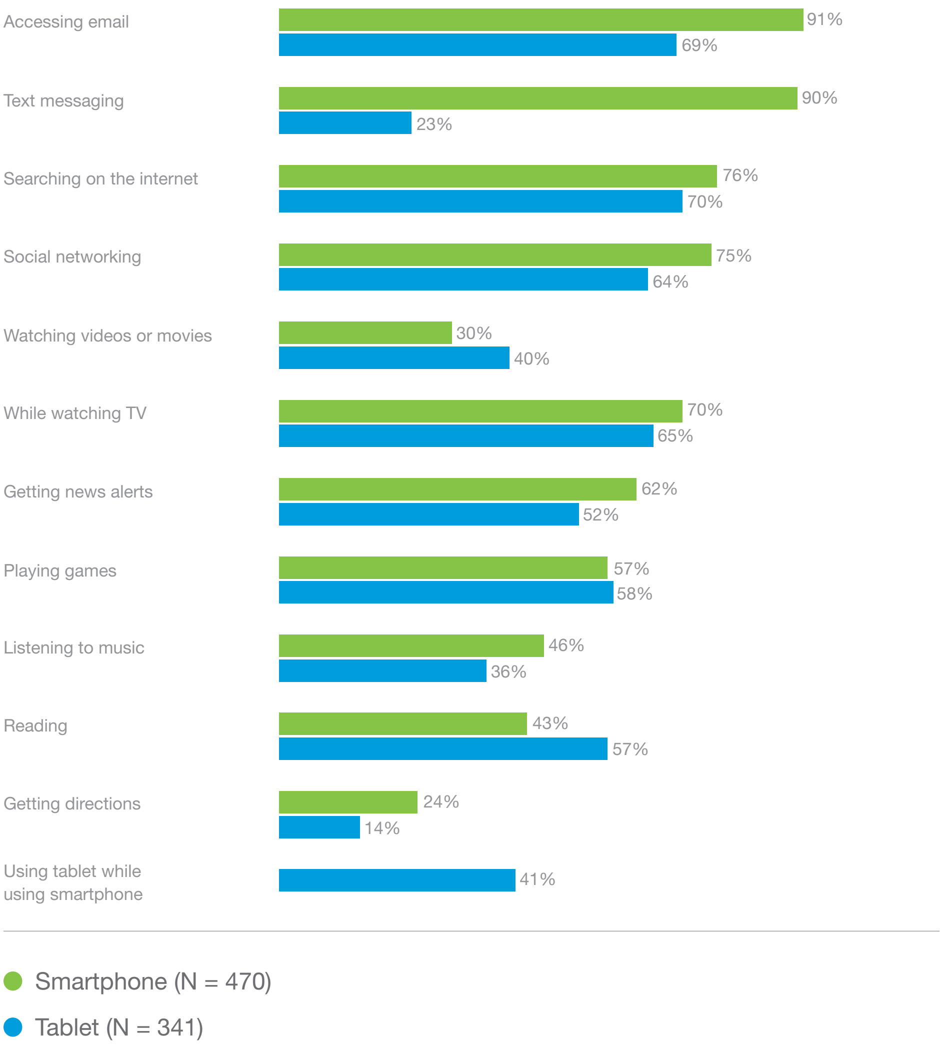
Average Hours Per Day Spent on Mobile Device



- Smartphone (N = 470)
- Tablet (N = 341)

Data source: Survey responses

Activities Performed at Least Once Each Day: Smartphone vs. Tablet



Data source: Survey responses

Activities on Devices

Email (91% check email on their smartphones at least once a day) and text messaging (90% text at least once a day) are the most often performed activities on smartphones, while email (69%) and searching for info online (70%) are the most common activities on tablets. Tablets are used more frequently than smartphones for passive activities, such as watching videos or movies (40%) and reading (57%).

Cross-device usage is prevalent, with two-thirds of consumers saying that they use their mobile device while watching TV at least once a day, and 41% of tablet owners reporting they use their smartphone and tablet simultaneously at least once a day. This chart shows the activities consumers say they perform on each device; check out the chart Properties Visited to see the tracking data for which device users chose to access popular content properties.

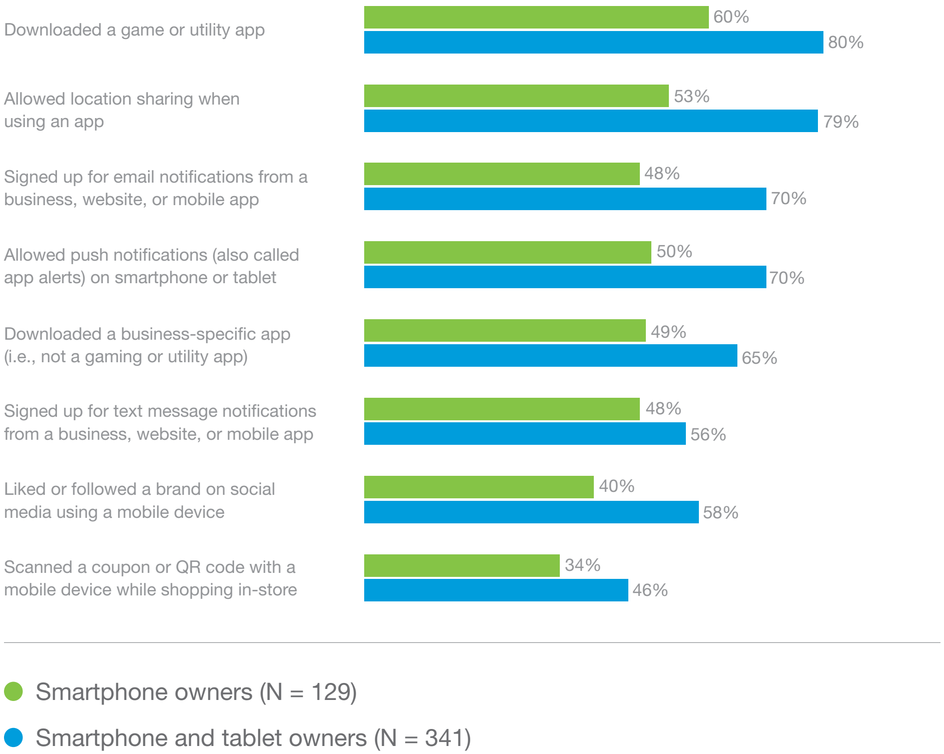
Male consumers use smartphones at a significantly higher frequency for getting news alerts than female consumers (72% vs. 54%); when comparing daily usage of their smartphones, younger consumers aged 18-34 will listen to music 19% more often when compared to total consumers (65% vs. 46%) and nearly 50% more than consumers aged 55+.

Activities of Multi-Device Users

As might be expected, people who own both a tablet and a smartphone vs. those who own only a smartphone perform a greater variety of activities on their mobile devices. They also place more significance on access to content and a seamless experience between devices (see the section "Importance of Mobile Brand Factors").

In short, these power users do more with their devices and have higher expectations for brands to meet. This chart lists various mobile activities, then the percentage of those who report doing that activity on a mobile device in the past six months, based on whether they own only a smartphone or both a smartphone and a tablet.

Comparing Activities of Smartphone Owners vs. Smartphone and Tablet Owners



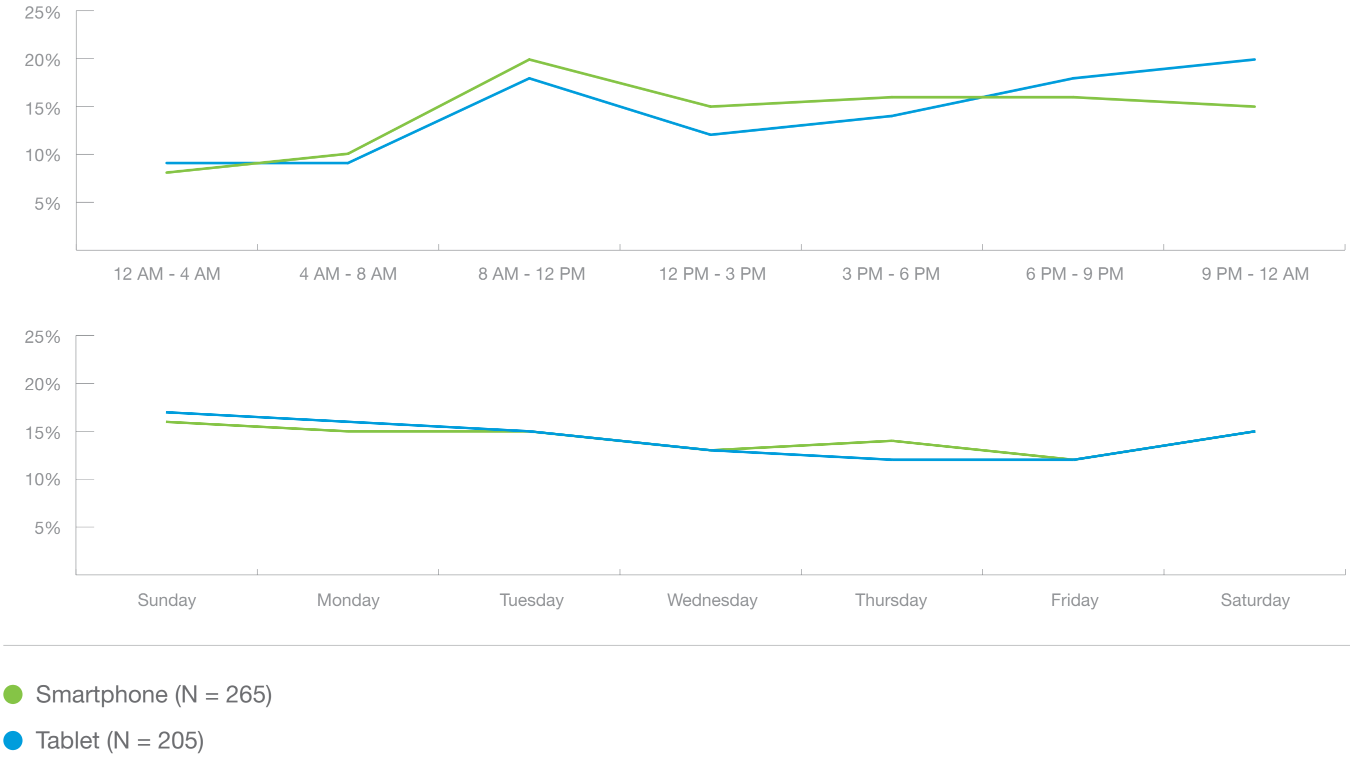
Data source: Survey responses

Mobile Usage by Device Type

When comparing tablet and smartphone visitation of ten top online properties (see the chart on page 16 for the full listing of properties), we noted that smartphones are used more between 8 a.m. and 6 p.m., while tablet usage increases slightly after 6 p.m.

When considering overall weekly usage, we saw minimal differences when comparing day-to-day smartphone vs. tablet usage. This chart is based on tracking data for the ten properties measured based on average usage hours throughout the day, and then weekly usage data.

Tracking Data: Average Mobile Usage by Hours in the Day and Days in the Week, Smartphone vs. Tablet

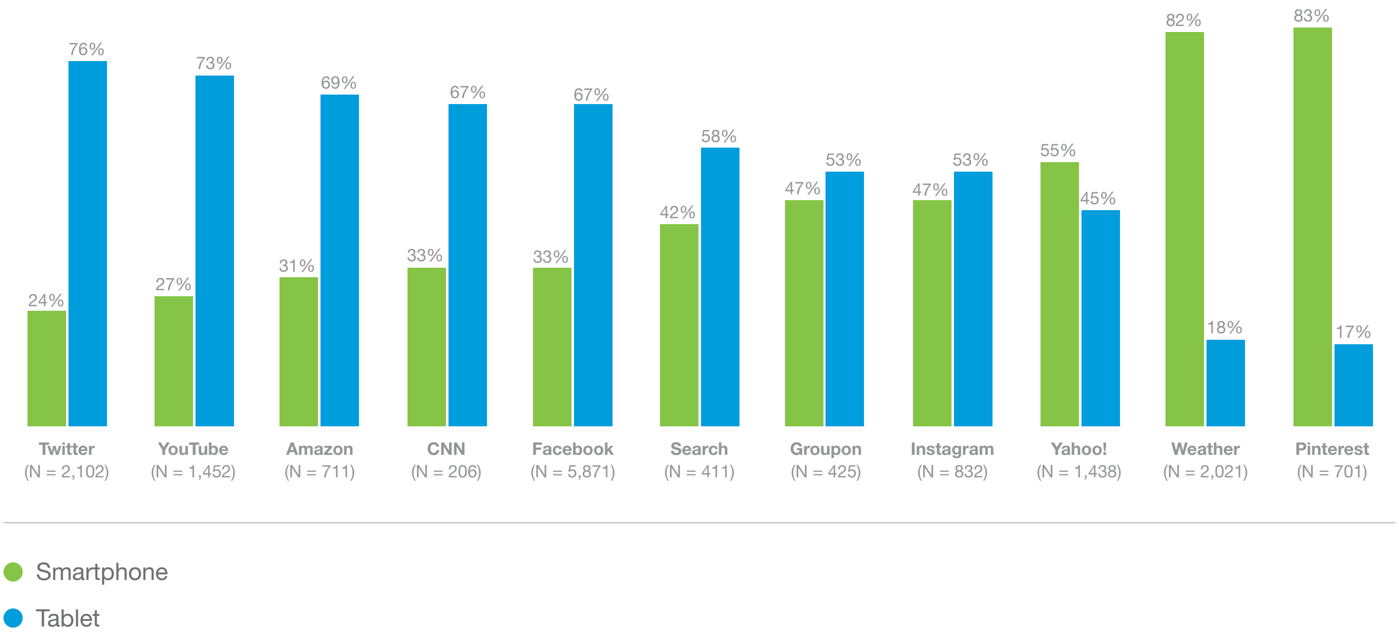


Data source: ZQ tracking data

Properties Visited by Smartphone or Tablet

Consumers have preferences about which device they use to access a certain online property; for example, consumers use tablets much more often to access Twitter (76% of Twitter visits occurred on tablets), YouTube (73% of YouTube visits occurred on tablets), Amazon (69% of Amazon visits occurred on tablets), CNN, and Facebook (both CNN and Facebook were accessed on tablets 67% of the time). The only three properties that our tracked consumers accessed more on smartphones were Pinterest (83% of visits occurred on smartphones), weather (82% of visits occurred on smartphones), and Yahoo (55% of visits occurred on smartphones).

Tracking Data: Ten Popular Online Properties Visited, Smartphone vs. Tablet



Data source: ZQ tracking data

Experiencing the Mobile Brand: Opting into (or out of) Communications

Consumers acknowledged the value and usefulness of several types of communication from brands, but they also acknowledged their hesitancy to reveal too much, to avoid excessive disruption and intrusion. Take a look at how consumers perceive branded messages on mobile devices.

Importance of Mobile Brand Factors

By far, access to content “any way I want” is consumers’ most important criteria when rating mobile brand experiences. In fact, 91% of consumers say access to content any way they want is important to them. Eighty-three percent of consumers also say a seamless experience across all their devices is important to them—and this number increases when considering just those who own both a smartphone or a tablet (87% of consumers who rated this factor as important owned both devices).

Even though it was rated as lower than the other two factors, more than two-thirds (68%) of consumers also said that it’s important for mobile brands to be a technology leader, as shown in the chart on the following page, How Consumers Rate the Importance of Mobile Brand Factors.

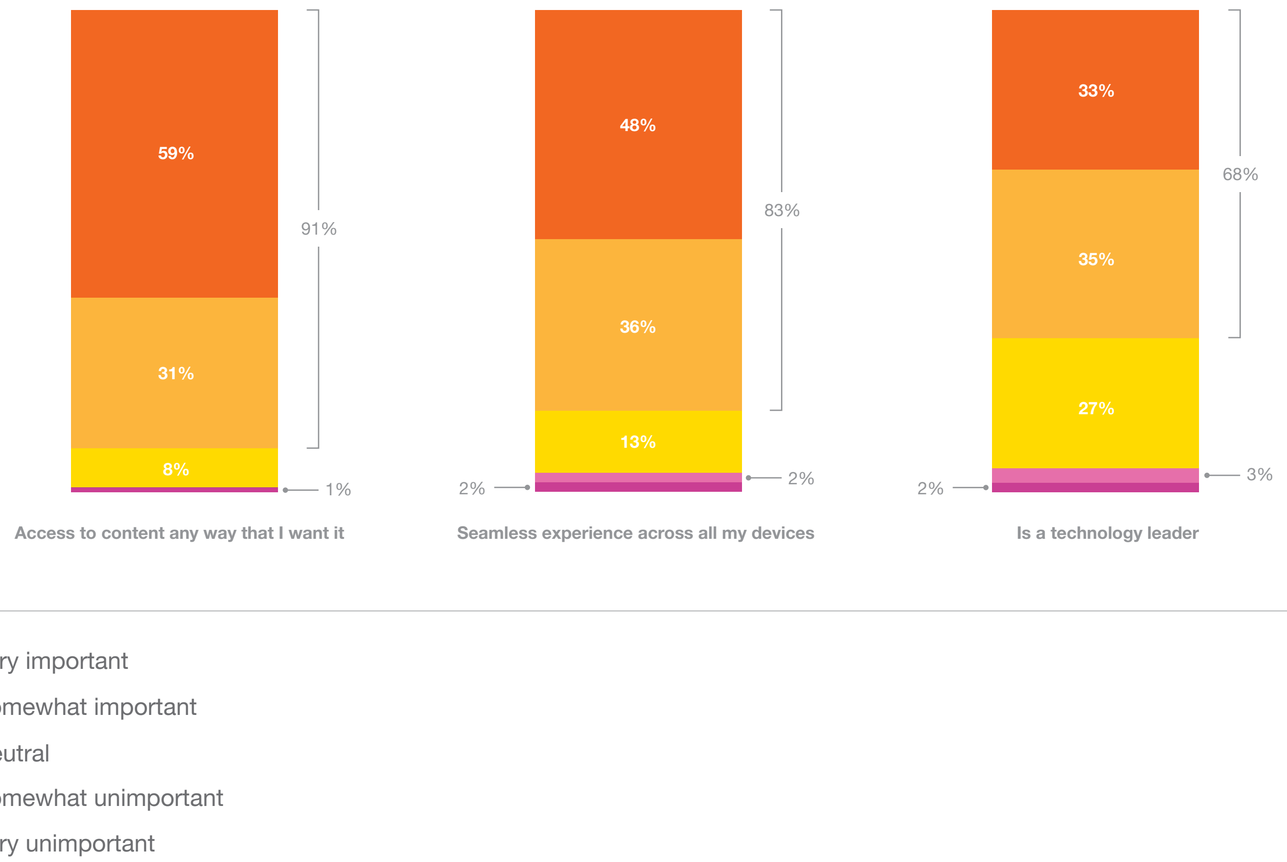
Gender differences emerge in what consumers seek in a mobile brand. Females are significantly more likely than their male counterparts to place a higher importance on access to content any way they want it (93% of females said this was somewhat or very important, compared to 87% of males and 91% of total respondents). Meanwhile, males place a significantly higher value on the company being a technology leader (76% of males felt this was somewhat or very important, compared to 62% of females and 68% of consumers overall).

Consumers aged 55 and over are significantly less likely to feel a company needs to be a technology leader, compared to younger consumers: 50% of those 55+ felt this was somewhat or very important, vs. 71% of those 45-54; 69% of those 35-44; 70% of those 25-34; 76% of those 18-24; and 68% of consumers overall.

91%

of consumers say access to content any way they want is important.

How Consumers Rate the Importance of Mobile Brand Factors (N = 470)



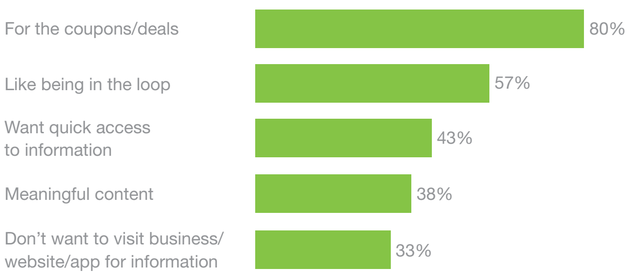
Data source: Survey responses. Total percentages may not equal 100% due to rounding.

Emails from Brands

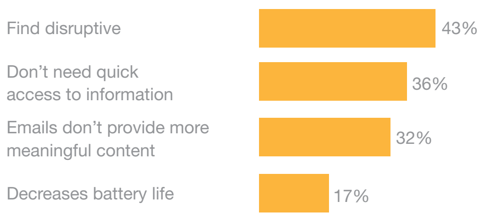
Sixty-four percent of consumers reported that they were subscribed to brand email notifications (or, simply, emails from brands). Ninety-five percent of those who subscribe to them rated these emails as somewhat or very useful, a higher usefulness rating than scores of location sharing (73% rated as useful) and push notifications (80% rated as useful).

The chart below shows why consumers do and don't subscribe to emails from brands, with the biggest rationale being coupons and deals, and the biggest detractor being the disruption. About four in ten consumers haven't signed up for emails from brands because they find the notifications disruptive.

Reasons Consumers Subscribe to Emails from Brands (N = 302)



Reasons Consumers Choose Not to Subscribe to Emails from Brands (N = 168)



Opt-In Channel	Usage	Usefulness
Location sharing	71%	73%
Emails from brands	64%	95%
Push notifications	64%	80%

Data source: Survey responses

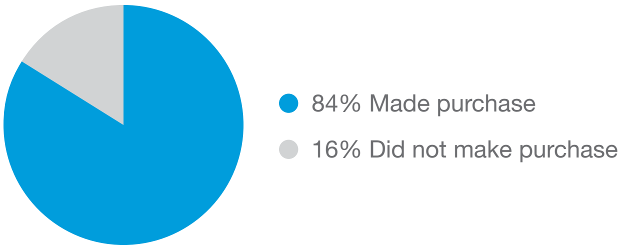
From Email to Purchase

Emails from brands are effective in converting to sales, especially when the email offers a deal. Eighty-four percent of consumers that have signed up for emails from a brand over the past six months report making a purchase based on what they received.

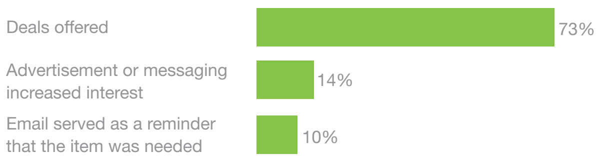
While computer and offline purchases are still the main channels for conversion from an email (64% say they purchased with a computer, while 56% purchased offline), almost half report making a purchase through a mobile device (46%). Of that 46%, males (54%) were significantly more likely to make an online purchase through a mobile device compared to their female counterparts, while women were significantly more likely than males to make an online purchase through a computer (69% of females did this, vs. 58% of males).

Additionally, those who owned both a tablet and smartphone were significantly more likely to make a purchase through a computer (70% of those who owned both made a purchase from an email through a computer, vs. 42% of smartphone-only owners), as well as more likely to make a purchase from an email through a mobile device (50% of smartphone and tablet owners did this, vs. 32% of those who owned a smartphone only).

Purchase from a Brand's Email (N = 302)



Top Reasons for Purchasing from an Email (N = 253)



Other Actions Taken	
Clicked on link	84%
Searched for more information	69%
Forwarded email	57%
Shared/discussed through social network	34%

Data source: Survey responses

Purchase Method	
Made online purchase	64%
Made offline purchase	56%
Made online purchase (mobile device)	46%

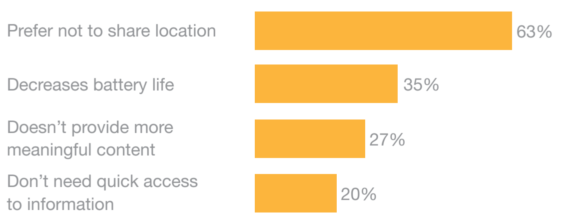
Location Sharing

Consumers are divided in their feelings about location sharing. On one side of the debate, some people are reluctant to share their location information with brands; 63% of consumers who don't use this feature simply don't want to share their location. An additional 35% say they don't want to participate because it decreases battery life.

On the other hand, 76% of those who actually use location-sharing say it helps them receive more meaningful content, and 73% rate this feature as useful, as shown below.

Reasons Consumers Opt In to Location Sharing
(N = 336)

Reasons Consumers Don't Opt In to Location Sharing
(N = 134)



Opt-In Channel	Usage	Usefulness
Location sharing	71%	73%
Push notifications	64%	80%
Emails from brands	64%	95%

Data source: Survey responses

Push Notifications

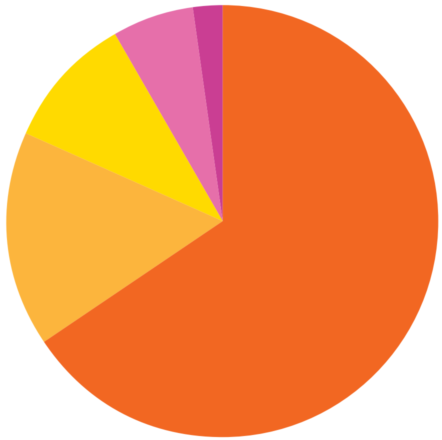
Push notifications (also called push messages, in-app messages, or in-app alerts) are messages that brands can send to consumers once they've downloaded their mobile app. These messages can take the form of alerts, reminders to resume shopping if a cart is abandoned, deals or offers (including location-based), and more.

The top reason that consumers opt into push notifications is for coupons and deals (52%), which is the primary reason that consumers opt into other messaging types, as well. But the coupon rationale is cited less for push notifications than it is for other messaging types (including text messages—77% say it's for the coupons, and emails—80% use these for the deals).

Push messages are often personally tailored to that user, providing individualized alerts about banking, flight, purchase, and other information. For that reason, 46% of consumers say they use push because they like receiving personalized alerts, suggesting a valuable opportunity for brands looking to provide more value through their mobile messaging.

In addition to push notifications' ability to serve highly personalized alerts, push messages are also effective in engaging consumers immediately. Only 8% wait or ignore the notification before checking it, as shown in the following chart.

Consumer Action When Receiving a Push Notification (N = 302)



- 65% Check and open if interested
- 16% Check and immediately open
- 10% Scan or read notification only
- 6% Wait before checking notification
- 2% Ignore the notification

Data source: Survey responses

Business-Specific Apps

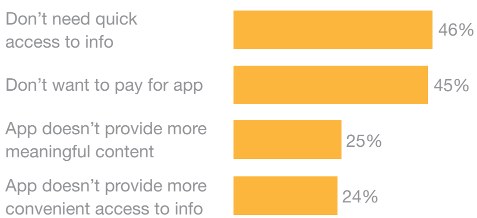
For the purposes of this report, we distinguished a business-specific app as an app that isn't a gaming or utility app (utility apps including apps like Find My iPhone, Wi-Fi locator, and so on). Six in ten consumers have downloaded a business-specific app in the past six months, and of those who have, 65% say it's a more convenient way to access information.

As depicted in the chart below, other consumers feel they don't need quick access to info (46%); don't want to pay for an app (45%); don't believe it provides more meaningful content (25%); or feel that the app doesn't provide more conveniently accessed information (24%).

Of those who do use business-specific apps, 92% say they're useful.

Reasons Consumers Download Business-Specific Apps (N = 283)

Reasons Consumers Don't Download Business-Specific Apps (N = 187)



Opt-In Channel	Usage	Usefulness
Push notifications	64%	80%
Business-specific app	60%	92%
Text messages	54%	91%

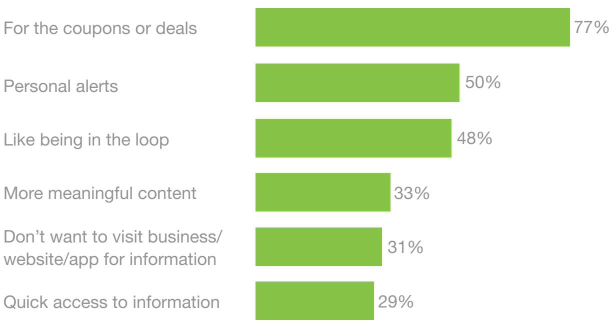
Data source: Survey responses

Text Messages

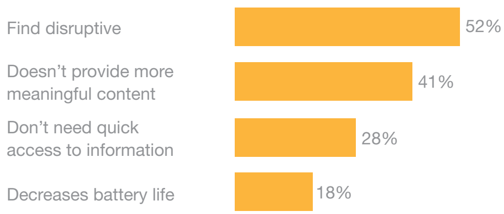
Consumers have been slow to opt in to text messages (also known as SMS) from brands, with just over half of the consumers surveyed indicating that they signed up for a brand's texts in the past six months. Although usage is low, consumers who opted in said they benefited from the technology, as evidenced by the 91% of users who rated it useful.

Coupons and deals are primary reasons to opt in, but personal alerts and being in the loop also factor highly. Similar to push notifications, consumers are warming up to the idea of immediate, personalized messages through SMS. Females are particularly more likely to use text messages to receive coupons or deals (83% of females vs. 68% of male consumers).

Reasons Consumers Opt In to Brands' Text Messages (N = 252)



Reasons Consumers Don't Opt In to Brands' Text Messages (N = 218)



Opt-In Channel	Usage	Usefulness
Business-specific app	60%	92%
Text messages	54%	91%
Liked or followed a brand on social media	53%	N/A

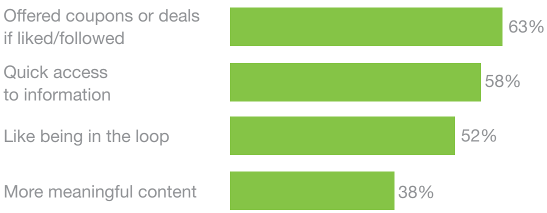
Data source: Survey responses

Social Media on Mobile Devices

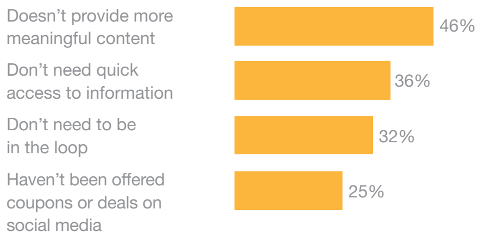
Using smartphones and tablets to peruse social networking sites is common; 75% of consumers do this at least once a day on their phones, and 64% of tablet owners use a tablet to access social media at least once a day. While social media is a common destination for the majority of mobile users, liking and following brands on social media using mobile devices isn't as common. Fifty-three percent of consumers say they've liked or followed a brand using a mobile device in the past six months, as shown in the chart below. Females are significantly more likely to like or follow a brand on social media to receive coupons or deals (71% do so, compared to 63% of consumers overall); males are significantly more likely to want quick access to information (67% like or follow for this reason, compared to 58% of consumers overall).

Finding meaningful content on branded social media properties can be a struggle, 46% say. Thirty-six percent say they don't need quick access to info, and 32% say they don't need to be in the loop. Brands need to clearly express the value of liking and following their social media properties, and deliver on that promise.

Reasons Consumers Like or Follow Brands on Social Media Using a Mobile Device (N = 248)



Reasons Consumers Don't Like or Follow Brands on Social Media Using a Mobile Device (N = 222)



Opt-In Channel	Usage	Usefulness
Text messages	54%	91%
Liked or followed a brand on social media	53%	N/A
Scanned a coupon or QR code	43%	90%

Data source: Survey responses

Scanned Coupons and QR Codes

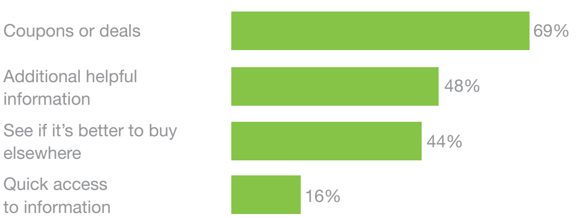
We grouped scanned coupons and QR codes together when asking consumers about their adoption of them. These items were the least popular among consumers, with only 43% saying they've utilized these in the past six months. However, of those who have used them, 90% said they were somewhat or very useful.

Males are significantly more likely than females to scan a coupon or QR code to get quick access to information (56% of males do this, vs. 39% of females).

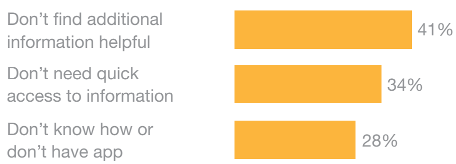
Usefulness is only worthwhile insofar as people actually know how to use these digital coupons and codes. Twenty-eight percent said they either didn't know how to use a scanned coupon or QR code or didn't have the correct app, while 41% said they don't find the additional information helpful, as shown below in the chart.

Consumers are still deciding how much mobile shelf space they want brands to occupy. In some cases (like scanned coupons or QR codes), people may not know how to activate these mobile relationships. Brands must overtly explain how to opt in, the frequency of communications, and above all, why opting in will be of service.

Reasons Consumers Used Scanned Coupons or QR Codes (N = 202)



Reasons Consumers Didn't Use Scanned Coupons or QR Codes (N = 268)



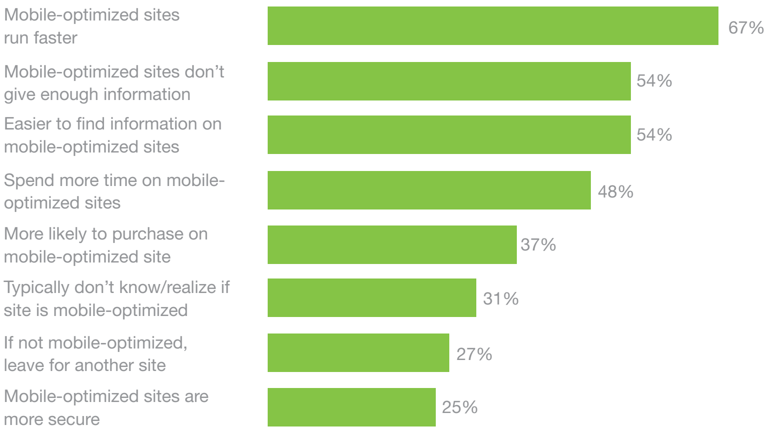
Opt-In Channel	Usage	Usefulness
Text messages	54%	91%
Liked or followed a brand on social media	53%	N/A
Scanned a coupon or QR code	43%	90%

Data source: ZQ tracking data

Mobile-Optimized Website Factors

A mobile-optimized website is a make-or-break opportunity for brands. Mobile-optimized websites make it easier for consumers to access content on smaller screens, decreasing the need to zoom in to read text and making it easier to find and tap relevant information.

Consumer Opinions on Mobile-Optimized Websites
(N = 470)



Data source: Survey responses

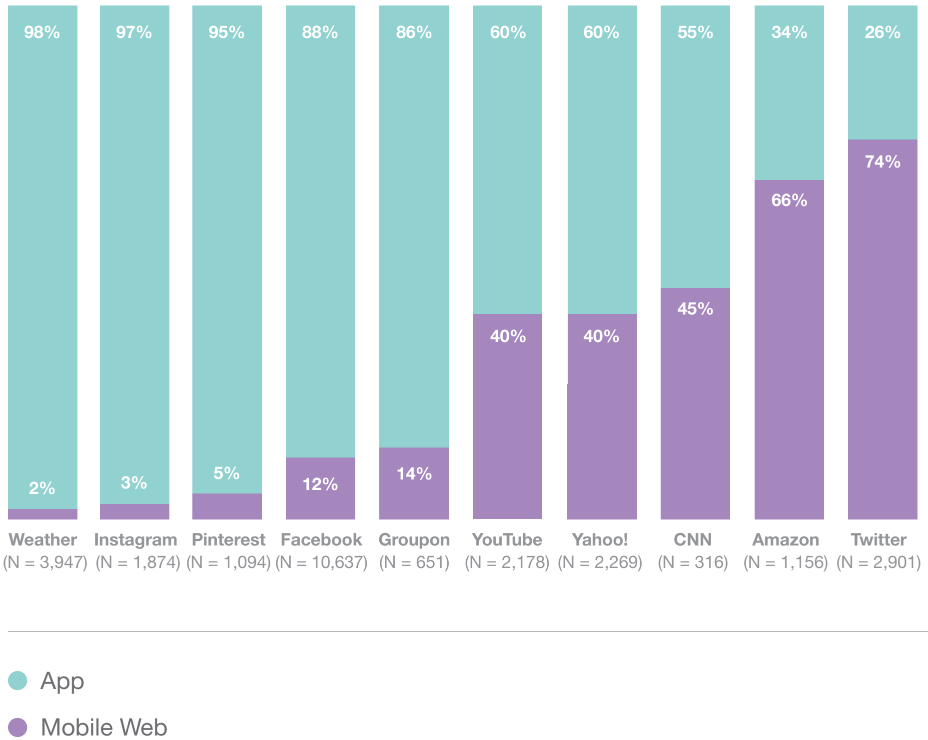
The Mobile Not-Always-Optimized Web

While 54% of consumers agree that it's easier to find information on mobile-optimized websites, 54% are also dissatisfied, saying mobile-optimized websites don't provide enough information. Mobile-optimized sites may be more user-friendly (67% also say they run more quickly), but they aren't meeting users' demands for how much content is actually stored on a mobile site. The chart Consumer Opinions on Mobile-Optimized Websites shows consumers' thoughts about their experiences on the mobile web.

Visitation on Mobile App vs. Mobile Web

People access mobile apps and the mobile web (i.e., the internet browser within a mobile phone, like Safari on iOS) differently.

Tracking Visits to Ten Popular Online Properties through Mobile Web vs. App



Data source: ZQ tracking data

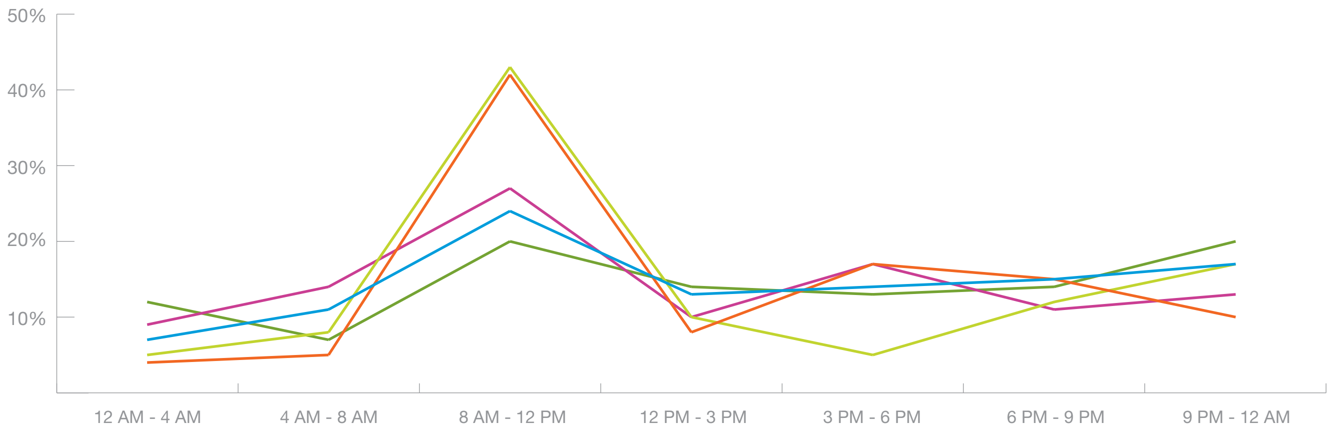
Tracking Mobile Traffic

Although both mediums allow people to consume content on a smartphone or tablet, many people prefer a mobile app in practice, as shown in this chart. For these ten properties, people preferred the app in all instances except Amazon and Twitter.

Weather, Instagram, Pinterest, Facebook, and Groupon visitors showed especially high propensity to turn to the app instead of the mobile website for on-the-go content. YouTube, Yahoo, and CNN have just under half of their visitation on mobile websites, with about six in ten sessions happening through a mobile app.

In the next four graphs, we compare daily averages of when consumers access mobile app vs. mobile versions of these ten online properties.

Daily Patterns: Mobile Web—Shopping and Informational Sites

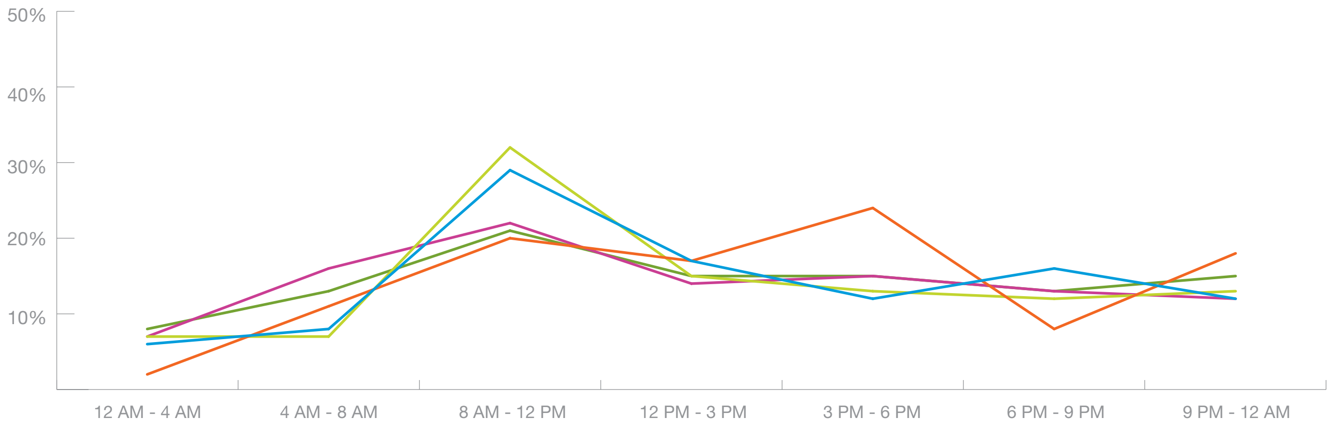


Amazon (N = 760)
CNN (N = 143)
Groupon (N = 93)
Weather (N = 93)
Yahoo! (N = 908)

Data source: ZQ tracking data

This graph depicts daily averages of when consumers access these five shopping and informational sites on the mobile web, based on tracking data. As might be expected, every mobile website sees an increase in traffic from 8 a.m. to 12 p.m.

Daily Patterns: Mobile App—Shopping and Informational Sites

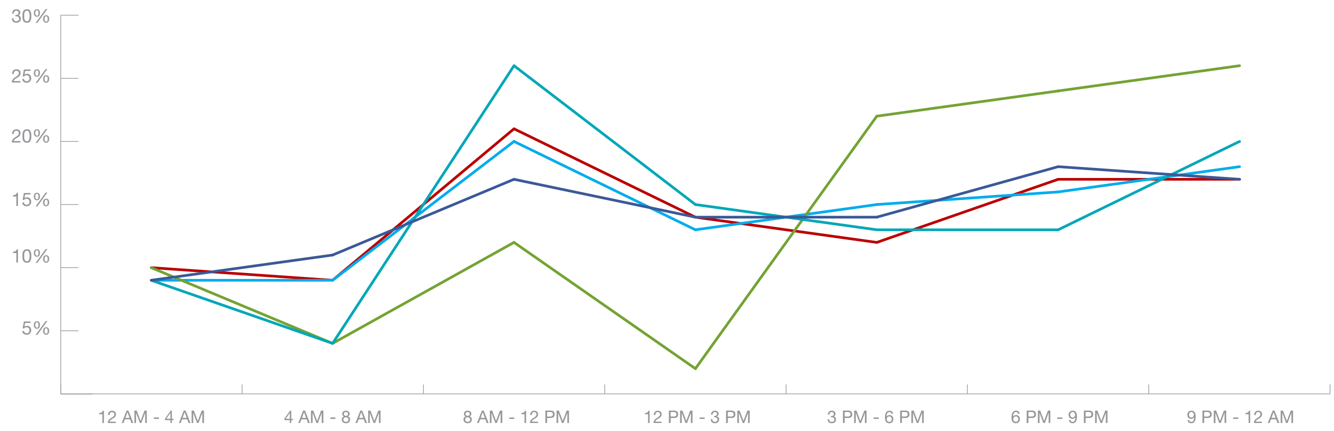


- **Amazon** (N = 396)
- **CNN** (N = 173)
- **Groupon** (N = 558)
- **Weather** (N = 3,854)
- **Yahoo!** (N = 1,361)

Data source: ZQ tracking data

Shown here are daily averages of when consumers access these five shopping and informational sites on their corresponding mobile apps, based on tracking data. Tracking data for mobile apps shows a surge in the morning similar to what's seen on the mobile web (see preceding chart), with steady use resuming throughout the afternoon and evening. Note an especially high morning surge for Groupon's mobile app.

Daily Patterns: Mobile Web—Social Media



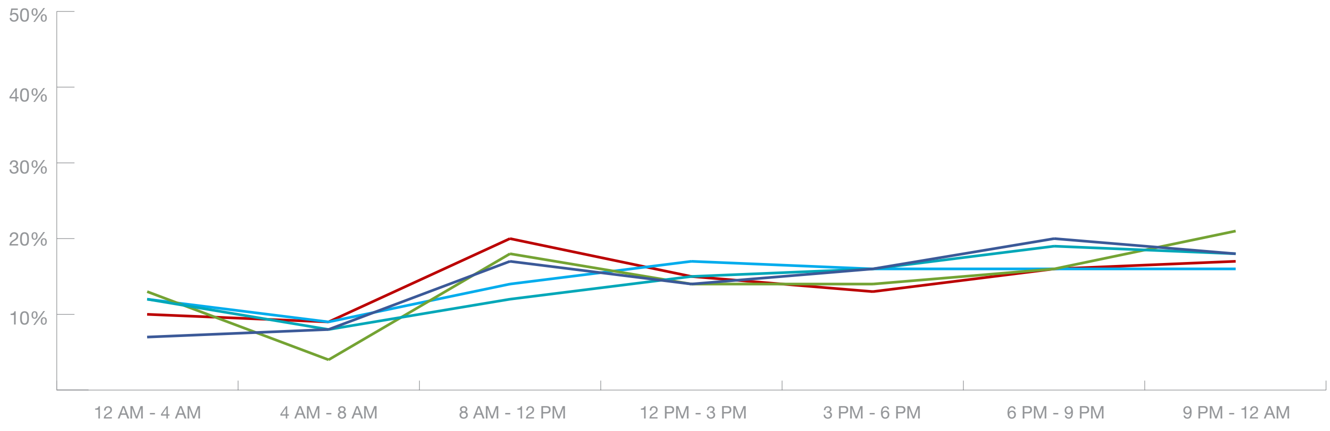
- **Facebook** (N = 1,244)
- **Instagram** (N = 54)
- **Pinterest** (N = 50)
- **Twitter** (N = 2,139)
- **YouTube** (N = 866)

Data source: ZQ tracking data

We tracked consumer visits to these five social media sites on the mobile web; this chart depicts daily visitation averages. Instagram, Twitter, and YouTube experience peak usage levels in the morning (8 a.m. to 12 p.m.) with secondary peaks at night (9 p.m. to 12 a.m.).

Pinterest shows especially high evening and night usage and especially low morning usage. Facebook traffic is most consistent throughout the day.

Daily Patterns: Mobile App—Social Media



- **Facebook** (N = 9,393)
- **Instagram** (N = 1,820)
- **Pinterest** (N = 1,044)
- **Twitter** (N = 762)
- **YouTube** (N = 1,312)

Data source: ZQ tracking data

This chart shows tracked app usage for these five social media apps; compare to the chart on the preceding page for a comparison of mobile app vs. mobile web. When it comes to visiting social media sites on proprietary mobile apps, the Twitter app maintains the most steady levels of usage throughout the day.

Whether your traffic is steady like Facebook or peaks at consumers' preferred time for relaxation like Pinterest, consumers may shift their clicks and traffic time between mobile app and mobile web. Mobile apps can be a significant monetary and time investment, but your app's presence on a consumer's mobile shelf space proves a high degree of commitment to your mobile content and services, and may provide an additional touchpoint of communications if users agree to opt into push messaging.

Recommendations

All charts and opinions considered, if you're a marketer looking to build a more powerful mobile strategy, there's no better place to start than current consumer data. These recommendations can help you apply the findings we discovered in the 2014 Mobile Behavior Report.

- Cater to a cross-media lifestyle. Of tablet owners, 65% reported using their tablet at the same time as watching TV at least once a day, and 41% said they use their smartphone and tablet simultaneously at least once a day. To win the consumer's mobile time, brands need to deliver an integrated, omni-channel experience.
- Optimize for specific needs and viewing environments—mobile web is accessed differently than mobile app, phones are used differently than tablets, and social media has a different pattern than weather. For example, the Twitter mobile app maintains a relatively steady level of traffic all day, while the Facebook, Instagram, and Pinterest apps peak in the evening. These differences are distinct and shouldn't be overlooked when developing a social publishing strategy.
- The smartphone is *the* mobile device, and 85% of consumers consider it a central part of their lives. Meanwhile, 54% of consumers also say that sites optimized for that central device don't provide enough content. If your site isn't mobile-optimized, then you now know what your most important mobile project is for 2014.
- Don't confine mobile to just the related devices. Focus on what mobility really looks like—a scanned coupon or QR code, a location-based push message, or a cross-channel offer. Customers are looking for brands who lead the way, as evidenced by the 68% of consumers who say it's somewhat or very important that brands they interact with are seen as technology leaders.
- The tablet is less of a mobile device and more of an at-home relaxation device. Think about what an ideal tablet experience could look like for your brand. For example, consumers enjoy reading and watching videos on tablets; can you write a series of helpful e-books or create more videos to engage them on this device? Develop a content strategy for tablet users, not just a communication plan.

- The top activities that people perform on their mobile devices haven't changed—it's still email and texting, like you might expect. Remember that these activities are the foundation of all mobile efforts.
- When it comes to what they can do on their mobile devices, consumers are inundated with options: games, social media, flipping through photos, answering emails, and infinitely more choices. To break through the mobile noise, think about how your brand can better sell and demonstrate the value of different mobile channels and types of engagement to these people who are already inundated with alternatives.
- Help consumers understand how to engage with you on newer mobile channels. Twenty-eight percent of surveyed consumers said they didn't know how to scan a QR code or print-to-smartphone coupon, or they didn't have the app to do so. Consumers might need assistance setting up newer mobile technologies, so you need to provide that guidance.
- The brand with the easiest-to-access content wins. Eighty-three percent of consumers said that a seamless experience across all their devices is somewhat or very important; they want the content they want where and when they want it. Deliver it and you'll be the clear leader.
- Push messages are opened immediately (only 8% ignore them); use this immediacy wisely, but don't abuse it.
- Delivering customized messages at only appropriate times is critical for brands looking to build customer relationships within the SMS channel. Fifty-two percent of those who don't receive text messages from companies said they found it disruptive, and 41% felt that texts don't provide more meaningful content. Consumers aged 45-54 were significantly more likely to feel text messages didn't provide meaningful content than all other age brackets (62% agreed with this sentiment). You'll need to prove the necessity of subscribing to your SMS program, but once you do it, you have a quick and simple inroad to consumer attention.

Conclusion

The smartphone and tablet are connecting hubs for critical facets of everyday life: relationships, work communications, on-the-go shopping, searches for information, and management of the latest happenings and news, on both a personal and global level. Unlike any other device before it, the smartphone travels everywhere with its owner—from bedside table to workplace to errands and home again.

When communicating on terms that the consumer on the other side finds useful and relevant, brands can efficiently capitalize on the immediacy and convenience of the mobile channel.

Appendix

This research tracked and surveyed 470 consumers. Here, you'll find additional detail on the people studied.

	Smartphone	Smartphone and Tablet
Total	265	205
Gender		
Male	40%	49%
Female	60%	50%
Age		
18-24	7%	15%
25-34	35%	34%
35-44	21%	23%
45-54	23%	17%
55+	13%	11%

	Smartphone	Smartphone and Tablet
Total	265	205
Income		
$24,999 or less	12%	14%
$24,999 - $49,999	23%	25%
$50,000 - $74,999	28%	23%
$75,000 - $99,999	12%	17%
$100,000 or more	22%	17%
Prefer not to say	3%	3%

Note: Some survey respondents may have owned both smartphones and tablets and responded to survey questions about both devices, but not tracked on their tablets (205 tablet owners were tracked); all smartphone users were tracked, as well as surveyed (470 smartphones were tracked).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