For: Customer
Experience
Professionals

Mobile Moments Transform Customer Experience

by Josh Bernoff, Julie A. Ask, Ted Schadler, and Ron Rogowski, January 24, 2014

KEY TAKEAWAYS

Your Customers Are Experiencing A Mobile Mind Shift

Your customers expect to get what they want in their immediate context and moments of need. Increasingly, your customer experience must accommodate mobile demands.

Attack Mobile Moments In Four Steps: Identify, Design, Engineer, And Analyze

Target the right mobile moments. Start by identifying mobile moments and context and then design the engagement, engineer supporting technology, and analyze the data to improve the customer experience.

Repeat The IDEA Cycle For Continuous Improvement

To get applications right, start small with a basic application. Then use an iterative, agile process to make improvements on a two- to three-month cycle.

Mobile Moments Transform Customer Experience

Mobile Experiences In Four Steps: Identify, Design, Engineer, And Analyze

by Josh Bernoff, Julie A. Ask, Ted Schadler, and Ron Rogowski
with John Dalton and Elizabeth Ryckewaert

WHY READ THIS REPORT

Your customer is experiencing a mobile mind shift: the expectation that she can get what she wants in her immediate context and moments of need. As a result, mobile is central to customer experience (CX). To master these moments, use the IDEA cycle: identify the mobile moments and context; design the mobile interaction; engineer your platforms, processes, and people for mobile interactions; and analyze results to monitor performance and optimize outcomes. This report explains how to apply the IDEA cycle to transform customer experiences with mobile.

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Notes & Resources

Forrester interviewed 30 vendor and user companies, including American Airlines, Bank of America, Boeing Employees Credit Union (BECU), Cynergy, eBay, Hertz, Lose It!, Nest Labs, SapientNitro, Starwood Hotels & Resorts, United Airlines, USAA, and Walgreens.

Related Research Documents

Re-Engineer Your Business For Mobile Moments
January 24, 2014

Mobile App Or Mobile Web? It's A Choice, Not A Battle
December 17, 2013

How Unified Is Your Customer Experience?
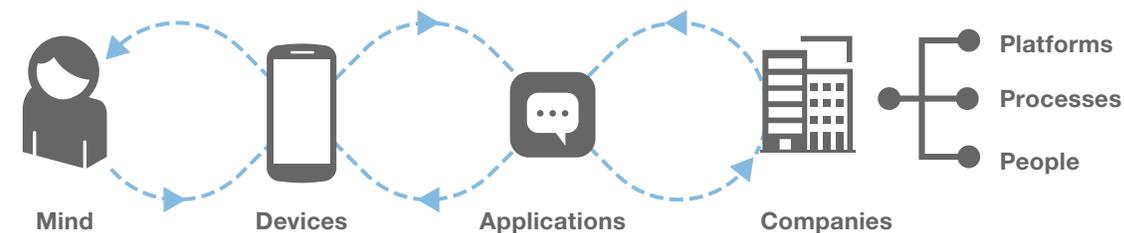December 12, 2013

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MOBILE IS CENTRAL TO YOUR CUSTOMER EXPERIENCE

Your customer is experiencing a mobile mind shift (see Figure 1).[1] Increasingly, when she needs something — anything — she turns to her mobile device and asks for help. "Do I need to wear a coat today?" "Did the Red Sox win?" "Is my prescription ready?" The answers to all of these questions are on the smartphone, and she knows it. Every interaction reinforces, in a Pavlovian way, the idea that the solution to every problem is on the mobile device. A shift of this magnitude transforms expectations. It should be central to your CX strategy. Here's how we describe this mobile mind shift:

The mobile mind shift is the expectation that I can get what I want in my immediate context and moments of need.
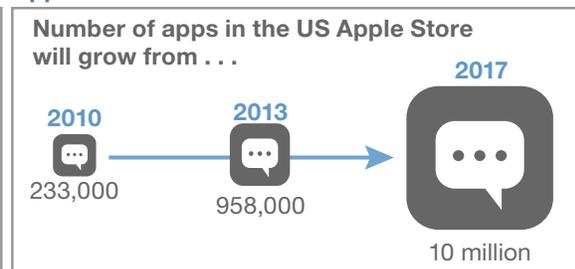
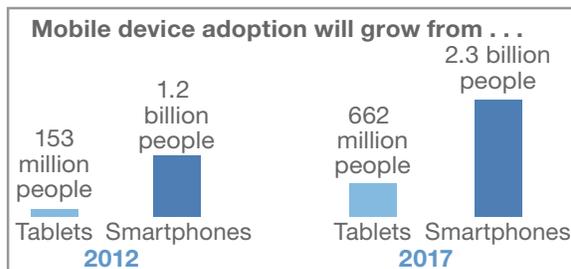**Figure 1** Understanding The Scale And Scope Of The Mobile Mind Shift
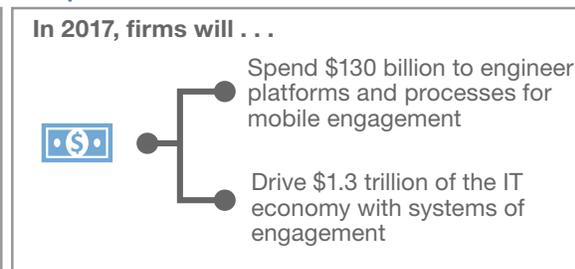

Mind
Of smartphone users . . .
- 62% expect a mobile-friendly website
- 42% expect to find a mobile app
- 23% expect that experience to change based on location

Applications§
Number of apps in the US Apple Store will grow from . . .
2010 — 233,000
2013 — 958,000
2017 — 10 million

Devices†
Mobile device adoption will grow from . . .
2012: Tablets — 153 million people; Smartphones — 1.2 billion people
2017: Tablets — 662 million people; Smartphones — 2.3 billion people

Companies‡
In 2017, firms will . . .
- Spend $130 billion to engineer platforms and processes for mobile engagement
- Drive $1.3 trillion of the IT economy with systems of engagement

*Base: 4,404 US online adults (ages 18+) who use a smartphone
*Source: US Mobile Mind Shift Online Survey, Q3 2013
†Source: Forrester Research World Smartphone Adoption Forecast, 2012 To 2017 (Global); Forrester Research World Tablet Adoption Forecast, 2012 To 2017 (Global)
§Source: 148Apps.biz, Forrester estimate
‡Source: August 6, 2013, "Wanted: Mobile Engagement Providers" Forrester report; February 23, 2012, "Mobile Is The New Face Of Engagement" Forrester report

113101   Source: Forrester Research, Inc.

January 24, 2014

How Big Is This Mobile Mind Shift?

While the mobile mind shift is difficult to measure, we see evidence of it everywhere:

- **For most people, phones are smartphones.** Smartphones are now a clear majority of all mobile phone sales. Apple has sold more than 400 million iPhones so far. More than 60% of US online adults access interactive content on their phones at least daily.[2] And this phenomenon is global — among online consumers, 46% of the British, 42% of the Poles, 76% of the urban Chinese, and 77% of the urban Indians are connecting to interactive content at least weekly.[3]

- **People interact wherever they are.** You might guess that at least half of online US adults connect in the living room or out-of-doors. But our survey reveals that 50% use phones while shopping, 48% in the car, and 37% while on public transportation. And we whip out our phones everywhere — 39% even admit to using them in the bathroom.[4]

- **People count on their phones for everything.** Apple App Store has more than 1 million apps, which have been downloaded a cumulative total of 60 billion times — that's 8.5 downloads for everyone on the face of the planet. Thirty-two percent of online US adults have used an interactive map on their phones, while 21% are banking and 18% are shopping monthly.[5] Consumers reserve meals, cabs, and flights; share music; make videos; and even screen potential mates on their phones. Whatever product or service you offer, your customers expect you to deliver mobile utility.

TRANSFORMING CUSTOMER EXPERIENCE IN MOBILE MOMENTS

Mobile creates an opportunity to transform your customer's perception of your company and your brand. Success here requires taking advantage of the brief but crucial instants in which that customer needs service, information, or just about anything. We call all these opportunities "mobile moments."
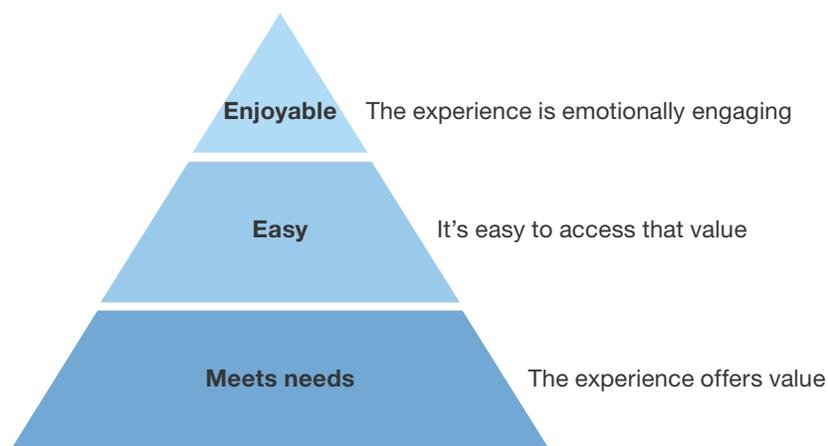
> *A mobile moment is a point in time and space when someone pulls out a mobile device to get what they want in their immediate context.*

Because people carry their mobile devices with them at all times, *mobile moments are the frontline of customer experience*. That's why every CX improvement effort, starting now, must include mobile. While mobile moments are short, they have huge influence on all aspects of customer experience (see Figure 2). As USAA's Neff Hudson put it, "Mobile gives you the ability to be outsized in your customer experience. We punch above our weight."

- **Mobile redefines what it means to meet people's needs.** The definition of *meets needs* has expanded, because mobile creates more needs. When you have to check your bank balance, see if the check cleared, or shift funds into your child's account, *now*, a bank cannot meet your needs without mobile. Some mobile businesses have even thrived on needs that were never conceivable before mobile — like the need to know where your child and her phone are at any moment.

- **Mobile transforms what "easy to use" means.** When it comes to mobile, "easy" is hard — but "easy" done right is differentiating. That's why USAA put so much effort into re-engineering its processes for mobile. Mobile deposit was very expensive and difficult to figure out, but the result was that customers no longer needed to mail a check or go to an ATM to make a deposit. The tricky part is that "easy" often depends on context — American Airlines knows to show you the boarding pass on the day of the flight, and Lose It! makes it easy to see whether you're allowed to eat that cookie based on knowing who you are.

- **Done well, mobile makes things enjoyable, too.** Enjoyable is where the "fit and finish" of mobile applications come in. Context is also crucial; an application that remembers your context and where you left off makes dealing with your company a lot more enjoyable. Uber is enjoyable, not only because it replaces an annoying ride in a smelly cab with a polite on-demand experience in a Lincoln Continental but also because the whole experience, from booking the ride to paying and rating the driver, is pain-free, seamless, and almost magical.

Figure 2 The Three Levels Of Customer Experience

Enjoyable — The experience is emotionally engaging

Easy — It's easy to access that value

Meets needs — The experience offers value

113101   Source: Forrester Research, Inc.

THE IDEA CYCLE: A FOUR-STEP PROCESS TO IDENTIFY KEY MOBILE MOMENTS

There are dozens of potential mobile moments in which you could engage a customer. Which ones matter? To understand this, you must undertake a *mobile moment audit* — a systematic effort to identify the moments that matter most, not only to your customer but also to your company. If you're familiar with journey mapping, recognize that a mobile moment audit goes hand-in-hand with a customer journey map — it's a tool to identify which moments in the customer journey are best suited to a mobile solution. There are four steps in the mobile moment audit. You can remember them with the acronym IDEA (see Figure 3):

1. **Identify the mobile moments and context.** Map out all of the situations and scenarios in which you can serve someone on a mobile device.

2. **Design the mobile engagement.** Bring businesspeople, designers, and developers together to decide how you will engage a customer in her mobile moments.

3. **Engineer your platforms, processes, and people for mobile.** Mobile interaction requires much more than an app. You must optimize the whole ecosystem, which includes the platforms, processes, and people in your organization and those of your partners.

4. **Analyze results to monitor performance and optimize customer experience.** Your mobile engagement initiative is not complete if you're flying blind. Capture, track, analyze, and act on the data to improve the engagement.

We call this analytical framework a *cycle* because you must repeat it continuously. You need to build a new platform for mobile interactions that supports rapid iteration in an environment where customer expectations and business opportunities change rapidly. Your best chance of getting mobile engagement done effectively is to start small. But you'll inevitably want to extend your mobile engagement strategy with customers as you learn, which means going through the cycle again.

Figure 3 The IDEA Cycle

Identify
the mobile
moments
and context.

Design
the mobile
engagement.

**Start small
with a platform
to extend.**

Analyze
results to monitor
performance and
optimize outcomes.

Engineer
your platforms,
processes, and
people for mobile.

Source: Forrester Research, Inc.

January 24, 2014
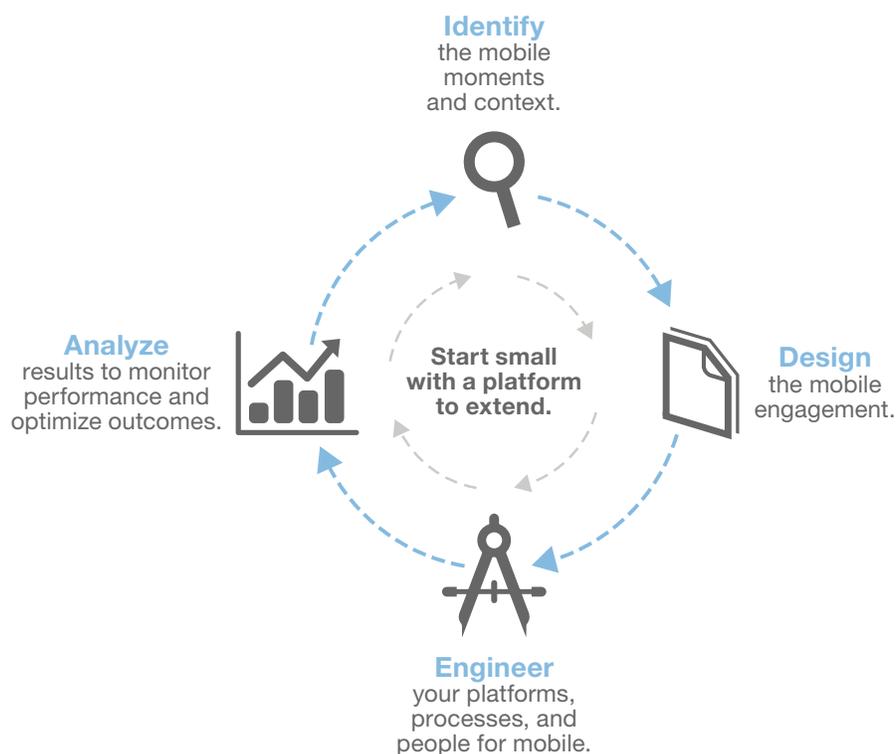
Step 1: Identify The Mobile Moments And Context

In the first step of the mobile moment audit, you will catalog and analyze target customers' mobile moments, identify the context, and determine their motivations (see Figure 4). This typically starts by conducting ethnographic research — observing customers as they try to accomplish their goals — and translating those observations into customer journey maps. For example, at Delta Air Lines, a cross-functional team watched customers prepare for travel, check in, go through security, wait at the gate, and board, seeking moments of anxiety — because where anxiety lurks, there is often a good opportunity to deliver a mobile moment. Here's how you can find the mobile moments in your customers' journeys:

- **Analyze customers' mobile mind shift.** Examine the mobile behaviors of your customers to learn which devices they use and when. For example, E-Trade found that its customer base was highly advanced and had already embraced mobile devices — so there was a high degree of urgency for moving forward on tablet and mobile apps. Refine your analysis with the Mobile Mind Shift Index, an analysis of how rapidly any customer group has shifted.[6]

- **Catalog the mobile moments.** What are all of the situations in which your customer might turn to a mobile device? Use a customer journey map to visualize your opportunities. Short of having ethnographic research to draw from, you could use our catalog of common mobile moments as a starting point (see Figure 5). Ask these questions: 1) Can you immediately solve a customer's problem ("Did I get the airline seat upgrade?" for example); 2) can you eliminate friction or annoyance in a customer's life; and 3) can you deliver a new business service? To answer this last question, you might take a close look at what entrepreneurs in your market are offering on mobile.

- **Determine the context.** To serve customers properly with mobile, you must know who they are, where they are on their journey, and what their emotional state is. This context makes it far easier to deliver service in a moment (see Figure 6). Starwood, for example, switches from "research and booking mode" to "stay mode" when a guest is within 48 hours of a hotel stay. Rather than showing rates and availability, the home page offers the hotel address and links to maps and transportation options.

- **Determine customer motivations in the moment.** Customers may want to gather information, make a decision, or conduct a transaction. Each moment comes with a motivation — find it. The Walgreens customer's motivation is to know when her prescription is ready for pickup, which is far different from the Nest Thermostat owner's motivation to figure out how much money he's saving on energy. Tap unsolicited customer feedback, social media, and internal expertise — like frontline service employees — to flesh out your target persona's deepest concerns.

Figure 4 How To Identify Mobile Moments

IDEA cycle	Steps in the audit	Audit questions
1. Identify the mobile moments and context.	Analyze customers' mobile mind shift.	• Who is mobile? • Why are they mobile? • What devices are they using?
	Catalog the mobile moments.	• Where can you solve an immediate problem? • Where can you eliminate friction or annoyance in a customer's life? • Where can you deliver a new service?
	Determine the context.	• What is their situation and location? • What is their emotional state or attitude? • What are their preferences, profile, and history?
	Find customer motivations in the mobile moment.	• What are their goals? • What do they want from you? • How often will they use it?

113101   Source: Forrester Research, Inc.

Figure 5 Catalog Of Possible Mobile Moments

Scenario	Customer motivations	Example mobile moments: when a customer . . .
Sales	Find a product, learn about it, check a price or review, make a purchase	• Sees a store display and needs more information about a product • Sees a movie ad and wants to know how people rated it • Sees a car commercial and wants to know the cost and features
Marketing	Discover, explore, engage, act	• Wants to know the number of people waiting in line at the local restaurant • Needs information about how to remove a stain from clothing • Wants to know if fares to her favorite destination have dropped
Physical products	Interact with the product to install, upgrade, control, or maintain it	• Wants to tell the thermostat to warm up the house before arriving home • Wants to tell if the electric car has finished charging • Needs an alert that the food in the crockpot is about to burn
Field service	Get customer service quickly, or find out answers to service questions	• Is interested in products that could be installed at the same time as a satellite TV upgrade • Wants to know how far away the car is that's about to pick him up

113101   Source: Forrester Research, Inc.

Figure 6 Elements Of Context

Element	Data to gather
What is their situation or location?	Location data: Where are they? Movement data: How fast are they going? Physiological data: What is their heart rate?
What is their emotional state or attitude?	Emotions: Are they in a hurry, agitated, anxious, or frustrated? Or are they happy or leisurely, leaning back? Attitudes: What kind of person are they? Are they impatient? Are they relaxed?
What are their preferences, profile, and history?	Preferences: What have they told you? Profile: What do you know about them? History: Does it suggest a different engagement model?

113101   Source: Forrester Research, Inc.

Step 2: Design The Mobile Engagement

In traditional customer experience design processes, identifying moments on the journey is just the first step. To complete the design, you must determine which services to deliver and prioritize them. You need to account for both the value of those services to the customer and their benefits to you (see Figure 7). For example, developers at Hertz noticed that the first thing travelers do when landing is pull out their phone and check their email. Hertz became the first rental company to notify travelers that their car was available and where to look for it. Then the company added short message service (SMS) notifications and moved on to a mobile app after that. The app added more features like automatic upgrades to preferred customers, paid upgrades for everybody, automatic check-in or drop-off to skip the line, and so on. Hertz makes these choices by looking for where the customers' needs intersect with the company's benefit. While this sounds simple, mobile introduces steep design challenges that require new skills and focus:

■ **Decide how you will engage your customer.** Customer interactions can deliver information, notify customers, respond to requests, or execute transactions. For example, eBay Now lets people see the state of their order being filled and contact the delivery driver if their drop-off location changes. Before you can design the interaction, you must know which type of engagement your customer is seeking (see Figure 8).

■ **Respect established mobile behaviors.** When Walgreens set out to reduce prescription abandonment rates on the phone, it didn't assume that the best solution would necessarily require a radical mobile innovation. Instead, the firm's designers considered how mobile device

capabilities had already transformed consumer behaviors and made sure that its solution worked well within those constraints. For example, when considering the most effective way to notify customers that their prescriptions were ready, it added SMS messages and then push notifications to garner a more immediate response from customers.

- **Enhance services with new device capabilities.** As a result of the mobile mind shift, clicking on links and typing gives way to tapping, pinching, and zooming. Hands-free interfaces like Siri's speech interface continue to gain momentum.[7] Folders, files, buttons, and sliders are giving way to more natural interfaces that anticipate a consumer's in-the-moment need, as Google Now does when it advises you on your commute based on past history, current conditions, and your calendar.

- **Prioritize based on the customer benefit and value to you.** To decide what to build first, assess the value of the new service to customers (e.g., the audience size and level of demand) and to your company (e.g., increasing sales, improving the accuracy of check imaging, speeding up the checkout process). Extend the value of features that benefit customers more than your company. And redesign or scrap those that help you but don't make customers happy (see Figure 9).

Figure 7 How To Design Mobile Engagements

IDEA cycle	Steps in the audit	Audit questions
2. Design your mobile engagement.	Decide how you will engage your customer.	• What service will you provide? • What will it accomplish? • How will they find it?
	Prioritize based on customer benefits.	• Does it accomplish a customer goal? • Does it accomplish a goal in seconds? • Is it convenient and enjoyable to use?
	Determine the value to your company.	• Does it accomplish your goal? • Is it cost-effective? • Are you committed to it for the long haul?

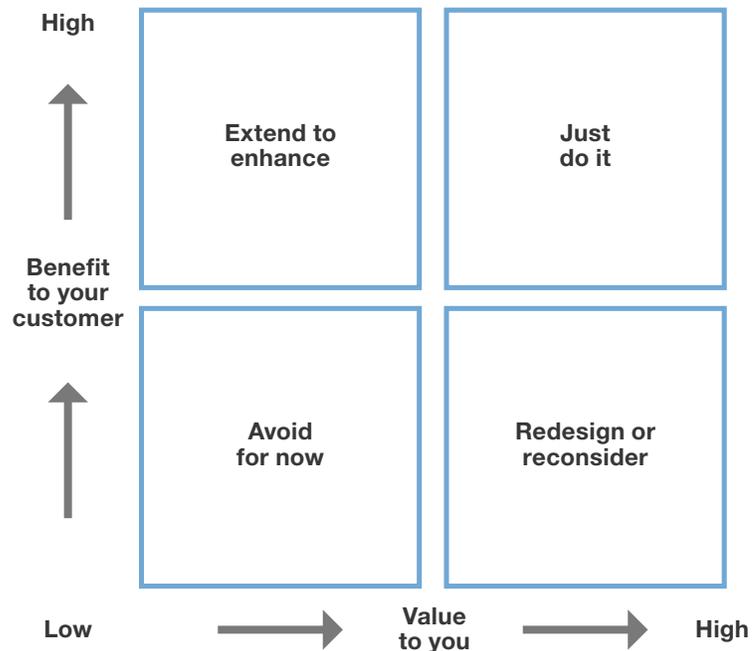113101

Source: Forrester Research, Inc.

Figure 8 Engagement Types And When To Use Them

Engagement type	When to use it
Notify customers when something they care about happens	Notifications are the best way to immediately serve someone in a mobile moment. Context is key to knowing how and when to serve someone appropriately. Examples: status change, seat upgrade, new job listing, low bank balance, violent storm in the area
Respond to a request for help	Any kind of mobile search, content, or access falls into this category. It's what makes the mobile Internet so valuable. Examples: room, car, or reservation availability; list of top stories on a news site
Enable a transaction to help customers take action	Mobile apps help people take action in a moment. Examples: making a reservation, booking a car, updating a profile, making a deposit, authorizing a payment, buying a stock
Entertain or educate	Mobile devices and wireless networks unshackle entertainment from the couch and education from the desk. Examples: showing a sports highlight, a news story, a movie review, or a how-to video
Capture or create content quickly	Mobile devices replace cameras and notebooks because they are ubiquitous and get the job done. Examples: photographing damage to a car, reporting and showing a pothole in the street, writing a review
Share an experience on a social network	Mobile devices and social networks are made for each other. Examples: posting a Facebook, Twitter, or Tumblr update

113101 Source: Forrester Research, Inc.

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Figure 9 The Mobile Moment Assessment

Source: Forrester Research, Inc.

Step 3: Engineer Your Platforms, Processes, And People For Mobile

Mobile isn't just an app — and thinking that way will doom your mobile solutions. It took serious engineering to build applications like Uber's car service or the cash deposit feature of USAA on mobile devices. Just as all customer experience takes place in the context of a complex ecosystem, mobile apps gain their power and utility from the corporate systems and processes they touch. When preparing mobile interactions, your company will spend 80% of its money and effort engineering your platforms, processes, and people for mobile engagement (see Figure 10). Ask yourself these questions:

■ **Are your technology *platforms* ready to support mobile engagement?** The information systems your business uses are systems of record — you must re-engineer them to create systems of engagement that are up to the frequent-access, high-volume demands of mobile interactions.[8] Bring technical experts in to identify the back-end systems and the new technologies you need, and assess if those technologies are ready to support your mobile moments. For example, at American Airlines, technology teams had to change the way they handled data after a tenfold increase in mobile app data consumption in some situations.

■ **Are your customer-facing *processes* aligned for engagement?** Prepare and assess a list of processes like field service, retail sales, marketing operations, or customer onboarding that the engagement will touch. Where will they break down? What changes will you have to make? And can mobile devices in the hands of your sales or service staff improve those processes? At Dish Network, installers using appropriately configured smartphones were able not only to improve efficiency with up-to-date customer data but also to identify new services that those consumers might value and sell them on the spot.

■ **How will mobile engagement affect your *people*?** Identify all of the departments that mobile access will affect. What new skills will their staff need? Delta Air Lines ended up equipping flight attendants with mobile devices connected to customer information, in part to keep up with the expectations set by the consumer smartphone apps that the company had deployed.

Figure 10 Engineering For Mobile

IDEA cycle	Steps in the audit	Audit questions
3. Engineer your platforms, processes, and people for mobile.	Platforms: Determine what technology you need.	• What systems will the engagement use? • Do you have access to those systems? • Are they ready for mobile?
	Processes: Find the impact on corporate processes.	• What processes will the engagement touch? • Where will your current processes break down? • What changes will you have to make?
	People: Identify the impact on your staff.	• What skills will you need? • Will your organization support the engagement? • Do you have resources to make these changes?

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Source: Forrester Research, Inc.

Step 4: Analyze Results To Optimize Outcomes And Improve Customer Experience

The IDEA cycle comes full circle when you collect data that helps you monitor performance and figure out how to optimize outcomes. Since you'll need to update the mobile applications you are creating regularly, build data and analytics into the process from the start, rather than attempting to add it in later (see Figure 11). You'll want to:

■ **Identify the data you need.** Consider what data you will need in three areas: business data, usage data, and technical data. Business data is about a transaction or result. Usage data is about how people use the app itself. And technical data is about more detailed information, like crashes and response times. For each category of data, ask: Is it practical to collect this data?

■ **Determine if you're ready to use the data.** Determine if you can practically collect and store the data. And if you have the data, are you ready to use it? This question often reveals subtle organizational barriers to collecting data. Then determine if your organization has the right expertise in place and the right technology to analyze the data to generate actionable insights.

To make all of these steps in the IDEA cycle easier to remember, we've assembled them all together in one place (see Figure 12).

Figure 11 Analyzing Results

IDEA cycle	Steps in the audit	Audit questions
4. Analyze results to optimize outcomes and improve experiences.	Identify the data you need.	• What are the business metrics? • What are the usage metrics? • What are the technical metrics? • What other data could generate insights?
	Determine if you're ready to use it.	• Can you collect the data? • Do you have the analysis tools? • Do you have the analytics expertise?

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Source: Forrester Research, Inc.

Figure 12 An Overview Of Steps In The IDEA Cycle

Identify the mobile moments and context.

Assess audience
- Who are we serving?
- What devices do they use?
- What is their motivation and goal?

Determine context
- What is their situation and location?
- What is their emotional state or attitude?
- What are their preferences and history?

Design the mobile engagement.

Engage your customer
- What service will you provide?
- What will it accomplish?
- How will they find it?

Calculate customer benefit
- Does it accomplish a customer goal?
- Does it accomplish a goal in seconds?
- Is it convenient and enjoyable to use?

Determine the value to you
- Does it accomplish your goal?
- Is it cost-effective? Does it drive revenue?
- Are you committed to it for the long haul?

High

Benefit to your customer

Low

Extend to enhance	Just do it
Avoid for now	Redesign or reconsider

Value to you

High

Engineer your platforms, processes, and people for mobile.

Build platforms
- What systems will the engagement use?
- Do you have access to those systems?
- Are they ready for mobile?

Transform processes
- What processes will the engagement touch?
- Where will your current processes break down?
- What changes will you have to make?

Align people
- What skills will you need?
- Will your organization support the engagement?
- Do you have resources to make these changes?

Analyze results to monitor performance and optimize outcomes.

Identify the data you need
- What are the business metrics?
- What are the engagement metrics?
- What are the technical metrics?

Determine if you're ready to use it
- Can you collect the data?
- Do you have the analysis tools?
- Do you have analytics expertise?

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Source: Forrester Research, Inc.

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RECOMMENDATIONS

HINTS FOR SUCCESSFUL MOBILE EXPERIENCES

Mobile requires a new way of thinking. While it allows you to meet customers' needs in a new and immediate way, the ecosystem it fits into is often complex. To succeed in creating a great mobile experience, you should:

- **Use analytics to anticipate or predict consumers' needs.** Simplify consumers' lives with intelligent use of analytics. For example, Grocery IQ uses a combination of behavioral data and machine-learning algorithms to make suggestions based on aggregate behaviors. The company knows what products people are likely to buy based on past history and similar purchases by others, and it uses that insight to add recommended products to a consumer's shopping list.

- **Master progressive disclosure.** Consumers have increased their browsing on mobile phones as the capabilities have improved. However, mobile screens are too small to include 200 links on a single page, allowing for an infinite number of paths. Progressive disclosure serves as an excellent foundation for mobile design by forcing designers to constantly situate the end user in a meaningful context that supports and encourages discovery.

- **Use customer experience — not mobile KPIs — to measure success.** Typical key performance indicators (KPIs) for mobile initiatives focus on app or site performance, customer engagement, and financial returns (e.g., revenue, conversions).[9] While important, these KPIs don't go far enough in measuring the actual experience. Both Walgreens and BECU used "time" — the time a customer was waiting for a prescription or in line to deposit money — to measure their success. The financial upside was huge for both when they attacked this metric.

- **Beg, borrow, steal, and buy talent.** Ideation is critical to delivering experience-boosting mobile services, but the process needs user experience designers with background in and understanding of how to take advantage of device capabilities in new and creative ways. The astronomical valuations of small companies like Instagram, Tumblr, and Waze were in part due to talent acquisition.

SUPPLEMENTAL MATERIAL

Methodology

Forrester conducted the Asia Pacific Technographics® Online Benchmark Survey, 2013, fielded in May 2013 of 9,007 individuals in Australia, Indonesia, Japan, South Korea, metropolitan China (including Beijing, Chengdu, Dalian, Guangzhou, Nanjing, Ningbo, Shanghai, Shenyang, Suzhou, Wuhan, Wuxi, and Xian), Hong Kong, and metropolitan India (including Ahmedabad, Bangalore, Chennai, Hyderabad, Jaipur, Kolkata, Mumbai, New Delhi, and Pune). This survey is based on an online population of people ages 18 and older who are members of the Ipsos-MORI online panel. Ipsos weighted the data in all countries by age, gender, and geographical distribution to be representative of the adult online population in each country surveyed. In metropolitan China, the data was also weighted by income level for each city surveyed. In metropolitan India, the data was also weighted by the SEC AB groups. For results based on a randomly chosen sample of this size (N = 9,007), there is 95% confidence that the results fall within a range of statistical precision of plus or minus 2.0% to 4.3% of what results would be if each country's entire population of online individuals (defined as those online weekly or more often) ages 18 and older had been surveyed. The survey sample size, when weighted, was 9,007. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) Please note that this was an online survey. Respondents who participate in online surveys have more experience with the Internet in general and feel more comfortable transacting online. The data is weighted to be representative for the total online population on the weighting targets mentioned, but this sample bias may produce results that differ from data collected offline. The sample used by Ipsos is not a random sample; while individuals have been randomly sampled from the Ipsos panel for this survey, they have previously chosen to take part in the Ipsos online panel.

Forrester conducted the European Technographics Online Benchmark Survey, 2013, fielded in May 2013 of 22,027 European individuals in the UK, France, Germany, Italy, the Netherlands, Poland, Spain, Sweden, and Turkey. This survey is based on an online population ages 16 and older who are members of the Ipsos-MORI online panel. Ipsos weighted the data by age, gender, and online frequency to demographically represent the online adult population in each country. In Turkey, the data was weighted by age and gender only. For results based on a randomly chosen sample of this size (N = 22,027), there is 95% confidence that the results have a statistical precision of plus or minus 0.7% of what they would be if the entire population of Western European online (defined as those online weekly or more often) individuals age 16 and older had been surveyed. This confidence interval can widen to 3.1% when the data is analyzed at a country level. The survey sample size, when weighted, was 22,027. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) Please note that respondents who participate in online surveys have more experience with the Internet in general and feel more comfortable transacting online. The data is weighted to be representative of the total online population on the weighting targets mentioned, but this sample bias may produce

results that differ from data collected offline. The sample used by Ipsos is not a random sample; while individuals have been randomly sampled from the Ipsos panel for this survey, they have previously chosen to take part in the Ipsos online panel.

For Technographics Clients: How To Get More Technographics Data Insights

You can find more information about the data on the Survey page online. From this page, you will be able to download the Survey Instrument.

For data subscribers, please contact your data engagement director or manager with any questions regarding the use of Forrester's Consumer Technographics Surveys or custom data analyses. If you do not have a direct point of contact, please pose all inquiries to the Technographics Team, who can be reached at datarequest@forrester.com.

For non-data subscribers, please contact the Technographics Business Development Team with any questions regarding the use of this data or custom data projects at data@forrester.com.

Forrester's US Mobile Mind Shift Online Survey, Q3 2013, was fielded in September 2013 to 8,249 US individuals ages 18 to 88. For results based on a randomly chosen sample of this size (N = 8,249), there is 95% confidence that the results have a statistical precision of plus or minus 1.08% of what they would be if the entire population of US online individuals ages 18 and older had been surveyed. Forrester weighted the data by age, gender, income, broadband adoption, and region to demographically represent the adult US online population (defined as those who go online weekly or more often). The survey sample size, when weighted, was 8,224. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) The sample was drawn from members of an online panel managed by MarketTools, and respondents were motivated by receiving points that could be redeemed for a reward. The sample provided by MarketTools is not a random sample. While individuals have been randomly sampled from MarketTools' panel for this particular survey, they have previously chosen to take part in the MarketTools online panel.

Please note that respondents who participate in online surveys generally have more experience with the Internet and feel more comfortable transacting online.

In addition to sampling error, one should bear in mind that the practical difficulties in conducting surveys can introduce error or bias into the finding of opinion polls. Other possible sources of error in polls are probably more serious than theoretical calculations of sampling error. These other potential sources of error include question wording, question ordering, and nonresponse. As with all survey research, it is impossible to quantify the errors that may result from these factors without an experimental control group, so we strongly caution against using the words "margin of error" in reporting any survey data.

These statements conform to the principles of disclosure of the National Council on Public Polls. You can find more information about the data on the Consumer Data page online. From this page, you will be able to download the Survey Instrument.

Companies Interviewed For This Report

[24]7	Plastic Mobile
3Cinteractive	Point Inside
Acquity Group	Rosetta
American Airlines	SapientNitro
Bank of America	Sephora
Boeing Employees Credit Union (BECU)	Starwood Hotels & Resorts
Cynergy	Strativity
Delta Air Lines	Symbility Solutions
E-Trade	T3
eBay	TD Ameritrade
Flipboard	Ubermind (Deloitte Digital)
Grocery iQ	United Airlines
Hertz	USAA
Lose It!	Walgreens
Nest Labs	

ENDNOTES

[1] In the mobile mind shift, marketers must decrease the distance between what their customers want and what they get. See the April 19, 2013, "Marketing Strategy For The Mobile Mind Shift" report.

[2] Source: US Mobile Mind Shift Online Survey, Q3 2013.

[3] Source: European Technographics Online Benchmark Survey, 2013, Asia Pacific Technographics Online Benchmark Survey, 2013.

[4] Source: US Mobile Mind Shift Online Survey, Q3 2013.

[5] Source: US Mobile Mind Shift Online Survey, Q3 2013.

6 You can measure the impact of the mobile mind shift on your customers to determine the urgency with which you need to act. See the April 19, 2013, "The Mobile Mind Shift Index" report.

7 New interfaces like voice and multitouch are replacing the mouse and keyboard. See the April 12, 2013, "Customer Experience In The Post-PC Era" report.

8 Your systems of record are not ready for the mobile mind shift. You must engineer systems of engagement. See the November 16, 2012, "Great Mobile Experiences Are Built On Systems Of Engagement" report.

9 Consumer expectations have shifted. As a result of their perpetual mobile connections, consumers now expect relevant information and services anytime and anywhere. Even so, only 46% of eBusiness professionals surveyed have implemented a mobile analytics solution. See the July 16, 2013, "Use Analytics To Build Mobile Advantage" report.

About Forrester

Global marketing and strategy leaders turn to Forrester to help them make the tough decisions necessary to capitalize on shifts in marketing, technology, and consumer behavior. We ensure your success by providing:

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