THE MEANING OF MOMENTS
BETTER SCIENCE. BETTER ART. BETTER OUTCOMES.

Question: “Which of these online applications does a good job when you want to…? [Social Networks]” Base: Germany  n = 1.003
PEOPLE IGNORE BRANDS THAT IGNORE PEOPLE.
# It’s essential for a brand to define the right target group

# Nevertheless, a brand will only have a competitive advantage if the needs of its target group are considered before starting to think in terms of touchpoints & reach:

# Identifying valuable moments, when a target group is emotionally ready to receive a brand’s message.

# Selecting suitable touchpoints, that convey a brand message in a respective situation. Circumstances that need to be monitored are social media platforms or the usage of devices.
Agenda

1. Welcome to the Wave Universe!
2. „The Usage of the 24/7-Phone“
3. „The Fragmentation of Social“
4. „The Meaning of Moments“
WELCOME TO THE WAVE UNIVERSE!
Since 2006, Wave measures the extent and the influence of Social Media worldwide and studies the behaviour of active internet users to derive future trends in communication strategies. It is structured in 4 main parts:

- Devices
- Platform
- Content
- Moments

People basically are influenced by 5 major needs...

LEARNING
- Learn
- Seek opinion
- Keep up-to-date
- Explore

RELATIONSHIP
- Belong
- Stay in touch
- Share knowledge
- Hang out
- Have fun
- Be creative
- Escape

DIVERSION
- Earn respect
- Express yourself
- Change opinions
- Make money
- Build a career

PROGRESSION
- RECOGNITION

The Wave Universe

52,500+ respondents from 78 countries represent 1.5 Mrd. active internet users worldwide.
The Wave Story

- **2003**: 15 countries, 7,500 respondents
- **2008**: 21 countries, 10,000 respondents
- **2009**: 29 countries, 17,000 respondents
- **2010**: 38 countries, 25,200 respondents
- **2011**: 54 countries, 37,600 respondents
- **2012**: 62 countries, 42,000 respondents
- **2013**: 72 countries, 49,600 respondents
- **2014**: 84 countries, 54,000 respondents
- **2015**: 98 countries, 59,000 respondents
- **2016**: 78 countries, 52,500+ respondents

- **Social**: Focus on platforms like Facebook, Twitter, LinkedIn
- **Visual**: Focus on content like YouTube, Netflix, Hulu
- **Influence**: Focus on influencers and their impact
- **Motivation**: Focus on the reasons behind social media use
- **Brands**: Focus on the role of brands in social media
- **Business**: Focus on business uses of social media
- **Needs**: Focus on the needs driving social media use
- **Content**: Focus on content creation and consumption

**Moments**
- 2008: Launch of social media platforms
- 2009: Rise of visual content
- 2010: Social media influence on business
- 2011: Growth of content creation
- 2012: Rise of social media in business
- 2013: Evolution of social media needs
- 2014: Expansion of social media content
- 2015: Maturity of social media

- **Technology Milestones**
  - 2003: iPod
  - 2008: iPhone
  - 2009: iPad
  - 2010: Twitter
  - 2011: Instagram
  - 2012: Snapchat
  - 2013: Facebook
  - 2014: LinkedIn
  - 2015: YouTube
  - 2016: TikTok
THE USAGE OF THE 24/7-PHONE
IT’S ALL THE SAME BUT STILL DIFFERENT…
THE SMARTPHONE HAS A STEADY ADOPTION OF FUNCTIONS FROM OTHER DEVICES

Question: „Please tell us which of the following items you own?“ /
Base: Germany n = 1.003
The Smartphone is a „Must-Have“

DESPITE THE GROWING MOBILE TREND, LAPTOPS STILL MAINTAIN THEIR POSITION

Question: „Please tell us which of the following items you own?“ / *Index (Wave7 =100)
Base: Germany n = 1,003
Smartphones & Laptops with unique characteristics

THE TABLET IS AN „IN-BETWEEN“ FOR THE DIFFERENT NEEDS

Question: Please select which of them do you think does a good job when you want to: …[Smartphone/Tablet/Laptop]°

Filter: owner of device  Base: Germany n = 1,003
The Laptop transfers functions on to the Smartphone

Question: Please select which of them do you think does a good job when you want to: "[Laptop]"
Filter: owner of device  Base: Germany n = 1,003
One Day in a Life

Commuters with own means of transportation:
- way to work
- at work
- way home/shopping
- evening (at home)

Commuters with public transportation:
Where did the fun go?

PEOPLE HAVE GOT HABITUATED TO THE SMARTPHONES AND NOW CONSIDER THEM AS NORMAL IN CONTRAST TO THE EXCITEMENT ABOUT THEIR NOVELTY IN WAVE7.

Question: Please select which of them do you think does a good job when you want to: "[Smartphone]"
Filter: owner of device  Base: Germany n = 1,003
HOW CAN COMPANIES USE THIS KNOWLEDGE?
Stationary devices are still superior in E-Commerce PURCHASE WITH SMARTPHONES SHOULD BE FAST AND EASY. HOWEVER, THIS IS RARELY THE CASE.

Question: Please select which of them do you think does a good job when you want to: …[Desktop/Smartphone/Tablet/Laptop]" Index (Wave7 =100)
Filter: owner of device Base: Germany n = 1,003
MDex

Mobile Index

brought to you by ansible

Source: ansible
Online Video: Everyone watches it frequently
2/3 of Internet users even weekly

Question: Thinking about using the Internet, which of the following activities have you ever done?
Base: Germany n = 1,003
Online Video needs big screens

VIDEO CLIPS WATCHED ON SMARTPHONES (E.G. FACEBOOK) NEED TO BE AS SHORT AS POSSIBLE.

Question: Usage: Thinking about using the Internet, which of the following activities have you ever done? You have indicated you have carried out the following activities in the last 6 months; please select which devices you have used to do these activities.

Suitability: You have indicated that you own the following devices. Please select which of them do you think does a good job when you want to.. Base: Germany n = 1,003

Question: Usage of Online Video

- VIDEO CLIPS WATCHED ON SMARTPHONES
  - Usage: 48%
  - Suitability: 41%
- VIDEO CLIPS WATCHED ON TABLETS
  - Usage: 59%
  - Suitability: 63%
- VIDEO CLIPS WATCHED ON COMPUTERS
  - Usage: 60%
  - Suitability: 65%

Question: Suitability of Online Video

- VIDEO CLIPS WATCHED ON SMARTPHONES
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  - Suitability: 63%
- VIDEO CLIPS WATCHED ON COMPUTERS
  - Usage: 60%
  - Suitability: 65%
Usability

„Snack“able Content

• Short

• Draws attention → compatible with device

• Creates connection between online & offline

Vertical Video

Connection Cross Device

Codes

„One Shop“
Save code in configurator and continue later with any device
...started OOH-campaign with Snapchat-content from influencers

Source: Levi's | Out-Of-Home-Kampagne with Snapchat Channel
Smartphone as connector

...WITH CARS, SMART HOMES, WEARABLES
# The smartphone is steady. But the expectations of usage have changed.

# Companies need to generate a value addition for users dealing with this device.

# Either via completely new possibilities for use or creating functionalities which fit in their daily life.

# Besides the fast-pace of use one‘s casual nature during usage must be considered when sending content.
"THE FRAGMENTATION OF SOCIAL"
There's a lot of dynamism in Social Media
STILL NO IMPROVEMENT FOR THE CONVENTIONAL SOCIAL MEDIA SITES

Social Networks

<table>
<thead>
<tr>
<th>Activity</th>
<th>Wave7</th>
<th>Wave8</th>
<th>Wave9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a video to upload</td>
<td>57.7%</td>
<td>54.3%</td>
<td>56.2%</td>
</tr>
<tr>
<td>online</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Business Social Network

<table>
<thead>
<tr>
<th>Activity</th>
<th>Wave7</th>
<th>Wave8</th>
<th>Wave9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Photo-Sharing Website</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Instant Messenger (e.g. WhatsApp)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Wave7</th>
<th>Wave8</th>
<th>Wave9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timed photo (e.g. Snapchat)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Question: Which of the following activities have you done in the past 6 months? | *Index (Wave7 =100) | ** Index (Wave8 =100)
Base: Germany n = 1.003
However, Social Networks are losing out on meeting the users’ needs...

Question: “Which of these online applications does a good job when you want to...? ” Base: Germany n = 1.003
... but they still are the front runners in totality
The rules are different for young target groups

Question: “Which of these online applications does a good job when you want to...? ” Base: Germany n = 1,003* A 16-19
Facebook is still the undefeated king of reach

BUT THERE’S NO WAY AROUND VISUAL PLATFORMS.

### Platform use in general

- **YouTube**: 93,5%
- **WhatsApp**: 84,8%
- **Facebook**: 77,0%
- **Twitter**: 34,8%
- **Instagram**: 34,5%
- **Pinterest**: 29,3%
- **Snapchat**: 23,4%
- **Location**: 12,3%

### Wave 9 vs. Wave 8

- YouTube: +2%
- WhatsApp: +16%
- Facebook: -0,2%
- Twitter: +6%
- Instagram: +18%
- Pinterest: +50%
- Snapchat: +35%
- Location: (*)

### Daily platform use

- **WhatsApp**: 79,2% (+14%)
- **Facebook**: 58,7% (+0,1)
- **Instagram**: 30,1% (+74)
- **YouTube**: 25,7% (+13%)
- **Snapchat**: 24,3% (+207%)
- **Twitter**: 17,5% (+7,4%)
- **Pinterest**: 7,8% (+91%)
- **Location**: 3,3% (*)

**Base: People that use the platform**

**Question:** Thinking about your usage of specific websites and applications, which of the following best describes how often you have used them?

**Base: Germany n = 1,003 *in Wave8 not queried**
There’s no specific platform to cater to all needs

...BUT FOR ALL SPECIFIC NEEDS, THERE IS A PLATFORM.

THE HAPPY PLACE

THE WORLD CONNECTER

THE FUN SCREEN

THE NEW THING

Question: “Which of these online applications does a good job when you want to...? [Social Networks]”  Base: Germany  n = 1.003
The Fun Screen

**FUN**

54%

**GETS TALKED ABOUT**

37%

**INFLUENCES WORLD OPINION**

33%

**Millennials***  55%

Teenager**   72%

36%  59%  34%

Question: “Which of these online applications does a good job when you want to...? [Social Networks]”  Base: Germany  n = 1,003

Source: youtube
The World Connecter

**INFLUENCES WORLD OPINION**
- Millennials*: 51%
- Teenager**: 63%

**PLACE FOR NEWS**
- 40%
- 39%

**NO POSITIVE PLACE**
- 75%

Question: “Which of these online applications does a good job when you want to...? [Social Networks]” Base: Germany  n = 1,003
Source: facebook
The Happy Place

**Fun**

- Millennials*: 46%
- Teenager**: 61%

**Positive Place**

- Millennials*: 37%
- Teenager**: 55%

**Gives Self-Confidence**

- Millennials*: 34%
- Teenager**: 61%

Question: “Which of these online applications does a good job when you want to...? [Social Networks]”  Base: Germany  n = 1,003
Source: Instagram
The New Thing

GET´S TALKED ABOUT

Fun

EXCITING & INNOVATIVE

Millennials* 34%
Teenager** 65%

32% 32% 30%
34% 77% 29%

Source: Snapchat

Question: “Which of these online applications does a good job when you want to...? [Social Networks]” Base: Germany n = 1,003
For Germans, life’s much more than just the Social Networks

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Confidence Level</th>
<th>Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>36%</td>
<td>95*</td>
<td>„Social Networks are an essential part of my social environment.“</td>
</tr>
<tr>
<td>35%</td>
<td>95*</td>
<td>„I think that my profiles in Social Networks display who I really am.“</td>
</tr>
<tr>
<td>21%</td>
<td>99*</td>
<td>„I’m worried about missing out on something online when I don’t visit my Social Network profile.“</td>
</tr>
</tbody>
</table>

Question: Below is a list of statements, please can you answer reflecting your opinion. Scale: 1 to 5. Stated: Top 2. Base: Germany n = 1.003 *Index (Wave8 =100) **In Wave8 not queried
WhatsApp – The Private Place

71% are keen to keep in touch with my friends.

For 53% the app stands for fun and thereby almost defeats YouTube.

83% of the Germans use it to keep in touch with 33 of their friends.
In Social Networks it is 71% with 46 contacts.

Caution should be exercised when used by companies as only 13% think the app protects their privacy.

Question: Which of the following statements do you think describe each of the platforms below?
Base: Germany; n = 1,003
It has never been that important for companies to handle customer data sensitively

GERMANS STAND OUT IN THIS MATTER ESPECIALLY IN AN INTERNATIONAL SETTING.

58%

**

„ My personal information is a commodity that advertisers should pay for“

56%

113*

„ I would like to be able to remain anonymous in everything I do online

51%

101*

„ I am concerned about the amount of personal data that goes online.“

Question: Below is a list of statements, please can you answer reflecting your opinion. Scale: 1 to 5. Stated: Top 2.
Base: Germany n = 1.003 *Index (Wave8 =100) **In Wave8 not queried
Targeted interactions with companies gain in importance

PRIMARILY, USERS WANT TO RECEIVE PERSONAL OFFERS & INDIVIDUAL RESPONSES TO THEIR QUESTIONS.

Question: Thinking about the kind of interactions that you can have with brands and companies that you purchase from, please tell us which 3 of the following interactions you would most like to have with these companies? Base: Germany n = 1,003
# Facebook is neither dead nor going to die soon.

# The visual language is becoming ever more crucial for users.

# The content has to be adapted to the needs & type of usage of the different platforms. Each platform needs its very own strategy.

# The privacy of their data is more important for Germans than their self-portrayal on Social Networks.

# Interactions with companies are desired, but they need to accomplish an added value in the users‘ daily life.
THE MEANING OF MOMENTS
The Beginning: The Identification of Moments

60 billion
Online Interactions per day

3,000 moments

Source: amobee
9 Categories with 120 Key Moments

- FAMILY
  - e.g. Wedding day

- FINANCE
  - e.g. Managing your bank account/finances

- HOBBIES
  - e.g. Playing a console game

- WORK
  - e.g. Going to a work-related event

- TECHNOLOGY
  - e.g. Wanting the latest device

- TRAVEL
  - e.g. Planning a holiday

- SOCIALISING
  - e.g. Attending a festival, sports game or big cultural event

- LOOKING AFTER YOURSELF
  - e.g. Taking part in sports or activities

- SHOPPING
  - e.g. Discovering a new product at the store
9 Categories with 120 Key Moments

- 13.8% Got their wedding day
- 50.8% Manages their bank accounts/finances
- 29.3% Play console games
- 12.4% Go to work-related events
- 18.5% Want the latest device
- 43.6% Planning a holiday
- 18.3% Attends a festival
- 36.7% Takes part in sports
- 26% Discover new products at the store
Which moments are relevant for the target group?

What are the feelings of the target group in these moments?

Which needs are intended to be satisfied in these moments?
Relaxation instead of Frustration

SEARCH FOR A BETTER FINANCE PRODUCT

<table>
<thead>
<tr>
<th></th>
<th>Direct Bank</th>
<th>Branch Bank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxed</td>
<td>37%</td>
<td>30%</td>
</tr>
<tr>
<td>Trust</td>
<td>22%</td>
<td>13%</td>
</tr>
<tr>
<td>Optimism</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Pride</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>Frustration</td>
<td>7%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Question: Thinking about the kind of interactions that you can have with brands and companies that you purchase from, please tell us which 3 of the following interactions you would most like to have with these companies? Base: Germany n = 1,003
May I introduce you? - The Moments Map -

Question: Thinking about the kind of interactions that you can have with brands and companies that you purchase from, please tell us which 3 of the following interactions you would most like to have with these companies? Base: Germany n = 1,003
Leisure Time Activities

Going on a long walk or run
Maintaining your garden
Reading a book

Discovering new music, TV, Films
Experimenting with new recipes or dishes
Doing some DIY
Creating something (e.g. a painting, knitting, drawing)
Learning a new skill (e.g. photography, language)
Streaming or ordering on-demand movies/TV, music or gaming

A lot of moments, which are supposedly relaxing, do not exactly do that:
→ Do-it-yourself
→ Discovering new music, TV, Films

Question: Thinking about the kind of interactions that you can have with brands and companies that you purchase from, please tell us which 3 of the following interactions you would most like to have with these companies? Base: Germany n = 1.003
Having a night out with friends

Social interactions are associated with elation and surprise:
- Making a new friend
- Saying thank you to someone

Question: Thinking about the kind of interactions that you can have with brands and companies that you purchase from, please tell us which 3 of the following interactions you would most like to have with these companies? Base: Germany n = 1,003
Generate an additional value for consumers to satisfy their needs

### TOP 3 NEED PER MOMENT

<table>
<thead>
<tr>
<th>DO-IT-YOURSELF</th>
<th>DISCOVERING NEW MUSIC</th>
<th>MAKING A NEW FRIEND</th>
<th>SAYING THANK YOU TO SOMEONE</th>
</tr>
</thead>
<tbody>
<tr>
<td>38% be creative</td>
<td>53% Have fun/be entertained</td>
<td>49% Meet new people</td>
<td>15% Stay in touch with friends</td>
</tr>
<tr>
<td>26% Learn something new</td>
<td>51% Relax/escape</td>
<td>13% Express yourself</td>
<td>13% Express yourself</td>
</tr>
<tr>
<td>21% Relax/escape</td>
<td>17% Keep up to date</td>
<td>28% Have fun/be entertained</td>
<td>12% Feel like you belong</td>
</tr>
</tbody>
</table>

Question: Thinking about the kind of interactions that you can have with brands and companies that you purchase from, please tell us which 3 of the following interactions you would most like to have with these companies? Base: Germany n = 1,003
# The identification of the right place & the right time to address the target group becomes a hygiene factor.

# The emotional condition of the group during a moment has to be recognized and the accompanied needs associated should be analyzed.

# Then, as a second step, it is possible to think about the right touchpoints for conveying the brands message.

# Best practice for brands is the use of situations and moments as communication strategy to create a special moment for the target group. This at least guarantees attention (a valuable asset) of the target group.
Thank you.

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