› White Paper

Understanding the Mobile Consumer

Realizing the Opportunities With Analytics

Kellogg School of Management

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The World Is Going Mobile

Few advances in technology have changed the way consumers conduct their lives more broadly and profoundly than mobile. Sophisticated mobile devices, such as smartphones and tablets, have transformed how people live, work, engage and what they've come to expect.

Mobile is both powerful and immediate – a strongly addictive combination. Mobile combines portability and immediacy with useful functions, such as email, text, web search, social media, camera and voice telephony. Add to that powerful mix an array of apps that can perform virtually every function imaginable – from tracking physical activity and counting calories, to a full suite of banking services – and it's hard to ignore the allure of mobile and its role in consumers' everyday lives.

On the business side, mobile presents an impressive opportunity. In the US, there are over 95 mobile subscriptions per 100 people (The World Bank, 2013). Mobile – and more specifically, mobile apps – drove a 24 percent increase in the amount of time spent on digital media among US consumers in 2014 (Dreyer, 2014). In addition, consider these statistics about the mobile landscape:

- 257 million mobile phone users in the US (Schwandt and Kroeger, 2011).
- Two-thirds of Americans own smartphones (Smith and Page, 2015).
- 156 million tablet users in the US (emarketer, 2015).
- 60 percent of digital media time is spent on mobile driven by mobile apps.

As consumers go mobile, their behaviors change, and businesses must respond. Mobile provides the opportunity for businesses to engage with customers in new ways. It also allows businesses to develop a deeper understanding of these customers by capturing mobile data and mining it for unique insights.

Indeed, businesses view mobile as increasingly important to marketing success. In a recent CMO Council research report, 73 percent of marketers indicated that they use some form of mobile to connect to their customers (CMO Council, 2014). However, few report that their mobile initiatives are very effective. And while businesses rush to become "mobile-enabled," they are in large part unprepared to meet their customers' mobile expectations.

Delivering an effective mobile experience to the customer is becoming an essential component of the marketing mix. To do this, businesses must understand the attitudes and motivations of the mobile customer. Within this context, SAS partnered with the Kellogg Graduate School of Management to conduct research to better understand mobile use and attitudes among US consumers. The results of this research, both primary and secondary, yielded a key insight:

There is a considerable gap between consumers' expectations of mobile and the mobile experience provided by organizations.

Today's Consumers Have High Expectations

Mobile devices – smartphones and tablets in particular – have catalyzed the rise of the *empowered consumer*. The compelling combination of portability, immediacy and utility has propelled this empowerment because mobile puts information and the ability to take action quite literally in the hands of consumers.

- **Not sure it's a deal?** Scan the item in the store with your phone and search the web for a better price.
- **Forget to deposit that check?** Oops! Snap a picture of it with your mobile banking app and deposit those funds without leaving your house.
- **Flight canceled?** No problem. Whip out your smartphone and look for alternatives while you queue up at the service counter. There's a chance you'll have a solution by time you reach the counter.

These kinds of interactions, fueled by mobile capabilities, illustrate the appeal of mobile and its empowerment. Customers can take action, solve problems and obtain information in real time, anywhere. What's more, the consumer often controls the interaction with the business and can establish the rules of engagement. With advancements in technology, what was once an exciting experience for the customer is now an expectation. Customers have become more demanding and self-focused. Our research highlights the shift in expectations:

- Convenience is increasingly important: Consumers want to be able to engage anytime and anywhere.
- Customers have come to expect near-real-time access, response and resolution.
- Customers want to engage on their own terms.

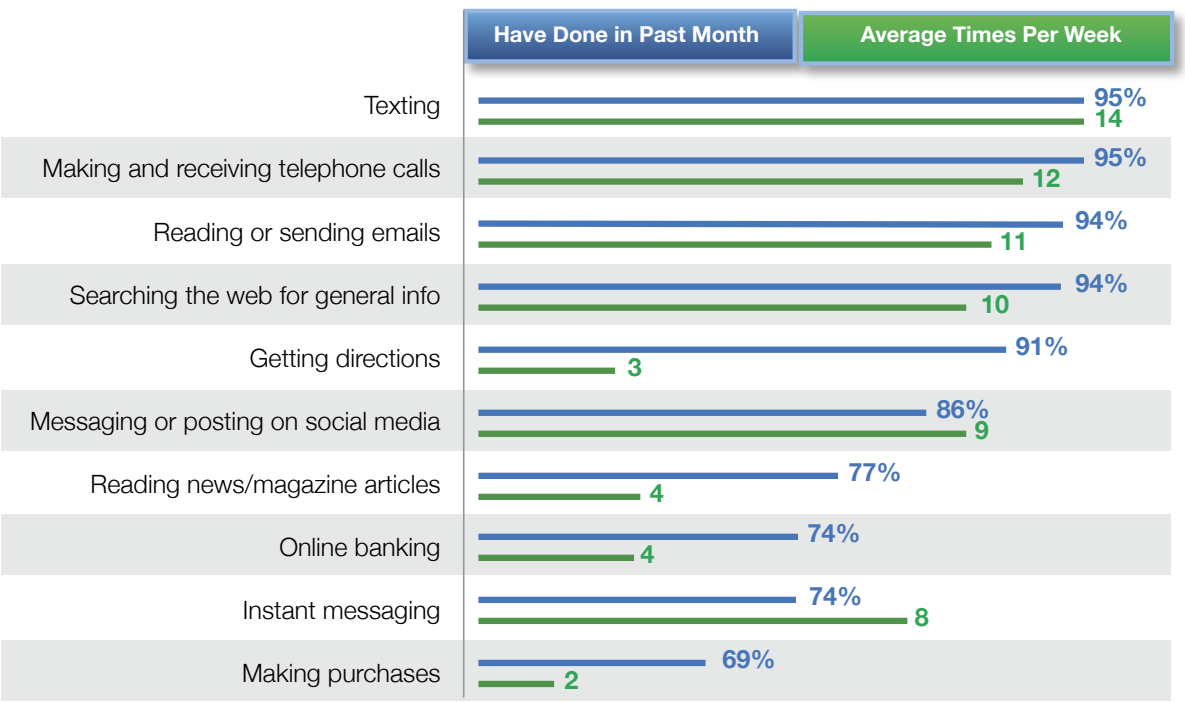
Mobile Is Changing How Consumers Do Everything

It doesn't take in-depth research to see that US consumers love their mobile devices. Everywhere we go, people are connected to their phones. A study by Salesforce.com (2014) reported that 85 percent of mobile users say their devices are a central part of their everyday lives, and Pew Research Center found that 46 percent of US smartphone users say they couldn't live without their devices (Smith and Page, 2015). And as more and more functionality is added, mobile is shifting consumer behavior patterns in almost everything we do.

Our research shows that mobile users are tapping their devices for communication, seeking information, creating and consuming content and performing business transactions at a high rate. And mobile is shifting communication patterns: Texting, according to our survey, as well as other sources, has edged out phoning on mobile devices. And the concept of the "second screen," most popularly referred to as watching television programming while also interacting with another device, really became prevalent with the advent of the smartphone and tablet, and per Mashable, has had a "transformative impact on the entertainment industry as a whole and specifically the television industry (Warren, 2013)." Approximately 66 percent of smartphone and tablet owners are now engaging their mobile device (smartphone or tablet, University of Chicago, 2012) as the second screen (companion device) during TV viewing (Schwandt and Kroeger, 2014; Nielson, 2013) .

People are reading and responding to emails on the go, searching the web for information and directions, and posting to social media through their phones and tablets. Mobile has also changed the format of content consumption. Three in four mobile consumers use their devices to get the news or read magazine articles. Over half of US smartphone users have used their devices to look up health information, and more than four in 10 have accessed real estate listings through their phones (Smith and Page, 2015). What's more, mobile serves as the ultimate transaction convenience: 74 percent of mobile consumers in our survey use mobile for online banking, and 69 percent make purchases through their mobile devices (see Figure 1).

Figure 1

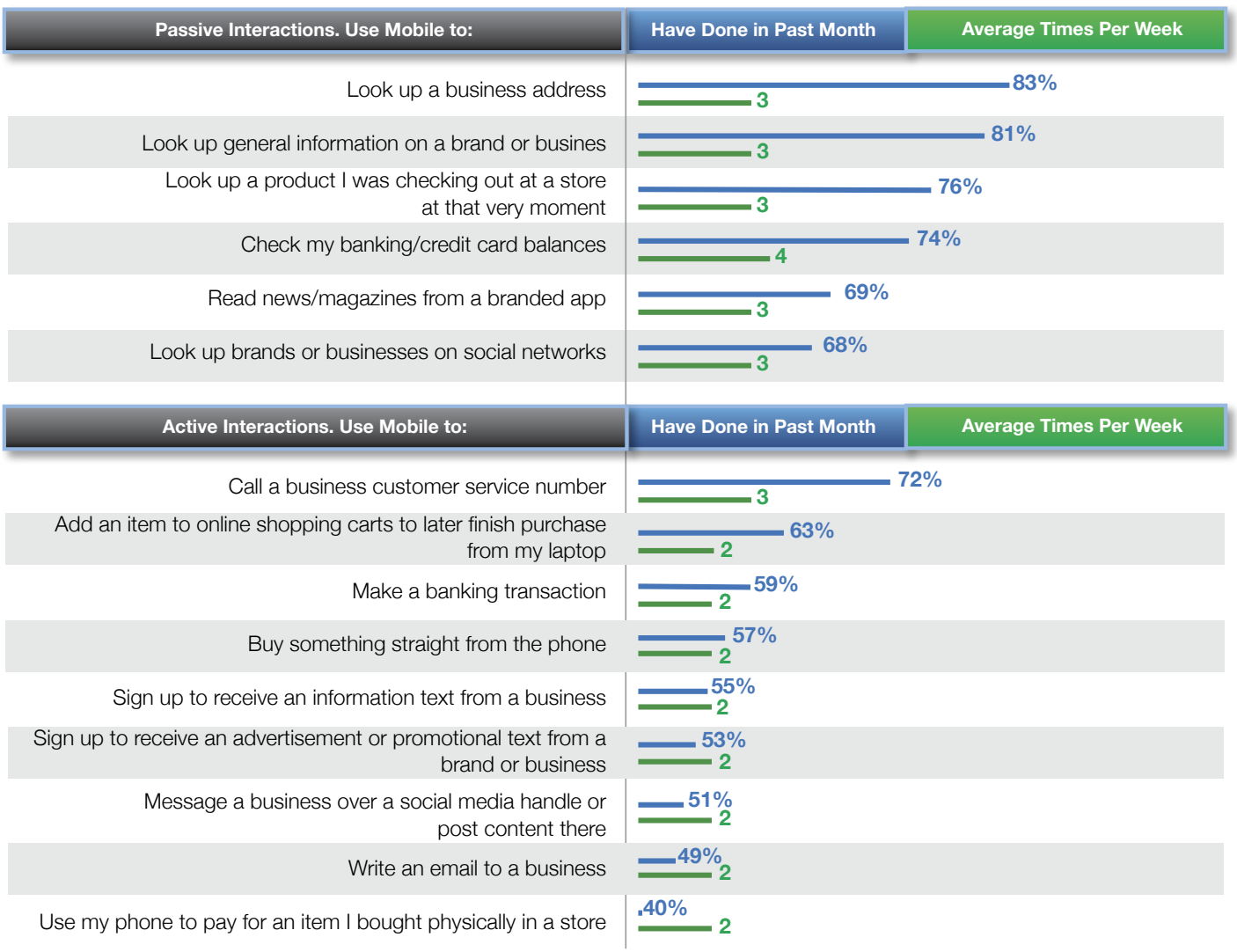


Mobile Is Reshaping Consumers' Business Interactions

While consumers continue to deepen their reliance on mobile, our research indicates that the vast majority of their mobile interactions with businesses are still primarily passive (i.e., they do not result in any action being taken beyond retrieving information).

More than eight in 10 survey participants report using their mobile devices to look up information on businesses, such as an address or general information. Three out of four engage in showrooming – an in-store activity where shoppers access information via their mobile devices about a product in that store. A similar proportion uses mobile devices to check bank account and credit card balances (see Figure 2).

Figure 2



On the other hand, active mobile interactions involve the customer taking steps to engage beyond the initial lookup. The primary active business interaction conducted via mobile is calling a business' customer service. The phone call still trumps other forms of contact with a business via mobile (such as messaging over social media or sending an email). However, our survey also suggests that choice of business contact method is situationally dependent. Factors that influence contact methods include issue complexity and time sensitivity.

In our survey, roughly six in 10 respondents use mobile to add an item to an online shopping cart for later purchase via laptop, conducting banking transactions and making purchases directly from their phones. Over half of the consumers responded that they are opting in via mobile to receive information and promotional offers from businesses.

App Use More Personal Than Business

Consumers are app-crazy. In 2014, we reached what ComScore has termed the "App Majority," or when the majority of all digital media time spent occurs on mobile apps (Lella and Lipsman, 2014). In addition, of time spent on mobile media, consumers spent 86 percent of their mobile time on apps, up from 80 percent in 2013 (Khalaf, 2014) . Our research found that 95 percent of smartphone and tablet users have downloaded at least one app, while the average is six apps.

But consistent with other mobile usage research, we found that the most active apps are for leisure or entertainment use (see Figure 3). Social media, games and music apps are not only the most downloaded, but also the most used. In fact, Facebook led among the most-downloaded apps in 2014, and over a half-billion users now access Facebook exclusively through mobile devices (Bonnington, 2015). Banking, shopping and deal/promotional apps are the only business-related apps in the top 10 most actively used among our survey respondents.

The Mobile Mindset

To keep pace with empowered consumers, it is critical to understand their attitudes about mobile. That understanding can guide strategy to capitalize on the marketing opportunities unique to the mobile environment. In addition to defining consumer mobile usage and behavior previously discussed, our research was designed to provide insight into the attitudinal factors that affect mobile usage.

Figure 3

Mobile App Types	Installed	Used in past month	Average times per week
Social networks	68%	100%	13
Games	67%	98%	8
Music	62%	97%	8
Banking	51%	96%	4
Entertainment	49%	96%	6
Shopping or e-commerce	44%	98%	4
Instant messaging	42%	98%	10
News apps	34%	98%	8
Deal or promotional apps	32%	98%	4
Photography	32%	96%	6
Productivity	24%	99%	7
Education/Learning	22%	96%	6
Restaurant reviews/ reservations	21%	97%	4
Travel – besides airlines	19%	93%	3
Personal fitness not linked to any wearable companion	16%	96%	7
Airline	16%	74%	3
Event ticketing	12%	81%	2
Dating	10%	97%	7
Insurance provider	10%	84%	3
Transit tracking	5%	88%	6
Wearable companion	4%	85%	9
Others	15%	58%	3

Our survey identified five key attitudinal factors that drive mobile use patterns:

1. **Technology Reliance**. Comfort with new, yet proven technologies; security issues are not of concern; reliance on smartphone and/or tablet for most daily tasks.
2. **Situational Dependence**. Depending on the urgency of the matter, multiple communication modes are used; word of mouth (from other customers is important); preference for self-service, but recognition that business interaction is needed based on the issue; faster is better.
3. **Security and Access**. Concern about the risk of sensitive information communicated across mobile platforms.
4. **Information and Records**. Requirement that business interactions are recorded for later reference; need for several sources of information and options when dealing with a business.
5. **Human Touch**. Preference for face-to-face interaction.

These attitudinal dimensions are consistent with prior research on technology readiness (Parasuraman and Colby, 2014),which have shown that, like anything, consumers' technology adoption is influenced by varying degrees of motivators and inhibitors.

Not All Mobile Users Are Alike

Consumers are in various stages of adoption and maturity in their use of mobile, not unlike adoption curves we have seen for decades after the introduction of new technology. But beyond their propensity to embrace new technology, the US mobile consumer market can be segmented based on their attitudes. Through segmentation, we identify the key differences among mobile consumers in order to more effectively target their needs.

Within the scope of this research, we uncovered three distinct mobile consumer segments:

Tech Reliant

The Tech Reliant segment, 45 percent of the survey respondents, corresponds with the 46 percent of US smartphone users who say they could not live without their devices. This group of mobile users has actively embraced the features and benefits. Members of this segment tend to be somewhat younger than those in other groups and are slightly more likely to be male. They are frequent users of all mobile communication channels, and their behavior and attitudes suggest they prefer mobile first; if they can do it on their smart device, they will. The Tech Reliants have clearly embraced mobile as a way of life, and they use it frequently for both leisure and business interactions. Not surprisingly, members of this segment are also the heaviest users of mobile apps.

Security Concerned

One in three survey respondents is in the Security Concerned segment – those whose mobile behavior is driven in large part by reservations about data security and privacy. Member profiles of this segment skew more heavily toward women. Their mobile use is about average across channels, but they prefer to check business information online and interact with them via email or text. Their concerns over security and privacy seem to be driving a need for a smaller mobile footprint. They don't want their mobile interactions traced and recorded.

Mobile behaviors for the Security Concerned differ from Tech Reliant only in frequency of use. Even the types of apps installed are similar for these two segments, and perhaps not surprisingly, they are more likely to have installed an insurance app.

Human Touch

The remaining 22 percent of respondents are those "nontechies" who prefer the human interaction not provided by many mobile features. Still, they own some sort of mobile device, and are therefore part of the mobile consumer market. They are predominantly older individuals, with 70 percent being over 45 years of age. These individuals use mobile features much less frequently and are more likely to view their mobile devices (primarily phones) for calling only. Many have never used mobile channels (other than phone) to engage with businesses.

Even with its lower usage intensity, mobile behaviors for our Human Touch segment include showrooming, shopping, banking, looking up brands and signing up for text promotions. But this segment is not about to be left out of the fun – over 50 percent have installed apps for social networks, games and music.

The Opportunities for Engagement With the Mobile Consumer

The most promising mobile marketing strategies evolve from knowing what differentiates the mobile consumer segments and how to appeal to them based on their unique needs.

The Mobile-First Engagement Strategy

We recommend a mobile-first engagement strategy as the best means to capitalize on the rich opportunities presented by mobile. As previously stated, mobile usage highlighted in research by Altimeter Group (Szymanski and Solis, 2015) revealed that one-third of shoppers use mobile exclusively, and more than half consider mobile the most important resource in the purchase decision process, and those findings underscore the rising potential of the mobile-first engagement strategy.

Insights from CMO Council research (2014) showed that many organizations currently view mobile merely as a new campaign platform – a limited strategy that misses the point of mobile. The risk in that approach is that each mobile campaign happens in a single moment in time, typically in one format, in one device and with one purpose in mind. Taking such a campaign-centric approach to mobile ensures you'll miss all the major opportunities for using marketing analytics to drive customer satisfaction and loyalty, which is what builds long-term value for your organization.

Just as mobile has catalyzed the rise of the empowered customer, it allows marketers to learn more about customer preferences without being intrusive and inform product development, packaging, pricing, distribution, contact policies and more. Since mobile is inherently digital, it generates streams of data that can reveal customer tastes, preferences, behaviors and habits that can be aggregated and analyzed for a view that is more accurate and complete than any focus group could possibly hint at.

By applying marketing analytics to mobile, organizations can make use of real-time data that allows them to have highly relevant real-time engagement with customers. Whether through smartphones, tablets, wearables or any other form of mobile device, marketing analytics lets us tailor relevant and valuable customer experiences like never before.

In addition to capturing and using the data from mobile, an effective mobile-first engagement strategy means that you need to make your marketing customer-centered and digital.

To understand what that means, you need look no further than the hands of customers, where their eyes are focused and what they are doing. And the two most important behaviors to bear in mind are searching and sharing because they describe some of the most important ways that customers use mobile – they search for content and they share it – and those behaviors apply to engagement across all industries.

Marketing in general today is about good content that's searchable, sharable and drives positive customer experiences. In the words of digital anthropologist Brian Solis (2013), marketing is about experiences that are *worthy of sharing*. Increasingly, it's also about ensuring that content is ready for mobile. Marketing today is about messages that have been researched and vetted to be relevant to your target market, and then surfaced on the media that matter to your audience. The tone and timbre of your messages should stir emotions that enhance the customer journey in ways that entwine the story of the customer with the story that you're telling.

Mobile-first also drives the need to improve how we orchestrate engagement strategies across the organization. This means evolving the mindset within the organization to mobile-first planning and execution that focuses not just on the customer, but on what the customer actually experiences. Doing that requires an attention to detail and an understanding of how internal processes, guidelines and procedures might ripple out to the customer with unintended consequences. And since marketing is most often the steward of customer data in the organization, it follows that other customer-facing functions in the enterprise, such as service, operations and sales, should be in alignment with marketing.

A mobile-first strategy in action may look quite different from industry to industry and even from company to company. In some cases, it makes sense to put effort into mobile apps that enable specific functions to be carried out reliably and consistently. In all cases, having a website with responsive design that accommodates multiple devices would enable visitors to have the best possible experience from the first visit.

The Second Screen Engagement Strategy

While the second screen concept sprung from the context of television viewing, there is mounting evidence that the mobile device is increasingly the "first screen" – particularly for younger individuals. Yet, it would overly simplify the potential of mobile to think of it as a substitution for TV, primarily because of the ability to personalize engagements. Indeed, there is even an expectation to personalize.

For the second screen to be an effective engagement strategy, it must be interactive, individualized and provide a compelling reason for the user to actively engage. The incentive does not have to be monetary; in fact, it is more effective and longer lasting if the incentive is relevant for the activity at hand and enhances the viewer's experience.

The Second Screen Family

The easiest strategy is to focus on the **Tech Reliant segment** – generally innovative, technologically optimistic, and savvy consumers. There are also opportunities with the **Security Concerned segment**, but the key is to be mindful of expressed concerns about privacy and mobile use. The Security Concerned segment more closely mirrors the US general population (albeit slightly skewed toward women). In a concept test with women and mobile devices as the second screen, 43 percent said they would definitely or probably use the second screen and emphasized the content had to be relevant, engaging and individualized (University of Chicago, 2012).

With such a premium placed on relevance and personalization, applying analytics to mobile data could help accurately discern usage patterns and preferences that would boost the effectiveness of a second screen strategy. Two ways that could be employed include:

Emotional Branding

This approach minimizes switching behaviors, and the brand differentiators are not easily copied. An example of second screen emotional branding would be where the primary screen is showing *The Big Bang Theory*:

- Provide the definitions for the scientific terminology being used in a particular episode, or use the format of a game show quiz during the show.
- Ask the viewer on the mobile device for suggestions via multiple choice for the socially inhibited roommate/physicist to approach women.

Rational Branding

In this case, the focus is on the specifics of a purchasing decision and highlights the features or benefits. Once again, let's consider a primary-screen showing of *The Big Bang Theory*:

- Customized offers on the mobile device of geeky T-shirts being worn by the characters or the action figures on the shelf behind the characters during the scene being displayed.
- Product offers on the mobile device that mirror product(s) shown in-scene on the program, such as a specific beverage brand on the table during game night.

Conclusion

The advent of mobile is a fundamental paradigm shift in how customers engage with organizations, which necessitates an equally radical change in how marketers engage with customers. The gap uncovered by research between consumers' expectations of mobile and the mobile experience provided by many organizations points to the opportunities before us.

The powerful allure of portability, immediacy and utility has helped mobile devices empower consumers with information and the ability to take action in real time. At the same time, the digital nature of mobile means that customer engagements can be more personalized, and that development enables marketers to address the heightened expectations of their customers.

The complexity of mobile and the behavioral changes it has brought about in customers compel the modern marketer to think differently about how to approach it. Our recommendations highlight two ways to capitalize on the opportunities before us, and both of them are made possible by using analytics to realize the value coming from insights available in the data.

All indications show that customers increasingly are switching to mobile. The next move is the marketer's: Embrace analytically driven strategies to meet changing customer needs, or risk becoming irrelevant.

About the Research

The research was conducted by a team of graduate students at Northwestern University's Kellogg School of Management under the guidance of project coach Vic Orler. The student team comprised Francesca Velasco, Ignacio Naveiras, Jason Yeh, Jonathan Wang, Phuong Huynh and Priya Mathew.

The research combined both qualitative and quantitative techniques to provide richer insights than might have been gained by taking one approach over the other:

- Quantitative: Survey of 316 respondents who are smartphone and/or tablet users.
- Qualitative:
  > 24 in-depth interviews representing customers from three adoption groups:
    a. Early adopters (owning the newest-generation mobile wearable gadgets).
    b. Majority (active smartphone user).
    c. Laggards (not using smartphone-specific features; may not own one).
  > One focus group representing the majority group.

About the Kellogg School of Management

The Kellogg School of Management (Kellogg) is the business school of Northwestern University in Evanston, Illinois, with additional campuses in downtown Chicago, Illinois and Miami, Florida. Kellogg offers full-time, part-time, and executive programs, and partners with schools in Canada, China, France, Germany, Hong Kong, India, Israel, Singapore, Spain, and Thailand.

Founded in 1908, Kellogg pioneered the use of group projects and evaluations and popularized the importance of "teamwork" and "team leadership" within the business world.

Kellogg has historically been ranked as one of the top business schools in the world by numerous business news organizations, and is widely recognized for its particular strength in marketing and related disciplines. Alumni from the Kellogg school hold leadership positions in for-profit, nonprofit, governmental, and academic institutions around the world.

About SAS

SAS is the leader in business analytics software and services, and the largest independent vendor in the business intelligence market. Through innovative solutions, SAS helps customers at more than 75,000 sites in over 140 countries around the world improve performance and deliver value by making better decisions faster.

SAS software's powerful analytics puts data in the hands of business users, transforming marketing on every level. Marketing programs become more effective, and your organization becomes more efficient in execution.

SAS® Customer Intelligence solutions enable marketers to deliver extraordinary customer experiences through truly integrated marketing across every channel, including web, social, mobile, broadcast, email, in-store and beyond.

With deeper insights, SAS customers become more customer-centric and profitable. Since 1976 SAS has been giving customers around the world THE POWER TO KNOW®.

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Terri Albert is a clinical associate marketing professor who joined Kellogg in 2013. Prior to joining Kellogg, Albert led the experiential learning curriculum for marketing and strategy lab courses at Chicago Booth.

She is the co-creator of the project-based learning model that was adopted by General Electric's globally recognized student learning lab (edgelab), where Albert also served as a faculty research fellow. Many of these projects have become successful, commercialized ventures for GE's various operating units.

Her scholarly research has been published in MIS Quarterly, Harvard Business Review, Multivariate Behavioral Research, and Journal of Advertising Research, in addition to her Prentice Hall textbook, *e-Business Marketing*. She received her MS and PhD from the University of Southern California.

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Pamela Prentice is the Chief Research Officer at SAS, where she is responsible for market and customer research strategy. She specializes in research design, data analysis, and deriving insights from qualitative and quantitative information to help address key business issues.

Prentice has 35 years of experience in the field of market research, including work for a leading market research supplier, 10 years as a college professor, and extensive experience in both consumer and business research. Some of her recent work includes collaboration with MIT Sloan Management Review on a series of papers and articles about the use of analytics in organizations.

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