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> *We now stand at the brink of the next major shift into wearable technologies, the internet of things and the connected self.*

Executive Summary

Throughout the past few years we have experienced the shift from desktop to laptop, and laptop to tablets and smart phones. We now stand at the brink of the next major shift into wearable technologies, the internet of things and the connected self.

Shift 2015 is a research project aimed at understanding the key consumer motivations for wearable technologies and the opportunities they present for brands and advertisers. The project is a collaboration between Mindshare and Dr Yael Gerson and Dr Chris Brauer of the Institute of Management Studies at Goldsmiths College, University of London.

Using a combination of consumer device testing, co-creation workshops, expert interviews and a quantitative survey we have addressed two key questions:

- What consumer need states and use cases will wearable technology fulfil?
- What opportunities for brand communication does wearable technology present?

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Executive Summary

We have identified six key need states that wearables can satisfy:

Flow
making everyday life smoother or easier
(e.g. opening locks)

Reflection
reflecting on ways you can improve your life
(e.g. fitness and wellbeing tracking)

Affinity
connecting remotely with family, friends or shared interest groups
(e.g. sending hugs or heartbeats)

Performance
helping with specific tasks to improve performance
(e.g. heads up display sports performance apps)

Value exchange
allowing tracking or data sharing for a consumer benefit
(e.g. health tracking for insurance)

Self expression
using wearables to look and feel good
(e.g. smart fabrics, Apple Watch)

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Executive Summary

We worked with our respondents to develop the different ways brands could tap into these need states and take advantage of wearables and their data in their communications.

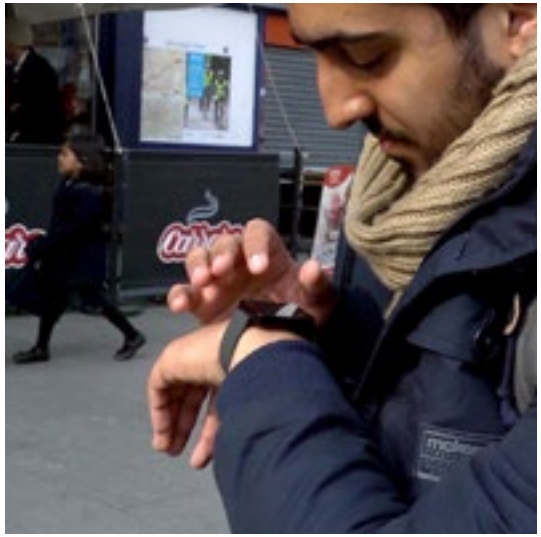
We found five key areas embracing both advertising (push notifications and search) and content (brand utility, brand experience and content personalisation), delivered both on the wearable itself and across other platforms.

Our research also found that 13% of UK smartphone users say they are very likely to get at least one wearable device in the next 12 months. If this take up rate occurs, the number of wearables owners will rise from 6m (12% UK adult penetration) to 8m (16%).

As the adoption of wearables gathers pace, we've outlined the opportunities for marketers that this next great technological shift presents.

What we did

> *Over four weeks, participants were immersed into the world of wearables.*



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What we did

This research uses an innovative co-creation method including workshops, ethnographic service design, and ethnographic experiments to gain insight into users' experiences of wearables in their everyday life.

For this study 14 participants (aged 16–40) were drawn from the general public to take part in a month of ethnographic experiments alongside two workshops. Throughout these four weeks, participants were immersed into the world of wearables. We gave them lots of kit: smart watches, fitness bands, lifestyle bands, heart monitors, wearable cameras, and smart rings so they could fully understand the roles wearables could play in their everyday lives.

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What we did

Through ethnographic experiments – which use behavioural insights to simulate future situations – we simulated future uses of wearables in order to trigger different experiences for users. Participants communicated with the research team on a daily basis using WhatsApp; they also participated in an introductory workshop, a storytelling workshop and an advertising workshop.

Alongside this intense fieldwork, the team also interviewed a series of subject matter experts, including senior leaders from the industry (e.g. UnderArmour), and technology commentators from CNET and Wired magazines. These interviews were used to provide longer term perspective on the marketplace and to refine the conclusions produced with our respondents.

Finally, the insights from the co-creation fieldwork were verified quantitatively through a survey amongst a sample of 841 nationally representative smart phone users.

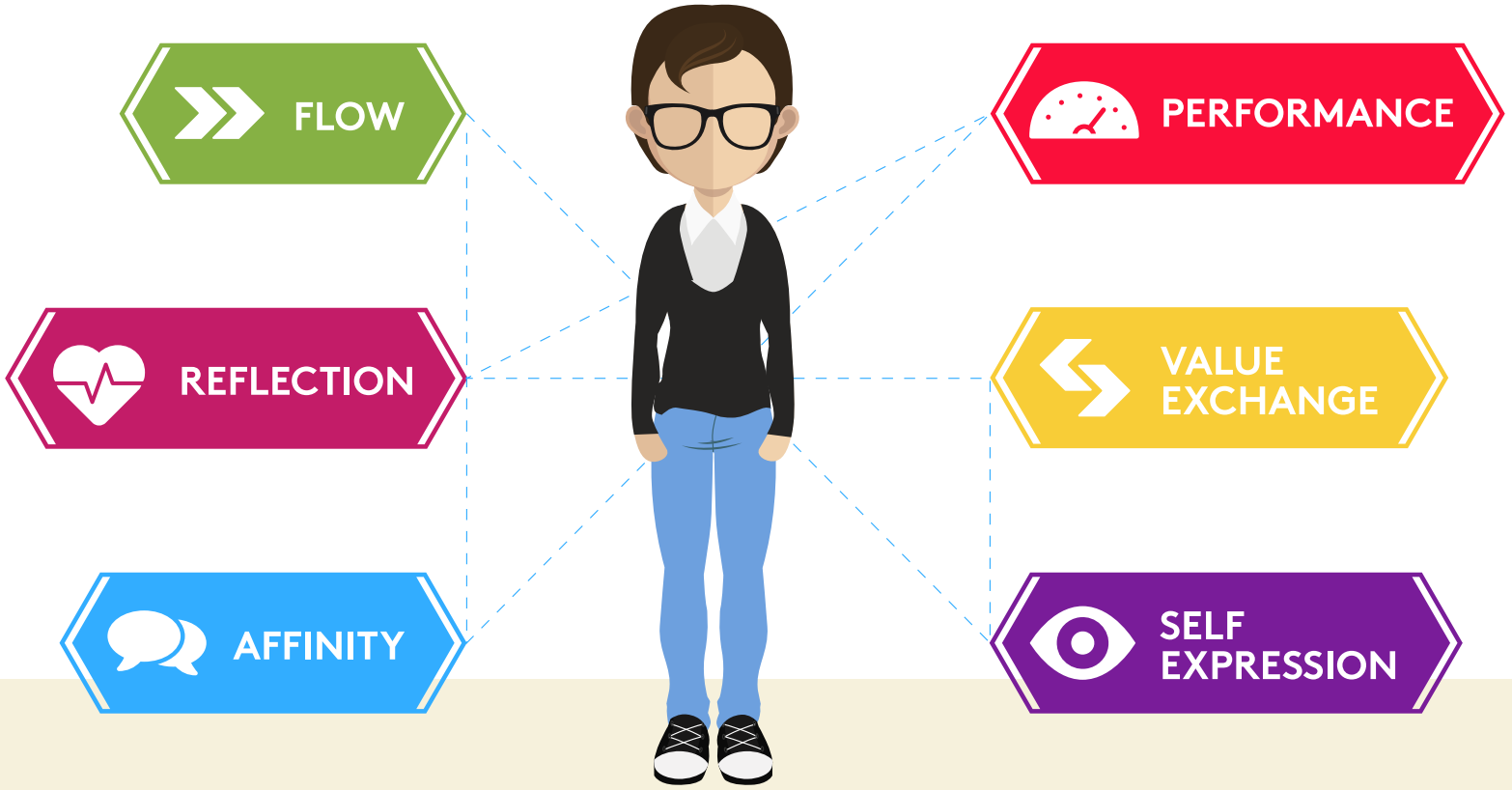
Why wearables?
Consumer need states

A key challenge for the wearables sector is to convince consumers that wearables are genuine 'must haves' for the mass market and not just gimmicky, 'nice to haves' for gadget heads. Following their intense immersion with a range of devices, we worked with our respondents to identify the range of potential use cases of wearables and the underlying need states they fulfilled.

The term 'need state' is used to describe an area opened up by wearable technologies; understanding these key needs provides an opportunity for branding and advertising to intervene and help shape products and services as they relate to each need state. The six need states identified that wearables fulfil are:

- Flow
- Reflection
- Affinity
- Performance
- Value Exchange
- Self Expression

Why wearables?
Consumer need states



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Flow

The predominant question in people's minds when using or thinking of using wearables is:

will this make my life better?

Throughout the research we found that participants would often ask:

– will this improve my lifestyle?
– will it make things easier?
– how can wearable devices make my life better?

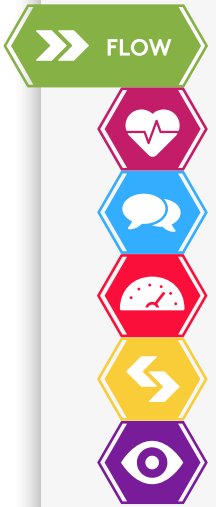
Flow

After a few days immersed in the world of wearables participants experienced them as something that could simplify everyday tasks making life easier. In this context 'better' meant easier, more seamless, a synced lifestyle that flows.

"I did a voice command on the street while pushing a pram and late for a train to send a text to people waiting for me on the platform the other day it was quite convenient. It was quicker and felt quite natural.

We identified this need state as **flow** or the need to take some of the friction out of everyday life by making interactions and tasks more connected and seamless. There were three key areas where this was felt to be particularly powerful:

– transactions
– the connected home
– communications



Flow

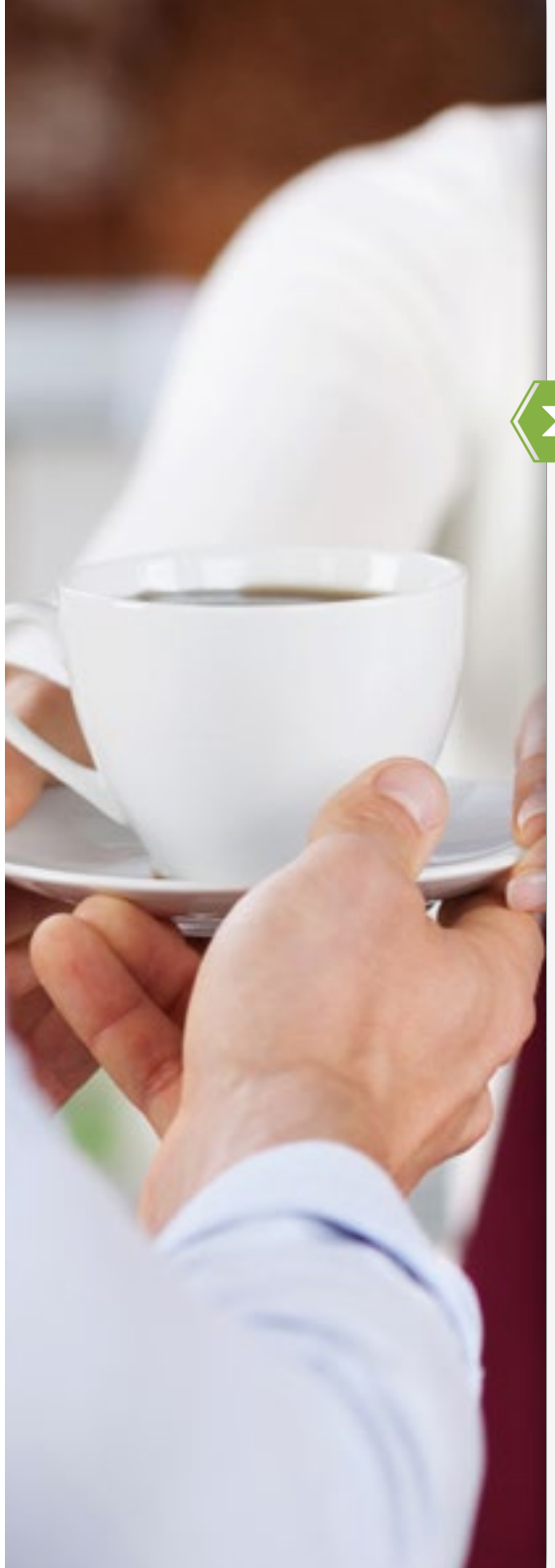
Transactions

A rich area for wearables to deliver on the **flow** need state was around transactions, particularly in the retail environment. Wearables could fulfil a number of functions such as alerting retailers to the customer's presence, enabling advance ordering and payments, thereby cutting down on queueing and generally speeding up the transaction.

> *That [ordering coffee through your watch] would be brilliant and I would use this every weekday. Saves time and I don't have to queue. Would also be nice if I could also pay [for] the drink through the watch.*

31% of respondents in our smartphone owners' survey expressed an interest in this use case (see figure 1).

Key to fulfilling this aspect of **flow**, is to provide ultra-personalised information, offers or services that the user will want. For example, when participants were sent simulations based on offers (e.g. 20% off River Island in the next hour; or recommendations for coffee shops based on foot traffic in the area), they expected their devices to know them and their routines, rather than send generic messages. When this was not the case, participants reacted quite negatively to this *"No, I don't shop there", "I don't drink coffee", "I'll leave when I normally leave".*



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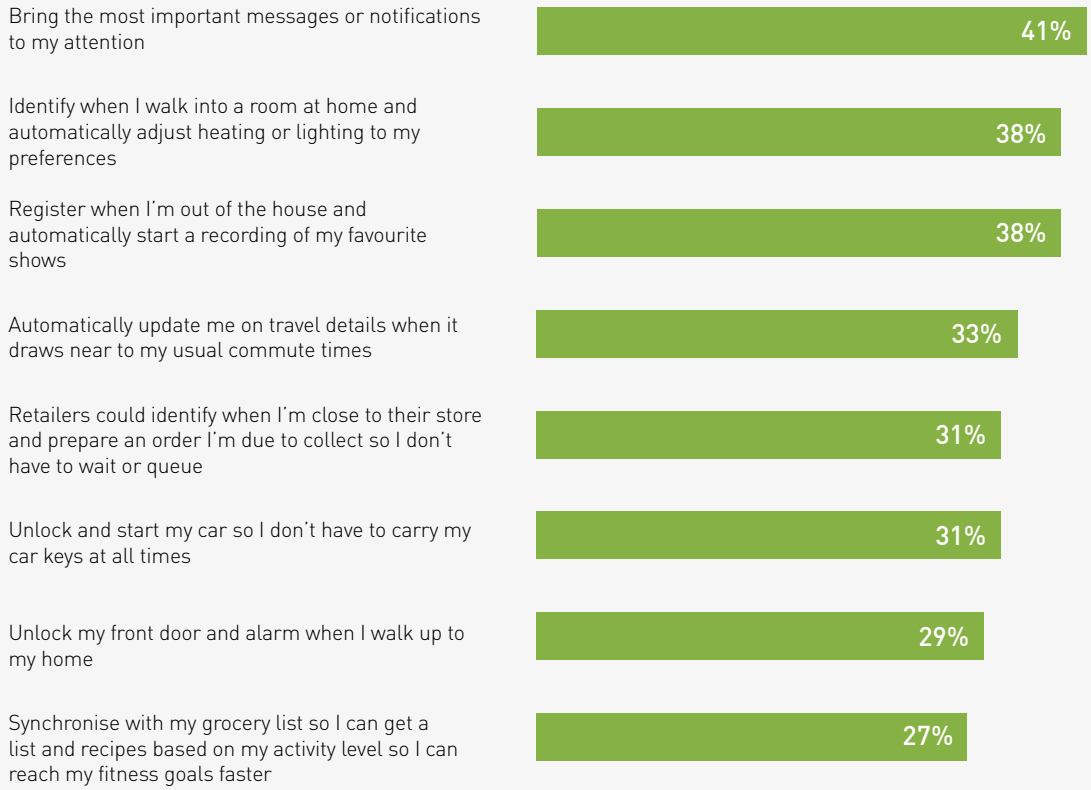
Flow

Figure 1. Flow – % Interest in each use case



Base: Nationally representative UK smartphone users, N=841

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Flow

Connected home

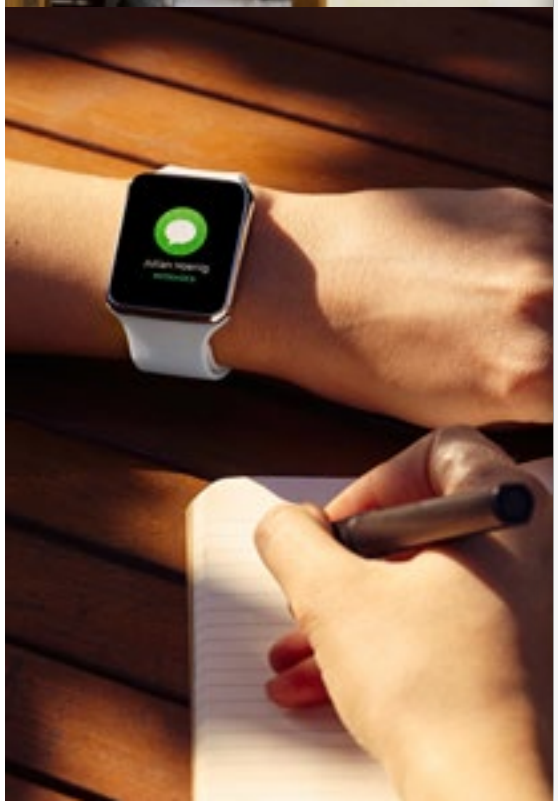
Respondents identified a big opportunity for wearables to fulfil the **flow** need state in the connected home and car environments. In the home wearables could adjust heating or lighting to individual preferences when entering a room (38% found this an interesting prospect); or they could be used to automatically open front door locks, security systems or start cars (this proved slightly less appealing in the wider population at 29% and 31%).

> *"If my band/ring could do that [open doors, turn car on, order food and drink] it would be out of this world... tbh.*

Communication

The blizzard of notifications that can often litter the mobile screen present an opportunity for wearables to fulfil the need for **flow** by bringing the most important notifications to the user's attention in a more easily accessible way. This is certainly part of the vision behind the Apple Watch that it will surface key information to the wearer that can be acknowledged through quick 'glances' or vibrations – essentially filtering key alerts and delivering them in a more seamless way to the user.

This proved one of the most popular uses cases of **flow** amongst the wider population with 41% interest (rising to 48% amongst 35–44s).



Reflection

Wearable devices worn on the body, usually throughout long periods of time, give people the opportunity to see themselves through their data, reflect upon their lives and identify ways of self-improvement.

This need state of **reflection** manifests itself in two broad areas:

– the physical and the emotional.

Reflection

Physical

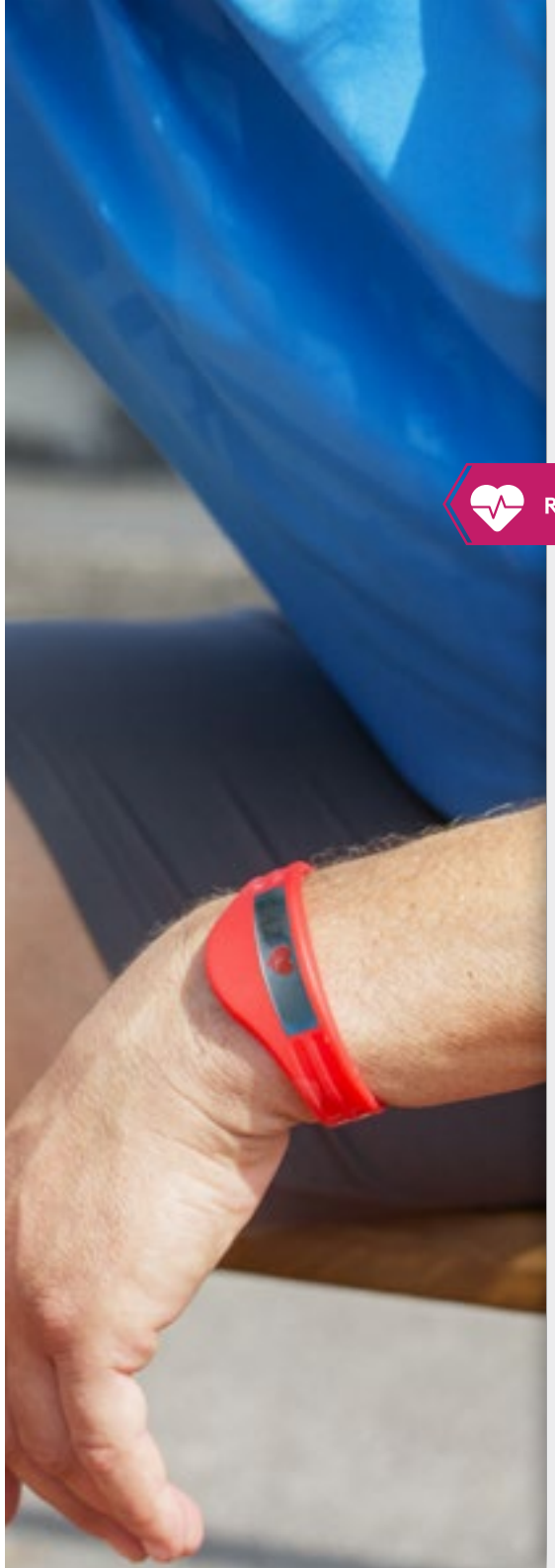
Wearables' success to date has been predominantly focused on fulfilment of the need state of physical **reflection**, through fitness trackers such as FitBit or Jawbone and this is likely to continue to be a core area of focus for wearables in the foreseeable future.

Participants responded positively to the experience of seeing their physical wellbeing through their data, particularly in relation to their sleep data,

> *"really cool [sleep data] I wouldn't have realised all of that.*

This was borne out in the wider population with 50% interested in the prospect of wearables measuring and analysing sleep patterns.

But there was an overwhelming sense that the limitation of current data analytics did not fulfil the potential of the data being captured.



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Reflection

Particularly when relating to specific activities such as improving sleep or developing fitness, users responded more positively to interpretations of their data and not just data visualisation.

"I think it could be improved by the band telling me how to improve my sleep and whether my current levels are healthy. And recommendations, e.g. Go to bed at 10; you'll fall asleep at 10:13 according to your data. It would be quite helpful - otherwise it can be quite useless to have all of this information but not use it.

Chris Glode, VP Digital Under Armour Connected Fitness echoes this,

"I think the onus is now on us, as wearable makers and software makers and ad makers, to provide feedback that is really surprising and engaging to users and will keep them motivated and committed to the process because just showing numbers and bar graphs, we see there is some attrition around that".

Reflection

Emotional

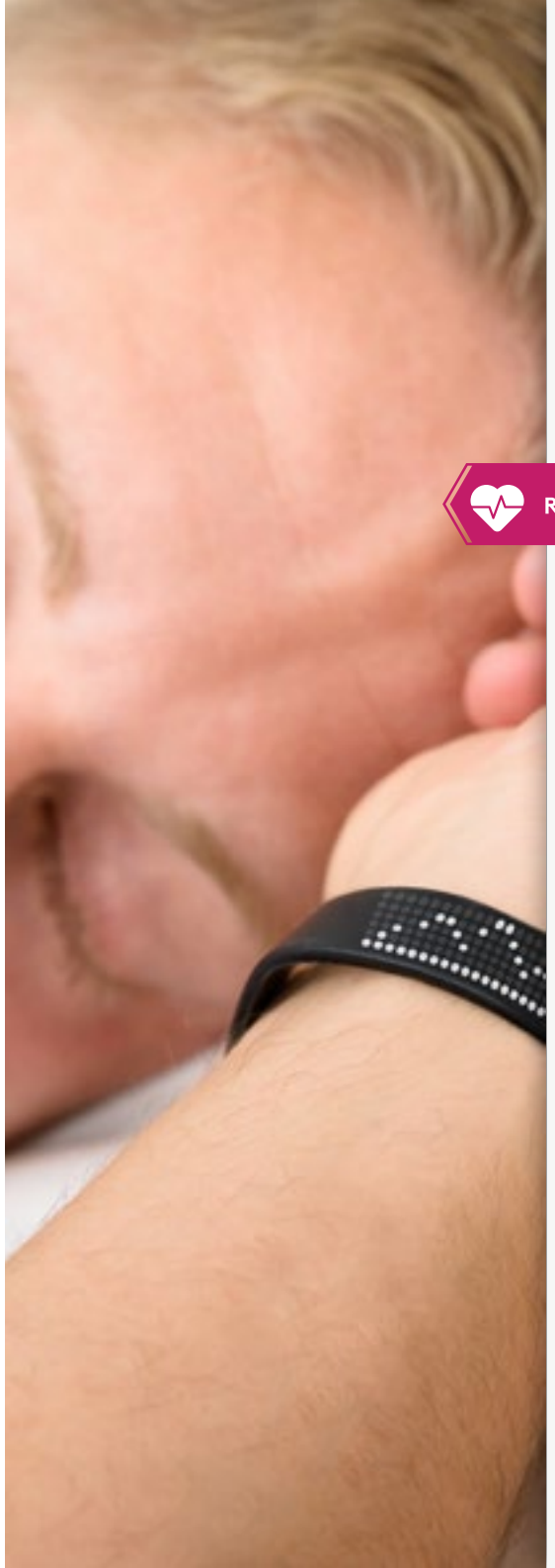
Interestingly, participants had diverse reactions to different kinds of data. Using wearable devices to track activity and sleep were generally accepted and taken with interest,
"sleep bot just told me it's bedtime. Seems useful not sure what the rationale is but it seems useful".

However, tracking mood or emotions produced a much wider array of responses. Some participants responded positively to the idea of tracking one's mood as illustrated by the following use case:
"as a person that is easily stressed I want my device to pick up on my mood and suggest activities to help calm me."

But questions were raised as to whether this technology was even necessary,
"I know what mood I am in, I don't need a device to tell me".

or whether it could be accurate,
"I think a bit more work might be needed on the mood sensors?"

This was also borne out in our quantitative study, where mood measurement proved less popular (35%, see figure 2) than measurement of activity (42%) or sleep (50%). This may also be in part because the measurement of mood data is much more intimate and personal than physical activity and sleep.



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Reflection

Figure 2. Reflection – % Interest in each use case

Base: Nationally representative UK smartphone users, N=841

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Affinity

Wearables are potentially the most intimate form of consumer technology yet, both in terms of the data captured and the fact they are worn on the body. This makes them well suited to fulfilling the need state of **affinity** – or emotional connection with friends, family or communities of interest.

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Affinity

Participants responded strongly to the idea of sharing moods and emotions. For some, the ability to connect with people remotely was exciting, particularly when living far away from friends and family.

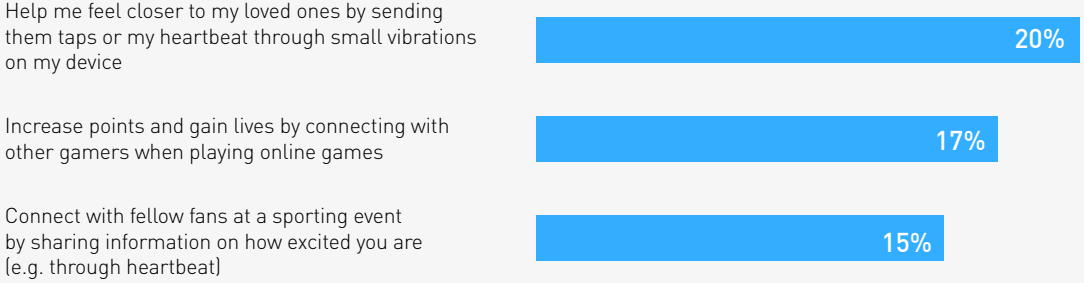
> *Actually that would be a nice feature of the watch, especially for people who are living far away from their parents and are not able to see them in person. I think I would definitely use that option on a regular basis as I am already using similar websites for this service. Especially for my friends' birthdays or mother's day and I can't be around*

Wearable devices are harnessing the power of haptic communication and feedback systems in order to create tangible long-distance connections, *"It would be awesome if I could send her a hug so she knew I was thinking about her/ wanting her to feel better".*

This proved the most popular form of **affinity** with the wider population (20% expressing interest).

Affinity

Figure 3. Affinity – % Interest in each use case



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Affinity

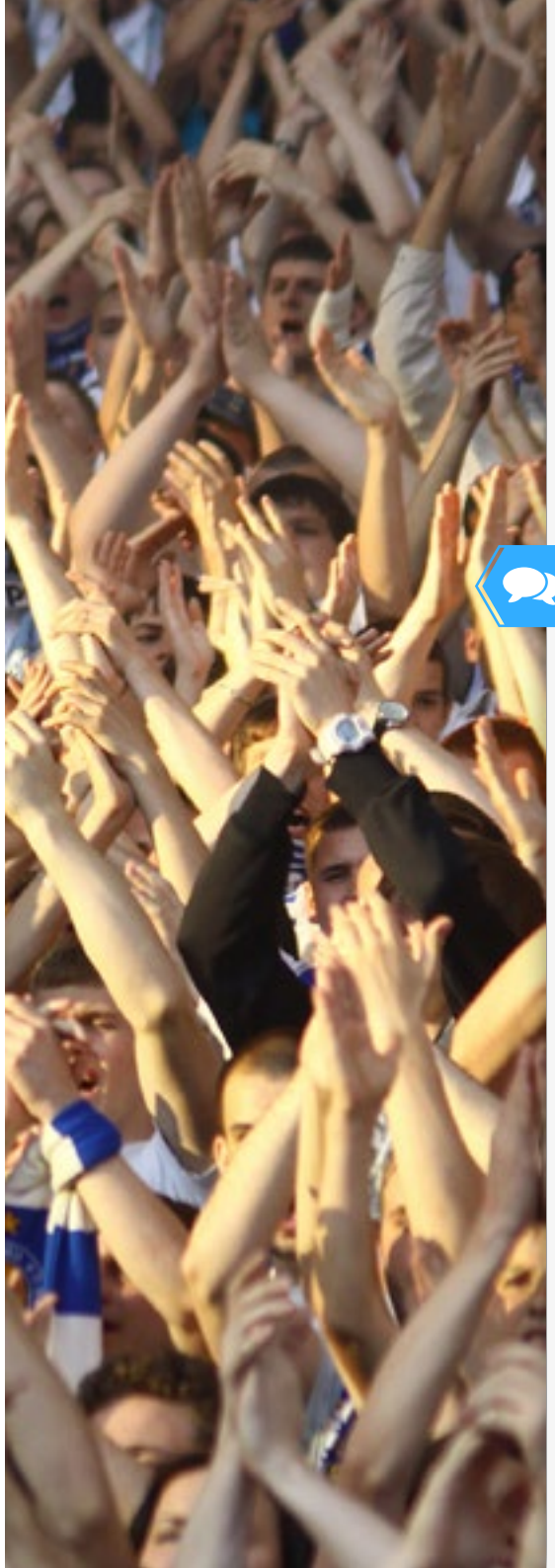
Wearable devices can bring people together in multiple ways: they can alert users if someone they know is in the area, or they can leave 'tickles' for people in places. They can create long distance togetherness.

But the **affinity** need state is not just about connecting friends and family at a distance. We found that wearable tech has the potential to create innovative ways to make connections amongst people who share similar interests for example in gaming: *"as a gamer I want opportunities to increase points and gain lives by connecting with other gamers."*

Or football, *"as a football supporter, I want responsive clothing so that I can connect with other fans."*

Wearables can reflect an individual's shared interest with people nearby, enabling access to communities of people and facilitating interactions through wearable social messaging.

However, this form of **affinity** with communities of interest proved less popular with the wider population (an average of 15%) perhaps because it feels a more challenging concept currently or because it is by definition related to specific interest areas which do not have universal appeal.



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Performance

Our respondents identified a strong opportunity for wearables to help **performance** when undertaking a specific task or activity.

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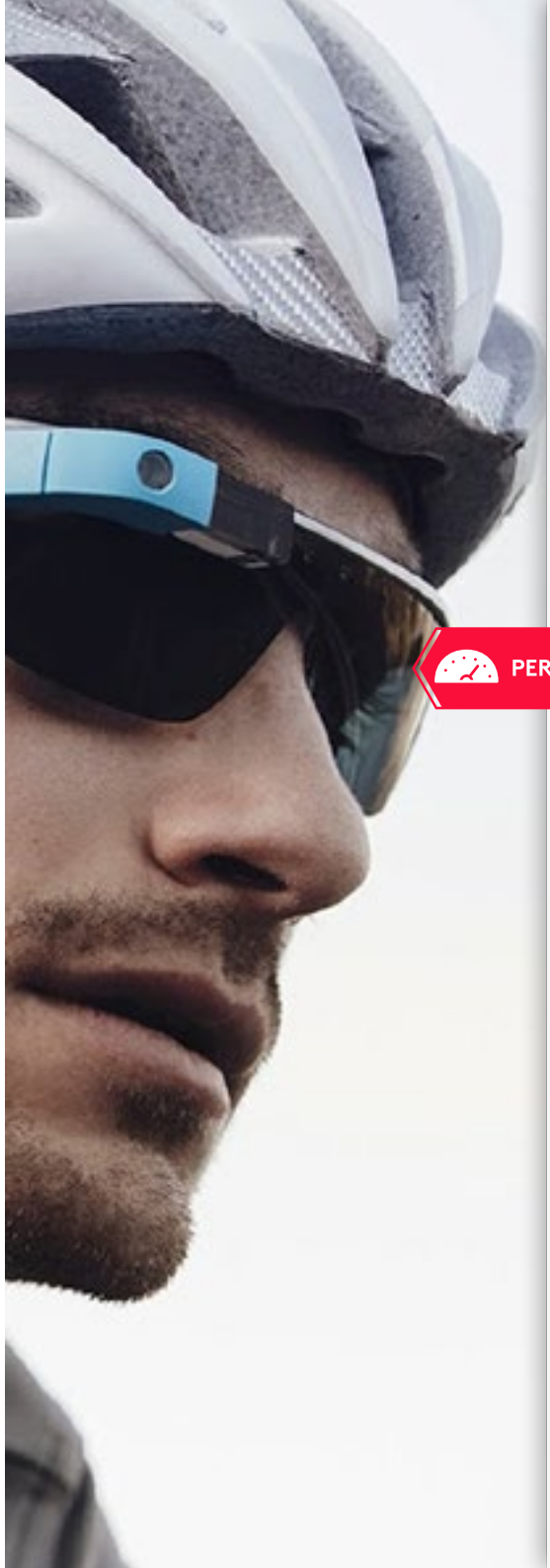
Performance

This role naturally lends itself to sport where sensor technologies can be integrated into products and clothing to seamlessly monitor performance, and offer specific feedback without affecting movement. Users will be able to receive feedback and specific recommendations based on accumulated data. So cyclists or skiers could be presented with real time performance data benchmarked against their historic performance on their glasses or goggles. Golfers could be coached on their swing with 'smart gloves' or runners could have their technique corrected in real time by shoes that change shape or alert them to poor performance. In effect, wearables could fulfil the **performance** need state by moving into more of a coaching role.

For the sports playing segment of the wider population this proved a popular concept with 41% expressing interest.

The performance need state could also be met by wearables helping to execute a specific task or function. Different wearable devices could assist people in different ways as users engage with these services on a temporary basis rather than on a continual basis in their everyday life. So for example, connected eyewear could overlay a virtual spirit level onto your line of vision to help you execute a specific DIY task. Or as one of our respondents suggested there could be a role for wearables helping you to carry out an everyday task like putting on make-up just a little bit better:

> *[it would be great to] watch YouTube tutorials for make-up [using Google Glass]*



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Value Exchange

Throughout the study participants continuously questioned and negotiated the value of their data.

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Value Exchange

Participants simultaneously expressed concerns about the security risks associated with companies having access to their data, and responded positively to the idea of receiving personalised offers and discounts based on companies having access to their data, *"I think I would use these deal alerts. Maybe not just coffee but things like bike accessories - wait until they're on sale and the watch would notify me."*

But in many cases, deal alerts and promotions were not enough. Respondents wanted to see something of greater value in return for sharing their wearables data. Brands must be careful to add or give value to users' data, as people are increasingly aware of its value. Just offering a discount might not suit everyone, and importance is increasingly placed on improving people's lives in a more significant way.

> *I would say that all these offers that suggest I buy something there or here are good ideas for saving some pennies every now and then but they don't really improve life quality.*

As Ben Hammersley put it 'I monitor my sleep because I wanna get better sleep, right? Because sleep itself is the reward. I shouldn't be monitoring my sleep in order to give a particular brand a better opportunity to get me to buy something that I previously didn't know I wanted to have'.

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Value Exchange

We identified this need to generate some tangible benefit for allowing tracking or data sharing, as **value exchange**.

So this need state for **value exchange** could for example be fulfilled through significant savings on private medical insurance in return for sharing wearables data on exercise levels, in effect an extension of what currently happens with 'black box' telematics car insurance. Similarly respondents identified the possibility of allowing the government access to wearables data covering your exercise levels and diet in return for tax relief incentives for healthy living. While that may seem somewhat 'big brother', it proved surprisingly popular amongst the wider population with 31% finding it appealing (see figure 4). A similar concept of a CSR initiative from a grocery retailer providing cashback in return for healthy living as measured through wearables, also proved popular (35%).

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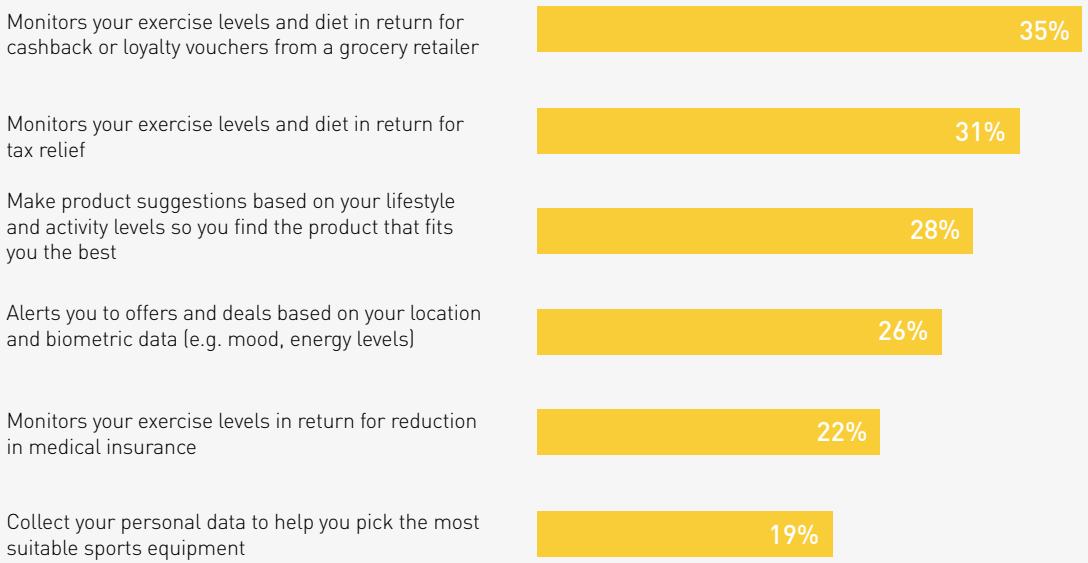
Value Exchange

Figure 4. Value Exchange – % Interest in each use case



Base: Nationally representative UK smartphone users, N=841

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Self Expression

Wearable devices until now have largely been associated with wellbeing and performance related activities.

Yet throughout the study, participants' reactions to wearable devices were as much about style - what they looked like, how they 'felt', and how others responded to them, as specifically about what they did. Respondents exhibited a strong need for wearables to help them look and feel good. We identified this need state as one of **self expression**.

Self Expression

During the fieldwork participants constantly commented on how their user experience was deeply affected by the look of a wearable and how it 'fit in' with particular situations, as one of our participants put it, *"I have my watch in bag. Not something I would wear when going out."*

We found that social proof plays a central role in the adoption of wearable technologies when it reinforces the need state of **self expression**. Participants who at first were reluctant to use features of certain wearables (i.e. speak to the smart watch using the command "ok Google") proceeded to embrace this feature when others around them either ignored them, or seemed intrigued and asked questions, *"they were asking what brand it was, said it looked nice. When I told them things I could do with it they seemed impressed."*

Although social proof will be central to the mass adoption of wearables, the promise of interaction and personalisation, the combination of fashion (style) with communication (technology) will allow people to present themselves in different ways. This means that for many people, wearables will become more about style than substance – with the added bonus that they can have this as well.

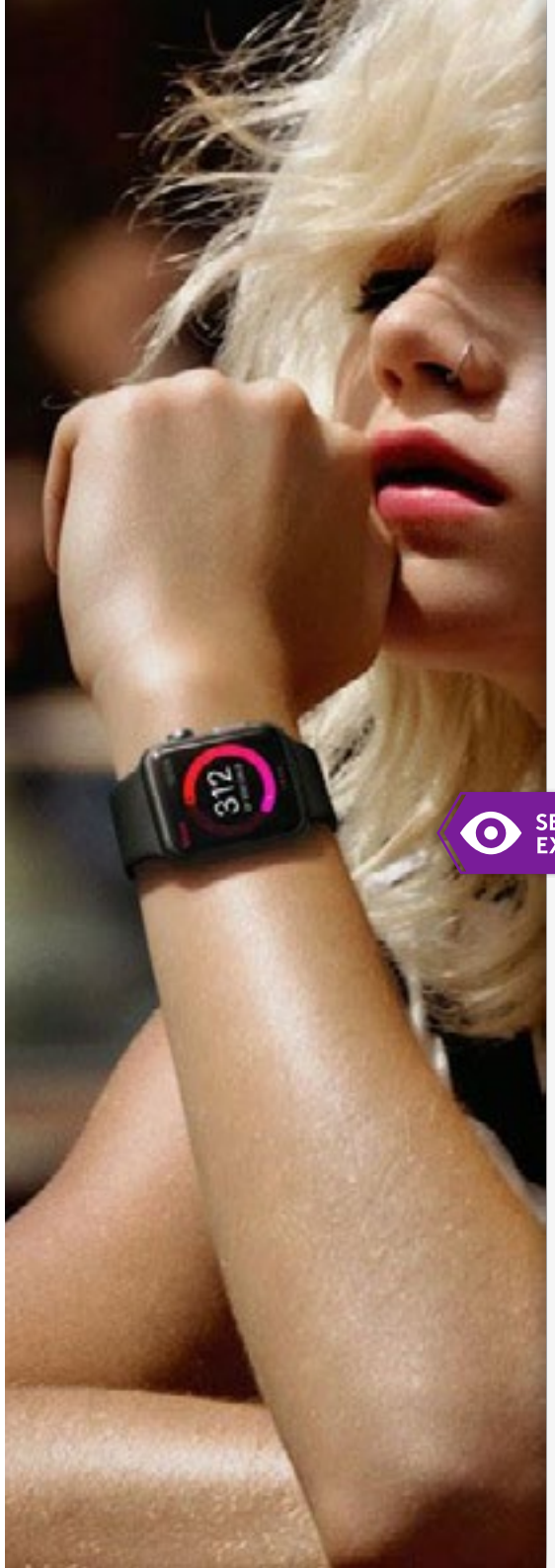
Self Expression

"One colleague said the watch looked like a tamagotchi (admittedly there are other designs on the market, but can't say that's what many people over 20 want - a tamagotchi watch). When playing with the watch in public people look at you funny, and many of my meetings this week have started with conversation about the watch. The conversation always ends... would you recommend it?

Wearable technology promises the intimacy and social familiarity of clothing, combined with the information access and transmission provided by mobile communications and micro processing. It offers the possibility of producing and delivering highly personalised services and experiences, and therefore providing channels of **self expression**. As it becomes more integrated into fashion we expect this to become an increasingly important area.

If wearables are to achieve mass adoption, style and fulfilment of the need for self expression will be a central motivating factor. As Ryan Genz co-founder of CuteCircuit said,

"no matter what it happens to be, it can be eye glasses, a tie, shirt, a bracelet, a necklace, people won't wear things unless they think they are cool enough to wear; if it matches your style, if it matches your personality, if it matches what you want to say about yourself to the world."



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Brands and wearables
Opportunities for Advertisers

The advertising industry has had a tendency to try and force old forms of communication onto new platforms with mixed success. The first TV commercials were radio ads read by a narrator; the first banner ads were essentially digital posters or print ads; and mobile advertising has suffered from attempts to shoehorn the banner ad into an even smaller screen.

Wearables represent even more of a challenge to advertisers. On the one hand they represent a platform with an incredibly intimate understanding of the consumer; on the other they have limited (if any) screen real estate on which to present a message.

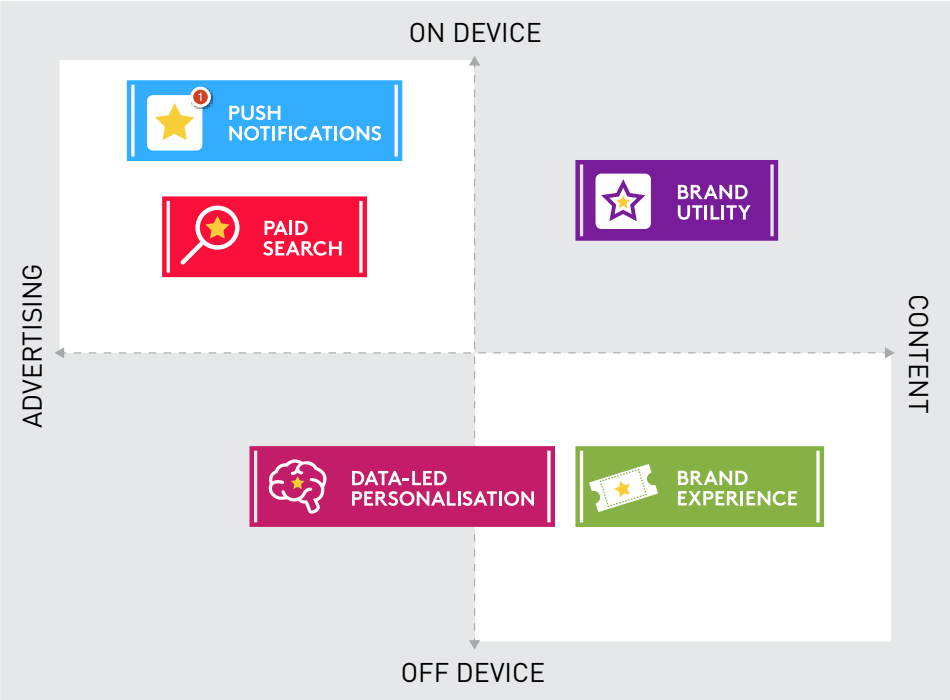
Working with our respondents in co-creation workshops we identified a series of areas where brands can take advantage of the shift to wearables.

Brands and wearables
Opportunities for Advertisers

These opportunities cluster along two clear dimensions:

On device vs. off device: Does the opportunity exist on the wearable technology itself? Or does it use the data generated by wearables to communicate on other platforms?

Advertising vs. content: Is the opportunity advertising based? Or is it content, utility or experiential?



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Brands and wearables
Opportunities for Advertisers

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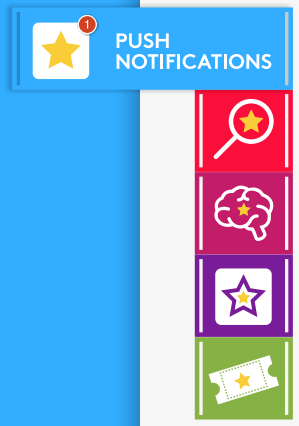
Push Notifications

On certain wearables with a screen, such as connected eyewear or notably the smartwatch, we think there will be an opportunity for push notifications. These may be offer or promotionally led, triggered by location and the data collected by a wearables device. So the runner who has completed a particularly fast run could be rewarded by an offer on a sports drink or vitamins, delivered as a short notification on the Apple Watch that could be saved in Passbook.



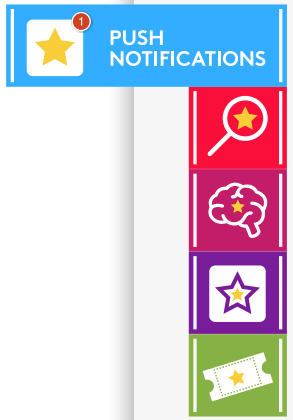
Push Notifications

As Jeff Malmad, the Managing Director of Mindshare North America's Life+ wearable tech unit put it,

"if I walk in to a store, and I have my device in my pocket, and I have opted in for push notification, from a specific app, those app notifications now come to my wrist and I get a little haptic feedback on my wrist telling me to take a look down. For example I was in a store, two weeks ago, going grocery shopping, at Stop&Shop, and I got a push notification on my watch from 'x' telling me here are the items today that I could purchase and get a rebate on, whilst I was in that aisle at the store".

This kind of contextually relevant communication was popular amongst the wider population with 36% finding it useful (see figure 5).

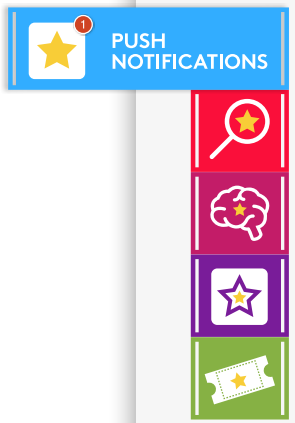
There is also great potential for more creative strategies. Brands could deliver motivational messaging in certain contexts such as running. Participants liked the idea of receiving messages in real time (i.e. using hearables) that could for example advise you to keep going or to rehydrate after a particularly long run, and could be delivered by a brand or celebrity athlete.



Push Notifications

Many of the rules that apply to push notifications on mobile are even more applicable to wearables. People need to feel that they have control over push notifications, in terms of which brands, under what circumstances and the volume of messaging. This is largely because the devices are worn on the body and therefore perceived to be even more intimate than the mobile, already arguably the most personal medium to date.

One of the early motivations for the Apple Watch is that it can be used to filter out the large volume of notifications that often litter the iPhone and surface the most important. In that context, for a brand to deliver a push notification to the smartwatch it needs to be very confident in delivering something of use and value, and not just cluttering up a new screen. Advertisers will need to be extra careful they don't kill this opportunity with clumsy interruption before it's even had a chance to develop.



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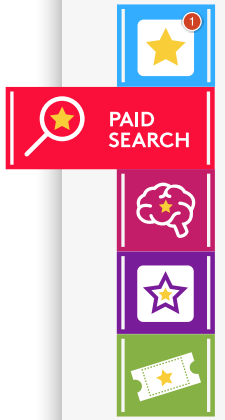
Paid Search

For certain categories of wearables, notably smartwatches, eyewear and hearables, there is strong potential for brands to deliver search style communications in response to requests for information. The success of PPC in matching an advertiser message with user intent can be replicated in scenarios where consumers are looking for information when on the go and prefer for reasons of speed or convenience not to use the smartphone.

Search on Wearables

The challenge though will be in generating even greater relevance in paid search results than can be achieved on other devices. Because wearables offer less space, and the user is less inclined to browse through multiple results, it is even more critical that the sponsored suggestion is of value to avoid irritation. There also needs to be flexibility in content form as it has to be understood with a glance but be able to provide more detailed information when required by the user.



Data-led Personalisation

The wealth of data captured by wearables presents the possibility of an increasingly detailed understanding of the consumer that in turn opens up opportunities for personalisation of content. While push notifications on the wearable itself are one manifestation of this, it is likely that different types of data aggregated from wearables will be used to inform targeting and content delivery across other digital platforms – desktop, tablet, mobile and beyond.

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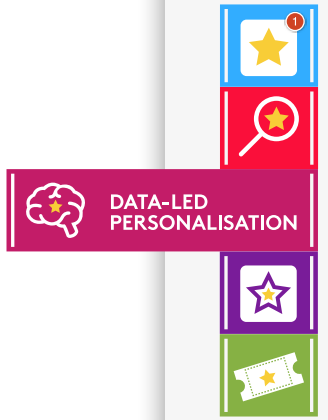
Data-led Personalisation

We can envisage a world in which mood or fitness data generated by a wearable is another dataset that is incorporated into the agency trading desk of the future to hone targeting or allows publishers to deliver ever more personalised content suggestions. So, the dehydrated runner arriving home and picking up their tablet could be presented with a display ad or piece of native content from a drinks brand.

Clearly, there are significant privacy implications that arise from using data as personal as from wearables, and we can see that in the relatively lukewarm response from consumers about the prospect of content personalised from their wearables data – 24% found it an appealing concept (see figure 5). But, this is largely consistent with much of the consumer response to data driven personalised advertising and does not suggest that wearables data is inherently 'off limits'.

So with sensitive use there's no doubt that this emerging data set has the potential to deliver a richer, more relevant content experience to the end user across all of their digital touchpoints



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Brand Utility

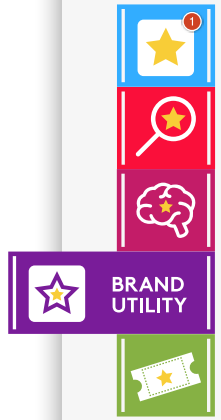
While wearables will open up some opportunities for advertising, we think the areas of greater potential lie in the use of wearables to provide consumers with some form of value or experience.

Brand Utility

In some cases this will consist of brands creating their own wearable technology – as Nike famously did with the Fuel Band or as BMW are doing with their driving goggles for Mini – to deliver a positive brand service to the user. But the challenges of developing and launching your own wearable onto a cluttered market mean that this approach will probably only be taken by the biggest brands. A more accessible approach that is likely to gain greater traction is for brands to develop services, such as apps for the Apple Watch, that are built on the capabilities of the wearable device.

The concept of brand utility proved popular amongst our fieldwork participants as it was perceived to be a less pushy form of communication that provided something of use in exchange for the commercial message, and left the consumer in control of whether to let the brand in or not. This sentiment is echoed in the wider population with 30% attracted to the idea of a health food company offering a smartwatch cholesterol app and 28% liking the idea of a bed retailer providing a sleep monitoring app.

The challenges for brands in executing this area lie in reassuring consumers that they will be responsible with their data but also in achieving stand out and scale given the plethora of alternative options facing consumers in most service areas.



Brand Experience

Another area of opportunity for brands which proved popular amongst our participants, was the concept of brands using wearables to enhance a real-world experience for consumers.

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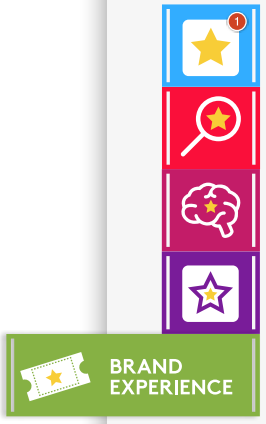
Brand Experience

Wearables can be used to enhance events, and leave lasting reminders – for example a Nike smart running shirt only for people participating in a Nike running event. Equally sponsors of sporting events could use wearables worn by the crowd to monitor excitement levels and broadcast the results on screens in the stadium and elsewhere online, thereby enhancing spectators' enjoyment of the event. In a similar vein, we've seen brands provide wearables that monitor movement and heart rate for clubbers at branded club nights which are then displayed on screens and used to 'power' the DJ's set.

Because people can independently choose to participate in these experiences, it reinforces amongst users the idea of control, and of the brand providing something of value.

The challenge will be in providing something that genuinely enhances the experience and is not just a forced use of technology for its own sake. This is also an area that may need to see constant reinvention to maintain excitement and avoid feelings of having seen it before.



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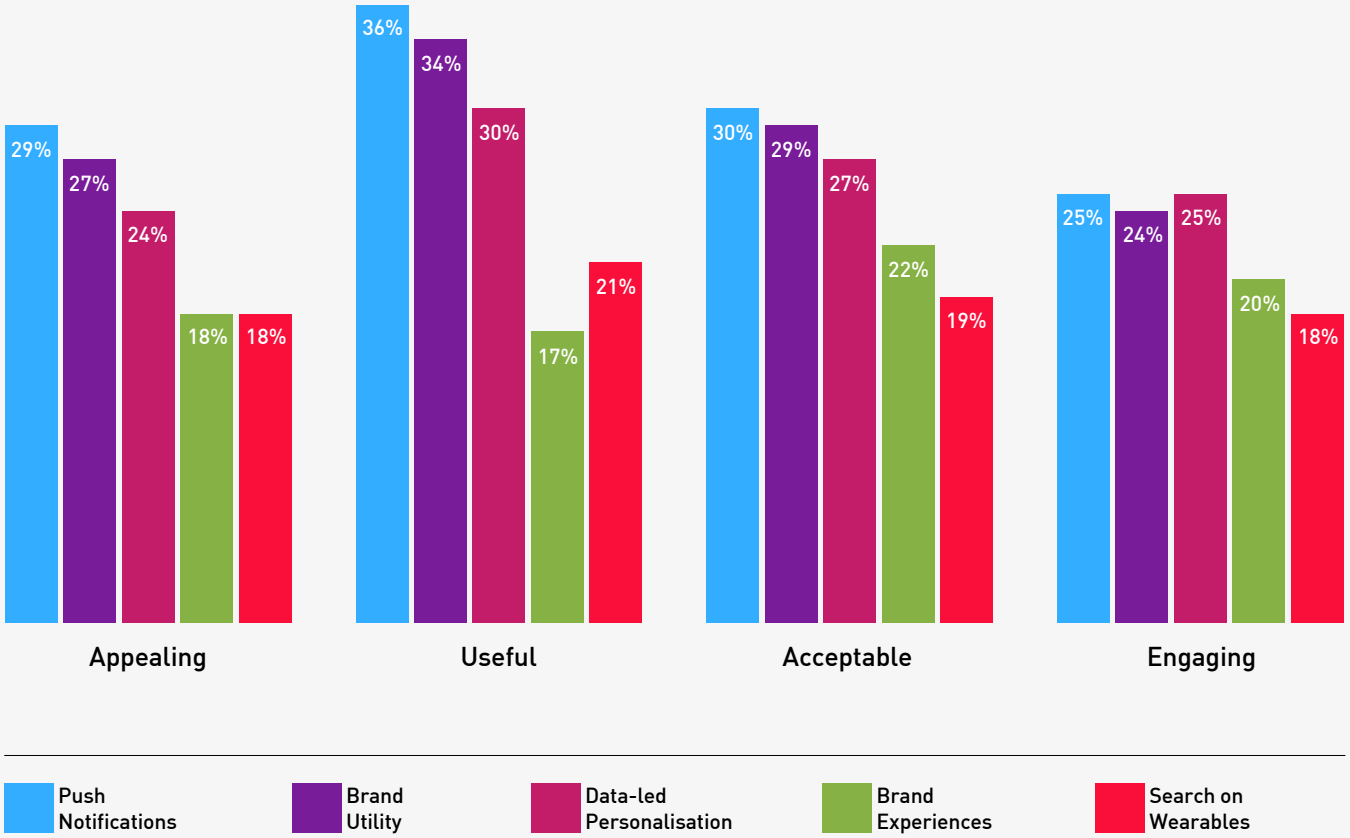
Brand Experience

Figure 5. Brand opportunity evaluation (% agreement)



Base: Nationally representative UK smartphone users, N=841

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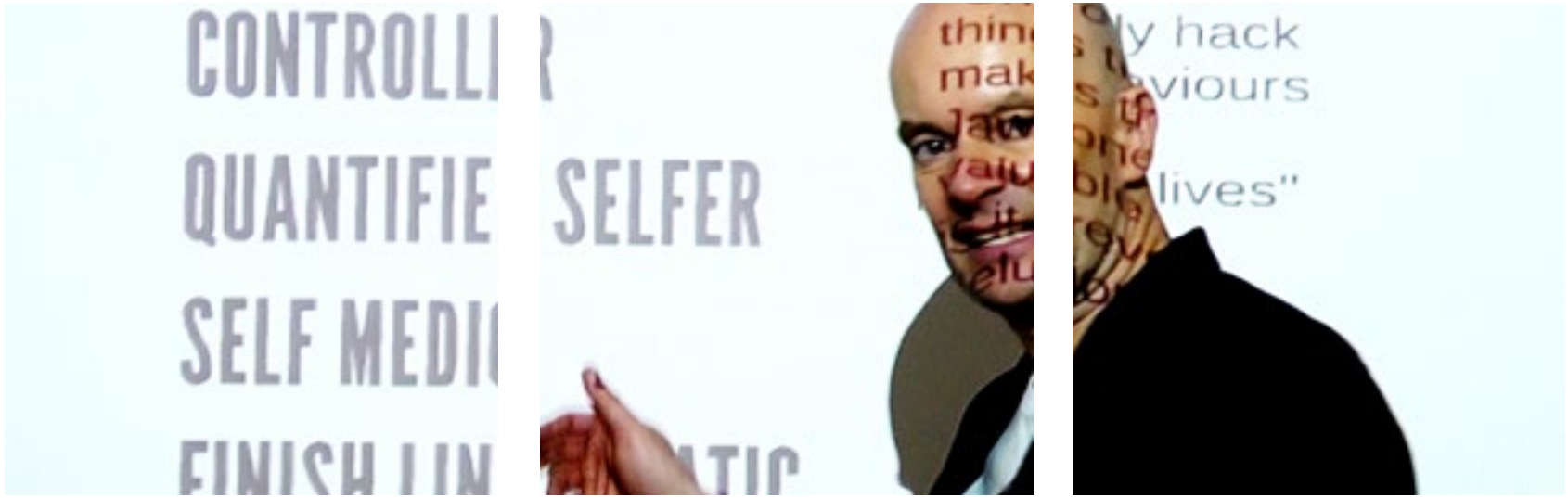
Conclusion

Just as advertisers are starting to get to grips with the implications of the rise of mobile, the shift to wearables, the internet of things and the connected self will present even greater challenges. It is only by understanding why consumers use wearables and the role they play, that advertisers will give themselves a fighting chance of getting the most out of them. **Shift** has opened the window on the underlying motivations for using wearables and the possibilities that their rise presents for marketers. As the launch of the Apple Watch kickstarts the entire sector, now is the time to experiment, learn and plan for the future.



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Acknowledgements

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Thanks should also go to Ricardo Leizaola and Louise Boer for their filming and photography.

Appendix

The following subject matter experts were interviewed as part of the research process:

Ben Hammersley, Editor at Large, Wired magazine

Jeff Malmad, Managing Director, Head of Mobile and Life+, Mindshare North America

Brian Cooley, Editor at Large at CNET

Chris Glode, VP Digital, Under Armour Connected Fitness

Francesca Rosella & Ryan Genz, Co-founders, CUTE CIRCUIT

For the quantitative part of the project, 841 nationally representative UK smartphone users were interviewed online through the future_medialab research community on 15th–28th April 2015.