



CONNECTING WITH CONNECTED CONSUMERS



**MORE
CONNECTED.**

**MORE
EMPOWERED.**

**MORE
NIMBLE.**

LEADING A
“LIFE UNTETHERED”
IS NO LONGER THE
SOLE TERRAIN OF
EARLY-ADOPTERS AND
SAVVY TECHNOPHILES.
AS MOBILE
TECHNOLOGIES ARE
EMBRACED BY
A WIDER AUDIENCE,
**A NEW MOBILE CLASS
HAS EMERGED...**

THE FREEDOM AND CONTROL
THAT ACCOMPANIES UNTETHERED
LIVING ALSO CARRIES NEW SETS
OF **CHALLENGES AND OPPORTUNITIES**



FOR MOBILE CONSUMERS,

as they navigate this new terrain for content and communication;



FOR COMPANIES, BRANDS AND RETAILERS,

trying to keep in step with consumers' emerging needs and expectations;



FOR MARKET RESEARCHERS,

who recognize the enormous potential that mobile offers to get into the lives, hearts, and minds of consumers in the moment and in context.

PERSONALIZED, CURATED CONTENT IS KEY TO MOBILE MARKETING.

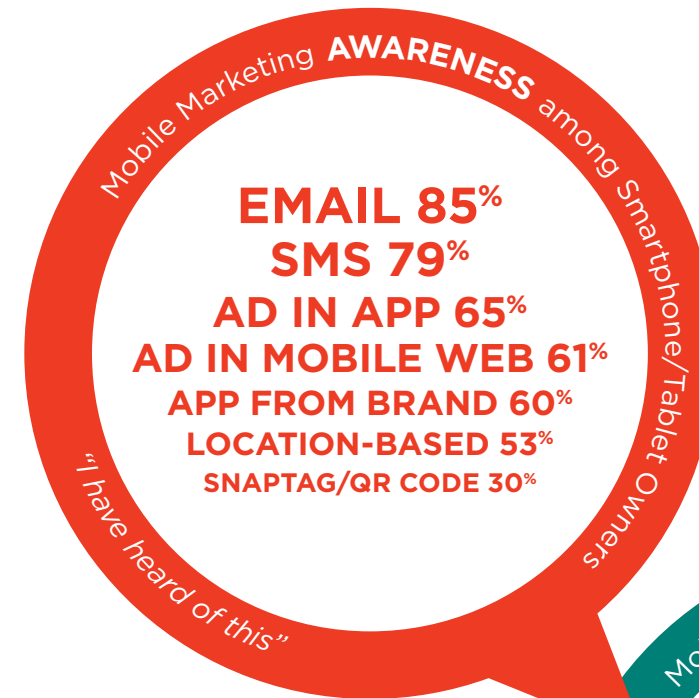
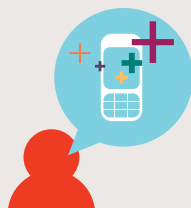
To explore how mobility affects the lives, lifestyles and expectations of the typical U.S. consumer, we tapped into nearly 200 members of the IdeaSpace, Communispace's proprietary online communities. The sample reflects a mix of male and female respondents, with a slight skew towards women and a majority under the age of 45. These members currently own a mobile device or plan to purchase one within the next six months.*

What quickly became apparent is that, while connections are quicker and reach is broader, the unrestricted ebb-and-flow of content and the increased demands placed on users' "anytime, anywhere" accessibility are potential points of tension for the everyday mobile consumer. Increasingly empowered and informed, connected consumers yearn for streamlined, instantaneous and personalized experiences. Those companies that make an effort to address these challenges — by providing tools to help curate, manage and filter the flow of content, or just by acknowledging that these concerns exist — demonstrate a deeper understanding of, and empathy for, their customers through doing so.

Specifically, when it comes to mobile marketing (i.e., the methods that companies and brands use to engage and interact with consumers on smartphones or tablet computers), connected consumers demonstrate a strong appetite for contact from brands, provided that contact is both solicited and relevant, and that they are able to retain some control over the cadence and nature of the interaction.

Currently, brands making contact with mobile consumers do so in the form of one-way communication: pushing out deals, discounts, promotions and contests to customers who have opted-in to receive them. While consumers are most familiar with interactions through email and SMS, many exhibit a willingness to try other, more dynamic methods like downloading apps or using Snaptags/QR codes and location-based services. Though experience is lower, interest in these new services is comparable to interest in SMS. As these services continue to grow in popularity and usage, brands will have an array of opportunities to initiate and sustain two-way interactions.

***Nearly two-thirds (60%) of respondents have never had negative experiences with mobile marketing, and many express an interest in seeing additional interactions in the future.**



"The QR codes are so cool! I love when companies have links that lead to really interesting pages, not just their brand homepage."

Mubeena A., Female

Designed to mirror the demographics of the U.S. general population, the IdeaSpace communities include Men's Space, Women's Space and Our Space (Millennials). Owned and operated by Communispace, these proprietary insight communities are available to clients on a short-term or long-term project basis. See the end of the report for the research methodology and respondent demographics for this project.

FOUR STEPS TO ENGAGING CONNECTED CUSTOMERS.

In stark contrast to their openness to most mobile marketing methods, more than four out of five respondents (84%) have zero interest in encountering an advertisement while using mobile applications or browsing the mobile web. (See previous figure.) **In fact, the word “ad” elicits a strongly negative reaction among mobile consumers.** On mobile platforms, traditional advertising messages (i.e., pushed out “broadcasts”) feel generic, irrelevant and out of touch. Untargeted (or poorly targeted) mass messaging, whether in apps or through the mobile web, is viewed as intrusive — worthy of being avoided and shunned.

Brands succeed when mobile communications are personalized, solicited and relevant. Such interactions are no longer seen as “ads,” but rather as “connections” or “messages” from brand to mobile-user. These types of exchanges have a greater chance of breaking through and making an impact with customers.

“I like the offers I choose to receive, such as emails and downloading apps. ... I don’t like unrelated ads when I’m playing an online game, etc.”

Beth G., Female

“I absolutely hate seeing advertisements in my apps and games and extra ads when I am browsing. I quite like it when I get a coupon in a restaurant I’m [at] for checking in via foursquare, and I like when I [get] deals sent to me in any form.”

Brian M., Male

1

Avoid unsolicited contact.

Privacy is closely protected and permission is a prerequisite; mobile users loathe brands that initiate interactions without prior consent or approval.

2

Come and connect, already!

Mobile consumers are ready and waiting for contact with familiar brands on mobile devices, but few brands have cracked the code for providing consistent value via mobile technologies.

3

Hand over the reins.

Mobile users require control over when, where, how, and how often they interact with brands on mobile platforms — the more personalized, the better.

4

Create custom, relevant experiences.

Untargeted and irrelevant content will be shunned by mobile consumers. Specialized, personalized and exclusive offers suggest an aptitude for giving customers what they need and want.

MOBILE RESEARCH— IN-TIME AND IN-CONTEXT— ENABLES **DEEPER INSIGHT.**

The best marketing campaigns, mobile or otherwise, are based on deep insight into consumers. What are their rituals, their frustrations, their workarounds and their habits? And what disrupts those habits? These are the discoveries that can drive success and minimize the problems associated with the adoption of new products and services.

Communispace, a leader in market-research online communities, derives much of that insight within the confines of their private, branded online communities of three-to five-hundred persons. Community members are invited to participate in discussions and surveys, upload images and videos, brainstorm, journal, and express themselves in a multitude of other ways. But as rich as that content is, there's no substitute for in-context, in-the-moment observations. That's where ethnography comes into play.

Traditional in-person ethnography, in which a trained researcher follows an individual or family around for a number of days, has been an invaluable means of applying that level of scrutiny into the particulars of daily life. But, until now, this research approach has been too costly to be scalable. Mobile technologies have changed that, enabling market researchers to obtain in-the-moment, in-context views into consumers' lives by "deputizing" ordinary people to become participant-observers... not just of the lives of others, but of their own lives.

MOBILE RESEARCH **IN ACTION**

WHEN A LEADING FOOD COMPANY SAW A SUDDEN DROP IN THE SALES OF ONE OF THEIR PRODUCTS, THEY WONDERED IF THE PRODUCT'S NEW PACKAGE WAS THE CULPRIT.

Their community members went shopping and while in the store reported back (via a mobile survey) on what they were seeing on the relevant shelves and how they felt about it. Not only did this exercise validate some of the brand's suspicions about the cause of the problem, but uncovered the fact that, in many stores, **the new product wasn't on the shelf at all.**

A COMPANY WITH A FOCUS ON KIDS WAS IN THE MIDST OF A MAJOR INITIATIVE TO STRENGTHEN ITS RELATIONSHIP WITH MOMS.

Communispace invited mothers to capture all those moments when they either fervently needed a parenting tip, or had solved a parenting challenge and wanted to share their solution. **The immediacy of the input took the brand well beyond obvious needs, such as wanting a way to keep kids amused on a long drive, and elicited some universal moments** (one child having a meltdown because her hair barrette wouldn't stay in place; another one who routinely rips off his diaper and runs around nude) that, in retrospect, one would never think of in a survey or focus-group context.

A FINANCIAL SERVICES COMPANY WANTED TO UNDERSTAND HOW SAVVY CONSUMERS WERE USING MOBILE-BASED FINANCIAL APPS.

Communispace invited community members to text to a short code every time they used a mobile financial app, which in turn triggered a brief mobile survey. The result? **The company got a new understanding of the compelling emotions that drove usage of these apps, with implications for how to position and message around them.**

TO GENERATE BETTER MERCHANDISING SOLUTIONS, A CONSUMER HEALTHCARE COMPANY ASKED THEIR COMMUNITY MEMBERS TO TAKE PICTURES OF WHAT CAPTURED THEIR ATTENTION ON THEIR NEXT SHOPPING TRIP.


They were also asked to photograph and/or scan the bar codes of every impulse purchase they made and explain the reasons why they made them. After members responded (in record time!), **the company had a rich picture of the signage, packaging, offers and store layouts that were breaking through the clutter and driving purchases.**

As mobile devices become not just the primary, but the sole means for a growing worldwide population to access the Internet, the ability of market researchers to interact with these consumers is an increasing necessity. Happily, it's also a luxury, as that interaction generates rich insights that could not be acquired any other way. The plethora of mobile survey and ethnography tools enables legions of highly engaged consumers and brand advisors to capture and share their real-time experiences, feelings and observations through pictures, videos, text notes, audio notes and bar-code scans. And, in so doing, they're also often engaging in the useful comparison between what they say, what they think they do, and what they actually do. By empowering people to document their own lives in a focused way, mobile research is helping to mitigate the risks of self-reporting.

WHETHER ENGAGED IN MARKET RESEARCH OR MARKETING CAMPAIGNS, WHETHER TRYING TO UNDERSTAND CONSUMER MOTIVATIONS OR TRYING TO MOTIVATE THEIR ACTIONS, COMPANIES AND BRANDS MUST **UNDERSTAND AND EMBRACE MOBILE TECHNOLOGIES AS CONSUMERS' CONSTANT COMPANION.**

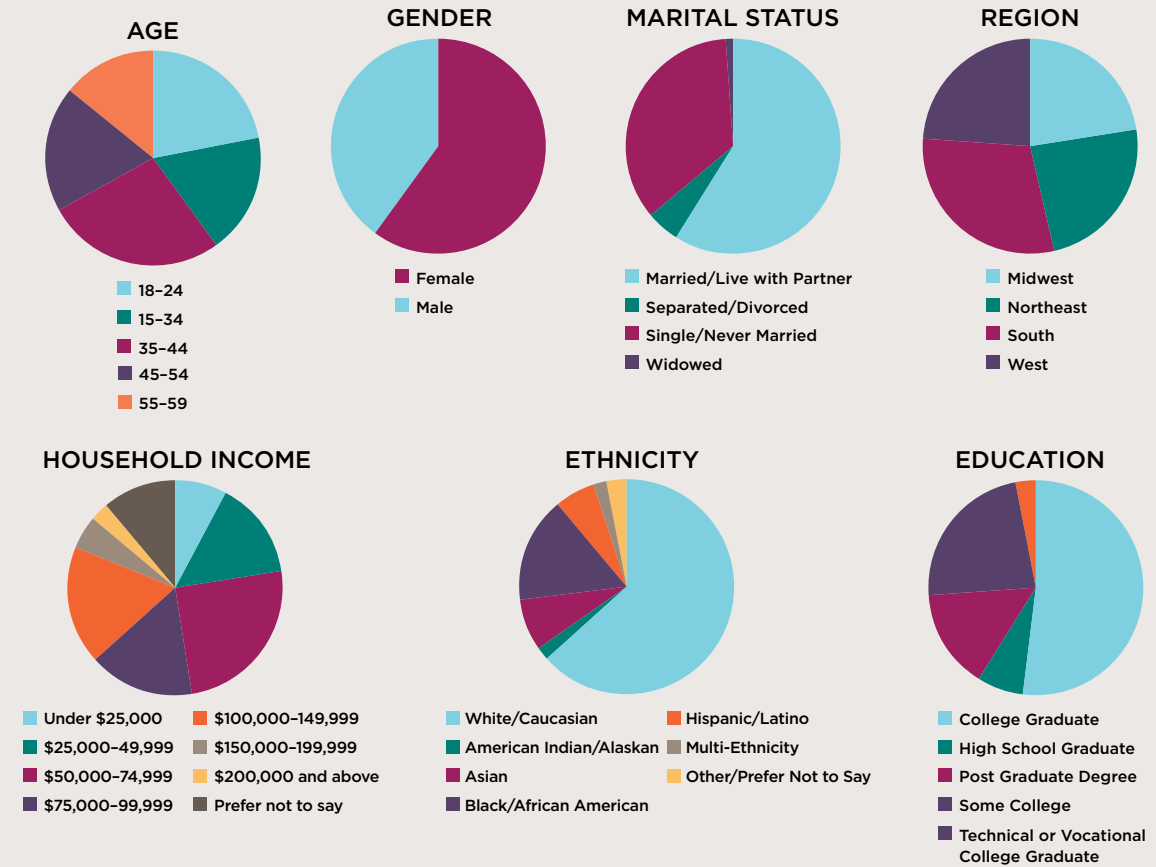
For all of the hype about “consumers in control,” mobile is the one arena in which they truly are. They can turn brands off or on, share or hide their location, and interact by touch or keystrokes, by voice or image, by video or text. To learn from that media-rich capability and get answers to questions they may not have thought to ask, market researchers must look beyond mobile as just another channel for pushing out surveys. To leverage the opportunities to be more relevant and useful that mobile presents, marketers must recognize it as a consumer-driven means of adapting a brand’s offers and content

..... to individual customers.



METHODOLOGY AND RESPONDENT PROFILE

The content from this report is derived from analysis of a survey (N=179) and discussion (N=163) that was fielded to members of our three IdeaSpace communities—Men’s Space, Women’s Space and Our Space—between February 21st and April 5th 2011. Below is the demographic profile of these respondents:



IDEASPACE: A DYNAMIC WORLD OF INSIGHTS AT YOUR FINGERTIPS

A proprietary group of insights communities that give you an unfettered, unprecedented window into the lives and thoughts of your clients’ most influential customers.

MEN'S SPACE



(N=300) 25-59 year olds

women's space



(N=400) 25-59 year olds

OUR SPACE



(N=300) 18-24 year olds



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