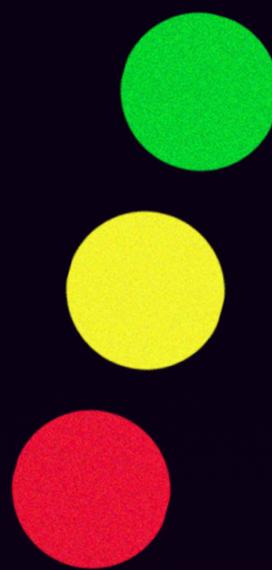


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Mobile Nation:

How Smartphones Have
Rewired American Life

Research Included

Fourteen-month longitudinal study conducted between 2018-2019

3,600 respondents

Interviews with smartphone users of all backgrounds

Focus groups in San Francisco and Nashville

Synthesis of 100+ pieces of secondary research

Methodology

Comprehensive review of literature

Qualitative: 20 in-depth interviews and 2 focus groups

Quantitative: Custom survey with sample size of 3,550 respondents across the US

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Executive Summary

Part 1

Radical Reliance: *When You Positively, Absolutely Have to Be Mobile*

Part 2

The Rites of Mobility: *The Car vs. The Smartphone*

Part 3

Conscious Connectors: *Born With a Mobile Phone*

Part 4

Mobile Learners: *Learning Digital Mobility as Adults*

Part 5

Gendered Mobility: *Men and Women's Use of Smartphones*

Part 6

How People Want Brands to Show Up on Mobile

P A R T 1

Radical Reliance: When You Positively, Absolutely Have to Be Mobile

Since the iPhone debuted in 2007, there's been a rapid and sometimes unsettling ramp-up with respect to how mobile devices are not only part of our lives but also sometimes the dominant force within them.



Worldwide, there are now more subscriptions to mobile services than subscriptions to electricity services (World Bank 2019). Closer to home, recent studies suggest a national epidemic of mobile dependency, with some claiming that mobile addiction is as serious a threat to health as substance abuse.

Alarmism aside, the genesis of this study was quite simple: to probe a seismic cultural and technological shift and to ask the basic question, **What is the role of the mobile phone in our lives?**

For many of us, the phone is a constant companion. It's one of the last things we see as we fall asleep. Its alarm is the first sound we hear when we wake. It infiltrates how we think, play, date, navigate the world, transport ourselves through it, eat and "be" for a wider audience whom we don't know and will never meet. The smartphone is now *the* most important cultural object of early-twenty-first-century living, bringing many of our ideas and values into bold relief.

We asked people what their phones do for them and why they are important. The answers were largely functional: phones are for predictable things such as communication, entertainment, shopping, navigating, taking photos and paying bills. (GS&P Qualitative 2018)



“It doesn’t seem like you could go a day without checking on things you need. It’s necessary; it’s addictive; it’s fantastic.”

Male respondent,
age 33, New York



“I mean, it’s access—whether it’s people or information. You’re a few clicks away from whatever it is that you’re looking for.”

Female respondent,
age 29, Georgia

But in in-depth interviews, we were able to dig down deeper into the new codependence of the human and the technical and saw and heard how deeply intertwined we have become with our smartphones.

We asked respondents to try to imagine the unimaginable and to think the unthinkable. Imagine a locked drawer with your phone inside, and it's not coming out for 24 hours.

What happens?

"I would probably start shaking and going into convulsions."

Male respondent,
Age 31, Michigan



"I can't live without my phone. I can't work; I can't talk; I can't even get where I need to go. There's no way I can survive without it."

Female respondent,
age 29, Georgia



"I would be lost, like I was disconnected from the world."

Female respondent,
age 23, California



Beyond the shell shock resulting from being device-free, some explained why life without a phone is unthinkable:

“I recently moved to a new state, started a new job, so I’m not in my familiar setting with my familiar social group, and so I wouldn’t feel connected to the things that are familiar to me. It would primarily be that. I would feel alone. I would feel cut off.”

Female respondent,
age 24, California



“I wish I could get off my phone. I can’t put it down. It’s my livelihood. I use it for everything. I read a lot on my phone. I am on social media a lot on my phone. Music, playing games. And I don’t have to go on a computer to do any of that. I’d probably say ... I have a pretty big dependency on it.”

Male respondent,
age 23, Connecticut



“There’s no way. First of all, I work in surgery, and I’m away from my kids for 12–14 hours a day when I’m working. I mean I have to have my phone to have contact. To know ... I have GPS on my kids. I know where they are at all times. I get alerts when they are on the bus, off the bus, at school, coming home, if they’ve left the safe zone when they’re playing outside, if they’re at the ball field or at the dance studio. I have three kids, and so I need it to keep in contact with them.”

Male respondent,
age 38, New York



What begins to emerge is the idea that we not only use our phones a lot (we all know that) but also have become newly and radically reliant on the fact that our phones are always there for us.

Qualitative conversations suggested a deep level of need in relation to the phone—certainly more than we'd anticipated. We took this a step further and probed the parameters of smartphone dependency in a large-scale quantitative study.

We asked 3,550 people what they would give up to keep their phones. And the results were startling.



47%

would give up fame



35%

would give up sex
for one year



30%

would give up talking to their
best friends for one year



24%

would give up hot water
for one year



22%

would rather sleep with their
smartphones than with their
significant others



17%

would rather live life without
their dominant hand

A significant number of your friends, family members and neighbors would prefer to be anonymous, celibate, lonely, smelly and left-handed than do without the indispensable device.

OK, these are pop research questions, but they point to something that the old flip-top Nokia or even Palm Pilot was never able to achieve. The smartphone's addictive power and all its potential to allow humans to do more, see more and know more have given rise to smart mobility as a new and necessary superpower. And this superpower isn't just in the hands of a fortunate few but available to many.

In just over a decade, the smartphone has reshaped how we think about ourselves and what matters to us. In this report, we examine how this happened, why it matters, and what it means for how to engage with a new generation of digital natives.

P A R T 2

The Rites of Mobility: The Car vs. The Smartphone

**FIRST, A CULTURAL TRUTH ABOUT ADOLESCENCE
AND MOBILITY IN AMERICA:**

Sixty percent of people currently believe that a child should get their smartphone between the age of 12 and the age of 15.

WHY DOES THIS MATTER?

1

60% convergence around anything in society suggests that it's a cultural truth. A cultural truth is a shared perception relative to a group. It often indicates a symbolic system linked to a set of activities/practices.

2

We all understand that adolescence is a pivotal time in the human lifecycle. Neurologically, we are still developing our emotional responses, decision making and, hopefully, impulse control. (WHO, Adolescent Health 2018)

3

The ceremonies and events that accompany adolescence (such as receiving your first smartphone) are tools that adults pass on to children to enable them to gain autonomy and transition into adulthood.

Anthropologists call the events that mark the transition into adulthood “rites of passage.” They often happen in a three-part process:

Preparation:
begin social or psychological transformation

Transition:
acquisition of new status or identity

Incorporation:
public acknowledgement of the transition

For nearly a century, there was a very established event in the US that made “becoming an adult” official: getting behind the wheel.

The driver’s license marked the transition from childhood and dependence to adulthood and freedom. A set of wheels, a paint job and Mom’s old Civic were the open sesames to freedom, mobility and making a statement to the world.

IN LINE WITH THE THREE PHASES, THE CAR AS A RITE OF PASSAGE COULD BE BROKEN DOWN INTO DIFFERENT CHAPTERS:

Preparation:

Also known as learning to drive. The teeth-gritting, sweat-stained edging around the local supermarket parking lot that we did with Mom or Dad is typically how we gain knowledge of a new, self-directed logic of mobility. For all the bumps, stops and reverse-parking scrapes, this is how we become familiar with the physical and written rules of “the road.”

Transition:

Lucky kids get the new cars they want, but most get hand-me-downs or previously owned cars. Stylings, accessories, new sound systems and other forms of customizing show that we’re escaping parental control on our terms and on, quite literally, our own wheels. (Cross 2018)

Incorporation:

Getting a license. If we presume that the learner hasn’t terrorized the examiner, the newly licensed 16-year-old is legally allowed on the road. There are plenty of things they still can’t do legally, but they can drive hundreds of pounds of metal at high speed down unfamiliar highways. The cultural permission to do this makes the shift into adulthood institutionally legitimate.

However, that was then, and this is now.



IN 1983

46%
of 16-year-olds had a license.

(Sivak and Schoettle 2016)



IN 2018

25%
of 16-year-olds had a license.

(Statista 2018)

Within a very short amount of time, the charms of car ownership and driving have diminished. There are a variety of things driving (no pun intended) this change: cars are expensive; they require fuel; and they require maintenance and insurance. But perhaps more importantly,

although it's thrilling to have the freedom of the road, that freedom suddenly pales in comparison to having the freedom of the whole world at your fingertips and in your hand—which you have with a smartphone. No maintenance. No insurance. Anyone can own a phone.

We use the term “Mobile Learners” to describe those who came of age with a car and learned to use mobile as adults. For them, mobility was physical.

For Gen Zers (born after 1997) and young Millennials (born after 1991), mobility is virtual. These mobile natives came of age with a phone, not a car. Their behaviors on and offline showcase a relationship to mobile that’s different from older generations who learned how to use mobile devices as adults.

The phone as a rite of passage into adulthood can be broken down as follows for mobile natives born after 1991:

1. Preparation:

Learn new ways through observing online behaviors.

85% use social media apps on their phones
(vs 74% non-mobile native)

Across all groups, those who came of age with a smartphone are the highest users of social media.



2. Transition:

Practice communicating online and consuming content.

41% engage in social media messaging
(vs. 32% non-mobile native)

Establishing a communication style and a regular cadence of communication with friends becomes the foundation of identity creation. Messaging allows users to maintain “always on” connectivity.

83% watch video (Netflix and YouTube) (vs. 65% non-mobile native)

Video consumption on mobile devices replaces live moments shared among peers. Video replaces social and physical connections and becomes the medium through which selfhood and social norms are learned.

3. Incorporation:

Master new identity by making the transition public.

61% post selfies
(vs. 45% non-mobile native)

They are conscious about what they post and care less about showing off and more about curating their image to reflect who they are.

51% use photo-editing apps—highest of all groups
(vs. 41% non-mobile native)

Sharing the way you look and what you like are key to performing your adulthood to the world.

Different rites of passage and two main groups of smartphone users

Mobile Learners:

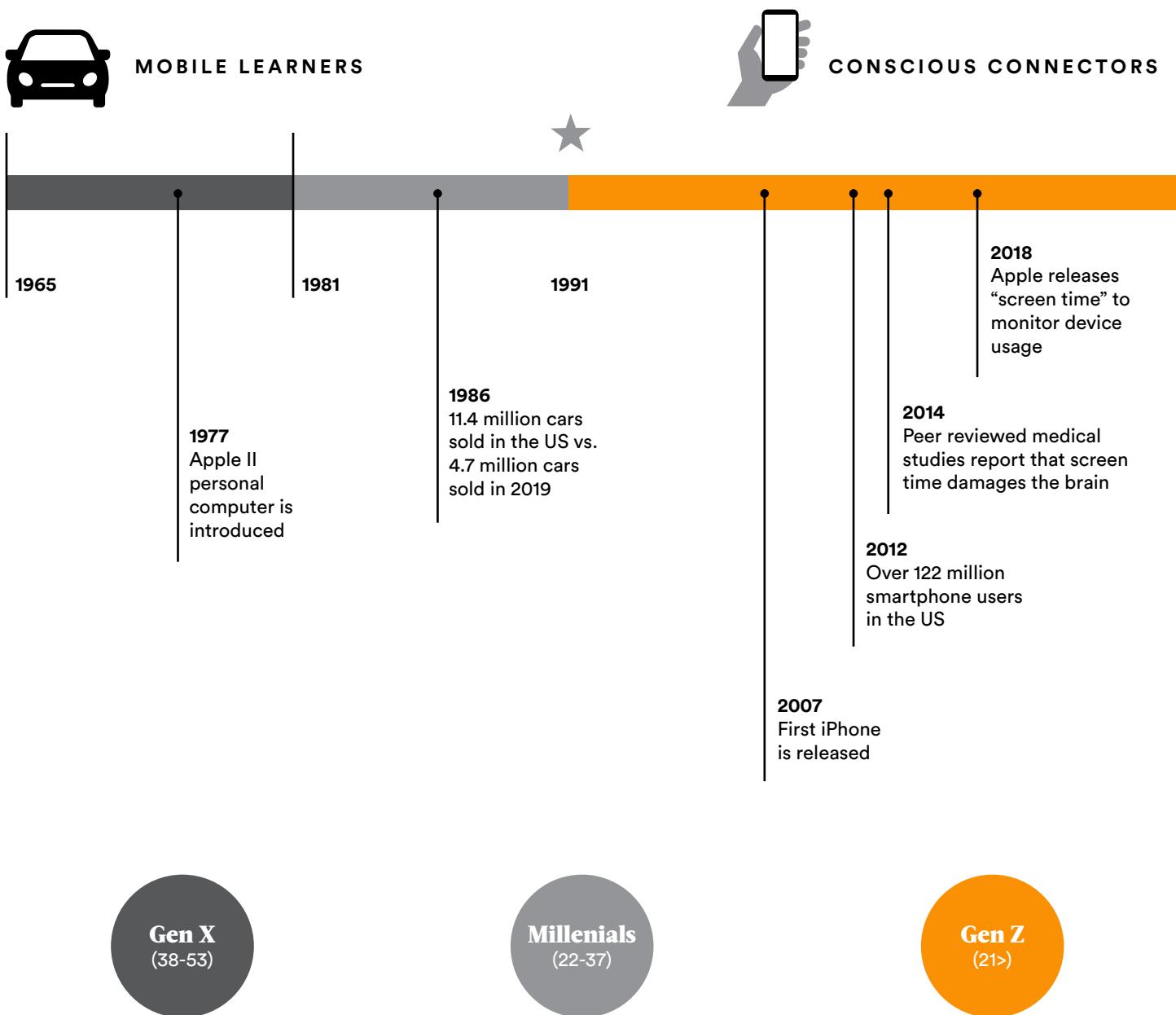
They came of age in the age of the car and “learned mobile” as adults. Physical mobility gave them a sense of freedom in the world.

Conscious Connectors:

Gen Zers and early Millennials who were born after 1991. Access to a mobile phone was their adolescent rite of passage. It was the Wi-Fi connection, not the driver’s license, that made them feel part of the bigger, wider, addictive world of mobile.

The sections that follow explore the differences between these groups and show that who we are impacts how we mobile.

Mobile Learners and Conscious Connectors



Rites of passage profiles



**Mobile
Learners**

**Conscious
Connectors**

1

Adopters of mobile

1

Mobile native

2

Born on or before 1991

2

Born after 1991

3

Default off line, value
online moments

3

Default online,
value offline moments

4

Mobile is information

4

Mobile is entertainment

P A R T 3

Conscious Connectors:

Born With a Mobile Phone

A new understanding of mobile

Conscious Connectors (ages 18–27) were born into a context of heightened mobile awareness, from reports that show how screen time damages the brain to increasing anxiety and depression among teens. As digital natives, they are seamlessly connected to mobile devices in ways that are inconceivable to Mobile Learners. For them technology is omnipresent--but it's also invisible. Yet their constant connectivity is not passive, as they use mobile in ways that are expressive and self-aware.

Conscious Connectors are always *on*.



- 60%** think they're on their phones too much. On average, they use their phones four hours a day. They're also more likely to check the phones across a range of intimate social exchanges:
 - 51%** have checked during a first date (vs. 41% Mobile Learners)
 - 50%** have checked while discussing relationship issues with a friend (vs. 40% Mobile Learners)
 - 32%** have checked during sex (21% Mobile Learners)

When Conscious Connectors check their phones - the connection has a seamless quality. While older generations may find the presence of a phone to be distracting or even taboo during 1-1 moments, Conscious Connectors experience offline intimacy and online connection simultaneously.

Conscious Connectors value offline moments a great deal.



Technology has given this group an unprecedented degree of connectivity. In spite of the “always on” nature of their mobile engagement, Conscious Connectors value the importance of showing up for “real life.” When asked about intimate gatherings and celebrations, this group was three times more likely to emphasize the value of purposeful IRL moments (20% Conscious Connectors vs. 6% Mobile Learners):



They're into self-expression (over selfies)



Conscious connectors are not the main drivers of selfie culture. In fact, only 33% reported posting selfies often. However, 51% (vs. 40% Mobile Learners) actively used photo and video editing apps like VSCO which are known for creativity and self-expression. Notably these apps lack the option to share likes and comments, which add more freedom to be creative with less opportunity for critique and social pressure.

Self-expression is important in their offline experiences too. When asked what they were unwilling to give up for one year, 61% of Conscious Connectors (vs. 43% Mobile Learners) said they would not give up new clothes. This claim supports both their commitment to self-expression and the importance they give to connecting offline.

Mobile is entertainment— to be consumed and created.

Contrary to the myth that digital natives have an irrational tech-dependence, they describe their devices pragmatically.

For 49% of Conscious Connectors (vs. 38% of Mobile Learners), smartphones primarily. Unlike Millennials, for example, who attached a deep emotive connection to their phones. Conscious Connectors spend a lot of their time streaming video and music content, two activities they can't stop doing. Their attraction to entertainment, and music in particular, extends to offline preferences. When asked how they like to spend their free time offline, 77% selected a creative activity such as playing an instrument, drawing, or writing and 80% said that expressing themselves creatively is important (Wunderman Thompson 2019). They don't simply consume entertainment; they help create it.

P A R T 4

Mobile Learners: Learning Digital Mobility as Adults

Learning Digital Mobility as Adults:

Mobile Learners experienced adolescence in the age of the car. Their proximity to digital is more distant on the coming of age timeline and their relationship to smartphones reveals the lack of closeness. Sometimes the ways they use their devices mimics analogue behavior. Other times, non-digital channels are preferred.

Millennials, however, showcase a unique relationship to smartphones. As the first generation to integrate mobile into their daily routines, they're more physically and emotionally attached to smartphones than their Mobile Learner counterparts.

Their default mode is face-to-face.



1 Mobile learners experienced adolescence in the age of the car. Their default mode is physical, face-to-face connection rather than digital interaction.

Mobile Learners observe stricter phone-etiquette standards. They are less likely to check their phones during IRL moments.

79%

won't check during sex
(vs. 68% of Conscious Connectors)

59%

won't check during a first date
(vs. 49% of Conscious Connectors)

2 They value online life but lack the need to consciously curate a digital persona.

55%

rarely post selfies
(vs. 40% of Conscious Connectors)

Similarly they are less likely to be seduced by the addictive qualities of social media. When asked what was the one thing they could not stop doing on their phone, Mobile Learners cited texting as their top choice whereas only **22%** reported turning to social media.

Mobile Learners value the functional aspects of smartphones.



3 Mobile Learners see mobile as an information resource.

The top three app categories they are more likely to use on their smartphones include:

 **69%** Weather

 **54%** Navigation

 **49%** News

4 Conscious Connectors see mobile as a source of entertainment.

The top three app categories they are more likely to use on their smartphones include:

 **85%** Social Media
(vs. 74% of Mobile Learners)

 **83%** Video
(Youtube and Netflix)
(vs. 65% of Mobile Learners)

 **51%** Photo & Video Editing
(vs. 41% of Mobile Learners)

Importantly, Mobile Learners value the mobile phone as a means to communicate. They engage with their smartphones and communication apps in ways that more closely mimic traditional telephone communication.



22%

can't stop texting (significantly higher than Gen Zers)

Mobile learners didn't grow up on social. Texting is an extension of one-on-one phone communication.

Mobile Learners don't experience an emotive connection to mobile phones as closely as Conscious Connectors do.

They're more likely to select "None of these" in response to questions that probe for nonrational connections with phones (32% none of these vs. only 20% of Conscious Connectors).

There's less widespread dependency, especially among Gen Xers and Baby Boomers.

Fewer of them think they're on their phones too much (42% of Mobile Learners vs. 60% of Conscious Connectors).

Unlike Conscious Connectors, for whom mobile is the hub of their world, Mobile Learners are willing to give up service and entertainment apps to keep their phones.

Remember that unlike Conscious Connectors, who came of age in the decade of Uber, Netflix and Spotify, Mobile Learners remember a “before time.” So giving up these apps/services is acceptable to this group, and they’re far more likely to defer to pre-mobile technologies to satisfy their entertainment needs.

Mobile Learners are much more likely to give up the following:



Uber—84% (vs 74% of Conscious Connectors)



Netflix—63% (vs 46% of Conscious Connectors)



Music streaming—57% (vs 32% of Conscious Connectors)



New clothes—55% (vs 39% of Conscious Connectors)

Accustomed to real-life interactions, they are less concerned about how they show up IRL because that is their default.



66% of Mobile Learners won't give up TV, their traditional medium of entertainment (vs 53% of Conscious Connectors)

Millennials: highest attachment to mobile-phone overall

Across nearly all areas, Millennials are more dependent on their phones than other groups are.

Millennials are the first generation to fully immerse themselves in the technological innovation of the smartphone; as young adults they experienced smartphones at school and work. But as the first generation to fully experience and integrate mobile technology and social media, they encountered challenges in the process of adoption.

They had to learn that their posts and digital footprints have far-reaching and long-lasting consequences. Nonetheless, they continue to put their lives on display via mobile more than any other group does.

Millennial Mobile Learners love to share.

Millennials post the most selfies of all groups. Thirty-five percent post all the time, and 26% post sometimes. And they have a deep emotional connection with their phones. They agree with the following statements more than any other group:

-  “Emojis express my emotions better than I do” (vs. 32% of Gen Z)
-  “I’m incomplete without my phone” (vs. 31% of Gen Z)
-  “I can’t remember anything without my smartphone” (vs. 23% of Gen Z)
-  “My smartphone is my best friend” (vs. 24% of Gen Z)
-  “A phone is more seductive than a lover” (vs. 11% of Gen Z)

And they’ll take out their phones more than any other group will.

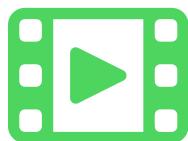
 While arguing with their significant other (vs. 17% of Gen Z)

 During a first date (vs. 47% of Gen Z)

 While talking to their boss (vs. 23% of Gen Z)

Gen X: less enthusiastic mobile learners

Aside from baby boomers, Gen Xers show the lowest level of engagement with apps. Their top app types include the following:



60%
video

(vs. 77% Millennials)



56%
payment apps

(vs. 68% Millennials)



51%
news

(vs. 43% Millennials)

(This is one of the highest among all groups)

They're also less emotionally and physically attached to their smartphones.

They're more likely to disagree or select "none of these" among statements that suggest an emotional connection to mobile phones.

They lean more toward analogue, face-to-face interaction and spend less time on their phones. They want devices to help them connect with others and provide easy communication and access to information.

Boomers: a passive relationship to mobile

They're more likely to use landline telephones and watch cable TV. They're less trusting of mobile too. Only 49% use payment and banking apps (vs. 68% of Millennials). And they are far less likely to take advantage of mobile conveniences overall. For example, only 21% use restaurant and food delivery apps (vs. 48% of Millennials).



93%

use home telephone services

(vs. 78% Millenials)



73%

use Cable TV service

(vs. 61% Millenials)



58%

stream video content

(vs. 83% Millenials)



73%

would “never” check their smartphone during a conversation

(vs. 42% Millenials)

P A R T 5

Gendered Mobility: Men and Women's Use of Smartphones

If we accept the idea that the smartphone is probably our most widespread and important cultural artifact (at least for now), they show us how lived realities are socially constructed.

Looking at how men and women use mobile differently tells a story about how mobile phones provide a “stage” for gender.

If we think about them in this way, smartphones begin to look like “places” where men and women act out gender roles. They do so in ways that mimic how gender has been socially constructed in America. For men, mobile is a site for self, leisure and pragmatic tasks. For women, mobile is more a place for personal communication, social connection and emotional exchange.



Men on mobile–phone as information and self-empowerment

For men the smartphone is a tool for gaining knowledge, expertise, and ultimately, self-advancement.

32%

"My phone allows me to better myself / become an expert"
(vs. 17% of women)

16%

"I can take on the world with my phone"
(vs. 7% of women)

Without getting too Freudian about this, men are more likely to take out their phone in every single scenario.

In social scenarios in which they would not take out their phones, they express that they would not do it due to a fear of judgement—unlike women, who are more likely to agree “it is wrong.”

App use demonstrates that their use of mobile is a way to consume public information (it's equivalent to the newspaper behind which they used to retreat) and to bring the public world into their lives.

51%

news
(vs. 40% of women)

43%

sports news
(vs. 12% of women)

32%

finance
(vs. 16% of women)

17%

dating
(vs. 10% of women)

Although men are less likely than women to use a mobile phone as a tool for social connection, data reveal that the mobile phone itself fulfills an important social and emotional role for them.

22%

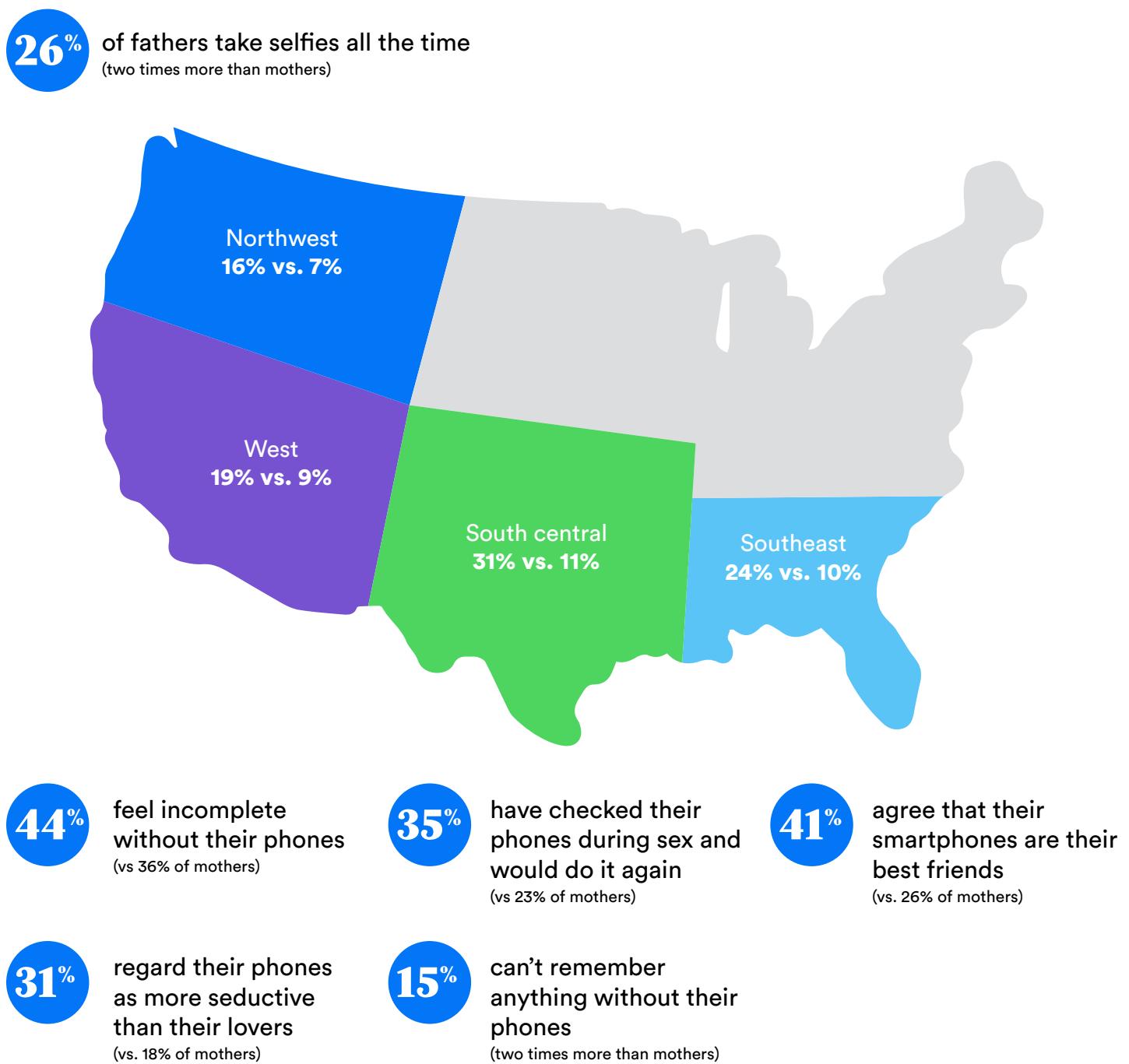
My phone's more seductive than my lover
(vs. 14% of women)

32%

My phone is my best friend
(vs. 22% of women)

Digital Dads:

A glimpse into how fathers are more likely to turn to their phones than mothers



Women, mobile and the power of “soft power”

The significance of the smartphone for women is somewhat different from its significance for men—and different in interesting ways. For women, the smartphone is seen less as a tool used to get ahead and more as a means to connect to others.

46% “My phone is my release/entertainment”
(vs. 34% of men)

25% “My smartphone makes me closer to the people I love”
(vs. 19% of men)

52% “I can escape reality with my phone”
(vs. 39% of men)

Women’s app use shows how mobile is used less as a way of making the world come to the user (the way that men think about and use their phones) and more as a way to extend personal lives into public space.

Whether through texting, photo editing or online shopping, women see and use mobile as a powerful way to keep on top of the demands of being group, household and family controllers.

- 82%** social
(vs. 70% of men)
- 64%** payment/Venmo
(vs. 57% of men)
- 62%** shopping
(vs. 51% of men)
- 51%** photo editing
(vs. 35% of men)
- 41%** messaging
(vs. 26% of men)



Unlike their male counterparts, women are able to draw a firm line with respect to what they will or will not give up for a mobile.

- 76%** would never give up music streaming (vs. 64% of men)
- 72%** would never give up new clothes (vs. 56% of men)
- 63%** would never give up eating out (vs. 50% of men)
- 61%** would never give up Netflix (vs. 45% of men)
- 50%** would never give up reading books (vs. 39% of men)

But pragmatically, **21%** would give up their dominant hands (vs. 14%)

Women who are younger Conscious Connectors use their phones as entertainment as their male counterparts do. But they dedicate more time to social- and communication-oriented apps that foster connection or IRL moments.

- 90%** social (vs. 77% of men)
- 69%** shopping (vs. 41% of men)
- 62%** photo/video editing (vs. 33% of men)
- 62%** payment/Venmo (vs. 48% of men)
- 47%** messaging (vs. 32% of men)
- 44%** restaurant and food (vs. 28% of men)

The only two types of apps in which Gen Z men overindex are the following:

- 28%** sports news (vs. 8% of women)
- 24%** financial stocks/trading (vs. 13% of women)

P A R T 6

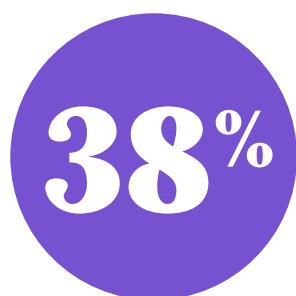
How People Want Brands to Show Up on Mobile

Fifty percent of Conscious Connectors are willing to give up their TVs to keep their smartphones.

In other words, the second screen is now, for many, the first and preferred screen in their lives. So as the entertainment landscape continues to shift toward mobile, brands must also continue to adapt.

Conscious Connectors - the majority of whom are Gen Zers - have been exposed to the internet, social networks, and mobile connectivity from their earliest youth, due to their rite of passage. As global connectivity soars, young people have become a potent influence on people of all ages and incomes, as well as on the way those people consume and relate to brands. Conscious Connectors' focus on self-expression and creativity influences the way they relate to brands. For them, brand consumption is an expression of individual identity and a matter of ethical concern.

Conscious Connectors view brands as informative allies. They engage with brands to stay informed and connect with the world. And they want to hear from brands about more than sales and promotions.



I like keeping up with the latest trends
(vs. 28% of Mobile Learners)



I like seeing how products are used
(vs. 27% of Mobile Learners)



I like being part of the brand community
(vs. 17% of Mobile Learners)

Conscious Connectors want brands to show up like friends: seamlessly connected, edgy, and mission driven

They are much more likely to want to hear from brands via the following:

- 30%** social media posts
(vs. 19%)
- 12%** app notifications
(vs. 6%)

While some also like receiving email, social media posts are preferred.

Conscious Connectors want to engage with a brand with a POV they can respond to or identify with. Brands have permission with this group to express a distinctive personality on mobile. Funny, edgy, political and mission driven are among the attributes they like.

- 64%** *mission driven:* “I like it when companies are mission driven”
(vs. 56%)
- 64%** *edgy humor:* “I enjoy edgy humor from companies”
(vs. 58%)
- 39%** *politics:* “I like companies that express a political opinion”
(vs. 27%)

Mobile Learners, who had to learn how to use mobile phone rather than working with them since childhood, are different from Conscious Connectors with respect to their preferences around brand communication. Conscious Connectors want a relationship with their brands. Mobile Learners prefer that brands keep things transactional.

- 59%** say email is by far the preferred way to hear from brands (vs. 42%)
- 49%** want only promos from companies, not any other brand communication.
(vs. 41%)

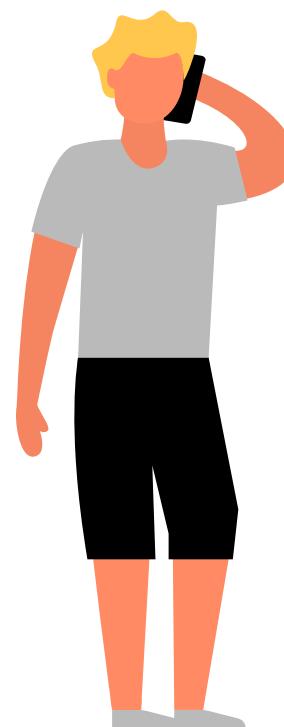
Mobile Learners:

- 42%** love it when companies are not politically correct
(vs. 33%)
- 47%** don't like it when brands express a political opinion
(vs. 39%)

Different groups reveal different brand-communication preferences.

For example, women prefer to follow companies on social to learn about the following:

- 58%** sales and promotions
(vs. 45% men)
- 34%** events / member benefits
(vs. 26% men)
- 31%** how products are being used
(vs. 26% men)



Conclusion

The age of the smartphone has eclipsed the age of the automobile.

The shift from physical to virtual mobility has changed American life in new and surprising ways. Mobile Learners who came of age when they got their first car were the first generation to use smartphones. Digital experiences were new to them. Some were reluctant to adapt, while others adopted virtual mobility without reservation. Sometimes they went too far, oversharing themselves and forging humanlike emotional connections with their devices. Conscious Connectors are the newest generation who have witnessed the perks and perils

of digital immersion. While they are effortlessly in sync with their devices, they're just as aware of the importance of IRL experiences. They're more critical of how they reveal themselves digitally and how brands represent themselves and their missions. If the smartphone is one of the most important cultural objects of the 21st century, then Conscious Connectors have a lot to teach us. Brands would do well to observe the ways Conscious Connectors inhabit the digital world.

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