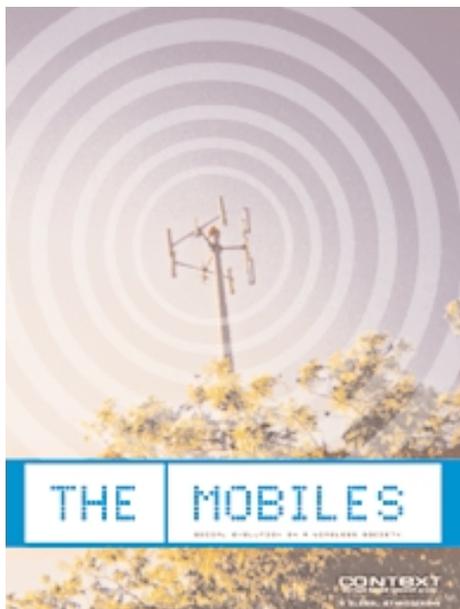


THE MOBILES: Social Evolution in a Wireless Society (Overview)

Wireless technology has evolved at a breakneck speed while people's attitudes and behaviors have not. The result is a gap between what people do and what they can do wirelessly. Marketers and developers who deeply understand people's needs and wants can bridge that gap.

"THE MOBILES: Social Evolution in a Wireless Society" points to the establishment of a new class – the Mobiles. This study takes a hard look at how people and cultures evolve and advance in their adoption of the new mobile lifestyle. The report also includes detailed summaries of findings by country and age and concludes with a prediction for what's to come in wireless and wi-fi.

The study was conducted by a team of true cultural insiders - professional ethnographers living and working in seven cities around the world: Beijing, New York City, San Francisco, Rome, Stockholm, Rio de Janeiro and Sydney. The Context team observed and interviewed 144 participants, "going deep" (meeting several times over the course of a few weeks) with 26 of them.



About Context-Based Research Group

Context is a leader in ethnographic research, founded in 1999 when anthropologists Belinda and Robbie Blinkoff, Ph.D. partnered with marketing and advertising executive Chuck Donofrio. Their goal was to found a company that would help generate the kind of insight to truly enable companies to put the customer at the center of their new product development, marketing strategies, and organizational growth efforts. Context clients include: Adobe Systems, American Express, Campbell's, ExxonMobil, Faith Popcorn's Brain Reserve, Fisher-Price, GuinnessUDV, Herman Miller, Kodak, LeapFrog Toys, Microsoft, Procter & Gamble and Tyson Foods.

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Introduction

A brief overview of the study that explores how people's attitudes and behaviors related to wireless have changed in two years, uncovering the feelings and behaviors people don't talk about.

A Mobile Lifestyle Emerges

Wireless today is no longer all about technology and devices. Instead, this report explores the evolution of a mobile lifestyle, complete with well-articulated mobile lifestyle adoption stages.

Key Themes

Four key themes emerged from the study data: relationships & community, education, changing behavioral & social norms, and sense of place. This section looks at how the themes relate to each of the mobile lifestyle adoption stages.

Relationships & Community

Wireless use helps build and maintain relationships and community. But it is clear that wireless use alters the kind of relationships people have, and changes the structure of their communities.

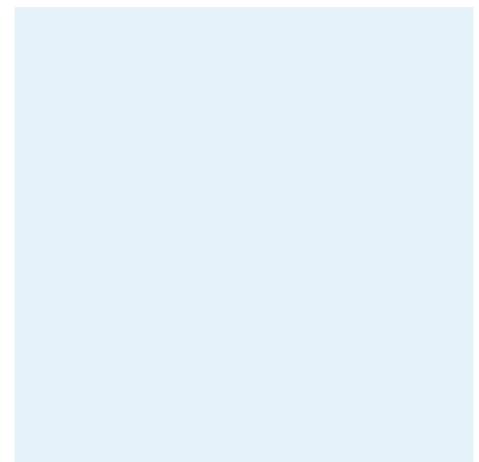
Education

When people begin using mobile devices, they must learn to think a new way about their life. On a more detailed level, they must learn specifically how to use the devices that will facilitate their mobility. With few formal training outlets, informal/ad hoc communities form to share knowledge about wireless devices and functionality.

Changing Behavioral & Social Norms

People's behavior evolves slowly, while technology changes quickly. As a result, we found many people testing the limits of new behaviors and social norms due to the rapid acquisition of these new technologies.

THE MOBILES: Extended Table of Contents



(.01) The ultimate protection. While hanging out with her friends at a local club after school, Doris jokingly puts her mobile inside a condom.

(.02) For teens, mobile phone conversations often take precedence over face-to-face.

(.03) Two Swedish teens talk on their mobiles as they hang out after school.

(.04) Several of Gianni's friends sit, talk, and make plans in the Campa di Fiori.

Sense of Place

Wireless technology and mobile phones allow people to contact a person, not a place (like traditional phones). As a result, when people are on a mobile phone with someone, they now make the natural leap to think of themselves as with that person, not just on the phone.

Then & Now

This section compares the findings of our 2002 study with what we found in the 2000 study, revealing how attitudes and behaviors around wireless are evolving by comparing the current mobile climate with the past.

Comparison by Segments

A look at the differences between wireless users of different age groups.

Teens

Both techno- and media-savvy, teens today embrace mobility and are leaders in wireless use. Having grown up with wireless devices and the rapid introduction of new technologies, they are comfortable incorporating constantly evolving devices into their busy lives, for both functional and entertainment purposes.

Young Adults

Just entering adulthood and needing to make their mark on the world, young adults (ages 20-40) have a love-hate relationship with their mobile devices. They remember the pre-wireless days, but their adult lives have been shaped by a mobile society. As a result, they are all at once dependent on, entertained by, and resentful of their mobile devices.

Older Adults

Because they had already established routines prior to the introduction of wireless devices, the older adult group remains the

most resistant to the mobile lifestyle and the least integrated of all – and will likely stay that way.

Comparison by Locations

A look at the differences between wireless users in different countries.

Sweden

The most highly evolved country in this study, Sweden represents the outer curve of attitudes and behaviors related to wireless use. Heavy wireless use has influenced a culture of impatience, in which immediate gratification is expected and there is no reason to wait for anything.

China

In Beijing, attitudes and behaviors around wireless are evolving in the face of a complicated political system and emerging economic market. New and high tech mobile devices are symbols of status in China, and individuals of all ages and socioeconomic levels are in the relatively early stages of integrating wireless into their lives.

Australia

Australia falls solidly in the middle of the countries studied regarding general attitudes and behaviors related to wireless use. People in Australia clearly see the practical benefits of wireless use and depend on their devices for security and connection to loved ones. At the same time, they also see the down side of the proliferation of mobile devices.

Brazil

Far behind the other countries studied in terms of device integration, even Brazilians who use their mobile phones instead of a home phone lack knowledge about their device functions and resist any use beyond voice.

Italy

Near obsession with constant communication characterizes the Italian's attitudes and behaviors around wireless. It's widely accepted that constant reachability is not only desired, it's a vital part of any work or personal relationship.

United States: NYC

For New Yorkers, the constant connectivity and immediacy made possible by wireless devices has been both a blessing and a curse. Wireless devices are great information tools for life in an incredibly busy city. However, the already fast pace of New York City has gotten even faster thanks to wireless capabilities, so it is nearly impossible to function without constant wireless connection.

United States: San Francisco

Still a US hotbed of technology adoption, San Francisco is home to wireless users who possess a great deal of knowledge about their devices and plans, but who defy typical American early adopter "geek" stereotypes.

The Future of Wireless *By Sean Carton*

A look at what's next for "the mobiles" and how Wi-Fi will change the wireless landscape.

Overview

A detailed account of the study scope and methodology.

Appendix

Charts illustrating the Mobile Lifestyle Adoption Stages.

About Context

Context company history and biographies.

