

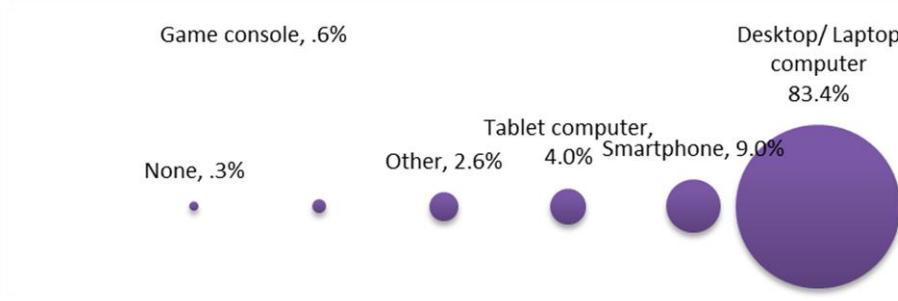
Places not platforms

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 3rd 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 3rd 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 what they want online and then choose the most convenient device to do that.

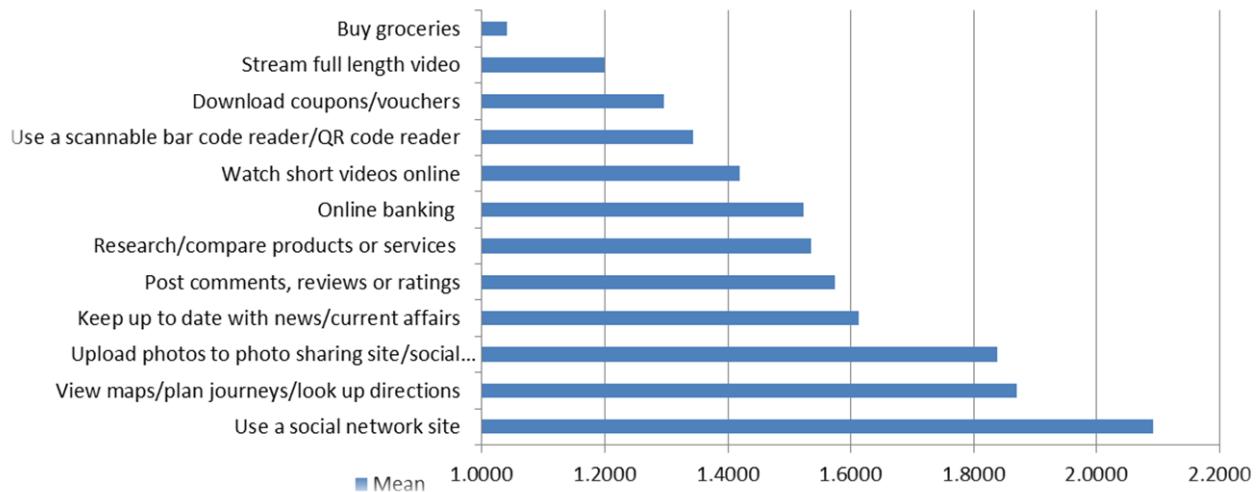
	Play games online	Apply to receive a free sample to a product	Download coupons/vouchers etc.	Buy products from websites (e.g. Amazon, eBay etc.)	Buy groceries	Use a micro-blogging site (e.g. Twitter, Facebook etc.)	Stream full length video (TV programmes/films, etc.)	Watch short videos online	Listen 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	Watch-download adult-erotic material	Use an online dating service	Access sports comment news	Keep up to date with current affairs-news	Upload audio-video/photos	Download music-video	Research/compare products or services	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	298	378	356	398	402	455	417	370	370	162	205	363	360	360	216	347	462	234	291	460	478	38	394	337	
Apply to receive a free sample to a product	342	650	490	442	342	398	290	328	333	283	294	164	253	360	378	353	173	173	327	398	336	385	419	405	418	329	
Download coupons-vouchers	204	448	545	415	329	319	250	226	252	230	181	134	242	245	275	204	283	350	211	338	295	322	337	340	307		
Use collective discount sites (e.g. Groupon, Groupalia, etc.)	324	443	473	714	403	336	331	347	320	268	283	194	326	373	385	343	290	245	367	429	283	368	383	425	371	391	387
Buy goods from websites (e.g. Amazon, Ebay, etc.)	260	404	417	415	583	360	344	387	379	301	298	09	351	377	377	341	281	300	351	421	281	467	420	439	387	363	363
Buy groceries	215	354	374	28	341	491	310	310	274	193	234	132	227	352	286	322	228	167	312	324	253	239	341	354	301	318	274
Use a micro-blogging site (e.g. Twitter)	351	342	307	293	319	363	792	459	383	289	290	278	236	346	353	348	326	209	400	392	215	262	409	428	394	354	296
Search engines (e.g. Google, Bing, etc.)	347	358	343	344	364	362	444	634	491	434	286	162	324	330	369	331	323	279	413	481	305	421	434	430	384	402	366
Watch short video online (e.g. on YouTube)	318	347	272	298	344	297	367	424	674	378	306	222	351	288	311	256	332	417	398	235	385	394	367	422	391	377	
Listen to the radio-music-podcasts via the Internet	297	337	335	249	283	286	279	369	368	644	225	167	259	289	286	273	275	322	413	284	333	329	307	350	327	309	301
Use an instant messaging service	364	373	329	337	279	317	329	358	336	238	659	251	286	268	324	286	364	239	230	307	441	374	325	434	363		
Use a social network site (e.g. Facebook, MySpace etc.)	287	126	133	133	133	133	243	148	265	162	758	758	758	758	758	758	758	758	758	312	145	145	146	146	146	284	151
View maps-plan journeys/look up directions	233	412	370	418	386	336	358	391	414	304	269	160	581	360	383	333	324	317	382	424	298	438	421	443	434	416	397
Place a bet-Gamble	329	487	419	414	426	493	395	422	311	322	339	252	253	780	574	587	318	173	369	441	276	277	496	610	409	430	345
Watch-download adult-erotic material	254	349	275	289	329	321	325	369	318	316	257	09	252	491	639	458	323	177	282	347	245	246	376	413	311	313	233
Use an online dating service	350	444	360	343	368	422	385	418	308	321	299	09	234	578	528	761	302	195	335	423	261	279	480	570	423	422	324
Access sports comment news	201	269	224	241	288	250	312	303	319	264	215	06	228	281	300	242	755	377	247	368	205	311	275	286	253	402	
Keep up to date with current affairs-news	083	118	118	119	164	168	078	142	231	178	174	078	073	237	053	148	097	299	488	183	155	168	259	176	116	194	153
Upload audio-video/photos	404	401	368	428	386	325	415	449	486	374	377	362	316	377	314	376	273	294	681	498	313	411	447	459	419	558	408
Download music-video	402	447	468	400	451	393	456	499	510	495	332	227	326	409	372	392	433	358	536	857	333	481	444	513	457	494	516
Online shopping	088	176	177	242	262	211	165	212	231	170	116	115	240	248	219	210	192	191	214	223	510	250	243	184	187	145	223
Research/compare products or services	281	392	368	342	398	315	272	372	432	332	306	134	399	299	299	295	335	337	430	252	571	399	349	370	333	401	
Phone calls over the Internet (e.g. using Skype)	369	441	433	419	440	438	378	497	416	452	452	186	359	416	417	440	298	298	441	461	331	422	751	538	469	516	351
Maintain or publish your own blog-webpage	294	413	363	326	344	331	432	401	430	369	299	227	370	360	344	361	280	276	405	398	211	382	383	450	886	467	379
Read blogs	393	458	369	345	301	340	429	363	421	328	365	317	262	370	366	364	257	268	449	429	238	335	408	446	469	634	389
Post comments, reviews or ratings	305	320	301	305	318	271	307	326	429	261	309	194	258	258	278	241	360	398	365	415	244	367	304	333	384	372	602
Keep up to date with entertainment news																											

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

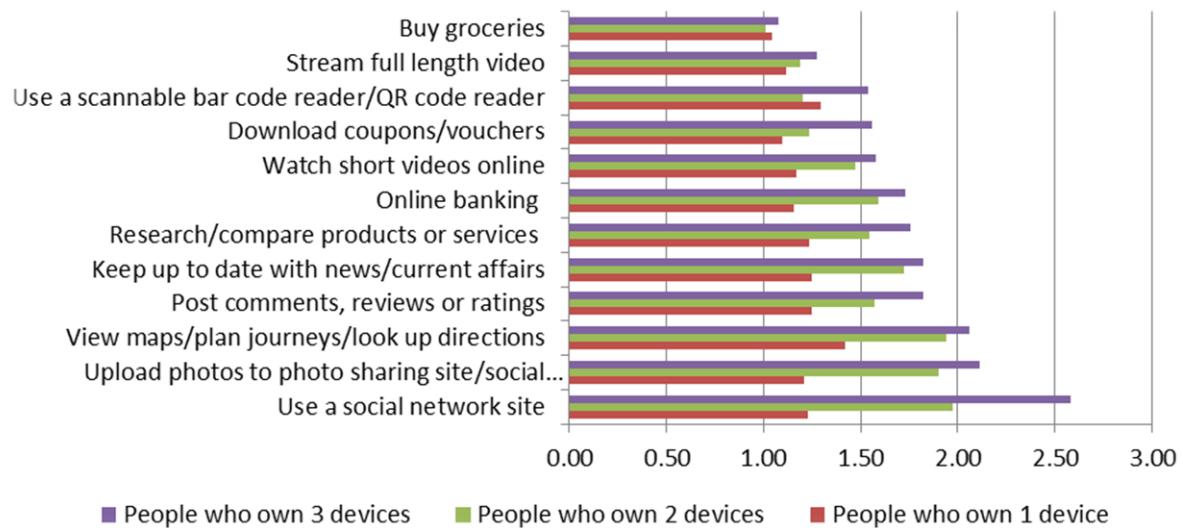
For the first time on Mindreader we asked respondents where they are when they complete an online activity. The activities were a range, made up from Mindshare's digital cultures work and we had a variety of locations we were interested in. Please see chart 3.

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	

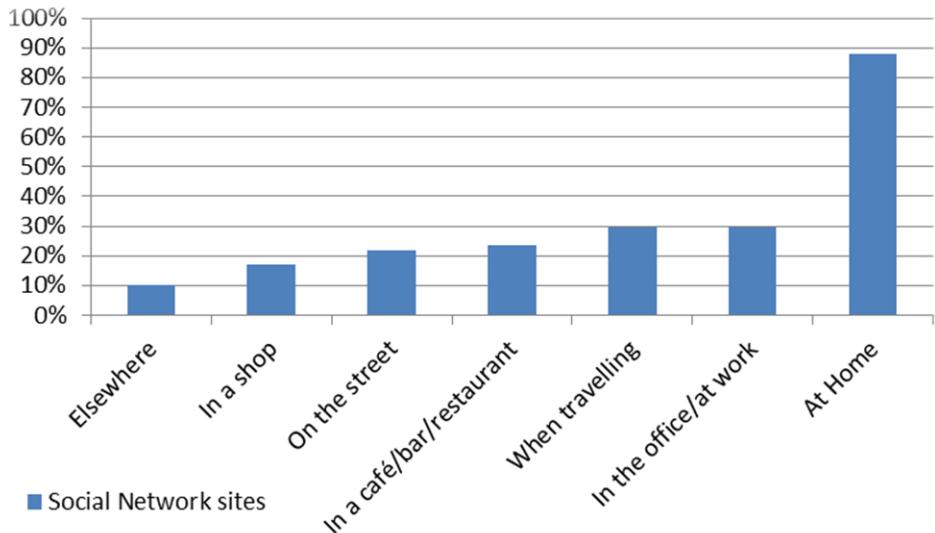
We found that, with the exception of the more social activities, most activities were still done at home. They might occasionally do the activities in other places but that is more out of need than out of want. Even with social networking the mean score was just over 2 locations. Please see chart 4.



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 activites? Given use of social network sites was the most likely to be used in multple 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?