

# Adobe 2014 Mobile Consumer Survey Results

## Reaching and building loyalty with your most valuable mobile customers

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Mobile is how the world communicates now. There will be more than two billion smartphones globally in 2014, as reported by Forrester Research in *Predictions 2014: Mobile Trends for Marketers*,<sup>1</sup> giving consumers unprecedented access to a vast array of information and capabilities at their fingertips, anytime, anywhere. It's also how today's digital marketers communicate and engage with consumers and how consumers want to interact with brands. Mobile is the test by which the customer experience is measured. As testament to how the mobile experience impacts sales, for businesses with e-commerce websites, an average of 16% of revenue comes from mobile, while 20% of sales are influenced by mobile engagements, according to eConsultancy in *Finding the Path to Mobile Maturity*.<sup>2</sup> The question is no longer whether your business needs a mobile marketing strategy. Rather, it's do you have the right mobile strategy in place to reach the right customers with the best experiences.

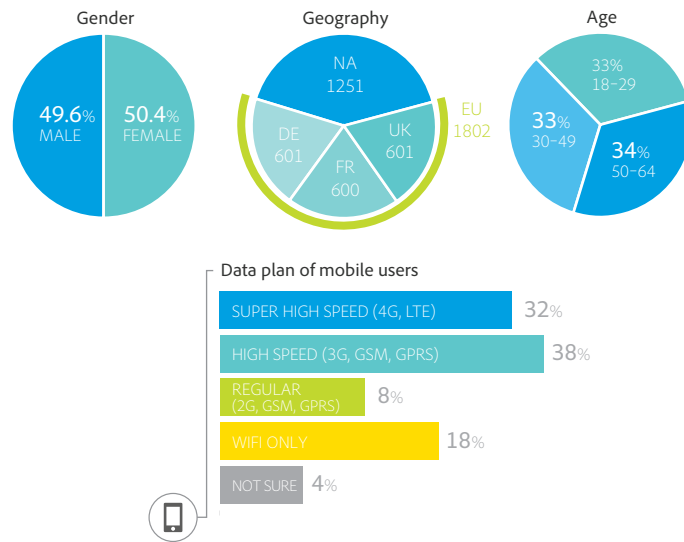
Now in its fifth year, the Adobe Mobile Consumer Survey aims to not only give digital marketers insight into how consumers are using their smartphones and tablet devices, but also provide guidance in how to identify the most valuable customer segments. In conjunction with the *Adobe Digital Index (ADI)*, which publishes research on the latest digital marketing trends and insights across channels and industries, results from the Adobe 2014 Mobile Consumer Survey helps digital marketers identify which target segments are spending the most time on apps versus websites, as well as hone in on mobile habits within those segments that are spending the most money. For instance, the 2014 *ADI Best of the Best* report<sup>3</sup> stated that the top retail sites achieve nearly 55% more visits from tablet users than the average retail sites. What does this mean to digital marketers? The Mobile Consumer Survey highlights consumers' mobile attitudes and preferences that retail marketers can capitalize on to optimize the mobile experience for tablet users.

### Survey of mobile users

In March 2014, Adobe surveyed mobile users in the United States, Canada, United Kingdom, France, and Germany to learn which mobile devices they use, how they interact with websites and applications, the activities they engage in on their mobile devices, and how they are adopting innovations in mobile. More than 3,000 participants provided valuable insights into their mobile habits and preferences across several categories, including media and entertainment, travel services, financial services, consumer products, and consumer electronics.

The survey, administered by Survey Sampling International, categorized preferences based on device type, gender, and age. The participants were split nearly equally between gender and age. Age groups were split into young (18–29), middle-aged (30–49), and older (50–64).

**Figure 1. Demographics of survey respondents**

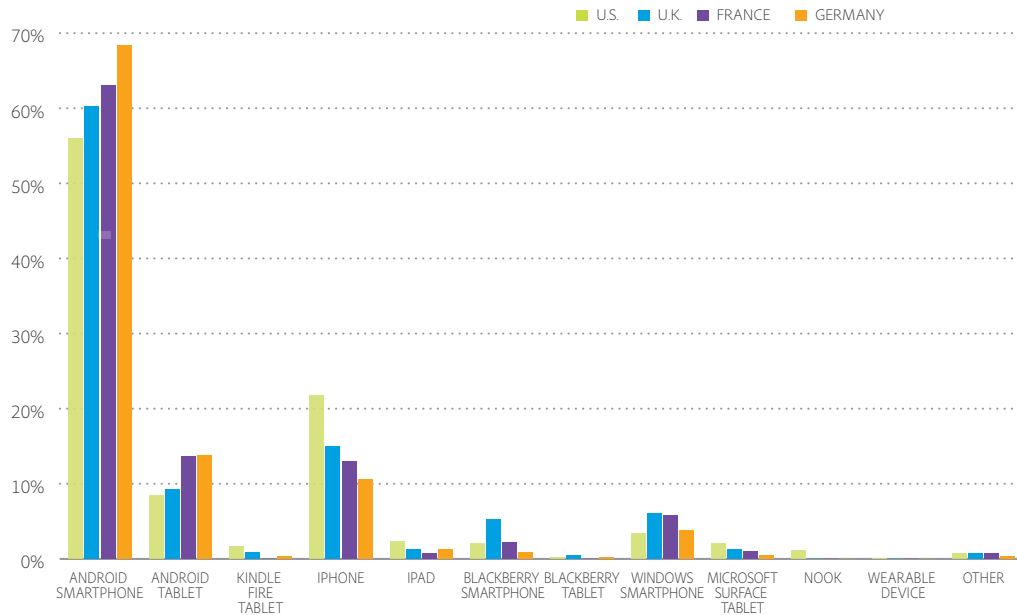


**Smartphones and tablets**

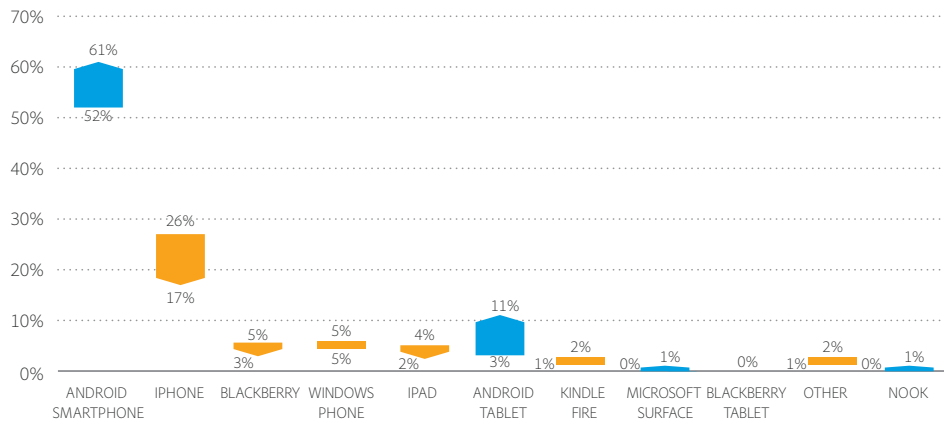
Results from the Adobe 2014 Mobile Consumer Survey show that Android devices have significantly increased their lead in overall popularity, with 71% reporting that Android is their primary mobile device of choice (versus 55% in 2013), while iOS devices were reported at 18% (versus 31% in 2013).

The young segment saw the biggest jump in reporting Android smartphones as their primary device, from 59% in 2013 to 67% in 2014. In terms of mobile phones, 61% of those surveyed said that Android phones are their primary device, with 17% reporting iPhones as their primary device. In addition, 64% of Europeans reported using Android phones, with only 13% using iPhones.

**Figure 2. Respondents' primary mobile device (by country)**



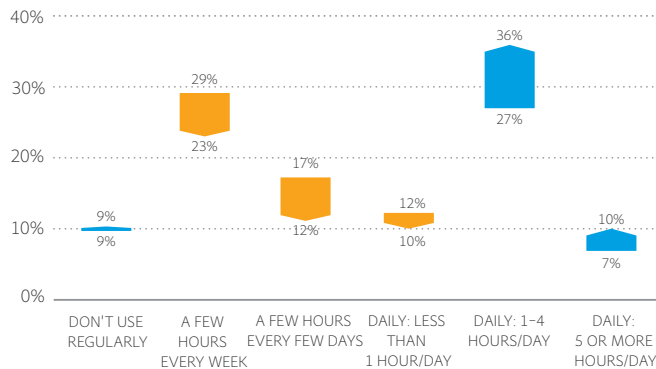
**Figure 3. Respondents' primary mobile device (percentage change from 2013 to 2014)**



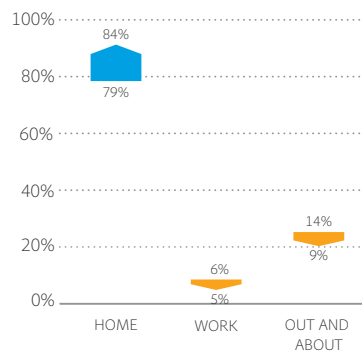
Consumers continue to turn to smartphones as their primary device over tablets (84%), however, they are also spending more time daily on their tablets as compared to 2013. Of the middle-age segment, 39% reported spending 1-4 hours daily on their tablets (compared to 26% in 2013), followed by the older segment at 38% (versus 28% in 2013) and the young segment at 32% (versus 26% in 2013). Respondents overwhelmingly use their tablets at home, rather than at work or out and about. And, according to the ADI *Best of the Best* report, tablet owners are more affluent and among the most gadget-oriented consumers.

Given the high usage of smartphones and the level of engagement that tablets provide, should organizations invest in mobile marketing strategies for smartphones or for tablets? The answer is both. However, as Forrester outlines, tablets and smartphones are not the same. Marketing strategies that combine the two "risk dissatisfying their best customers and missing opportunities to engage when customers discover and explore their products."<sup>1</sup>

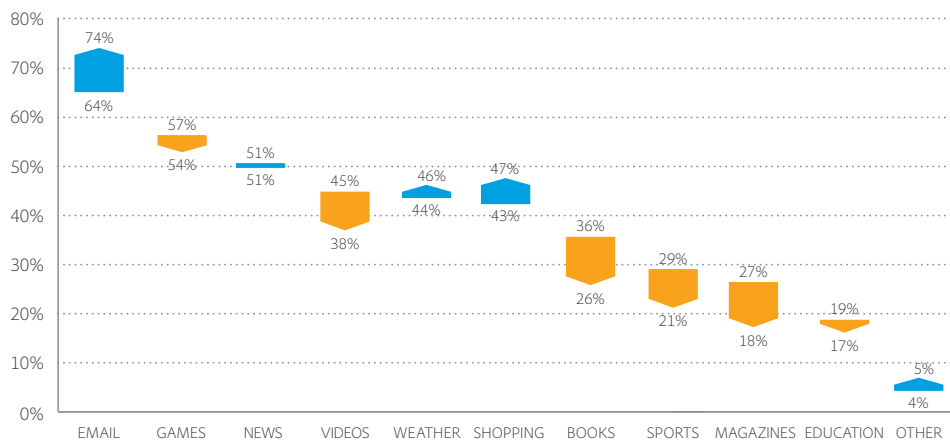
**Figure 4. Average time spent using tablet (percentage change from 2013 to 2014)**



**Figure 5. Where tablets are used most frequently (percentage change from 2013 to 2014)**



**Figure 6. Most common activities engaged with on tablet (percentage change from 2013 to 2014)**



Consumers continue to use their tablets for engaging with content, communicating through email, playing games, and viewing videos. The young segment is increasingly using tablets for shopping, with 52% in 2014, compared to 43% in 2013.

## Key insights and findings

Based on responses from this year's survey, consumers are reaching for mobile first, making it more important than ever for marketers to adopt a true cross-channel approach when it comes to communicating with their customers. Not only are consumers spending more time on their devices, but they are using their devices in conjunction with traditional offline activities, signifying a behavior shift on the part of consumers and a call to action for how marketers need to engage with their customers.

### Profile of the mobile elite

The Adobe 2014 Mobile Consumer Survey took a close look at the DNA of the most valuable mobile consumers. Compared to past studies that focused on demographic variations of consumers to understand issues and opportunities that influenced their adoption of mobile in various sectors, the 2014 study was expanded to also look at the impact of behavior. This year's study carved out those consumers who reported spending more time and money on mobile devices compared to the general sample. These consumers, the mobile elite (ME), were then profiled based on their attitudes and behaviors compared to the rest of the mobile audience (see Methodology for details). This segment appears to share some similarities to what Forrester identified as "shifted segments" (perpetuals, immersers, adapters), making up 22% of online U.S. adults and the furthest along on the mobile mind shift: "They connect frequently on multiple devices from multiple locations and use a variety of applications."

Consumers at this point in the mobile adoption curve are as varied and complex in the different mobile sectors as they are in the general consumer market. As such, segmentation and optimization strategies need to be in place to isolate mobile segments and personalize messaging and channel frameworks. Within the industry sections discussed below, variations in reported preferences and behaviors were highlighted for the ME specific to that segment. Additionally, the survey combined consumers within any one of those segments into an overall ME segment to see if significant observations could be made across segments in terms of demographics, attitudes, and behaviors.

Demographically, the ME segment slightly skewed to the young and middle-aged ranges (34% and 36%, respectively, with 30% from the older age range) and toward males (53% male versus 47% female). Additionally, they reported a slightly higher number of mobile devices being used: 1.9 for the ME versus 1.8 for the general consumer. Although demographic differences appear minor, larger variations in reported preferences and behaviors between segments are noted in the subsequent sections of this paper.

Perhaps nowhere is the understanding and acting on the fragmentation of the consumer market more important today than in mobile. However, as many marketing departments and organizations are still ramping up their mobile analytics, optimization, and delivery platforms, insight is key to making wise decisions that take advantage of the various segments and their unique mobile preferences and behaviors. Especially with mobile consumers interacting with businesses from multiple devices—and even cross-channel, such as starting from Facebook to a mobile site or app and then offline in a store or physical location—it is important for marketers to understand the variety of journeys on which their consumers embark to consider how to optimize the mobile experience for key interactions.

Best practices for mobile execution include reviewing mobile analytics data to understand how one group might interact differently than another and using that information to test and tailor experiences for optimized relevance. The starter segments typically include mobile device type, channel (site versus app), and geolocation, or a combination of any of these. Advanced analysis and segmentation use engagement and lifetime value metrics to determine and tailor mobile experiences even more.

In the sections below, the highlighted survey results aim to assist with this prioritization effort by looking further at what mobile consumers reported this year within the financial services, media and entertainment, travel services, consumer products, and consumer electronics industry segments.

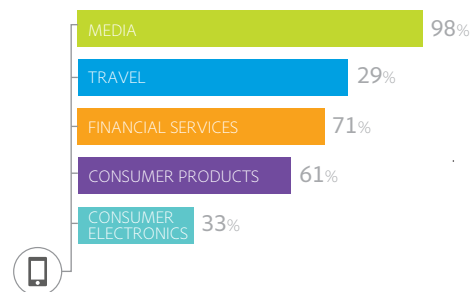
## Financial services

The majority of consumers who engaged with financial services via mobile in 2014 reported having an overall positive experience. In fact, only 11% reported having a bad experience over the past six months. When asked “How satisfied are you with the overall experience of accessing personal financial information on mobile websites?”, the majority indicated “satisfied” or “very satisfied” (52% for general consumers and 64% for MEs).

Given consumers’ greater perceived risk to access and provide account information via mobile in this sector—compared to risks that consumers might associate with media or travel sites—it is a positive indication that responders did not report heightened negative reactions to mobile experiences with financial services activities. This year’s survey drilled down on the financial services activities that consumers reported participating in most frequently, which should receive the highest priority for an organization’s optimization and development efforts.

The survey also explored in which areas of financial services consumers are adopting mobile apps and where they rely on mobile websites, and how the MEs are different than general consumers in this sector. Overall, financial services had the third-highest percentage among the sectors for consumers reporting mobile adoption—a positive indicator for continued growth.

**Figure 7. Percentage of mobile respondents who qualified for industry vertical sections of survey based on industry engagement**

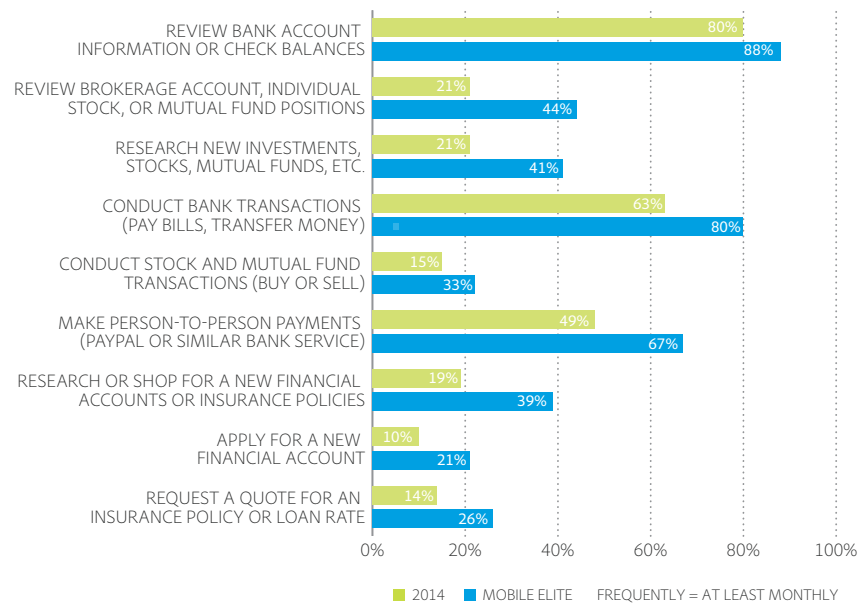


The key activities that were examined included researching, applying for, and opening new accounts. Unlike shopping for clothes or looking up flight information, applying for a financial account is more complex. Financial services companies that want to focus on deepening customer relationships through mobile, the application process has to become easier. Although forms technology has improved vastly to help increase conversion and simplify the experience, these activities are still reported near the bottom of the scale in terms

of frequency. For example, only 19% of consumers reported "Researching or shopping for new financial accounts or insurance policies" as a frequent activity. Almost half of the consumers (45%) reported never performing this activity via mobile. On the surface, this could raise caution for new business growth potential in financial services via mobile. However, a closer look at the MEs in financial services showed a significant gap—for this activity as well as several others—from the general financial services consumer.

In fact, 20% more of the MEs reported research and shopping as a frequent activity than general consumers in this segment. Because MEs are much deeper into the adoption curve for this activity, there is clearly room here to increase consumer adoption. Other shopping and purchasing questions, such as "apply for a new account" and "researching new investments," showed similar deltas. Of importance to note, 80% surveyed reported that they "review bank account information or check balances" frequently, which demonstrated the ubiquity of financial services adoption and potential in this sector. Comparatively, popular media activities, such as "following social" or "checking news and blogs" (58% and 34%, respectively), had a much smaller portion of the sample reporting these as frequent activities.

**Figure 8. Percentage of mobile respondents who frequently engage with financial services activities**



The depth of time spent with these transactional activities underscores the importance of building out analytics and optimization within these apps. ADI *reported* that consumers open mobile financial services apps 30% more frequently than apps in other sectors, noting that "new banking and investment apps are more secure and make login and use much easier than the website."<sup>5</sup> Moreover, because an even higher percentage of the MEs (88%) reported frequently spending time with these activities, and consumers in this sector overall reported a preference for apps over mobile sites to perform these tasks (54% versus 46%, respectively), organizations should prioritize optimization to increase loyalty and adoption.

In this survey, financial services appears to have the strongest brand presence in mobile channels as compared to other sectors. Only 36% reported accessing mobile sites in financial services for the first time via a search engine, as compared to media at 39%, consumer electronics at 43%, consumer products at 49%, and travel services at 54%. Perhaps even a stronger indicator of multichannel brand loyalty is that 20% of those surveyed reported visiting financial services, consumer products, and travel sites and apps for the first time by directly typing in the address, as compared to consumer electronics at 19% and media at 10%.

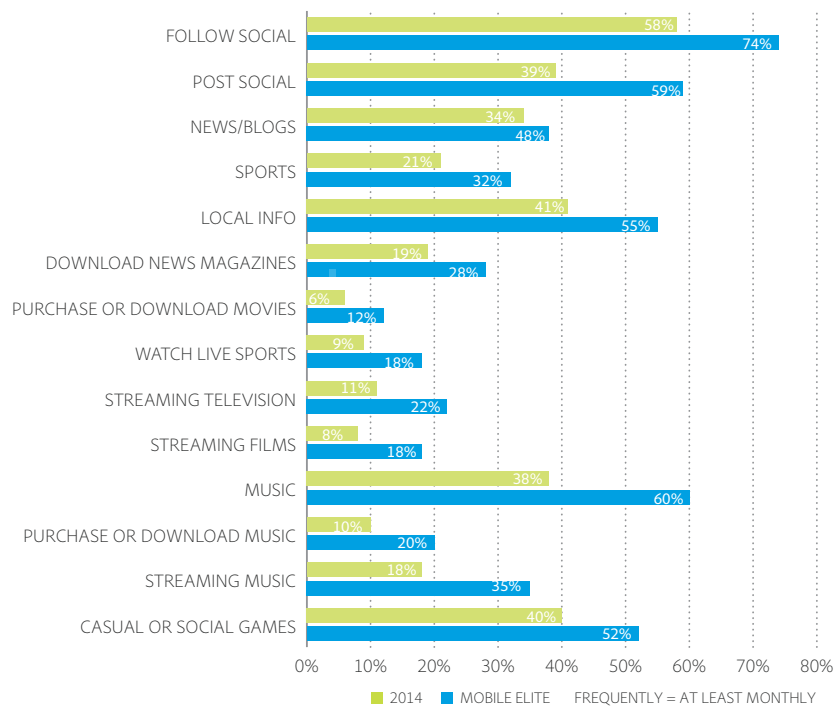
## Media and entertainment

Mobile has transformed the way that consumers interact with content, particularly for media and entertainment companies. Across the board, the percentage of consumers who reported engaging with media was higher than any of the other mobile sectors surveyed. The audience for media on mobile is potentially huge. Media and entertainment companies need to hone in on the activities that consumers report participating in most often, learn whether consumers prefer mobile websites or apps for engaging with content, and understand how media MEs are different than general mobile media consumers.

Because the activities are deep and varied in the media sector, it is challenging for organizations to know where to focus development efforts for content (apps versus mobile websites) and which activities to prioritize for optimization efforts. Consumers' mixed preferences for apps versus mobile websites for performing different activities adds to this complexity. For example, consumers reported that they prefer apps when it comes to social (59%), games (58%), and music (57%). However, they prefer mobile websites for magazines (60%), sports (65%), and news (65%). Mobile users who prefer mobile websites might not want to download an app to consume the content. Consequently, media companies need to carefully prioritize which channels should be supported to reach the most valuable audiences.

The top activities that consumers reported engaging in are social (58%), accessing local content (41%), and playing games (40%). MEs in media reported a much higher frequency of engaging with all media content. In this segment, MEs exemplify what Forrester calls shifted consumers, where "almost four out of five have a tablet in addition to their smartphones or phones. They connect from anywhere, frequently, and use nearly every possible type of app."<sup>6</sup> Over 50% of consumers in the media segment reported being frequently engaged with at least five different activities related to media content.

**Figure 9. Percentage of mobile respondents who frequently engage with media activities**



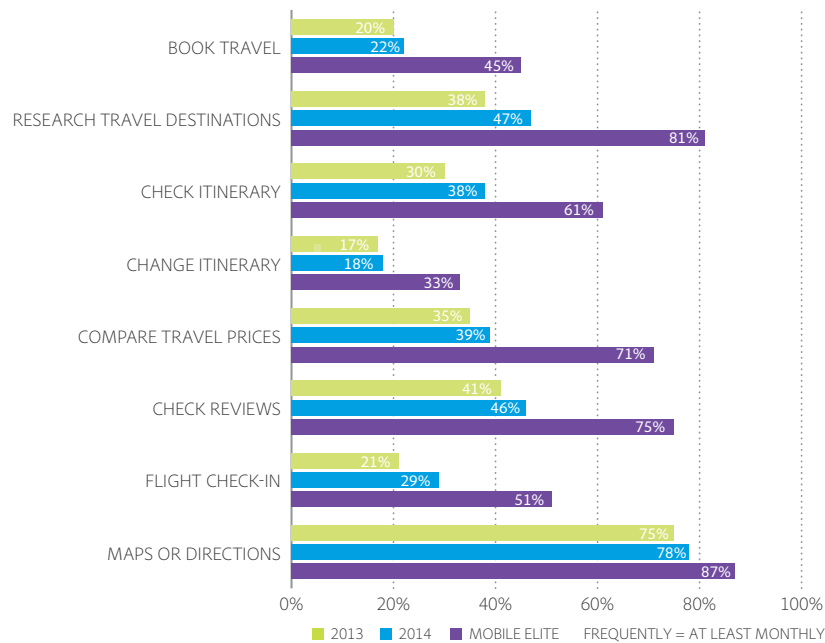
## Travel services

For travel services, the key activity for consumers to engage in is researching and then booking a reservation, which equals sales. And the opportunity is significant: the *ADI Travel 2014 Report*<sup>7</sup> shows that online travel bookings are anticipated to reach \$61 billion in the United States over the summer months in 2014. This year, there was a 2% increase in consumers who reported making frequent travel bookings via mobile as compared to 2013. However, the MEs in this sector were nearly twice as likely as general consumers (45% versus 22%) to report frequent travel booking via mobile, making these consumers a priority to understand to maintain loyalty.

The activity that is a true standout in 2014 for the travel sector is the number of consumers who reported regularly researching travel destinations via mobile, which jumped by almost 10% (38% in 2013 to 47% in 2014), indicating that travelers are becoming much more comfortable with mobile as a travel research and planning tool. According to ADI, travel apps are “a huge hit for mobile users because road warriors and vacationers are frequently on the run and more willing to download and use hotel, airline, and car rental applications. ... On average, travel enthusiasts use an app more than 20 minutes per app session.”<sup>8</sup>

Check-in and check-itinerary activities also saw big jumps in frequent usage (29% in 2014 versus 21% in 2013, and 38% in 2014 versus 30% in 2013, respectively). In fact, adoption of all the major activities associated with travel services experienced increased frequency over the last year. Consumer comfort and adoption of mobile as a tool to facilitate travel is on the rise. Ease of use, navigation, and speed were cited as the key areas of importance when accessing mobile websites and apps.

**Figure 10. Percentage of mobile respondents who frequently engage with travel activities**



Also of importance to note for travel services: More than 54% of consumers reported finding travel websites by search engines, which was the highest percentage of any market surveyed, indicating that travel websites are not as strongly branded and do not retain the level of customer loyalty of websites in other market segments.

## Shopping for consumer products

In the category of consumer products, purchasing products jumped 4% from last year as a frequent activity, reaffirming that the trend in the growth of general e-commerce is carrying over to mobile commerce. At the same time, consumers are looking to their mobile devices to help aid their overall shopping and product education process, with accessing “customer ratings and reviews” experiencing the biggest increase in frequent usage over the last year (41% in 2013 to 47% in 2014).

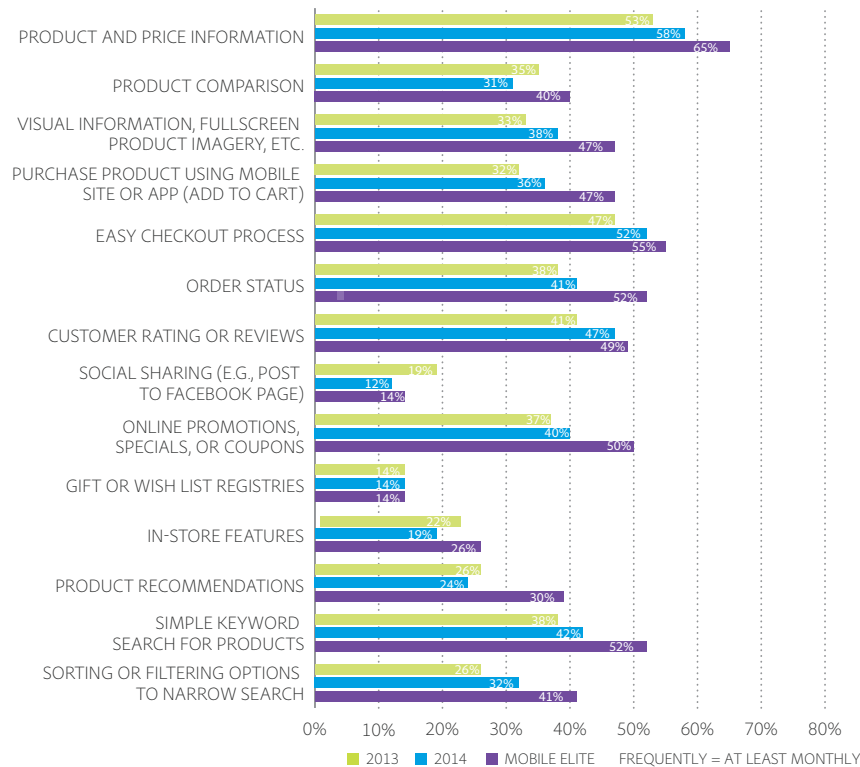
MEs in this segment—those who reported purchasing more than \$750 in products via mobile in the past 12 months—are significantly differentiated from general mobile consumers. For example, a higher percentage of MEs reported that they accessed visual information frequently (47% versus 38% for general consumers), while product and price information was also accessed more frequently (65% versus 58% for general consumers).

MEs reported preferring mobile apps for shopping, followed by mobile websites, and then regular websites. General consumers also reported a preference for mobile apps, but next in line was regular websites, followed by mobile websites. The key takeaway for providers of consumer products is that across the board, consumers prefer mobile apps for shopping, and therefore, they should tailor their mobile strategies to prioritize apps.



MEs reported frequently using mobile to assist with in-store shopping, giving providers of consumer products another opportunity to use leading-edge technology to build loyalty with these consumers. Case in point, Home Depot’s mobile apps can be considered a best practice for geolocation use that delivers on customers’ needs.<sup>9</sup> When a customer enters a Home Depot store and launches the Home Depot app, the app uses GPS to provide a store-specific menu that helps customers easily find items, a handy, time-saving tool in a store that can be up to 150,000 square feet.

**Figure 11. Percentage of mobile respondents who frequently engage with consumer electronics activities**

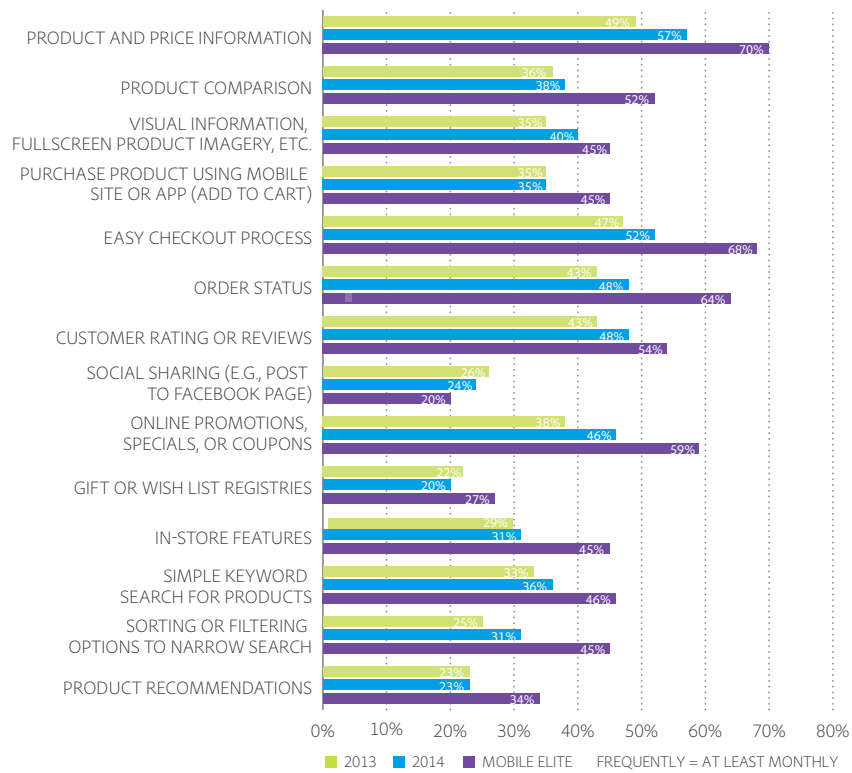


## Shopping for consumer electronics

Unlike the consumer products category, where purchasing products jumped 4% in reported frequent usage, it remained flat for consumer electronics from 2013 to 2014. However, it appears that consumers are more likely to use mobile devices to help aid their overall shopping and product education process with the frequent usage of online promotions, specials, or coupons jumping 8% in 2014. Accessing customer ratings and reviews also increased over the past year (43% in 2013 to 48% in 2014).

Similar to the consumer products category, MEs in this segment—those who reported purchasing more than \$750 in products via mobile in the past six months—are highly differentiated from general mobile consumers, with 70% of them reporting accessing product and price as a frequent activity, compared to 57% of general consumers. MEs also differ from general consumers when it comes to the frequent usage of order status, checkout, and product comparison features (64%, 68%, and 52%, respectively). Consumers reported shopping for consumer electronics fairly evenly between accessing mobile websites (34%), apps (35%), and regular sites via mobile (31%). However, when people were asked how they would prefer to shop, the MEs reported a much stronger preference for apps, jumping from 27% to 39%, indicating that current mobile app experiences have limitations or issues that are holding consumers back from fully embracing them.

**Figure 12. Percentage of mobile respondents who frequently engage with consumer electronics activities**



When asked about the preference for shopping via apps versus mobile websites for given tasks, mobile websites are the strong preference across the board. Consequently, providers of consumer electronics could improve their mobile app experiences to be on par with mobile websites and provide better engagement with MEs, especially as app usage outpaces mobile website visits by an average of 100 minutes per month, according to *ADI*.<sup>10</sup> At the same time, mobile websites continue to play a vital role, indicating that companies must also invest in mobile website experiences, as well as measure and analyze their customers' usage patterns to ultimately improve the overall mobile experience.

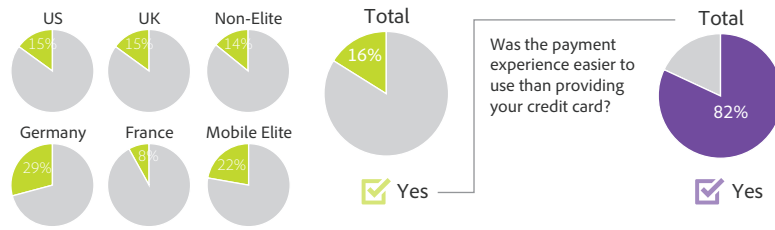
## Emerging mobile marketing tactics

Given the broad selection of mobile-specific marketing tactics, businesses should provide improved customer experiences and create significant brand differentiation. There is a unique opportunity on mobile devices to personalize content and offers to consumer behavior at a precise location and moment in time. For example, the launch of iBeacon technology last year has contributed to the deployment of in-store and event-related offers across the retail, sports, and entertainments sectors. Notably, Major League Baseball has installed beacons at all stadiums to drive engagement with fans that download the At the Ballpark app. Further along those lines, geo-fencing and geo-conquesting campaigns that drive conversion rates within stores or lure consumers away from competitors in real time are emerging. However, to realize a return on investment, marketers need to educate consumers about the potential benefits of these promotions, provide enabling services to support them, and build the right mobile applications.

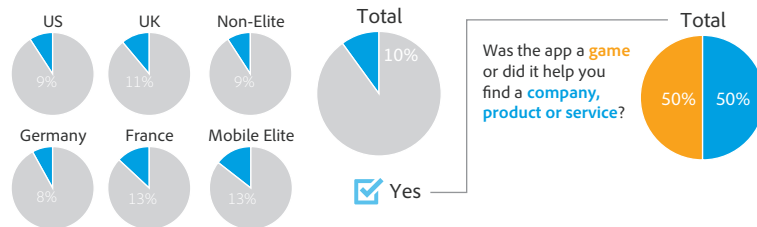
Consumer segments are using mobile devices to take advantage of these tactics. For example, in North America, the percentage of consumer reporting that they allow apps to use their GPS to personalize the experience jumped from 49% in 2013 to 58% this year. With a majority now open to location-specific experiences, which tactics are most adopted and where should the marketer focus?

Part of the answer to this question is brand and industry specific. It's also important to note that the adoption of emerging tactics varies across segments and geographies. For example, for mobile wallets, augmented reality, and mobile-assisted in-store shopping, the ME segment was ahead in the adoption curve.

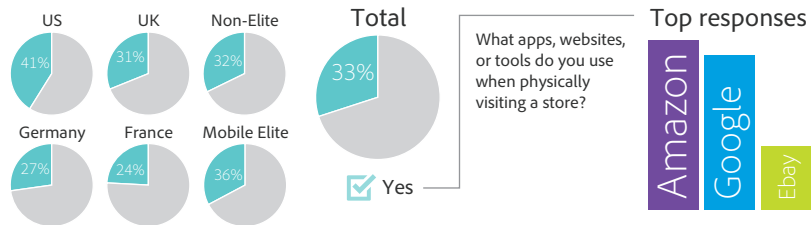
**Figure 13. Have you used a "mobile wallet" capability where you can use your mobile device to pay for products and services in the last 3 months?**



**Figure 14. Have you used an augmented reality app in the last 3 months?**

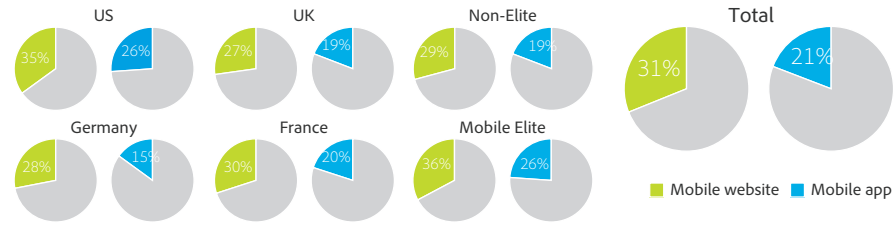


**Figure 15. Do you access your mobile device when physically visiting a store to assist or support your shopping?**

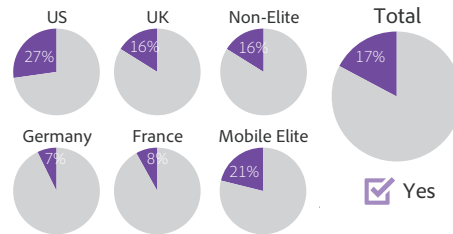


Twenty-two percent of the ME segment reported using a mobile wallet in the past three months, as opposed to only 14% of the general consumer segment. In the case of augmented reality, 13% of MEs actively used these apps in the past three months, compared to 9% for general consumers. When asked about mobile-assisted in-store shopping, 36% of MEs reported this behavior, compared to only 32% of general mobile consumers. These metrics indicate that the consumers who spend more time and money (the ME), also take greater advantage of emerging mobile tactics to assist them in this process. And, importantly, they are also more likely to be influenced by advertising and promotional tactics in this process. For example, 36% of MEs reported clicking through ads displayed on mobile websites over the past three months, but only 29% of the general consumers reported this behavior. Similar behaviors were reported for ads presented in mobile apps (26% of MEs clicked through, but only 19% of general consumers). In addition, 21% of MEs reported sending SMS or text messages to connect with brands or receive discounts, as opposed to 16% of general mobile consumers.

**Figure 16. During the last 3 months, have you clicked through on mobile ads that are presented in a mobile app or mobile website?**



**Figure 17. Do you send SMS/text messages to connect with brands or receive discounts?**



From a regional perspective, some significant variations were observed in the reported adoption of these emerging tactics. For example, mobile wallet applications were reported as being used by only 8% of consumers in France and 15% in North America, but Germany was more than double, even triple those adoption rates at 29%. Although behind in adopting mobile wallets, France is further ahead when it comes to location check-in services. In France, 43% of people checking-in is much greater than Germany at 24%, and 14% ahead of the 29% reported in North America and the United Kingdom. In terms of cross-channel behavior and the use of a mobile device to assist with in-store shopping activities, North America has the most cross-channel connected consumers.

## Summary and conclusions

The Adobe 2014 Mobile Consumer Survey showed that consumers are acting mobile first as indicated by significant behavior shifts, such as using mobile devices to aid in their physical shopping experiences, from researching and comparing products, to looking up customer reviews, to locating specific products within a brick-and-mortar store. The survey also brought to light the highly valuable mobile elite (ME), who exemplify the perpetually connected consumer and underscore the need for today's organizations to consider mobile as a vital platform in a true cross-channel approach to customer communications and engagement. Yet there is a gap between customers' propensity for using mobile and organizations aligning their resources to act mobile first.

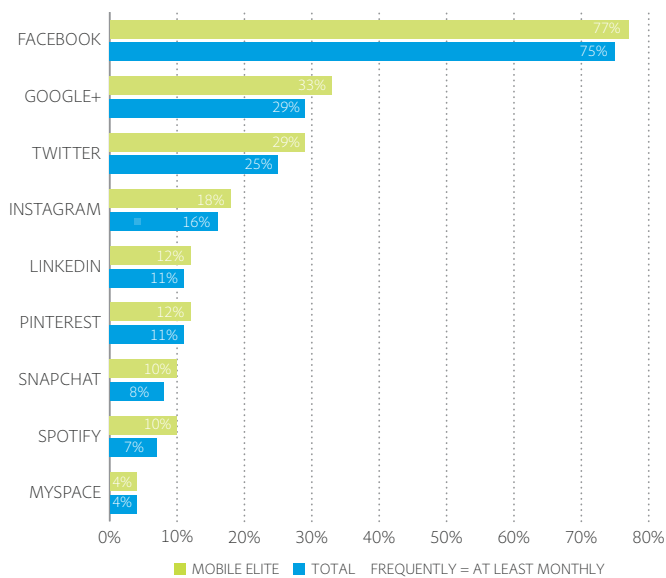
For example, in the *Adobe 2014 Digital Marketing Optimization Survey*, 66% of digital marketers indicated mobile is very or somewhat important to cross-channel marketing;<sup>11</sup> however, the investment in mobile channels is not proportional to the amount of digital traffic that many brands see from mobile devices. In addition, a Forrester report indicated that only 49% of interactive marketing professionals surveyed in 2013 used mobile analytics.<sup>12</sup> The upshot is that many organizations are "flying blind" with no key performance indicators to measure and analyze mobile channel effectiveness. Even more telling, the *Adobe 2014 Digital Marketing Optimization Survey* indicated that only 20% of digital marketers indicated they are planning to optimize their mobile channels, and 50% didn't know if A/B testing is part of their 2014 strategy. Again, this means that many organizations are simply guessing, by making assumptions about which experiences drive conversion instead of using a proven, scientific method to test and optimize mobile experiences.

For organizations to build loyalty with their high-value customers, they must understand their behaviors and preferences to deliver more targeted, engaging mobile user experiences. And, more importantly, they must take the next step to test which variables are making a difference to the customers' experiences and then continually optimize to deliver the best mobile experiences, translating to increased loyalty, greater revenue, and improved bottom line.

Following is a summary of the key insights from the consumer survey.

- For consumers who own both a smartphone and a tablet, the primary device is still the smartphone (84%), and it has increased slightly from 2013 (77%).
- Android smartphones have gained in popularity across all age groups.
  - 74% for young (59% in 2013), 69% for middle-aged (60% in 2013), and 63% for older (54% in 2013)
  - Apple ownership is higher in the United States than Europe
  - In the United States, Android ownership is 63% versus iPhones at 27%
  - Android ownership is higher in Europe than the United States
- Tablet popularity has shifted to Android tablets across all age groups, at 32% for young (iPads were most popular in 2013 at 23%), 41% for middle-aged (iPads were most popular in 2013 at 21%), and 36% for older (Kindle Fire was most popular in 2013 at 10%).
- Facebook is still the primary social network accessed by mobile at 75% (also 75% in 2013). Google+ grew to 29% (26% in 2013), and Twitter fell to 25% (28% in 2013). Instagram and Pinterest still show strongly on the charts at 16% and 11%, respectively, while newcomer Snapchat gained a significant foothold with the young segment at 19% (8% overall).
  - Females are spending time pinning and taking photos, using Pinterest at 17% (versus 5% of males) and Instagram at 19% (versus to 13% of males).
  - U.S. mobile users are more likely than Europeans to use Twitter (30% versus 21%), Instagram (24% versus 10%), Pinterest (21% versus 4%), LinkedIn (17% versus 7%), and Snapchat (11% versus 6%).

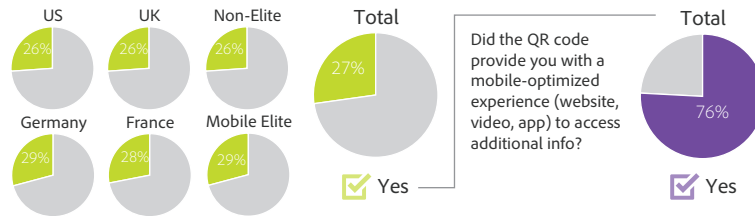
**Figure 18. Which social networks do you access from a mobile device?**



- Mobile ads presented in both sites and apps capture the attention of mobile users. A majority of advertisers provide mobile-optimized experiences when consumers click through on ads (60%), and the click-through to an ad was a mobile-friendly experience 74% of the time.
  - 31% clicked through ads on mobile websites in the past three months
  - 34% of users in North America clicked on ads, significantly higher than Europe
  - Users in consumer electronics are the highest at 52% to click on ads

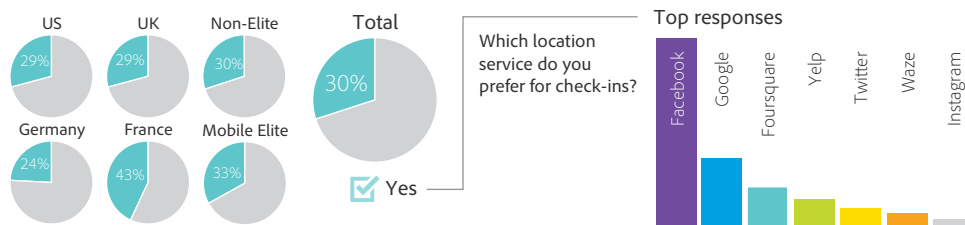
- Scanning QR codes
  - Young users are higher at 30%, versus 25% for middle-aged and 25% for older
  - Men reported 31% versus women at 22%
  - Users in the consumer electronics segment reported highest at 40%
  - 76% of scanning experiences were optimized for mobile

**Figure 19. Have you used your primary mobile device to scan a QR (Quick Reference) code in the last 3 months?**



- Location services
  - Young and middle-aged groups are more likely to check in (34% and 33%, respectively) than older at 24%.
  - Users in France checked in at 43%, much higher than the other regions.
  - Instagram (46%) and Snapchat (44%) check in the most out of social users.
  - 18% of users reported receiving an incentive to check in, while 68% reported wanting an incentive.

**Figure 20. Have you used your mobile device to "check-in" to a location service in the last three months?**



- Augmented reality and mobile wallets
  - 16% of users overall have used a mobile wallet capability, with young using mobile wallets 21%, compared to middle at 15% and older at 12%.
  - Users in Germany reported using mobile wallets at 29%.
  - Users in the consumer electronics segment used at 31%.
- Push notifications
  - 16% of users reported opting in for push notifications at least on occasion, indicating that users are selective when it comes to receiving alerts or messages on their home screen.

## Best practices

Today's consumers are adopting a multichannel approach to interacting with organizations across all industries. Brands must offer an engaging and dynamic mobile user experience to ensure consistent engagement across all devices and screens. As organizations look to implement mobile platforms as part of their cross-channel marketing strategies, there are several best practices to consider.

**Review the mobile analytics data you have today**—Across all Adobe Analytics customers, we see more than 36% of traffic coming via smartphones and tablets, a trend that will only accelerate in the near future. Use mobile analytics to directly measure consumer behavior and understand the most frequently used capabilities. The analytics either confirms or disproves what your customers say via surveys, allowing you to refine your mobile marketing strategy to deliver mobile experiences that best meet your customers' needs.

**Launch mobile channels with an optimization strategy in place**—Instead of guessing which experience is preferred by consumers, plan for ongoing A/B and multivariate testing of mobile websites and apps. Consider personalization capabilities that leverage information about the mobile device type, operating system, and GPS location or proximity to iBeacons.

**To app or not to app**—that is the question—Industry research says yes. Recent ADI reports show mobile consumers spend four times longer with a tablet app and two-and-a-half times longer with a smartphone app than on the web. Before building your mobile app, have clear objectives and goals for driving customer loyalty and engagement over time. Plan for quarterly or semi-annual updates and new versions for each major app store. App optimization technology is now available to assist in tracking app engagement from purchase and download to usage so that you can monitor how it's contributing to customer loyalty and revenue. Additionally, align your mobile tactics to app-centric goals, including the number of downloads per month, launches per month, average session length, and conversion rate for the app.

**Focus on location, location, location**—Every mobile device has the inherent ability to track where a mobile user is at a given time. The easiest step toward mobile personalization is location-based targeting via GPS data, geo-fences around a point of interest, or proximity to iBeacons. Present a relevant offer as the mobile user approaches a prime location for immediate action.

**Push it to the limit**—Consider using push notifications to reach your most active users. According to Forrester, consumers who opt in to push are the heaviest app users.

**Responsive design for mobile interactions**—Given that consumers may prefer a mobile website experience for their initial exposure to your brand, you need to have a web strategy that is inclusive of smartphone and tablet browsers. A responsive website that can support all device types and browsers is one approach to address this need while maintaining a consistent experience for the consumer. For more information on this topic, Adobe recently authored a responsive design best practices paper that can be accessed [here](#).

**Ensure that your social media presence is optimized for mobile**—Review your owned social media channels to ensure that consumers can click through to offers and that tweets are optimized for smartphones and tablets.

**Link mobile advertising campaigns to mobile websites and apps**—When planning your mobile search and display campaigns, ensure that landing pages are mobile-optimized and do not simply click through to the desktop home page.

**Leverage mobile know-how from the experts**—Seek guidance from Adobe Consulting and partners for expertise in mobile marketing.

## Methodology

In March 2014, Adobe surveyed about 3,050 mobile users in the United States, Canada (North America sample size of 1,251), United Kingdom (601), France (600), and Germany (601) to learn which mobile devices they use, how they interact with websites and applications, the activities they engage in on their mobile devices, and how they are adopting innovations in mobile. The survey, administered online by Survey Sampling International, categorized preferences based on device type, gender, and age. The participants were split nearly equally between gender and age. Age groups were split into young (18–29), middle-aged (30–49), and older (50–64). Participants then provided insight into their mobile habits and preferences across several market segments, including media, entertainment, travel services, financial services, consumer products, and consumer electronics. To qualify within a market segment, a consumer needed to have reported an activity within the segment within the last six months. All figures reported on within a segment are specific to the sample that qualified into that specific segment. By default, all other figures are from the global sample.

The mobile elite segments were built by filtering the general sample for the following criteria:

- Media—Respondent reported more than 6 hours on media mobile apps or media mobile websites in a week.
- Travel—Respondent spent more than 3 hours on travel mobile apps or travel mobile websites in a month.
- Financial services—Respondent spent more than 3 hours on finance mobile apps or mobile websites in a month.
- Retail—Respondent spent more than \$750 during the past 12 months via a mobile device.
- Consumer electronics—Respondent spent more than \$750 during the past 6 months via a mobile device.
- Mobile elite global segment—All individuals who qualified in any segment within an individual market segment.

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