Mobile Devices and Marketing

A Look at User Preferences and Behaviors for Advertiser Opportunities

Fifty-one percent of the US population uses a smartphone and 46% uses a tablet at least once per month, according to eMarketer’s 2014 estimates—both up from 2013. Given the increase in consumers’ use of mobile devices, it is not surprising that mobile advertising spending is seeing a meteoric 83% increase in 2014 (vs. 2013). By 2015, mobile ad spending will grow by another 50% to $26.6 billion.

To better understand the impact the mobile revolution is having on consumer behavior, Burst Media surveyed nearly 750 US online adults aged 18 or older who use a mobile device to access the mobile web and/or applications. We conducted the study in the first three weeks of June and focused on device preference, apps used, reaction to advertising and mobile video consumption.

1 eMarketer, March and April 2014.
2 eMarketer, June 2014.
Key Findings

Smartphones edge tablets as the primary device for accessing the mobile web and applications. A majority (54.4%) of respondents say smartphones are their go-to device, vs. 32.2% who say tablets.

Women generally spend more time than men accessing the mobile web and/or applications. In a typical day, 74.6% of women vs. 60.5% of men spend at least an hour accessing the mobile web and/or applications from a mobile device.

Mobile browsers are used more than apps. One-third (33.4%) of all respondents say most or all of their mobile time is spent with a mobile browser, vs. 15.8% for apps—26.1% say their time is split equally.

App usage differs by gender and primary device type. One-half (49.8%) of women vs. one-third (32.3%) of men use social media apps in a typical week.

Primary tablet users are more likely than primary smartphone users to have clicked on in-app ads. Three-in-five (61.9%) primary tablet users vs. 54.1% of primary smartphone users have clicked on ads that appear within apps.

Men are more likely to have clicked on an ad within a mobile browser. Three-fifths (63.1%) of men clicked on mobile browser ads vs. 52.3% of women.

Two-thirds of respondents use mobile devices inside retail locations. Among these respondents, 50.4% of women and 37.1% of men have accessed coupons.

The vast majority (80.4%) of respondents watch online videos on their mobile device(s). Nearly 3-in-5 (57.9%) women and 52.1% of men frequently watch videos on their devices via a mobile browser and/or app(s).
The majority (54.4%) of respondents to our survey cite a smartphone as their primary access device to the mobile web and/or applications. One-third (32.2%) say a tablet and 6.0% say other mobile devices are their primary means to access the mobile web.

Gender and Age Breakdowns

The smartphone is cited by both men and women as the primary device by which they access the mobile web and/or applications (58.1% and 51.4%, respectively). However, women have a much greater affinity than men for tablet devices. Among women, two-in-five (39.1%) say a tablet is the primary mobile device by which they access the mobile web; compared to 23.7% of men.

Among all 18-34 year-old respondents, 63.9% cite a smartphone as their primary device to access the mobile web and/or applications. [See chart #1.] From this peak, the share of respondents citing a smartphone as their primary access vehicle to the mobile web drops to one-half (52.4%) of the 35-54 year-old segment and drops further to 42.3% of respondents aged 55 years or older. Conversely, the use of a tablet as the primary means to access the mobile web increases with age—rising from 21.6% among 18-34 year-olds to 36.2% of 35-54 year-olds and rising further to 42.8% of respondents aged 55 years or older.

As would be expected, the number of women saying a tablet is their primary mobile access device increases with respondent age; going from 28.1% of women 18-34 years to 43.3% of women 35-54 years and climbing further to nearly half (48.8%) of women aged 55 years or older.

Among men aged 55 or older, one-third (34.3%) cite a tablet as their primary mobile device to access the web—compared to 14.0% of men aged 18-34 and 27.4% of men aged 35-54.
Most men (60.5%) and women (74.6%) spend at least an hour of a typical day on their mobile device(s) accessing the mobile web and/or applications. These figures include pluralities of both men and women (25.6% and 34.2%, respectively) who turn to their mobile device(s) on a typical day between one and two hours for mobile web and app use. [See chart #2.]

Overall, men are more likely than women (19.4% vs. 7.7%) to say they spend fewer than 30 minutes per day on the mobile web or using apps—however, men are slightly more likely than women (11.4% vs. 7.2%) to say they spend four or more hours a day on the mobile web or using apps.

### Age Makes a Difference

One-fifth (22.2%) of respondents can be classified as “heavy users”—spending three hours or more of a typical day on the mobile web and/or apps. Men aged 25-34 is the segment with the greatest percentage of heavy users, with nearly one-half (46.2%) spending at least three hours per day—including 30.8% who report accessing the mobile web more than four hours per day. Interestingly, mobile web usage is also heavy among both men and women aged 35-44 years: one-third (33.3%) of men and two-fifths (39.4%) of women this age spend at least three hours per day.

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**INSIGHT #2**

**Women Generally Spend More Time Than Men with Mobile**

They just can’t put it down: more than one-third of 35 to 44 year-olds spend at least three hours on mobile device(s) on a typical day.
INSIGHT #3
Browsers are Used More than Apps

When it comes to using installed apps vs. surfing the web from a browser such as Safari or Chrome, one-third (33.4%) of all respondents say all or most of their mobile time is spent with a browser. Just 15.8% say all or most time is spent with apps—and 26.1% say their time is split equally between browsers and apps. Nearly one-fifth (18.7%) says they’re not sure.

Among men, two-fifths (39.8%) use a browser all or most of the time—and nearly 3-in-10 (28.2%) women use a browser all or most of the time. Men are also more likely than women (18.7% vs. 13.5%, respectively) to say they use installed apps all or most of the time. Compared to men, more women take a balanced approach in how they spend their mobile time: 30.2% of women vs. 21.0% of men say “an equal amount of my time is spent with apps and a browser.”
Two-fifths (41.6%) of respondents overall say they use social media/networking apps most in a typical week—edging out weather apps (37.8%) and games (35.3%) as the leading category of app.

There are significant differences in app usage between men and women—one-half (49.8%) of women vs. one-third (32.3%) of men say they use social media/networking apps most in a typical week. [See chart #3.] Three-fifths (60.5%) of women 18-34 use social media apps most in a typical week—much more than men the same age (36.1%).

The most dramatic app category usage differences between men and women (respectively) are: news (32.1% vs. 24.1%), shopping (12.3% vs. 28.9%), sports (36.0% vs. 7.7%), books/periodicals (14.4% vs. 22.5%), and food and drink (8.7% vs. 18.8%).

There is a difference in the preferred apps of respondents who use a smartphone as their primary device to access the mobile web and those who prefer a tablet. In looking at smartphones and tablets respectively, some app categories such as social media/networking (43.9% vs. 41.5%) and music (25.0% vs. 25.2%) rank even—but others have significant gaps. These include games (34.7% vs. 43.8%), entertainment (23.0% vs. 30.7%), sports (21.7% vs. 13.6%), books/periodicals (16.2% vs. 26.8%) and navigation/mapping (23.6% vs. 15.6%).

In-App Ads: Who’s Tapping

Primary tablet users are more likely than primary smartphone users to have clicked on in-app ads (61.9% vs. 54.1%, respectively)—however 35.7% and 37.0% (respectively) say they rarely clicked. However, more than one-quarter (26.2%) of tablet users say they have clicked frequently* on ads within apps on their mobile device, vs. 17.1% of smartphone users. Women are also more likely than men (21.7% vs. 17.9%) to have frequently tapped/swiped on in-app ads. At 36.2%, women aged 55 or older in particular frequently clicked on in-app ads.

*Subtotal of “All the Time” and “Sometimes” responses.
Interestingly, while women are more likely than men to have tapped or swiped on in-app ads, men are more likely to have taken action on an ad within a mobile browser. Overall, three-fifths (63.1%) of men clicked on mobile browser ads vs. 52.3% of women—figures that include respondents who say they rarely clicked (35.2% and 33.6%, respectively). However, 3-in-10 (27.9%) men and 18.7% of women say they frequently* swiped or tapped on mobile browser ads.

Among the 18-34 years segment, 26.0% of men say they frequently tapped/swipes on mobile browser ads, compared to 14.9% of women this age. The difference between men and women’s responses becomes more pronounced with the 35-54 year-old segment where 31.6% of men vs. 16.6% of women frequently tapped/swiped on ads seen on a mobile browser. Only among the oldest segment (respondents aged 55+) do men and women perform similarly with 24.2% and 28.2% (respectively) saying they frequently tapped/swiped on ads within a mobile browser.

Unlike the case with in-app ads, primary mobile device does not impact action on browser ads. One-quarter (24.6%) of primary tablet users and 23.1% of primary smartphone users frequently tapped or swiped on ads within a browser.

*Subtotal of “All the Time” and “Sometimes” responses.
INSIGHT #6
Mobile Devices Help Shoppers Compare and Save at Retail Locations

Two-thirds (67.4%) of respondents use mobile device apps and/or browsers inside physical retail locations for shopping purposes—including one-half (48.4%) who say they frequently* use devices. Primary smartphone users are more likely than primary tablet users—57.2% vs. 42.8% respectively—to use a device frequently while shopping in a physical retail location.

Among men, nearly 3-in-5 (57.3%) 18-34 year-olds use a device for shopping frequently while within a location, outpacing men aged 35-54 (50.5%) and 55+ (25.7%). Among women, 35-54 year-olds (55.8%) outpace 18-34 year-olds (46.4%) and those aged 55+ (44.2%) in frequently using a mobile device while in a brick-and-mortar store.

Going Mobile While Retail Shopping

Overall, more than two-fifths (44.7%) of respondents who use mobile devices inside physical retail locations do so to access coupons and/or sales promotion codes. Two-fifths (39.6%) research and compare prices of different stores, and 32.3% research and compare prices of different brands.

Not surprisingly, there are differences between men and women’s behavior when using a mobile device in a physical retail setting. One-half (50.4%) of women vs. 37.1% of men access coupons/codes—but men are more likely than women to compare store prices (42.6% vs. 37.4%) and compare brand prices (38.7% vs. 31.9%). [See chart #4.]

Interestingly, 61.1% of men aged 18-34 say they research and compare the product reviews of different brands while in a retail setting—far outpacing our findings for men (30.9%) and women (29.7%) overall. One-fifth (22.2%) of 18-24 year-old women use a device inside a location to post a shopping-related status update, tweet or pin on social media—much higher than our overall findings for women (5.3%) and men (3.5%).

*Subtotal of “All the Time” and “Sometimes” responses.

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**Chart #4, Devices and Shopping**
Burst Media, July 2014
n = 343 | Margin of Error = +/- 5.3% | “Other,” “Prefer not to say” and social media-related responses not included. (Percentages are rounded.)
The vast majority (80.4%) of respondents watch online videos on their mobile device(s). This figure includes nearly 3-in-5 (57.9%) women and 52.1% of men who say they watch online videos frequently*. Not surprisingly, younger respondents are more likely than older respondents to watch: two-thirds (64.8%) of 18-34 year-olds watch videos frequently on a smartphone and/or tablet, vs. 55.0% of 35-54 year-olds and 41.4% of respondents aged 55 or older.

**Mobile Video Advertising Recall**

Among respondents who watch videos on their mobile devices, 9-in-10 (92.4%) recall advertising within video. This figure includes more than three-fifths (63.2%) who say they notice video and/or banner ads frequently within mobile videos. Only 6.4% overall say they “never” notice video ads.

Men are more likely than women (66.4% vs. 60.6%) to frequently notice mobile video ads. Interestingly, more than three-quarters (77.3%) of men aged 35-54 say they notice these ads frequently, as do 72.1% of women aged 55 or older.

*Subtotal of “All the Time” and “Sometimes” responses.
According to *The Wall Street Journal* and eMarketer, Americans spend nearly a quarter of their total daily media time on smartphones and tablets—and in 2014 mobile will draw more money from advertisers than the centuries-old newspaper industry or the nearly century-old radio sector, a sign of just how rapidly technology is transforming media habits.³

Marketers seeking to reach and engage mobile audiences have a variety of targeting and creative options at their disposal—as is the case with display, gone are the days of having only standard banners.

Mobile rich media, when paired with mobilized sites on browsers or within installed apps, can be an effective branding and direct marketing vehicle—especially when location-based targeting (e.g., geo-fencing within a mile radius of a shopping mall) is applied. Beacons—devices installed in brick-and-mortar locations that can “beam” coupons and branded content to nearby smartphones via app push notifications—can also be very effective in pinpointing consumers.

Mobile video advertising can be very effective for branding as 9-in-10 of our respondents say they notice mobile video ads while engaged with video content.

Most importantly, marketers need to know their audience’s mobile preferences—not just which device or devices consumers are using, but how they are spending their time with the Internet and/or apps.

Founded in October 1995, Burst is a full service provider of digital advertising solutions for independent web publishers and brand advertisers.

We’ve grown up in the digital space and clearly see how it fosters vibrant and diverse communities that are redefining the way brands must communicate, interact and engage with consumers. For Burst nowhere is the power of communities more current than in the independent web—and the independent web is what Burst believes in. Where we succeed is bringing the independent web to brands that want to reach loyal, highly segmented audiences—no one does it better and at greater scale than Burst. Burst is the independent web—and through our direct publisher relationships and our cutting-edge creative solutions we bring success to publishers, advertisers and audiences alike.

In addition to our digital media offerings, we also market AdConductor, an ad management solution, to ad-supported businesses such as ad networks, technology providers, portals and individual websites.

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Trends in Internet use and consumers’ online purchasing behaviors are constantly evolving, so it can be very difficult to stay up to speed. That’s why Burst Media publishes Online Insights—our research series that highlights emerging trends in online media and ecommerce. Findings reported in Online Insights are based on an online survey fielded across our collection of sites.