Adobe 2013 Mobile Consumer Survey results

Using mobile sites, apps, and emerging technologies to build loyalty

Contents

With the meteoric rise of mobile devices and tablets, it's no surprise that mobile is a way of life and is here to stay. In 2012, there were 121 million smartphone users and 94 million tablet users in the United States alone, representing a 31% and 180% increase over 2011, respectively.[1] Mobile devices have changed the way consumers interact with businesses, and today's digital marketers must understand how consumers use different devices to be able to build and optimize mobile marketing strategies that deliver the right mobile experience to each mobile user.

In addition, 2013 marked a significant shift in how mobile users are accessing websites. According to the Adobe Digital Index,[2] global websites are now getting more traffic from tablets than smartphones, with 8% and 7% of monthly page views respectively. Given that tablet visitors spend more per online purchase with U.S. retailers than visitors using smartphones,[3] tablet traffic is proving to be more valuable in terms of e-commerce and engagement and represents significant implications for the development and optimization of mobile strategies.

Results from the Adobe 2013 Mobile Consumer Survey show that consumers are using their smartphones and tablet devices to connect with brands in a variety of ways, and they are increasingly moving back and forth between different devices and form factors. Mobile is a unique channel, with different requirements for smartphones and tablets, and this channel must be integrated into the overall marketing mix. It is imperative that businesses understand who their mobile consumers are, how they access sites or apps, which devices they use, and what their expectations are for a positive experience. By understanding the consumer through analytics and measurement, businesses can optimize their mobile channel to enhance their online presence, engage better with their customers, and achieve business objectives.

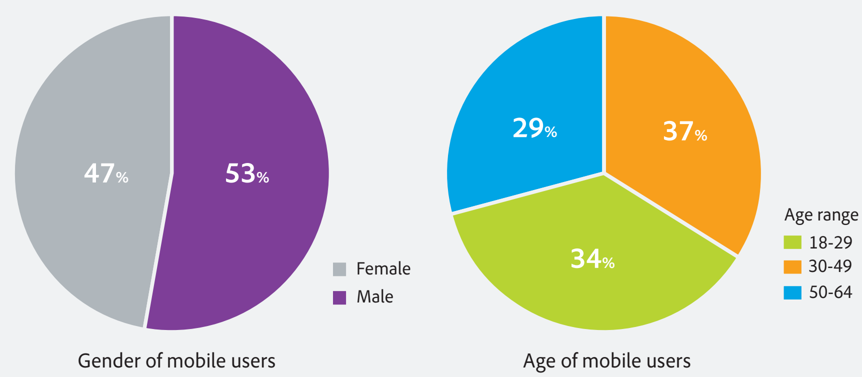
[1] eMarketer, Search gets a mobile makeover, April 2013
[2] Adobe Digital Index: Tablets trump smartphones in global website traffic, March 6, 2013
[3] Adobe Digital Index Report: The impact of tablet visitors on websites

Survey of mobile users

In March 2013, Adobe surveyed more than 3,075 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, and what they want most out of their mobile experiences. Participants provided valuable insight into their mobile activities across several categories, including media and entertainment, travel services, financial services, and shopping for consumer products and 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) .

Demographics of survey participants



Key insights and findings

Increasingly, consumers are visiting websites with tablets instead of smartphones or desktops or laptops. While consumers strongly prefer tablets to smartphones for website visits, they still use desktops and laptops the most for website visits, even though the tablet and the desktop and laptop engagement levels are comparable. As the tablet market matures, the advantages of desktop and laptop browsing will erode, causing consumers to use tablets to visit websites more frequently. To engage customers who use tablets, companies should adopt tablet-specific strategies, instead of offering experiences identical to those of smartphones or desktops and laptops.

Smartphones and tablets

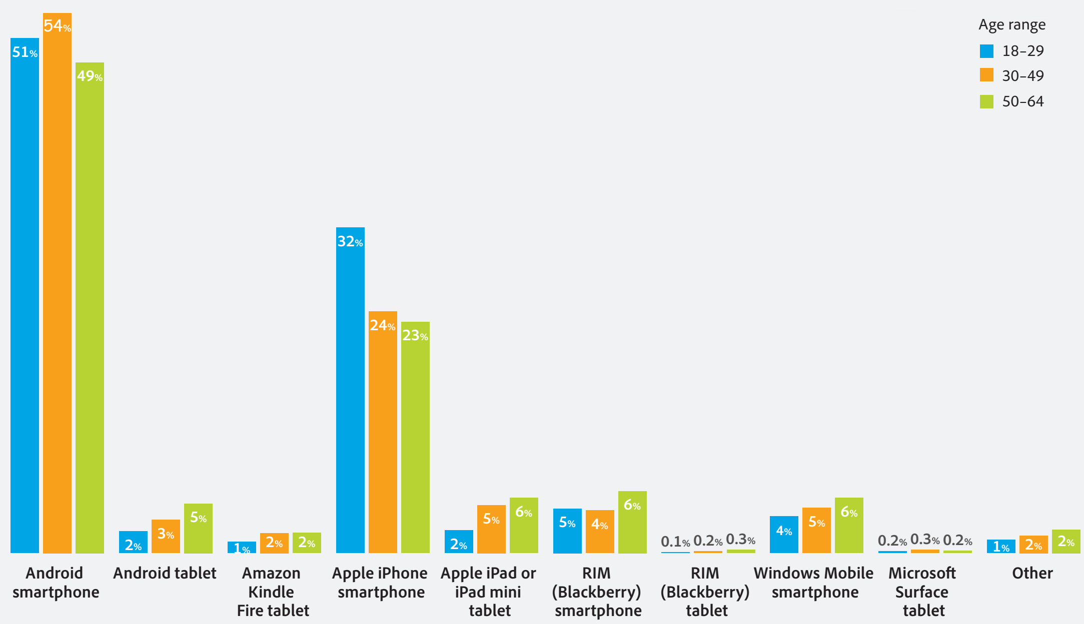
Results from the Adobe 2013 Mobile Consumer Survey show that Android devices lead the way in overall popularity, with 55% of people reporting Android as their primary mobile device of choice, while iOS devices were reported at 31%.

Although the Android operating system gained in popularity across the board as compared to 2012, the middle-aged segment is now the largest adopter of Android smartphones. Android smartphones are the most popular as a primary mobile device by ownership across all age groups and regions, with 52% for the young segment, 54% for the middle-aged segment, and 49% for the older segment, which significantly increased from 38% in 2012. Overall, 52% of people report that Android phones are their primary device, with 27% reporting iPhones as their primary device. In addition, 55% of Europeans reported preferring Android phones, with only 23% preferring iPhones.

While Android devices are steadily gaining in popularity, according to the Adobe Digital Index State of Mobile Benchmark, iOS has reemerged as the operating system of choice for browsing. iOS users tend to be more engaged and spend more time with apps and websites, and they tend to be loyal, having both iPhones and iPads to stay connected anytime, anywhere. These are the perpetually connected consumers, as termed by Forrester, 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."[4] It is important for businesses to keep this highly valuable segment in mind when building their mobile strategies.

[4] Forrester Research, The Mobile Mind Shift Index, April 19, 2013

Consumer's primary mobile device by segment



For consumers who own both a smartphone and tablet, the primary device is still the smartphone (77%), but tablets are making strong headway as a primary device, up from 12% in 2012 to 23% in 2013. And, as noted earlier, tablets are now generating more website traffic than smartphones.

While smartphones still lead market share in the overall mobile device market, tablets are quickly gaining ground because of consumer preference to interact with websites and engage with content on the larger screen size. According to a recent Adobe Digital Index analysis of website visit activity, mobile users on average view 70% more pages per visit when browsing with a tablet compared to a smartphone. Designing for the tablet experience, as well as responsive design that optimizes experiences for every device, are key tactics for businesses that want to maximize engagement and increase consumer satisfaction.

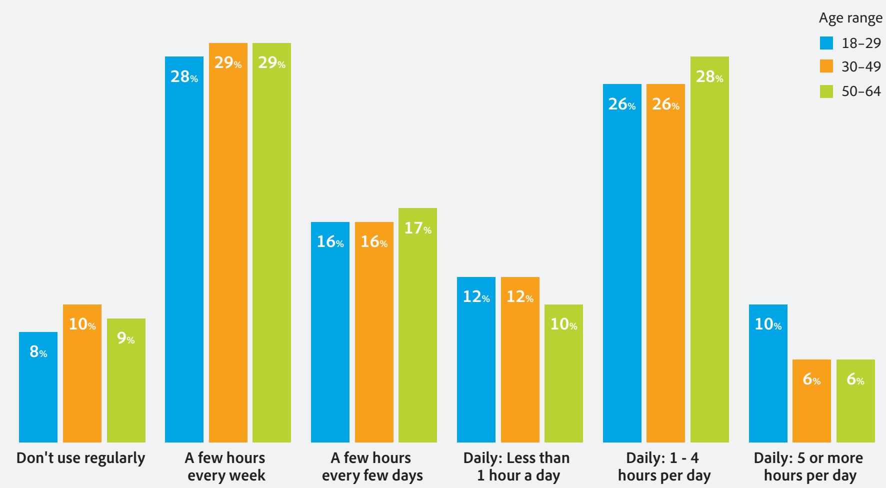
When it comes to tablet usage, as expected, users are more likely to be home-based (80%), while 14% use tablets on the go and 6.5% use tablets at work.

Consumers devote a significant amount of time to their tablets, with 26% using them daily between 1 to 4 hours, and 7% reporting more than 5 hours per day of usage.

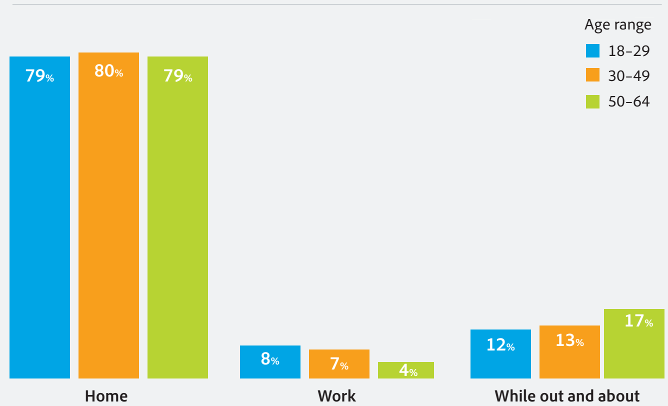
Tablet users continue to be the more valuable mobile consumer segment when it comes to website visits. Seventy-one percent of iPad users (62% in 2012) and 65% of Android tablet users (56% in 2012) reported spending more than $250 on consumer products via their devices over the past 12 months, compared to 59% of iPhone users (58% in 2012) and 53% (53% in 2012) of Android smartphone users.

Overall, the spending reported by smartphone users was relatively flat compared to 2012, but spending at the upper levels by tablet users has jumped. Nine percent more tablet users (iOS and Android) report spending over $250 in the past 12 month compared to those reporting spending at that level last year.

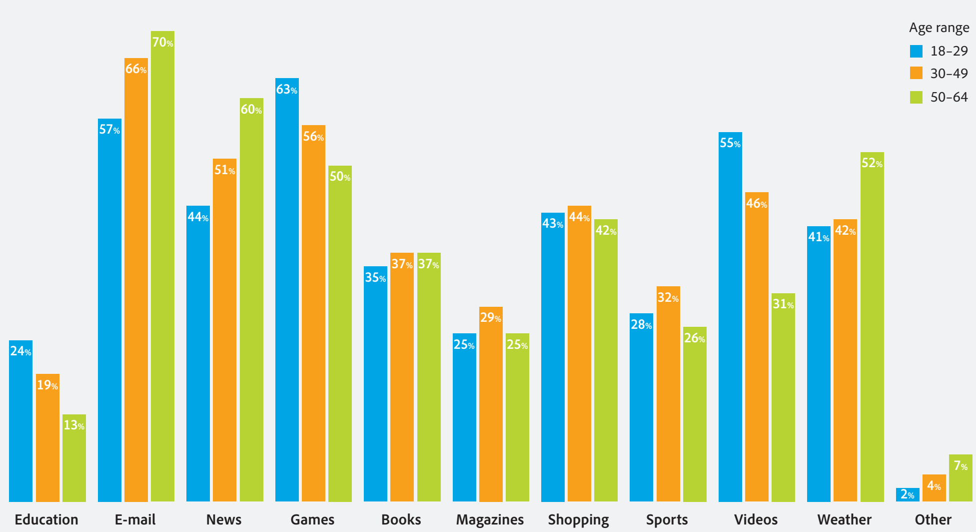
Q272. On average, how much time do you spend using your mobile tablet?



Q271. Where do you use your mobile tablet most frequently?



Q273. What are the most common activities that you engage with on your tablet (email, news, sports, weather, play games, shopping, etc.)



While consumers engage with a broad spectrum of content and conduct diverse activities on tablets, communication and news are the most common , with 64% reporting using their tablets for email, 51% for news, 45% for videos, and 44% for weather.

User experience and engagement with mobile services

Participants in the Adobe 2013 Mobile Consumer Survey rated their user experience when conducting mobile activities for both mobile websites and applications, as well as provided insight into how much time they are spending on these activities. The categories spanned media and entertainment, travel services, financial services, and shopping for consumer products and consumer electronics.

Comparison of "How satisfied are you with engaging with the following website and apps in the given industries?"

	Satisfied	Neutral	Not Satisfied
Websites			
Media	50%	48%	2%
Travel	55%	43%	1%
Financial	61%	37%	2%
Retail	60%	38%	2%
Consumer Electronics	74%	26%	0%
Average	**60%**	**38%**	**1%**
Apps			
Media	52%	46%	2%
Travel	54%	45%	1%
Financial	58%	39%	3%
Retail	59%	39%	2%
Consumer Electronics	77%	21%	1%
Average	**60%**	**38%**	**2%**
Overall (avg website / app)			
Media	51%	47%	2%
Travel	55%	44%	1%
Financial	60%	38%	3%
Retail	60%	39%	2%
Consumer Electronics	76%	24%	1%
Average	**60%**	**38%**	**2%**

On average, people appear to rate their experiences on apps and websites equally. A 60% average satisfaction rate for both websites and apps indicates a strong opportunity to improve experiences for mobile audiences, because 40% are neutral or not satisfied. However, within categories and in stating preferences for what consumers prefer, there are important differences. For example, when asked which method they would prefer to use for shopping, most consumers preferred websites to apps. Fifty-eight percent reported preferring mobile-optimized or regular websites, while 42% preferred applications, indicating that consumers might not be willing to download, install, and continually upgrade applications. In turn, businesses should provide both engaging mobile web experiences and mobile apps to address their total audience.

When it comes to how people make a decision to look for an app, social recommendations are critical to driving app downloads. Of the top three reasons cited for deciding to download a mobile app, 49% reported following a recommendation from people they know, 49% browsed an app store, and 34% searched for a particular app. This data indicates that mobile marketers need to follow and measure the influence of social networks in driving application discovery.

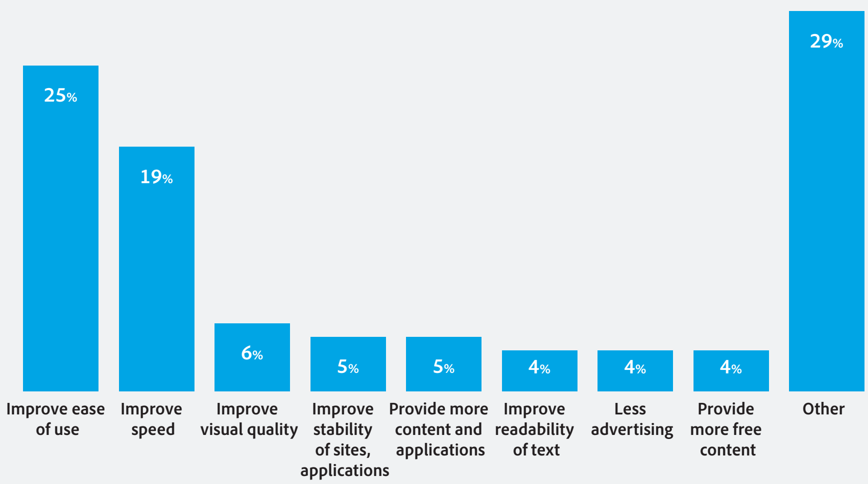
Media consumption

In the category of media consumption, as compared to other categories such as retail and consumer electronics, consumers reported having the most negative-to-neutral experiences overall for both mobile websites and applications in the areas of speed and performance, transaction processes, ability to load the website on a phone, and entering data. Consumers also highlighted navigation as a key area for improvement.

People still predominantly use their mobile devices to gain information, including social. Of those surveyed, 71% reported using their mobile device to access social media, while 70% searched for local information (such as event times, weather, maps, and reviews), and 65% reported reading news, including entertainment and national and world events.

While other categories of media consumption were reported at lower rates, the younger segment is much more likely than the older segment (71% versus 43%) to use a mobile device for playing music. Video consumption also decreases significantly by age group, with 69% of the younger segment watching videos on mobile devices compared to only 37% of the older segment. In looking at media consumption by age and the time spent on a device per week, the younger segment again reported the most hours, with 45% averaging over 3 hours per week (similar to 2012), and only 25% of the older segment reporting over 3 hours per week.

Q55. If you could say one thing to a media service provider to improve the experience using its mobile website, what would it be?



When asked how people access media-related mobile sites and apps for the first time, using a search engine was the overwhelming response at 43%, followed by browsing the app store at 28%, and directly typing in the address at 17%. For those who start in the app store, users in North America appear more comfortable, reporting in at 37% versus 30% in Germany, 27% in the United Kingdom, and 14% in France.

Given the choice between websites or apps for accessing media content on a mobile device, 42% reported preferring a mobile app, followed by a regular website at 38%, and mobile-optimized website at 20%. However, preferences alter significantly by age group, with 43% of the older segment preferring a regular website, compared to 38% for the middle segment and 34% for the younger.

In general, people don’t like paying for access to content on their mobile devices, based on the 70% who reported never paying to access content. Only 22% said they paid for access to games, 8% for news, and 7% for video. Media companies targeting younger audiences experience more success in this area, with numbers skewing a bit higher at 34% for games, 12% for news, and 13% for video.

Overwhelmingly, people are willing to view ad-supported content (85%) versus paying for content. Given this willingness to view ads, media companies should look to monetize content via ads as opposed to requiring subscriptions or payment.

In general, 43% of the responders access media content on their mobile devices daily, with the younger group clocking in the most at 62%, compared to middle at 44% and older at 27%. Women also tend to access content on a daily basis more than men, at 51% versus 36%.

Only 31% of respondents access news on a daily basis, and 28% report accessing local information on a daily basis. In general, people prefer to access games and social content via apps, whereas they tend to browse websites for news and information-related content.

Travel Services

Travel services were second to media with the highest negative-to-neutral ratings for experiences with both mobile websites (44%) and applications (46%). The areas that people rated the most negative-to-neutral experiences were in transaction processing, the ability to enter and submit data, and the login process.

People use their primary mobile devices for a variety of travel-related activities. Maps and directions were most popular at 66%, followed by researching destinations at 39% and checking reviews at 37%. People in the United Kingdom are significantly more likely to be engaged with travel sites compared to other regions. For example, 49% reported researching travel destinations via mobile, as compared to only 35% in North America and 34% in France.

While people regularly participate in travel-related activities on their mobile devices, 80% say they rarely or never book travel on a mobile device. According to the Adobe Digital Index,[5] desktop and laptop rates are 30% to 60% higher than tablet conversion rates for retail and travel websites, mirroring consumers' responses that they still prefer desktops or laptops for visits involving research, comparing alternatives, and online purchasing. The younger segment is significantly more likely to book travel and comparison shop. For example, 25% of the younger segment report booking travel via a mobile device, but only 16% of the older segment report that activity.

This pattern is expected to continue in the immediate future, with 76% of people anticipating that they will use their mobile device to view maps or directions in the next six months, 38% to research travel destinations, 30% to check reviews, and a mere 19% will book travel—although, this does skew a little higher for the younger group at 22%.

For those who do book travel, 70% prefer to access travel features on a mobile web browser instead of an app. People also prefer to use tablets as opposed to smartphones for booking travel. For example, 33% of Android tablet users reported using their device to book travel, compared to 17% of Android smartphone users. Similarly, 29% of iPad users reported booking travel versus 17% of iPhone users.

The most important considerations for people when using travel-related mobile apps or mobile websites are ease of use (59%), ease of navigation (54%), and a good experience in finding what they were looking for (36%).

Financial services

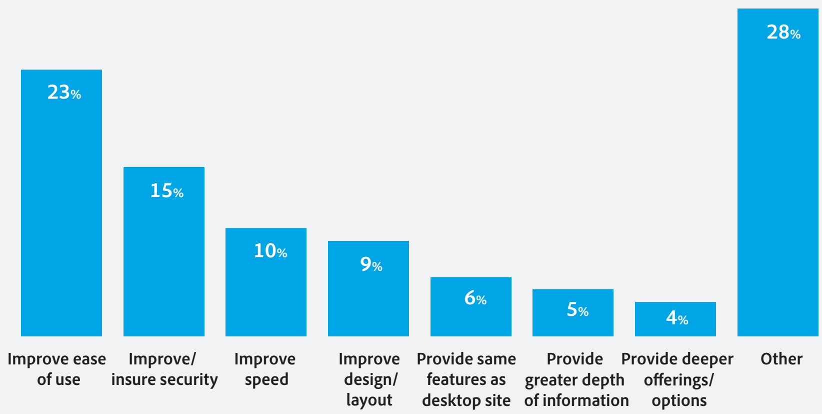
Mobile is now a key imperative for financial services firms, reinforced by the Forrester State of Mobile Report that states, "We expect the number of US mobile banking users to double in the next five years and reach 108 million by 2017—46% of US bank account holders."[6] As mobile consumers move from traditional activities such as checking account balances and finding ATM locations, to more complex functions such as depositing checks and paying bills, financial services firms must look at providing better mobile experiences that solve today's problems and meet customers' expectations.

As with the travel services industry, survey respondents reported significant neutral-to-negative ratings for their experiences with transaction processes, with navigation coming in second. The older segment reported the highest percentage of neutral-to-negative ratings with these experiences. With the older segment having more history of personal interactions with financial services, organizations may want to test their mobile channels as a portal to connect this age group to services that are easy to access. By creating more personalized engagement via mobile, organizations can create an experience that is closer to an in-establishment feel.

[5] Adobe Digital Index: Tablets are catalyzing brand website engagement
[6] Forrester Research, State of Mobile Banking Report 2012, August 24, 2012

The top three experiences that respondents would like financial services companies to improve are ease of use, security, and speed. As with last year, the category of financial services was the only vertical in which security was highlighted as an area for improvement for both mobile websites and applications. Consumers are still concerned about the safety of their personal and financial data within the mobile channel. Organizations can efficiently test options to help ease customer concerns by testing the placement of security certificates on the UI, thereby encouraging trust with the visual cue that security is in place.

Q136. If you could say one thing to a financial service company to improve the experience on its mobile website, what would it be?



When it comes to accessing financial services on a mobile device, if a customer has an established relationship, apps are gaining in popularity for conducting transactions. However, websites are generally preferred when customers are conducting research and an established relationship does not exist. For example, 52% prefer apps for reviewing bank information, but websites are more popular for reviewing stock and mutual fund account information (60%), researching stocks and mutual funds (65%), conducting stock and mutual fund transactions (61%), researching or shopping for a new financial account (71%), and applying for a new financial account (67%).

Reviewing bank account information, paying bills, money transfers and budgeting, and checkbook balancing are the top financial activities performed on mobile with 50%, 36%, and 32% of the people reporting these activities respectively. Given that these activities are account maintenance in nature, the big question for financial services and mobile is when will behavior shift from servicing existing accounts online to shopping and purchasing products and services.

For most people, researching for a new financial account is an occasional activity. Only 15% currently research or shop for a new financial account in any given month. Within this group, the United Kingdom reports 21% of people conducting research or shopping monthly, compared to 11% in North America, which may indicate that U.S. banks focus more on servicing existing clients via mobile as opposed to providing opportunities for shopping and research. Men are also more likely to consider researching or shopping for services, with only 29% of men reporting that they have never researched or shopped for a new account via mobile, compared to 42% of women.

When asked whether people have applied for an account or opened one via mobile, the number goes down even further, with only 8% reporting this activity in the past 6 months. At 12%, the younger segment is four times more likely than the older segment (3%) to have applied for or opened an account via mobile.

Shopping for consumer products

Today's consumers are more apt than ever to use their mobile devices to make a purchase. Approximately six out of seven mobile shoppers will use a smartphone to shop in 2013. Based on an eMarketer mobile commerce forecast, it's estimated that mobile shoppers will contribute $38.4 billion in sales from mobile devices, or roughly 15% of e-commerce sales.[7] Notably, tablets now account for 62.5% of mobile sales, and eMarketer estimates the share for tablets will rise to 71.5% by 2017.

Consumers who shop via mobile applications on Windows® mobile phones appear the most satisfied with their shopping experiences (64%), followed by iPhones (61%), iPads (56%), Android phones (55%), and Android tablets (54%). Interestingly, these numbers are lower than the previous year. For example, in 2012, 71% of iPad users reported a satisfying experience, but only 61% reported the same level this year.

When it comes to shopping for consumer products via mobile websites, consumers using Android tablets reported the highest satisfaction levels at 67%, followed by Windows mobile at 66%, iPad at 64%, iPhone at 62%, and finally Android phones at 57%.

All age groups reported that they are comfortable spending in the range of $1–$250 (44% overall). The older segment comprises the bigger spenders with 60% spending over $250 in the past 12 months, compared to the younger segment at only 51%.

Q151. On average, how much have you spent on consumer product purchases over the last 12 month via your mobile device?
(percent of total responders)

	18-29	30-49	50-64	Total
$1 to $249	49%	40%	41%	44%
$250 to $499	28%	28%	25%	27%
$500 to $749	15%	19%	19%	17%
$750 to $999	5%	6%	7%	6%
$1,000 and above	3%	6%	9%	6%

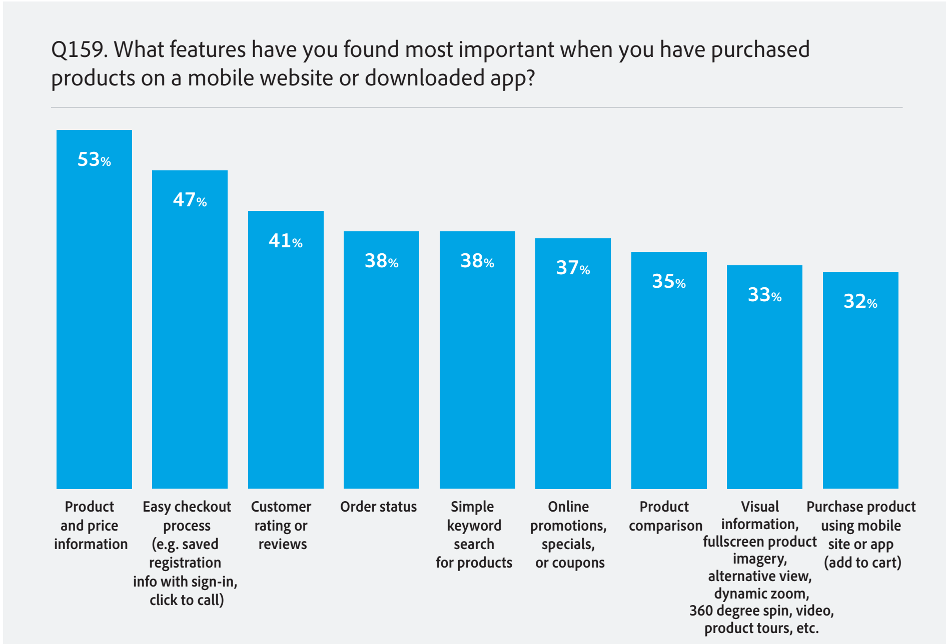
The most popular items that were purchased via mobile devices were clothing, shoes, and jewelry, with 51% reporting purchasing these items in the past 12 months, followed by books, magazines, and newspapers at 48%, and movies, music, and games (excluding mobile games) at 47%.

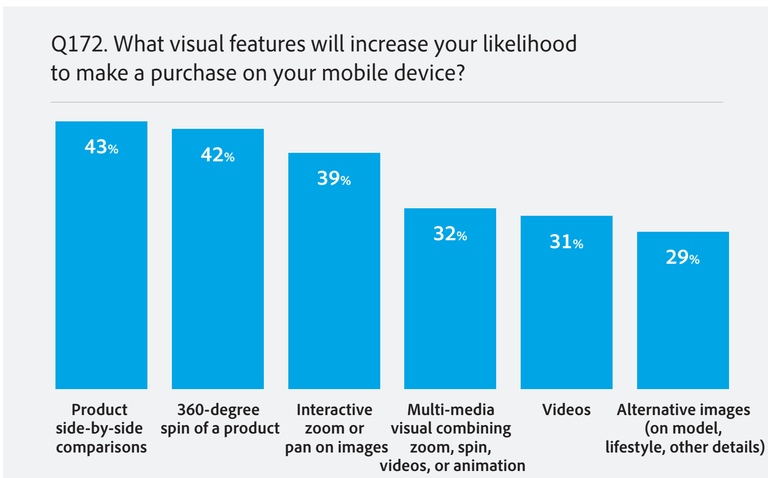
The primary way people shop and browse products on their mobile devices are 37% via mobile apps, 33% via mobile optimized websites, and 30% via regular websites; however, the older segment skewed much higher in preferring to shop and brose regular websites (48%).

Overall, consumers spend more on product purchases via their tablets than smartphones, which is not surprising given that tablets have become the primary device for mobile browsing.[8] Thirty seven percent of Android users reported spending more than $500 on consumer products compared to 25% of Android smartphone users, while 43% of iPad and iPad Mini users report the same compared to 32% of iPhone users. In addition, tablet users prefer to browse websites over apps, while smartphone users prefer apps. However, the majority of mobile users prefer to shop via web browsers as opposed to apps.

When purchasing a product on a mobile website or app, people reported that the most helpful items are product descriptions and price, easy checkout process, and consumer ratings or reviews.

[7] eMarketer, US Retail Mcommerce Sales, 2011-2016
[8] Adobe Digital Index: Tablets trump smartphones in global website traffic, March 6, 2013





The visual product features that were cited as most likely to increase the likelihood of purchasing a product via a mobile website were side-by-side comparisons of products (44%), 360-degree spin of a product (42%), and interactive zoom or pan on images (38%).

The most popular items that consumers have purchased directly through their mobile devices are clothing, shoes, and jewelry (31%) and movies, music, and games—excluding iTunes and mobile games—(29%). Eighteen percent of men responded that they purchased sports and outdoor goods, compared to 10% of women, but 35% of women reported purchasing clothing, shoes, and jewelry, compared to men at 27%.

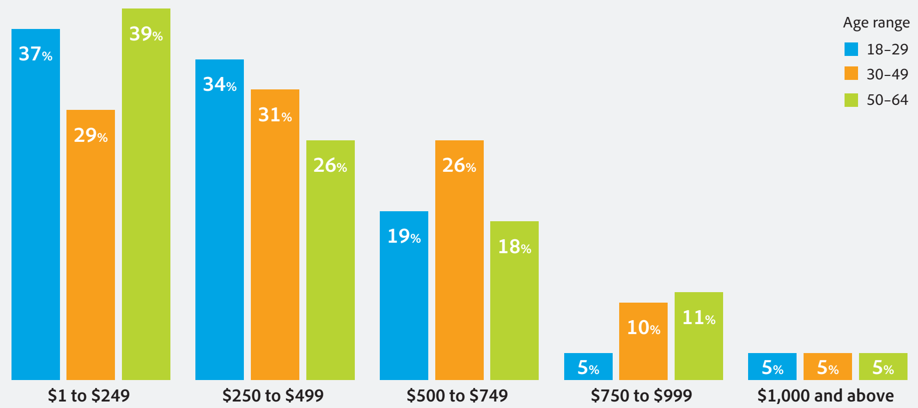
Age appeared to have a significant and direct impact on purchase behavior, with 57% of the older segment reporting that they have never made a purchase of these consumer goods through their mobile devices, compared to 41% of the middle segment and 30% of the young segment.

The primary means to access consumer product shopping mobile sites and apps for the first time was via a search engine (45%), app store (24%), or typing in the address (18%).

Shopping for consumer electronics

Consumer electronics received the highest rating for satisfaction across the board compared to other categories of business rated by consumers in this study. The areas rated highest on these sites were the legibility of the text, the site search, and the quality and quantity of images.

Q202. On average how much have you spent on consumer electronics purchases via your mobile device in the past 12 months?



Overall, 35% reported having spent over $500 on consumer electronics purchases via their mobile devices in the past 12 months. When given the choice, approximately 60%–70% of respondents preferred mobile websites to apps for most tasks. With this in mind, companies may want to prioritize building a mobile-optimized site that delivers optimal mobile experiences, and then turn their focus to building a mobile app.

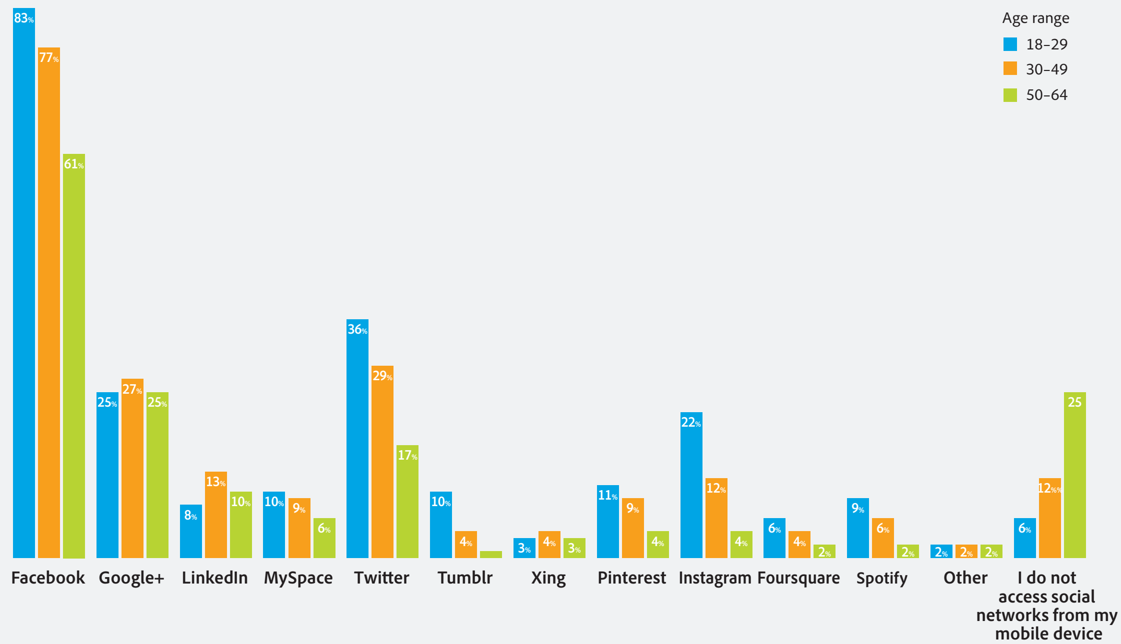
The top three consumer electronics products that were purchased by mobile consumers were smartphones (15%), laptops (14%), and cameras (13%). When broken out by age groups, the younger segment is more apt to purchase consumer electronics via mobile devices. For example, 22% of the younger segment reported purchasing a smartphone via their mobile device.

Social media and mobile access

It's no surprise that Facebook is the dominant social network accessed via mobile with 75%, followed by Twitter at 28%, and then Google+ at 26%. Notably new on the charts this year are Instagram (13%) and Pinterest (9%). These social sites experienced rapid growth, partly due to the ease of sharing via mobile, and should be considered seriously by businesses looking to make headway in their social media efforts.

As expected, the most popular social activity is to read status updates (73%). However, consumers are also using their mobile devices to view Facebook fan pages of their favorite brands. Today's brands should have mobile-optimized experiences for offers that are launched from their Facebook fan pages. This is most important for brands that target younger demographics, with 94% of the young segment and 88% of the middle segment accessing social networks via mobile devices.

Q267. Which social networks do you access from a mobile device?



While 48% of consumers who view a Facebook fan page receive an offer or promotion, 23% consumers report that they do not have a mobile-optimized experience when linking from Facebook to a brand's site. Because the assumption is that the consumer wants to take advantage of the offer or promotion, companies should consider optimizing their social campaigns for mobile engagement to drive higher conversion rates.

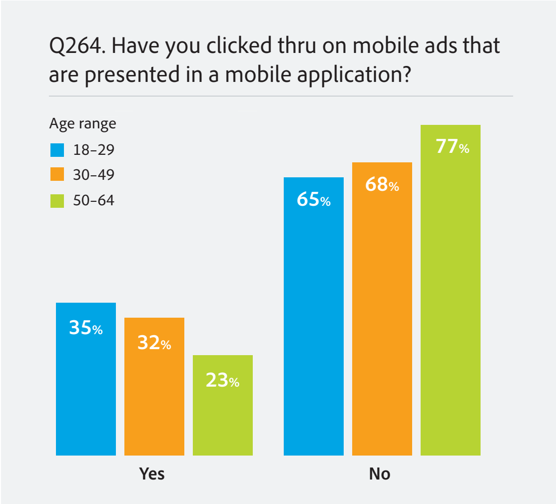
Forty-four percent of all consumers access their social networks on a daily basis, with another 20% reporting that they visit these sites on a weekly basis. Given the frequency of mobile visits to social sites, marketers responsible for social media should work with teams that own mobile experiences to ensure a cohesive strategy for engaging the social and mobile consumer.

Mobile advertising

Businesses looking to acquire new customers and retain current customers are increasingly turning to mobile search and display ads. The ad spend for mobile search and display ads is anticipated to see a compound annual growth rate of over 50% from 2010 to 2015.[9] A significant percentage of consumers surveyed report that they are clicking through mobile ads presented in both mobile websites and apps, with 31% clicking through ads on mobile websites, and 25% clicking through ads on mobile apps during the past 3 months.

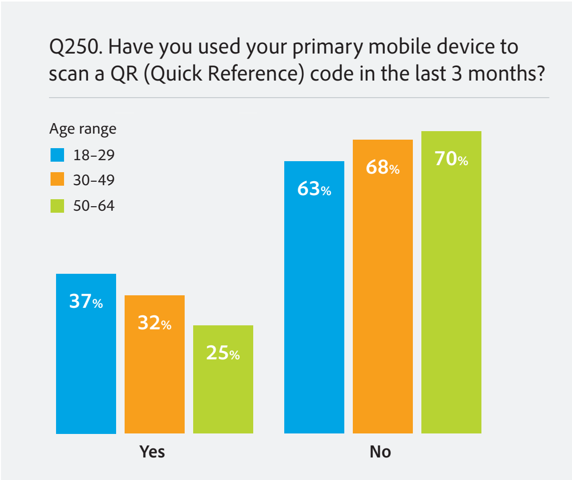
Because mobile consumers exhibit high intent when searching for products or services, having tools to target and optimize mobile-specific offers represents a big opportunity for companies. Consumers are reporting that a majority of advertisers are providing mobile-optimized experiences when they click through ads on mobile websites (61%) and mobile apps (68%), suggesting that optimization of mobile ad content appears to be prevalent. However, because nearly 40% of respondents indicate that they received mobile web landing pages that were not easy to read and view, there is still significant room for improvement. In addition, survey results indicate that men are more likely to click through on mobile ads presented within mobile websites and apps than women—33% versus 28% for websites, and 26% versus 24% for apps.

Personalization is becoming an important consideration for mobile consumers. A large majority of people who spent over $500 (81%) reported that mobile ads were personalized to their interest, while only 75% who spent under $500 reported seeing personalized mobile ads. For those who spent over $500, 58% reported that the personalized experience they received when providing information to businesses via mobile seemed valuable, compared to 53% of those who spent under $500.



Emerging technologies

In the area of emerging mobile-specific technologies, businesses have a clear opportunity to provide improved customer experiences and significant brand differentiation. For example, the practice of scanning Quick Response (QR) codes continues to gain momentum, with 37% of young and 32 % of middle segments reporting that they have scanned QR codes in the past three months. After scanning the code, a high percentage (80%) of respondents said they were presented with a mobile-optimized experience. Because QR codes can be associated with a location-based offer, such as an in-store display, companies should take advantage of the ability to dynamically personalize the brand experience for their target audience.



Another opportunity for location-based personalization is represented by the rise in adoption of consumer "check-in" services. Almost a third of respondents have checked in via a location service on their mobile device, and 30% of those people said they received an incentive to check in. Marketers should consider providing more incentives to drive check-ins if their business has a physical location.

Although augmented reality (AR) and mobile wallets are still at an early stage, consumers are reporting their advantages. For those who have used AR (only 14% overall, but 21% of the younger segment), 46% indicated that it was used to locate and find a company, product, or service. And of those who have used a mobile wallet (18% overall, 25% of younger segment) to pay for a product or service, 83% said that the payment experience was easier than providing their credit card. Given this high rate of positive response, retailers should consider supporting this payment option when they have the opportunity to efficiently test and deploy.

The study showed that men are adopting these emerging mobile technologies at a quicker pace than women, with 22% of men reporting mobile wallet usage versus 15% of women. In addition, 16% of men reported experience with AR versus 11% of women.

As could be expected, consumers who are the earliest adopters of emerging technologies are also the most valuable customers. For example, people who reported using a mobile wallet in the past three months were also the bigger spenders online: 31% of people who used mobile wallets spent more than $500 on consumer products via their mobile device over the past 12 months versus only 10% of those who did not use mobile wallets.

The same holds true for QR codes. Of those who reported using a QR code in the past three months, 21% spent more than $500 on consumer products via their mobile device over the past 12 months versus only 11% of those who did not report using QR codes.

The results of the survey hold strong implications: Companies that want to convert consumers with the highest potential value should implement plans to test and adopt emerging mobile technologies.

Conclusion

The 2013 mobile survey revealed that consumers are using their smartphones and tablets to connect with brands across a variety of categories through websites, mobile-optimized websites, and mobile apps. Not only do companies today need to understand how consumers are connecting with them, but they also need to gain better insight into who those consumers are. For example, perpetually connected consumers interact with brands across multiple devices at any time, and therefore, have a high propensity to spend more money via mobile. Similarly, consumers who are the earliest adopters of emerging technologies report spending more than those who are more reticent to adopting mobile technologies. By understanding these factors, companies can leverage their customers' perspectives and preferences to deliver a better user experience, which can translate to increased customer loyalty and an improved bottom line.

- For consumers who own both a smartphone and a tablet, the primary device is still the smartphone (77%).
- Android smartphones are the most popular by ownership across all age groups: 59% for young, 60% for middle, and 54% for older.
- iPads are the most popular with young (27%) and middle-aged (31%) groups. The Kindle Fire is the leader with the older age group (22%).
- Facebook is the dominant social network but less so than last year, accessed via mobile at 85%, followed by Twitter at 35%, and Google+ at 21%. A majority of brands provide mobile-optimized experiences for offers that are launched from their Facebook fan pages via mobile devices.
- Mobile ads presented in both sites and apps capture the attention of mobile users, and a majority of advertisers provide mobile-optimized experiences when consumers click through on ads. When asked whether users had clicked on an ad in the last 3 months, survey respondents indicated:
  - 31% had clicked on at least one ad presented on mobile websites, of which 61% thought the ad was personalized.
  - 25% had clicked on at least one ad presented on mobile apps, of which 68% thought the ad was personalized.
- Men are more likely to click through on mobile ads presented within apps than women.
  - 33% to 28% for men versus women with mobile websites
  - 26% to 24% for men versus women within apps
- Scanning QR codes
  - 38% of young and 40% of middle age have scanned in the past three months.
  - 37% for young, 32% for middle
  - Men 35% and 28% for women
- Location services
  - Younger age group is more likely to check in (35%) versus older at 18%.
  - 44% young, 33% middle, and 22% older
- Only 19% of young adults have used AR or mobile wallets. Men are more likely than women to use these emerging technologies: 25% for young, 17% for middle, 12% for old; male 22% and 15% for women

In addition, as noted by the Adobe Digital Index, it is important to watch for developments that will accelerate competition and innovation in the tablet market, including the following:

- Transition to cloud computing, which permits tablets to be used for activities that have historically required computer-based software, memory, and storage, thereby reducing the need for frequent and easy access to desktops and laptops.
- Emergence of stronger competitors to the iPad enabled by Microsoft's release of Windows 8 and Google's purchase of Motorola Mobility and planned co-branding of Android tablet devices.
- Greater enterprise demand for tablets that will increase tablet availability and frequency of use within the workplace.
- Increased adoption of HTML5, freeing brands to more consistently deliver rich, device-specific experiences outside the confines and fee structures of platform-controlled app stores.
- Reduced willingness for telecom providers to subsidize smartphone purchases, reducing the difference in out-of-pocket costs between smartphone and tablet devices.

Best practices

Different devices deserve different experiences. Today's consumers move easily between smartphones and tablets and expect equally optimized visits across all devices. Brands must offer an engaging and dynamic mobile user experience design to provide a consistent experience across all devices and screens. As sites add mobile-optimized implementations, there are several best practices to consider.

- **Reduce the number of touch events to conversion.** Understanding the business goals and key performance indicators (KPIs) you are driving toward is the foundation of building any commerce strategy. Design the mobile experience with the path of least resistance to achievement. Research has shown that conversion rates are directly impacted by streamlined paths to purchase—conversion should occur within three touch events. Two will be table stakes in the near future.
- **Design for mobile interactions.** The tablet and smartphone user experience needs to focus on touch-driven controls as the primary visitor interaction, rather than mouse clicks and keyboard controls. Take advantage of mobile display controls, such as finger swipe, touch, drag, pinch, and zoom. Use simple, large buttons to designate interactions and navigation, such as a large shopping cart or video play button. If designing for mobile retail, incorporate rich product visualization that is optimized for the device type. The difference in functionality shifts the user experience focus to embedded, large-viewer or full-screen interactive zoom and pan, 360-degree spin, and enhanced video functionalities.
- **Optimize for speed.** Even a 1-second delay in mobile page load time equals a 7% loss in conversion, according to the Aberdeen Group. Lighten the load on a mobile-optimized website by incorporating dynamic media content, such as images, video, and campaign banners, that automatically adjusts content size, resolution, and format delivery based on the device platform and network detection.
- **Make content "findability" easy.** Mobile users have high intent, and the majority of mobile customers use search before they do anything else on m-commerce sites, making mobile site search optimization crucial. Use explicit navigational cues for easy browsing. Implement auto-suggest and auto-correct in search input boxes to address the difficulty of mobile typing. Provide the most compelling, relevant top-search results optimized for screen size and location.

The more positive consumers feel toward their mobile experience, the more ability brands have to build customer loyalty and improve conversion rates. And with over 40% of respondents reporting a negative-to-neutral rating for mobile website and app experiences in several areas across the categories of media consumption, travel services, financial services, and shopping, there is significant room for improvement.

Recommendations

The world is becoming increasingly mobile, making it more important than ever for companies to connect all their channels—including web, social, call center, search—with mobile to achieve the business objectives of conversion, revenue, and loyalty. Today's digital marketers should review their mobile strategy to look for cross-channel execution opportunities and ensure that analytics are in place to measure success. While the following recommendations may not represent the ideal solution for every business, it is critical to integrate mobile marketing into your overall marketing strategy.

- **Integrate analytics from day one.** Review your mobile sites and apps to ensure that analytics are in place to effectively measure success. Direct measurement of visitor behavior is important to understanding the effectiveness and ROI of mobile channels. This mobile consumer survey provides a snapshot of macro trends. However, Adobe recommends that you acquire the same insights about device platforms and user engagement for your mobile channels via the Adobe Marketing Cloud.
- **Prioritize tablets.** As reported in the Adobe Digital Marketing Index, tablets provide engagement levels nearly equivalent to desktop and laptop computers (*http://success.adobe.com/en/na/programs/digital-index/1205_13926_di_report_rise_of_tablets.html*). Consequently, marketers need to plan and prioritize optimization efforts for tablet experiences that are unique and different from smartphones, given the larger screen size.
- Launch mobile channels with an optimization strategy in place. Instead of guessing whether experience A or B is preferred by consumers, plan for ongoing A/B and multivariant testing of mobile websites and apps. In addition, consider personalization capabilities that leverage information about the mobile device type, operating system, and location.
- **Ensure that your social mobile 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.** When planning your mobile search and display campaigns, ensure that landing pages are mobile optimized and do not click through to the desktop home page.
- **Leverage mobile know-how.** Seek guidance from Adobe Consulting and partners for expertise in mobile marketing.

About The Adobe Marketing Cloud

Now there's a place that puts everything digital marketers need in one spot. It's called the Adobe Marketing Cloud. It includes a complete set of analytics, social, advertising, targeting and web experience management solutions and a real-time dashboard that brings together everything marketers need to know about their campaigns. So marketers can get from data to insights to action, faster and smarter than ever.

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