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Market Insight: Products That Successfully Target Digital Individuals' 24-Hour User Experience

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Individuals will expect their digital hardware, software and services to deliver personalized customer experiences tailored to their unique 24-hour digital lifestyles. Technology product management leaders must utilize techniques such as analytics and AI to reduce the cognitive load for users.

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Overview

Key Findings

- Solutions that seamlessly integrate family, social and work groups with personalized data provide rich, continuous usability throughout the day and offer the greatest differential value.
- Applying analytics can improve the relevance of the product to improve user productivity and create a more compelling user experience.
- Vendors are leveraging partnership opportunities to fill functionality gaps in their solutions. These partnerships allow vendors to provide solutions that embed more deeply into the lives of their users.

Recommendations

To enhance the technology and service provider customer experience, device, apps and service technology product management leaders must:

- Keep products up to date by investing in continuous development cycles and offering a feedback mechanism for customers in order to quickly respond to the constantly changing consumer landscape.
- Reduce the cognitive load on users by investing in analytics and artificial intelligence. Failure to address this will make it difficult to make clear decisions on the complex data that will be available over the next two to three years.
- Identify the unique behaviors and needs of millennials in the different 24-hour scenarios by adequately representing them in customer councils. Time must be invested into this group as it will make up about half of the global workforce in three years.
- Strengthen and enhance the value proposition of solutions by investing in co-solutions with partners.

Analysis

Traditional product differentiation approaches among technology vendors have begun to erode in recent years. Vendors that achieve success now and in the future will be those that are able to deliver innovative and personalized customer experiences that capitalize on the emerging 24-hour digital lifestyle of today's consumers. This research will guide technology product management leaders to understand where these customer experience opportunities are and how they can be utilized.

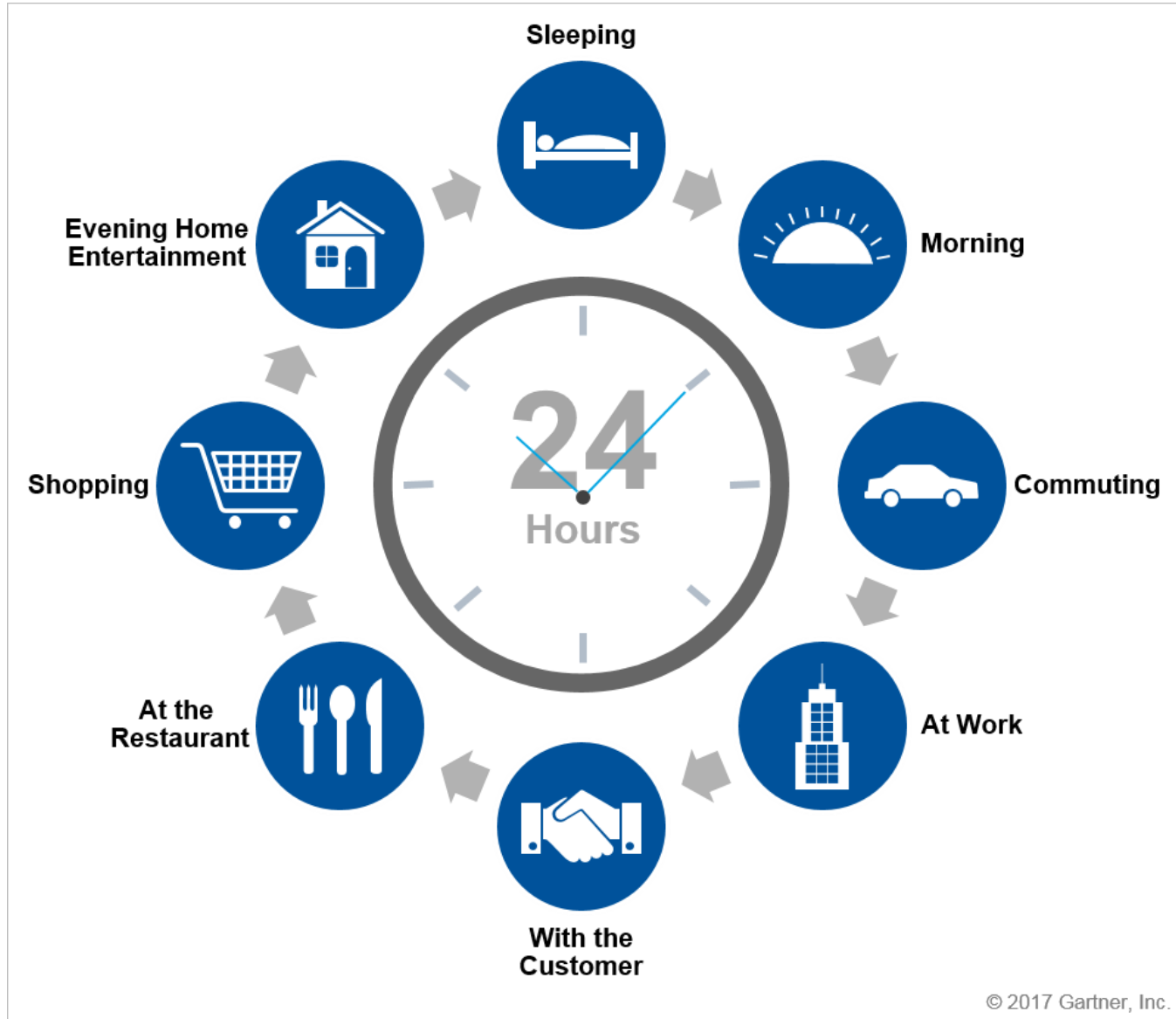
Who Is the 24-Hour Digital User?

Individuals are increasing their connectedness to digital devices and services now more than ever. Soon, nearly everything that can be connected will be connected to a network. Hence, consumers will expect the digital hardware and software that they use to be available regardless of where they are, whether it's at work, home or on the go. The 24-hour digital user will be most interested in rich, integrated customer experiences that span an entire day. They will want to interact with personal technology that minimizes their cognitive load and allows for more to be accomplished in less time. A 24-hour user will choose trusted devices and platforms that are powered by artificial intelligence (AI), and are capable of simplifying tasks or making smart choices on the user's

behalf. Vendors that deliver these integrated customer experiences will see increases in loyalty, retention and preferential spending (see "[Market Insight: Getting Time in the 24-Hour User Experience](https://www.gartner.com/document/code/308520?ref=grbody&refval=3778870)" (<https://www.gartner.com/document/code/308520?ref=grbody&refval=3778870>)).

Gartner has created a 24/7 scenario to provide product management leaders with a visual overview of this opportunity (see Figure 1).

Figure 1. The Format for a 24/7 Scenario



Source: Gartner (August 2017)

Creating Compelling User Experiences

Product management leaders have to successfully develop compelling interactions in peoples' 24-hour digital lifestyles. To do this, they should implement attributes from the following dimensions: product platform, financial business models, use-case scenarios, automation and personalization of data, and family and social circle coverage.

Later, a select group of products that have successfully inserted themselves into a consumer's digital life are highlighted. We showcase how the different attributes above are implemented to create a compelling experience for the 24-hour digital user.

Product Platform

Creating a product is increasingly difficult — be it hardware, software or service — that is proprietary and closed unless it addresses a very specialized requirement. In an increasingly digital and connected world, vendors have to select a few partners to enhance the product offering. Otherwise, vendors must open up APIs to entice developers to extend product usage and address other market segments that are not the vendor's primary focus.

Making a product part of an existing ecosystem — be it Microsoft, Google, Amazon or Apple — is a quick way to secure the operability of solutions within that ecosystem. It also increases partnerships to connect to new customers. Importantly, being part of an ecosystem brings more new experiences into the product. In the future, the various systems will increasingly "talk" to one another, creating new digital experiences.

Unless the product is part of an emerging marketplace — such as the Internet of Things, which is currently fragmented — there is an opportunity to build your own ecosystem to supplement your capabilities. However, this is a long-term commitment and strategy.

Attributes that can help with this implementation are:

1. Dedicated hardware or software platform with a single provider
2. Dedicated hardware or software platform with integration with selected third parties
3. Open APIs available to be implemented by third parties
4. Integration with multiple third parties and the formation of a new digital business

Financial Business Models

Today's technology products can be paid for in several different ways, including one-time payments; subscriptions; group subscriptions; service only; free; and free, but advertisement funded. With more payment choices becoming available to consumers over the last five years, many have begun to move away from the traditional one-time payment method. For example freemium — where apps are available for free and the consumer only pays for increased functionality (see "[Mobile In-App Transactions: More Users, Higher Spend](https://www.gartner.com/document/code/318175?ref=grbody&refval=3778870)" (<https://www.gartner.com/document/code/318175?ref=grbody&refval=3778870>)) — has become popular.

In the traditional device market, vendors are struggling with the erosion of revenue and profit. The "as a service" business model is evolving to become an alternative payment option (see "[Market Trends: PC Business Leaders Need to Overhaul Their Business or Exit the Market by 2020](https://www.gartner.com/document/code/310406?ref=grbody&refval=3778870)" (<https://www.gartner.com/document/code/310406?ref=grbody&refval=3778870>)). With a mature hardware offering, products become homogeneous and are difficult to differentiate based on specifications and brand. However, consumers can now customize their spend based on their needs through service-based, support-based and even time-related or consumption-based models.

If concentrating on developing products for the connected home, vendors should strategize and determine their involvement in the payment process. This is an opportunity to re-examine the value chain and choose where to monetize the different contributions of the providers involved. This can be through either revenue sharing or freemium and advertising models (see "[Market Trends: Can Device Vendors Build a Sustainable Digital Business Model Based on New, Recurring Revenue Sources?](https://www.gartner.com/document/code/318953?ref=grbody&refval=3778870)" (<https://www.gartner.com/document/code/318953?ref=grbody&refval=3778870>)). Contributions can be attained through partnerships, acquisitions or internal developments.

A simplified method of payment enhances the usability of a product. One-click or one-tap payment options should be available across multiple device platforms. Relationships with financial institutions (banks, credit unions) should be formed to ensure seamless payment transactions. Payment-capable mobile applications can include social media and location functionalities to help to deliver real-time, on-the-go, personalized interactions. Millennials are especially at ease with using mobile payment and shopping apps, so focus on the overall commerce experience (see "[Use Growing Mobile Payment, Shopping and Banking Adoption to Enhance User Experience](https://www.gartner.com/document/code/313737?ref=grbody&refval=3778870)" (<https://www.gartner.com/document/code/313737?ref=grbody&refval=3778870>)).

Attributes that help in this implementation are:

1. Single one-off purchases
2. Potential repeat use of service with cashless payments
3. Ongoing, regular financial relationships via subscriptions or pushing advertisements
4. Payment for numerous different products and services with digital wallet integration

Use-Case Scenarios

Products can be offered with narrow use cases that only do one thing and do it well, such as smart locks. However, to remain relevant in the life of a digital user, there must be a way to control and view usage through a smart device, such as a smartphone or a virtual personal assistant (VPA) speaker.

Multifunction devices and ease of accessing services are key to becoming indispensable in consumers' lives and 24-hour usage. Real usage scenarios are important; without them, consumers will abandon devices/services quickly. According to "[User Survey Analysis: Wearables Need to Be More Useful](https://www.gartner.com/document/code/316483?ref=grbody&refval=3778870)," (<https://www.gartner.com/document/code/316483?ref=grbody&refval=3778870>) the abandonment rate of smartwatches and fitness trackers is nearly 30%, and reasons given were that users "get bored of using it" and "realize it is not useful enough." Consumers can be fickle, and some will discontinue the use of a product if they deem it is not useful enough.

A product meant for the 24-hour user lifestyle must incorporate a user's needs more broadly. The functions must be extended to be used at different times of the day or in different scenarios. More successful products will integrate services from different providers for multiple activities throughout the day.

Virtual reality (VR) is an exciting technology where consumer use cases can be further explored. Although challenges must be overcome (such as costs and long-period usage), the technology offers rich and immersive user experiences. VR is currently used for entertainment such as PC gaming and in IMAX VR theatres. The technology is also used in education, where VR is utilized in museums and schools to consume information, holistically and beyond physical barriers. Vendors that want to have an impact with this technology have to start developing an ecosystem of solutions and, if needed, establish partnerships to gain the necessary functionality.

Attributes that help approach this implementation include:

1. Single-focus use case
2. Multiple use cases within the same area
3. Multiple use cases beyond the focus area
4. Fully integrated into the 24-hour lifestyle

Automation and Personalization of Data

Automation is progressing faster than ever; eliminating manual and mundane work once performed by humans. The hours in a day will never increase, but the number of activities that consumers want to do continues to rise. Today's products include a level of intelligence, based on algorithms that enable computers to learn and act upon massive amounts of collected data. In order to decrease the complexity of consumers' interactions with technology, new AI techniques need to be developed in order to reduce friction (see "[Market Trends: Artificial Intelligence and Context Data Drive 24-Hour User Scenarios](https://www.gartner.com/document/code/315496?ref=grbody&refval=3778870)" (<https://www.gartner.com/document/code/315496?ref=grbody&refval=3778870>)). AI autonomy (which acts on its own autonomous VPAs) and user trainability AI are two techniques being developed that will provide more consistent learning along with more predictable outcomes.

As the number of connected product use cases (that may or may not involve a screen) increases, the amount of conversational (speech/text) interfaces used for digital interfaces will also increase. Natural applications will consist of agents or bots. Agents are individually oriented VPAs and customer-oriented virtual customer assistants. Bots consist of either chatbots or machine-to-machine bots. Their acceptance is growing (see "[Market Trends: Human-Machine Interactions – Role of Voice Across Devices and Ways to Enhance Customer Experience](https://www.gartner.com/document/code/324311?ref=grbody&refval=3778870)" (<https://www.gartner.com/document/code/324311?ref=grbody&refval=3778870>)) as the regular use of VPAs, such as Siri, Google Now and Cortana, has grown from 31% in 2015 to 35% in 2016. The U.S. has the highest adoption rate, where 42% of surveyed respondents said they used VPAs, compared with the U.K. at 32%. VPAs are most often used to check the weather, followed by nearby places and news.

Personalization based on the individual, location, context and personal preference will be important, and is something that all marketers are talking about. However, you need access to personal data, as well as AI to create such targeted offers. Not every provider has the ability to do this and most will have to partner (see "[Five Tenets From Innovative Consumer Apps to Transform Your Mobile App Strategy](https://www.gartner.com/document/code/307785?ref=grbody&refval=3778870)" (<https://www.gartner.com/document/code/307785?ref=grbody&refval=3778870>)). Younger users (under 25 years old) are savvier about handling their privacy settings and tend to move their original content-sharing activities to messaging apps (see "[Big Data vs. Privacy – The Rise of the Off Tribe](https://www.gartner.com/document/code/278252?ref=grbody&refval=3778870)" (<https://www.gartner.com/document/code/278252?ref=grbody&refval=3778870>)). Collecting data via social network sites will not be the best option going forward. Bots can be used as conversational interactions and deliver value while gathering data from messaging apps, connected home ecosystems and VPA platforms. As a golden rule, always let the users explicitly know and agree to share their content.

Attributes that help with this implementation are:

1. Sync (store and sync a user's apps and digital content across all devices in a contextual way)
2. See (understand users' context, and know where they are and have been to better align services and promotions)
3. Know (understand users' needs, wants and boundaries, and proactively present suitable services and products to them)
4. Be (Act on users' behalf on learned and explicit rules)

Family and Social Circle Coverage

Now more than ever, messaging and social media apps are enabling individuals to stay connected, via the virtual world, to family, friends, neighbors, colleagues and interest groups. Users want the social network to be easily amassed so that it can be embedded quickly and easily into their lives.

These online social networks are important and allow people to share information and content such as videos, photos and personal accomplishments (such as fitness achievements). They can also bring people together with similar beliefs and interests, and provide a foundation for the creation new ideas and inspiration. These online communities can also allow users to make more informed purchasing decisions based on user reviews or review-based blog sites.

Attributes that help with this implementation are:

1. Personal (user-only) coverage
2. Small focused and selected group that is specifically chosen
3. Extend social group to include selective information to share with third parties
4. Wide coverage with all users using the product

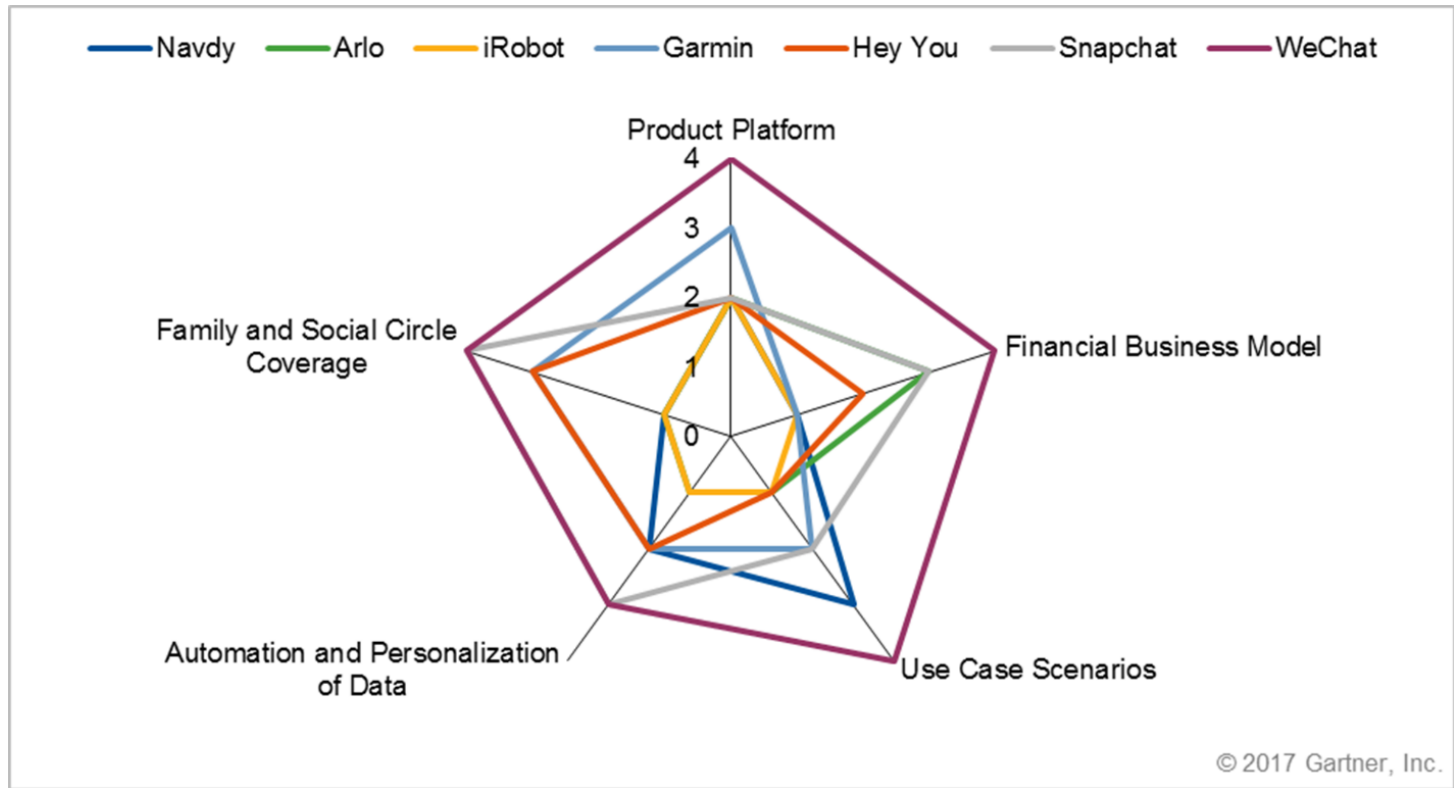
Background and Context

Providers That Excel in Reducing Users' Cognitive Load

The vendors discussed in this section are not an exhaustive list of brands that deliver enhanced customer experiences. Nor does the analysis focus on large incumbent technology and service providers such as Google, Amazon, Microsoft, Facebook and Apple.

These vendors were selected because they showcase how the attributes (numbered 1 to 4 within the five dimensions) are implemented in the products that are currently popular in the life of a digital consumer. These vendors are delivering products that minimize the cognitive load and allow users to accomplish more throughout the day. Figure 2 is a visual overview of the products' implementation.

Figure 2. How Products Utilize the Attributes Within the Five Dimensions



Source: Gartner (August 2017)

Navy

Day Stages: Commuting (Throughout the Day)

Navy is a portable heads-up display (HUD) that make users' cars smarter with the power of projection. The product utilizes the attributes shown in Table 1.

Table 1: Navy's Implementation of the Four Attributes Within the Five Dimensions

↓	Product Platform ↓	Financial Business Model ↓	Use-Case Scenarios ↓	Automation and Personalization of Data ↓	Family and Social Circle Coverage ↓
Attribute	2	1	3	2	1

Source: Gartner (August 2017)

Navy integrates into users' daily lives by connecting a HUD to a user's smartphone (both Android and iOS are supported), displaying information on the car's windshield. Besides providing navigation and displaying current speed and speed limits, the device allows users to receive/answer calls and texts with the swipe of a hand, and control their music. To reduce the cognitive burden on users and ensure they are concentrating on the road, there is an option for the device to "read out" messages, notifications, emails, Facebook updates and WhatsApp updates. The device also integrates with both Siri and Google Assistant. Navy is still very new in the market; it went on sale in October 2016 and costs \$499. This price point will limit its targeted audience to affluent, car technology enthusiasts.

Arlo

Day Stages: Throughout the Day

Arlo (a product from Netgear) is an HD streaming home monitoring system that consists of HD cameras and a base unit that receives streaming video image from the cameras. The product utilizes the attributes shown in Table 2.

Table 2: Arlo's Implementation of the Four Attributes Within the Five Dimensions

↓	Product Platform ↓	Financial Business Model ↓	Use-Case Scenarios ↓	Automation and Personalization of Data ↓	Family and Social Circle Coverage ↓

Attribute	2	3	1	1	1
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Source: Gartner (August 2017)

Users can view video through a smartphone, tablet or PC, but only on one account at a time. Arlo is unique in that the camera unit is battery powered, which makes it flexible enough to be placed anywhere (no need to place it near a socket). Arlo has a plug-in version of the camera with audio functionalities. Typically, a plug-in camera is placed in the main area to surveilled, then battery-powered cameras are placed throughout the house. Arlo cameras are weather-proofed so they can be placed outside, with a wide range of temperature tolerance. Arlo cameras can be integrated into the Stringify app, allowing them to connect and interact with more than 600 smart home products and digital services. Amazon (Alexa), Wink, SmartThings, IFTTT and Telguard are other partners that support the Arlo camera.

Arlo comes with a free cloud service (up to 1GB storage for seven days of recording for up to six cameras) for users to record the video of their choice. As an upgrade option, users can increase the storage size, number of cameras and extend the recording period by paying a monthly subscription fee, currently coming with \$9.99 or \$14.99 per month options.

iRobot

Day Stages: Morning, at Work, Evening Home

iRobot Roomba is a vacuum cleaner robot that moves throughout the house by itself and goes back to a charging station when it is done and/or low on battery. It is an example of a product that utilizes the attributes shown in Table 3.

Table 3: iRobot's Implementation of the Four Attributes Within the Five Dimensions

↓	Product Platform ↓	Financial Business Model ↓	Use-Case Scenarios ↓	Automation and Personalization of Data ↓	Family and Social Circle Coverage ↓
Attribute	2	1	1	1	1

Source: Gartner (August 2017)

Roomba can be restricted from going into undesired areas, such as stairs or a fireplace, by placing small sensor-built boxes, which function as invisible gates, at different locations. The premium model has visual localization functionality that lets the Roomba create visual landmarks throughout the house. It also uses optical and acoustic sensors to detect areas that have high levels of dirt, dust and pet hair, and then cleans where it's needed most. Users can control the Roomba via a mobile app to start, resume and recharge, in addition to scheduling cleanings. With its artificial voice, the Roomba can communicate with users to tell them certain things such as "clean the brush" when the brush gets dirty. In addition, Amazon's VPA, Alexa, is now compatible with select Roomba models. Users can make a command for Roomba through Alexa-enabled devices such as Amazon Echo.

Garmin

Day Stages: Throughout the Day

Garmin offers fitness and health trackers and smartwatches. The products utilize the attributes shown in Table 4.

Table 4: Garmin's Implementation of the Four Attributes Within the Five Dimensions

↓	Product Platform ↓	Financial Business Model ↓	Use-Case Scenarios ↓	Automation and Personalization of Data ↓	Family and Social Circle Coverage ↓
Attribute	3	1	2	2	3

Source: Gartner (August 2017)

Many models of Garmin trackers and smartwatches come with built-in GPS. Garmin wearables are targeted toward sports and outdoor enthusiasts, such as runners, rock climbers, golfers, bikers and swimmers. Garmin's trackers include technologies that enable advanced functionality, such as being able to recognize the difference between riding on the slope and sitting on the lift in the case of a snowboarder or skier. Data on the user's achievements can be shared with family and friends. The company has a comprehensive developer program offering software development kits (SDKs) and APIs. Garmin has partnered with LifeQ – a cloud-based offering with biomathematical capabilities – to offer a solution for the health insurance and corporate wellness ecosystems.

Hey You

Day Stages: Morning, at Work, Shopping

Hey You is a mobile app that allows consumers to preorder coffee, beverages and food from primarily independently owned cafés that have enrolled in the app in Australia. The product utilizes the attributes shown in Table 5.

Table 5: Hey You's Implementation of the Four Attributes Within the Five Dimensions

↓	Product Platform ↓	Financial Business Model ↓	Use-Case Scenarios ↓	Automation and Personalization of Data ↓	Family and Social Circle Coverage ↓
Attribute	2	2	1	2	3

Source: Gartner (August 2017)

Hey You not only allows users to preorder food and beverages, but it also includes a customer loyalty program and cashless payments. Hey You currently has more than 180,000 users and more than 700 merchants on the platform. Hey You also includes a social aspect, as the app enables users to review and critique the food and beverages they've had and the cafes they've visited. On the other side, retailers have the opportunity to get real-time feedback on products and services they offer.

Snapchat

Day Stages: Throughout the Day

Snapchat is mobile app that allows users to create and send "Snaps" – photos, videos and chats – to their friends. Through the application, Snapchatters can also explore Snaps submitted to the crowdsourced, public Our Stories. They can also view expert editorial perspectives curated within the Discover feature, including Publisher Story and Show products. Snapchat utilizes the attributes shown in Table 6.

Table 6: Snapchat's Implementation of the Four Attributes Within the Five Dimensions

↓	Product Platform ↓	Financial Business Model ↓	Use-Case Scenarios ↓	Automation and Personalization of Data ↓	Family and Social Circle Coverage ↓
Attribute	2	3	2	3	4

Source: Gartner (August 2017)

Snapchat is popular globally, and at the end of 2016, it had over 156 million users worldwide. The company is making communication more fun and visual via its app, as it allows Snapchatters to create photo or video Snaps. Snaps can include creative tools such as Geofilters (location-based, artistic overlays); Lenses (animated, augmented reality [AR] effects for decorating selfies and the world around you); stickers; doodles; text; and more. The mobile app is very popular with teenagers and millennials who are looking for an "in the moment" way of interacting with and sharing their experiences with their close friends. Snaps sent directly to a friend or select group of friends are designed to disappear after the receiver views them. Snapchatters can also post Snaps to their "Stories," which can live for 24 hours for their friends to watch and play in chronological order.

In fall 2016, Snap Inc. (the parent company of Snapchat and Spectacles), launched "Spectacles," which are sunglasses with a built-in video camera that can record up to 30 seconds of continuous video at a time. Spectacles were designed as a new way to create memories from your personal perspective. Video Snaps taken with Spectacles import into Snapchat's "Memories" feature where they can be saved for personal use, sent to friends or posted to your Story, or exported in a circular format.

The company's revenue is obtained via a suite of advertising products, including Snap Ads, Sponsored Geofilters and Sponsored Lenses. These are sold primarily via Snapchat's sales team, as well as through its auction-based self-serve Ad Manager and ads API partner program. Snapchat has close integration into users' daily lives and contacts/interactions with their family and friends.

WeChat

Day Stages: Throughout the Day and Night

WeChat is a messaging app that originated in China. WeChat users can use the app for various activities, including social banking/payments, e-commerce, entertainment, dining, utility, transportation and healthcare. The product utilizes the attributes shown in Table 7.

Table 7: WeChat's Implementation of the Four Attributes Within the Five Dimensions

↓	Product Platform ↓	Financial Business Model ↓	Use-Case Scenarios ↓	Automation and Personalization of Data ↓	Family and Social Circle Coverage ↓
Attribute	4	4	4	3	4

Source: Gartner (August 2017)

As of the first quarter of 2017, WeChat had 938 million active users. WeChat is available on PCs and smartphones (iOS, Android and Windows). The majority of usage occurs through the mobile app where the service caters to the unique 24-hour usage scenarios of users in China. Beyond connecting to family and friends, additional social features such as "Shake" and "People Nearby" allow users to chat with random WeChat users. A user is able to make doctor appointments, make cashless payments, transfer money between contacts, hail and pay for a taxi, file police reports, book flights, read the news and apply for microfinancing. Launched in late 2016, Tencent's chatbot developer open platform should lead to an increase in the use of chatbots engaging in conversations with users.

WeChat has evolved into a platform of services that allow for the formation of new digital businesses that third parties can leverage to bypass and disrupt traditional establishments, such as financial institutions (credit cards), banks, retail stores and media. WeChat's challenge has been the ability to deliver the same level of integrated services to users outside of China.

The Impact

Vendors must focus on integration and partnerships in order to successfully deliver valuable technology to the 24-hour digital user. Integration and partnerships will not only be important to provide context, but also to monetize the value chain. Currently, providers are struggling to establish themselves (see "[Market Trends: Can Device Vendors Build a Sustainable Digital Business Model Based on New, Recurring Revenue Sources?](https://www.gartner.com/document/code/318953?ref=grbody&refval=3778870)" (<https://www.gartner.com/document/code/318953?ref=grbody&refval=3778870>)). Therefore, the earlier the vendor can take on these changes, the more equipped it will be for the changes to come in the next five years.

Google Home, Amazon Alexa, Apple HomeKit and Samsung SmartThings are certified ecosystems that are making an impact on the connected home. Leveraging these ecosystems can ultimately offer a unified 24-hour user experience. Advanced analytics and AI should be used to reduce the number of choices, while being able to increase relevance and user productivity. Eliminating the need for numerous configurations, management and apps that users struggle with today will be vital.

Additionally, as the service element becomes important in the product delivery experience, vendors must quickly adapt to local market conditions when expanding geographically. Vendors need to ensure that when a new product or service targets a particular country, these solutions include features and functions that users in these regions are already familiar with. Failure to address this will result in an inferior user experience and less of a chance that users give a service a second chance.

In the next three years, millennials will account for nearly half of the world's workforce, so identifying and understanding their behaviors and needs will aid in developing the next generation of digital products and experiences.

Conclusion

Demonstrating an understanding of the five differentiating dimensions that impact the 24-hour user lifestyle will be essential for technology vendors involved in this space. Evaluating these elements and deciding which ones to incorporate into your solutions is an exercise all technology vendors will have to conduct.

Evidence

Results from the following surveys are referenced in this analysis:

Gartner Personal Technologies Consumer Survey 2016

- A consumer study was conducted online from June to August 2016 among 9,592 respondents in mature markets (the U.S., the U.K. and Australia) and among 6,048 respondents in emerging markets (China and India).
- The study covers personal computing devices, wearables, the connected home, entertainment services, workplace behavior and brand attitudes.
- Respondents ranged from 18 through 74 years old, with quotas and weighting applied for age, gender, region and income (over \$10,000). Results are representative of the online country population.

Gartner Mobile Application Survey 2016

- A multicountry consumer study was conducted in three countries from 26 August 2016 through 13 October 2016 to help Gartner understand consumers' behavior and attitudes around the use of mobile apps. The survey also sought to explore how these trends are evolving, and to compare and contrast country, gender and age group differences.
- The results presented are based on online responses from 3,021 respondents in the U.S. (n = 1,000); the U.K. (n = 1,000); and China (n = 1,021).
- Respondents ranged from 18 through 74 years old. In the U.S. and U.K., respondents were required to have an annual household income of at least \$10,000 or £6,000. Respondents were also required to personally use a smartphone on a regular basis (at least once per week) and have used apps on their smartphone in the last three months.

Recommended by the Authors

[Market Insight: Getting Started With Conversational Platforms](https://www.gartner.com/document/code/320478?ref=ggrec&refval=3778870) (<https://www.gartner.com/document/code/320478?ref=ggrec&refval=3778870>)

[Market Insight: Tencent's WeChat Platform Disrupts 24-Hour User Scenarios](https://www.gartner.com/document/code/315895?ref=ggrec&refval=3778870) (<https://www.gartner.com/document/code/315895?ref=ggrec&refval=3778870>)

[Cool Vendors in Consumer Mobile Applications and Bots, 2017](https://www.gartner.com/document/code/325275?ref=ggrec&refval=3778870) (<https://www.gartner.com/document/code/325275?ref=ggrec&refval=3778870>)

[Market Trends: Selling Hardware in the Application and Service-Driven Market](https://www.gartner.com/document/code/262689?ref=ggrec&refval=3778870) (<https://www.gartner.com/document/code/262689?ref=ggrec&refval=3778870>)

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Market Insight: How to Exploit Conversational Artificial Intelligence to Drive Digital Commerce (<https://www.gartner.com/document/3781363?ref=ddrec&refval=3778870>)

Maximize Personal Technology Platforms to Shape User Experiences Primer for 2018 (<https://www.gartner.com/document/3850764?ref=ddrec&refval=3778870>)

Market Insight: Build a Comprehensive Wellness Platform for Maximum Consumer Engagement (<https://www.gartner.com/document/3876966?ref=ddrec&refval=3778870>)

Survey Analysis: Balance Privacy Controls to Improve the VPA User Experience (<https://www.gartner.com/document/3865392?ref=ddrec&refval=3778870>)

Strategic Considerations on Zero-Touch UI Design for a Superior Customer Experience (<https://www.gartner.com/document/3663517?ref=ddrec&refval=3778870>)

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