

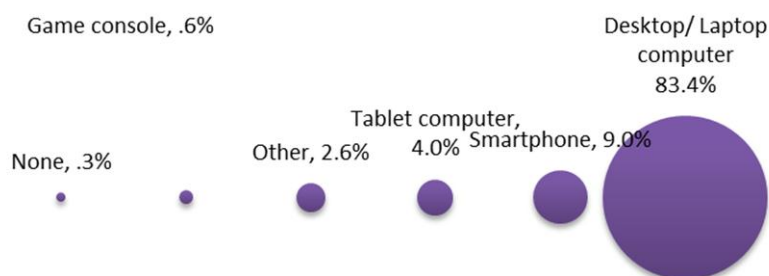
## Places not platforms

Over the past 6 years we have been running Mindreader, our annual study, to understand the digital consumer today. During this time many technology advances have happened including the launch of both the iPhone and iPad and Smart TV. The rate of change of technology is fast but how quickly does the average consumer behaviour catch up with the technology? Mobile technology in particular changes quickly. We are now able to do more and more in a mobile environment. We are not required to focus the majority of our internet activities at home but does that mean consumer behaviour is dictated by the technology available or by what they want to achieve with technology. Using our data we have found 5 key areas to remember when thinking about consumer behaviour.

1. People still consider laptop/desktop computers as their primary internet device.
2. If someone does an activity online they are just as likely to do that activity on any device
3. The location someone is in will have more impact on what they are doing online not that the technology is available to them.
4. When devising a campaign we need to make sure that it is optimised for all technology.
5. Marketers need to think more about the way consumers are using the internet and not focus on device led campaigns.

### 1. People still consider laptop and desktop computers as their primary internet device.

People have inbuilt associations between objects and activities. Habits can also be very hard to break. If we look at technology ownership over 90% of our sample use a laptop or desktop on a regularly basis. This is compared to 56% who use a smart phone and 33% who own a tablet. This means that although the penetration of both smartphones and tablets is increasing lots of people are still relying on traditional technology to access the internet. This is born out of in Mindreader data. We asked what device they primarily use to connect to the internet and the overwhelming answer is a desktop/laptop computer as shown in figure 1. The 3<sup>rd</sup> device is the tablet. Although the number of tablets being bought is increasing currently it doesn't mean that people are sacrificing a PC to obtain one. According to the Forrester report 'The worldwide tablet forecast' people still view PC as being better at creating content and Tablets better for viewing which means we will still be multiple device homes. We can also see that high and medium income households are more likely to own a tablet. Although some of this will come from the price point of tablets it still indicates they are the 3<sup>rd</sup> device.



## 2. If someone does an activity online they are just as likely to do that activity on any device

When different technologies are introduced we want to know as much as possible about that new activity. Over the past couple of years on Mindreader we have asked what digital activities people have conducted on individual platforms. This was a time consuming question to ask and as technology devices multiple is only going to get longer. We decided we wanted to investigate how these different activities change by platform and the results surprised us. As you can see from the below figure there is a high correlation between online activities regardless of device. People do want they want online and then choose the most convenient device to do that.

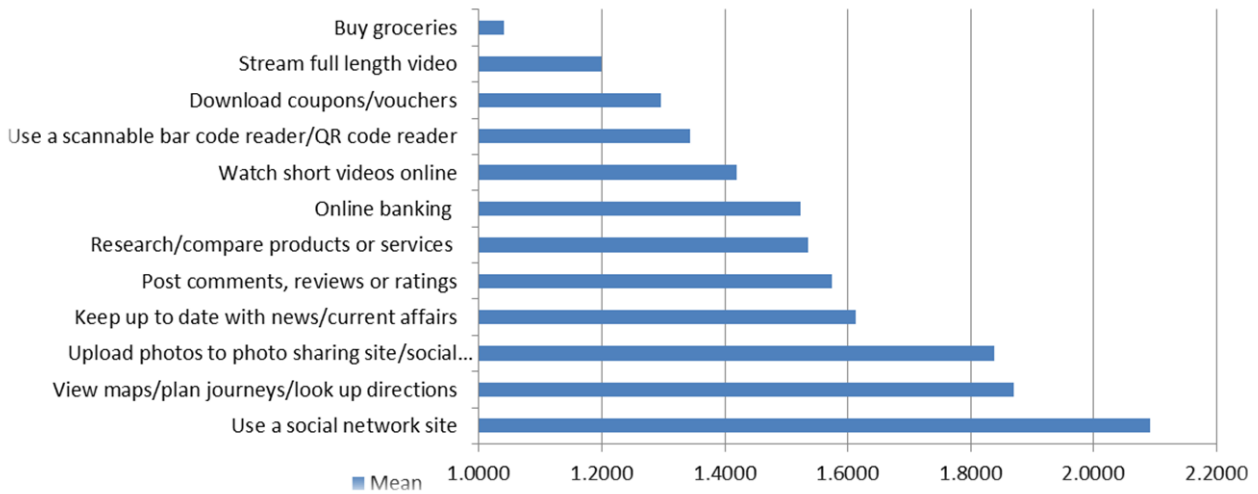
	Play games online	Apply to receive a free sample for a product	Download coupons/vouchers	Use collective discount sites (e.g. Groupon, Groupalia, etc.)	Buy goods from websites (e.g. Amazon, Ebay, etc.)	Buy groceries	Use a micro-blogging site (e.g. Twitter)	Stream full length video (TV programmes/films, etc.)	Watch short videos online (e.g. on YouTube)	Listen to the radio/music/podcasts via the Internet	Use an instant messaging service	Use a social network site (e.g. Facebook, MySpace etc.)	View maps-plan journeys-look up directions	Place a bet/Gamble	Watch/download adult-erotic material	Use an online dating service	Access sports content/news	Keep up to date with current affairs/news	Upload audio-photos	Download music-video	Online banking	Research/compare products or services	Make phone calls over the Internet (e.g. using Skype)	Maintain or publish your own blog/webpage	Read blogs	Post comments /reviews or ratings	Keep up to date with entertainment news
Laptop/PC vs Mobile																											
Play games online	428	409	236	278	356	396	402	455	417	370	370	162	205	383	360	360	330	218	347	463	234	291	460	476	387	396	
Apply to receive a free sample for a product	342	850	490	442	342	398	290	328	333	293	294	164	253	390	378	353	173	327	398	205	336	385	419	405	418	329	
Download coupons/vouchers	286	448	346	415	325	319	258	226	262	230	191	134	242	274	245	275	204	202	265	350	211	338	295	322	337	340	
Use collective discount sites (e.g. Groupon, Groupalia, etc.)	324	443	473	714	403	336	331	347	300	286	283	194	326	373	385	343	280	245	307	429	283	368	383	428	371	391	
Buy goods from websites (e.g. Amazon, Ebay, etc.)	260	404	417	415	583	360	344	386	379	301	298	151	351	377	377	341	281	300	351	421	281	467	420	439	397	381	
Buy groceries	215	354	374	280	341	481	310	310	274	193	234	132	227	352	286	322	228	167	312	324	253	239	341	354	301	318	
Use a micro-blogging site (e.g. Twitter)	351	342	307	293	319	353	792	459	353	289	290	278	236	346	353	348	328	209	400	392	215	262	409	500	428	394	
Stream full length video (TV programmes/films, etc.)	347	358	343	344	364	362	444	634	491	434	298	162	324	338	369	331	323	278	413	481	302	421	434	430	394	402	
Watch short videos online (e.g. on YouTube)	318	347	272	269	345	297	365	421	619	378	306	229	351	288	311	266	332	326	417	396	236	385	394	367	422	391	
Listen to the radio/music/podcasts via the Internet	268	330	335	242	283	288	278	395	366	643	255	167	235	250	299	284	273	275	325	413	284	333	338	293	324	309	
Use an instant messaging service	364	373	325	267	276	317	329	358	336	238	659	236	251	289	266	324	288	245	364	379	230	307	441	374	325	434	
Use a social network site (e.g. Facebook, MySpace etc.)	287	128	135	133	368	315	243	140	205	107	162	758	697	645	597	682	621	658	312	145	671	107	146	146	180	284	
View maps-plan journeys-look up directions	233	412	370	418	380	336	358	391	414	304	269	160	581	360	383	333	324	317	382	424	299	438	421	442	434	416	
Place a bet/Gamble	329	487	419	414	425	493	395	422	311	322	339	351	253	390	374	587	318	172	309	441	276	277	486	303	409	430	
Watch/download adult-erotic material	254	349	275	289	329	321	325	369	318	316	267	60	252	491	638	458	323	177	282	347	245	246	376	413	311	313	
Use an online dating service	300	444	360	343	358	422	385	418	308	321	299	59	234	578	528	761	302	195	335	423	261	279	480	570	423	324	
Access sports content/news	201	269	224	241	288	250	312	303	319	264	215	684	228	281	300	242	755	377	347	368	205	311	275	286	282	253	
Keep up to date with current affairs/news	371	118	119	164	171	171	142	231	178	174	174	237	273	148	148	299	488	183	155	259	176	116	194	153	277	277	
Upload audio-video/photos	404	401	368	428	385	325	415	448	485	374	377	362	316	377	314	376	273	294	381	498	313	411	447	458	419	558	
Download music-video	402	447	468	400	451	393	456	499	510	465	332	227	326	409	372	382	433	358	538	857	333	481	444	513	457	484	
Online banking	371	176	177	242	262	211	150	212	231	170	116	115	240	191	248	219	204	192	214	223	510	250	243	184	187	145	
Research/compare products or services	281	392	368	342	396	315	272	372	432	332	306	134	399	299	271	260	296	335	337	430	252	571	399	349	370	333	
Make phone calls over the Internet (e.g. using Skype)	369	441	433	419	440	436	378	497	416	370	452	188	358	416	417	440	298	298	441	461	331	422	751	536	460		
Maintain or publish your own blog/webpage	398	480	424	451	446	489	327	512	358	354	357	197	278	563	475	531	297	176	408	501	230	342	569	398	327	365	
Read blogs	294	413	363	335	344	331	432	401	430	308	268	227	370	380	344	351	280	276	405	398	211	382	383	450	686	467	
Post comments, reviews or ratings	393	458	369	345	301	340	429	363	421	326	365	317	262	370	356	364	257	268	449	429	239	335	408	440	469	634	
Keep up to date with entertainment news	305	320	301	305	318	271	307	326	429	261	309	194	258	236	278	241	380	398	365	415	244	387	304	333	384	372	

## 3. The location someone is in will have more impact on what they are doing online not that the technology.

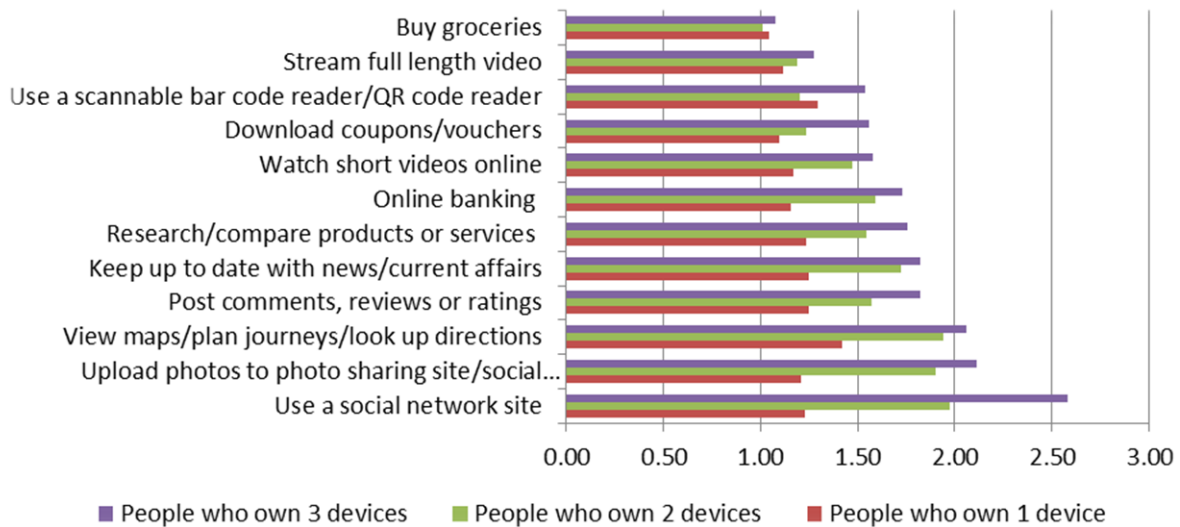
For the first time on Mindreader we asked respondents where they are when they complete an online activity. The activities were a range, made up from Mindshare's digital cultures work and we had a variety of locations we were interested in. Please see chart 3.

Online Activity	Location
Download coupons/vouchers	At home
Buy groceries	In the office/at work
Online banking	When travelling (e.g. In the car, on the bus/train etc.)
Research/compare products or services	In a shop
Use a scannable bar code reader/QR code reader	In a café/bar/restaurant
Use a social network site	On the street
Post comments, reviews or ratings	Elsewhere
Upload photos to photo sharing site/social network	
Watch short videos online	
Stream full length video (TV programmes/films, etc.)	
View maps/plan journeys/look up directions	
Keep up to date with news/current affairs	

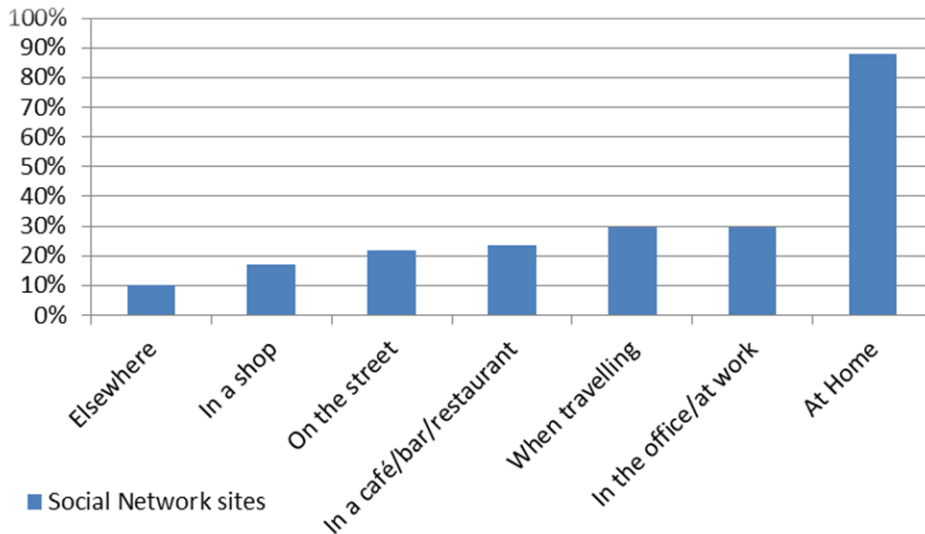
We found that, with the exception of the more social activities, most activities were still done at home. They might occasionally do the activities in other places but that is more out of need then out of want. Even with social networking the mean score was just over 2 locations. Please see chart 4.



We wanted to make sure this result wasn't skewed by the proportions of the population who only has one device to access the internet so we split the sample by the different devices. In chart 5 you can see that although those who own multiple devices are more likely to conduct the activity in more than one place the rank is not remarkable different.



So what locations are people conducting these activities? Given use of social network sites was the most likely to be used in multiple locations we started there. In chart 6 we can see that home is still the primary location.



So even with more devices people are still doing the same pattern and where will be more likely to impact activity then the devices they have.

**4. When devising a campaign we need to make sure that it is optimised for all technology**

All this means that we can't predict the type of device someone might use when completing an online activity. They will use what they have at hand and are just as likely to use a mobile as a PC. This means that if we limit the way consumers connect to a campaign by optimising for a device we will be forcing them to use a device which they might not natural use for that activity and therefore run the risk of alienating consumers. We need to think about every platform available to use.

**5. As an industry we will need to cater to the way consumers behave and not focus on device led campaigns.**

When we are buying and selling campaigns for our clients we need to thinking about all devices and therefore are we going to see a shift in how digital campaigns are bought and planner?