



Reimagining Smartphone Experience

How 'Surfaces' can play a key role
in making the phone smarter

February 2024

A decorative horizontal line of small teal dots spans the width of the slide at the bottom.



About BCG

Boston Consulting Group partners with leaders in business and society to tackle their most important challenges and capture their greatest opportunities. BCG was the pioneer in business strategy when it was founded in 1963. Today, we work closely with clients to embrace a transformational approach aimed at benefiting all stakeholders—empowering organizations to grow, build sustainable competitive advantage, and drive positive societal impact.

Our diverse, global teams bring deep industry and functional expertise and a range of perspectives that question the status quo and spark change. BCG delivers solutions through leading-edge management consulting, technology and design, and corporate and digital ventures.

We work in a uniquely collaborative model across the firm and throughout all levels of the client organization, fueled by the goal of helping our clients thrive and enabling them to make the world a better place.

Meet the Authors



Nimisha Jain

Managing Director
and Senior Partner,
Boston Consulting
Group



Vipin Gupta

Managing Director
and Partner,
Boston Consulting
Group



Kanika Sanghi

Partner and Director,
Boston Consulting
Group



Aarav Singhal

Managing Director
and Partner,
Boston Consulting
Group

Executive Summary



Wake up

Usage of smartphones is inarguably the single most dramatic and observable shift in human behavior in the last 13 years. A proverbial visitor from Mars might conclude that these devices are an extension of the human anatomy, without being too far from the truth.

We attempted to study this ubiquitous phenomena by focusing on the following questions

- How has usage on smartphones evolved?
- How can the same be segmented?
- What are the pain points in current the smartphone experience?

Coverage is on stated and unstated user opinions via Mindiscovery® workshops, juxtaposed with mobile usage data (n=1,132).



Power up

We found that users can begin their journeys in 3 different ways:

- **Pre-determined:** User is aware of the use case (to shop, to stream, etc.), as well as the app to fulfill the same
- **Exploratory:** User is clear on action but not the app
- **Spontaneous:** User picks up the phone out of sheer habit

These 3 journeys define one axis. The other axis is defined by 9 use-cases of the smartphone, out of which the original functionality of communication is just one ('socializing').

These two axes give rise to 12 distinct Demand Spaces, which capture all the needs of the smartphone user.



Scroll & Surf

We imagined an 'AI Powered engine' which could potentially help users be more productive, support discovery and finally, help explore the universe of all the relevant use cases. Early editions of this idea exist even today.

'Surfaces' or non-app screens, could be 'AI Powered engine' that elevates the current smartphone experience to the next level.

We re-imagined a few user journeys within our Demand Spaces to visualize the unmet needs that could be fulfilled by intelligent 'Surfaces'.

This idea - in its full potential could deliver a strong consumer value through seamlessness for pre-determined journeys, smart experience for the exploratory journeys, and inspiring serendipity in the spontaneous ones.



To the Destination

Lastly, we discussed the smartphone experience with select ecosystem stakeholders:

- **OEM/Telcos**
- **App Developers**
- **Brands/Advertisers**
- **Content Publishers**

We also touched upon a few specific opportunities with the strategic imperatives for each of the stakeholder who need to collaborate to bring this concept to life!

Early signs of success are demonstrated by select case-studies.

We conclude with a few recommendations for each stakeholder on how they can shape the surface economy!



Table of Contents

1 Rise and Rise of Smartphones

- I, me, and my smartphone 10
- Digital Swiss-knife 12
- Pick-up lines 14
- Demand Spaces 16

2 Introducing 'Surfaces'

- What if... 22
- The early signs of smart-surfaces 24

Pages 08-19

Pages 20-25

3 Reimagined Journeys

▶ Journey 1 On Demand viewing	28
▶ Journey 2 Guilty pleasures	32
▶ Journey 3 Joyful interludes	36
▶ Consumers love surfaces for...	40

Pages 26-41

4 Opportunities for the ecosystem

▶ Owners of smartphone experience	44
▶ Maturity ladder and what best looks like	46
▶ Ecosystem players' perspectives	48
▶ Rise to the surface	56

Pages 42-57



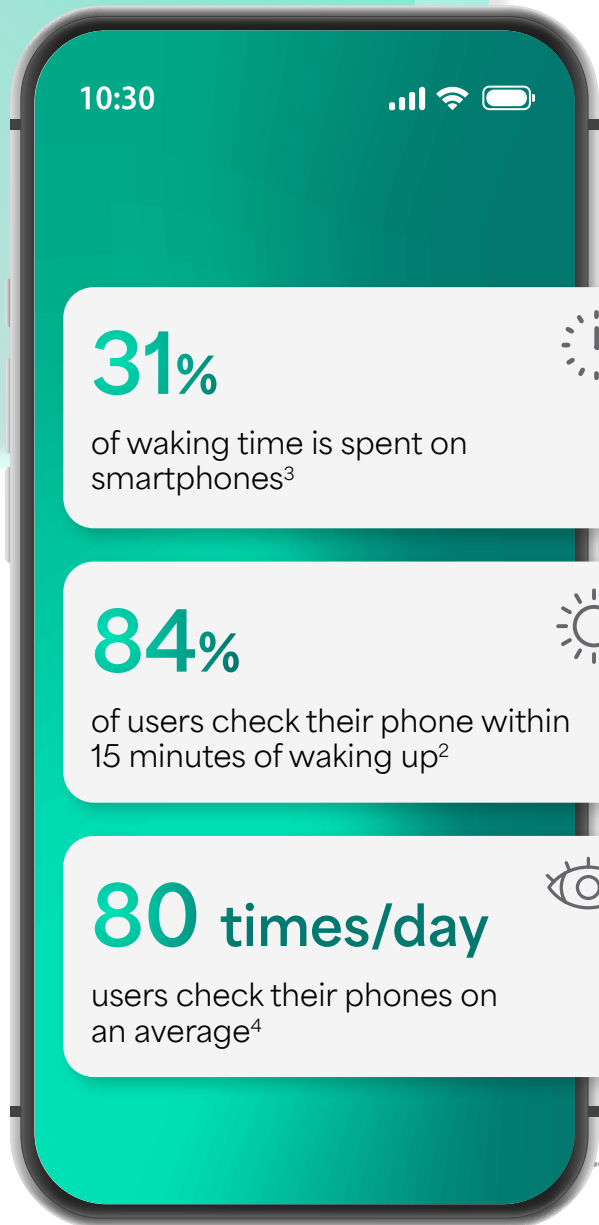
1



Rise and Rise of Smartphones



Smartphones today are an inseparable part of our existence...



We are in a relationship with our smartphones

Mobile devices are interwoven into every aspect of our lives. We feel a sense of panic or anxiety when the phone's battery goes below the 20% mark.¹

Smartphones are not just as important as the proverbial keys or wallets, they have even replaced the same.

In India, the first access to the internet for most of the population has skipped the usual desktop phase, seen in developed countries. Users leapfrogged directly to mobiles, due to the affordability of smartphones and the availability of cheap data.⁴

1. Reviews.org Cell Phone Usage Survey 2023; 2. Vivo India smartphone survey, 2020a; 3. Data.ai State of Mobile 2023, India & Global; 4. Expert interviews

...no wonder smartphone volumes and usage, have grown by an order of magnitude from 2010 to 2023

Apps on Play Store¹

As people use their smartphones to do more today, the number of apps have gone up by 35x



Smartphones sold²

With more affordability and uses, smartphone penetration has also gone up, resulting in - 5X growth in sales



Mobile internet penetration³

Lastly, usage of internet is now at 71% and shows no sign of slowing down



1. Techcrunch report; 2. Gartner data; 3. Statista

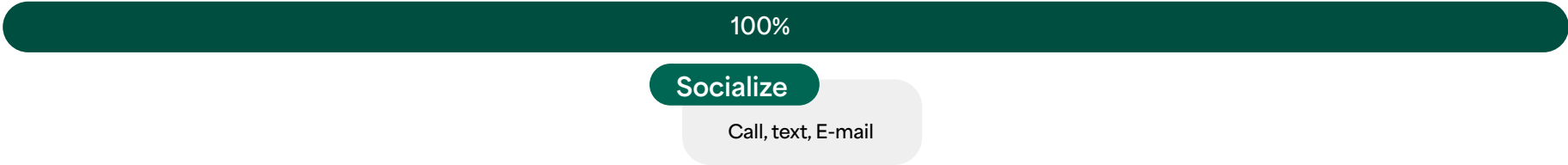
Introducing the new digital Swiss knife: One smartphone, 9+ use-cases



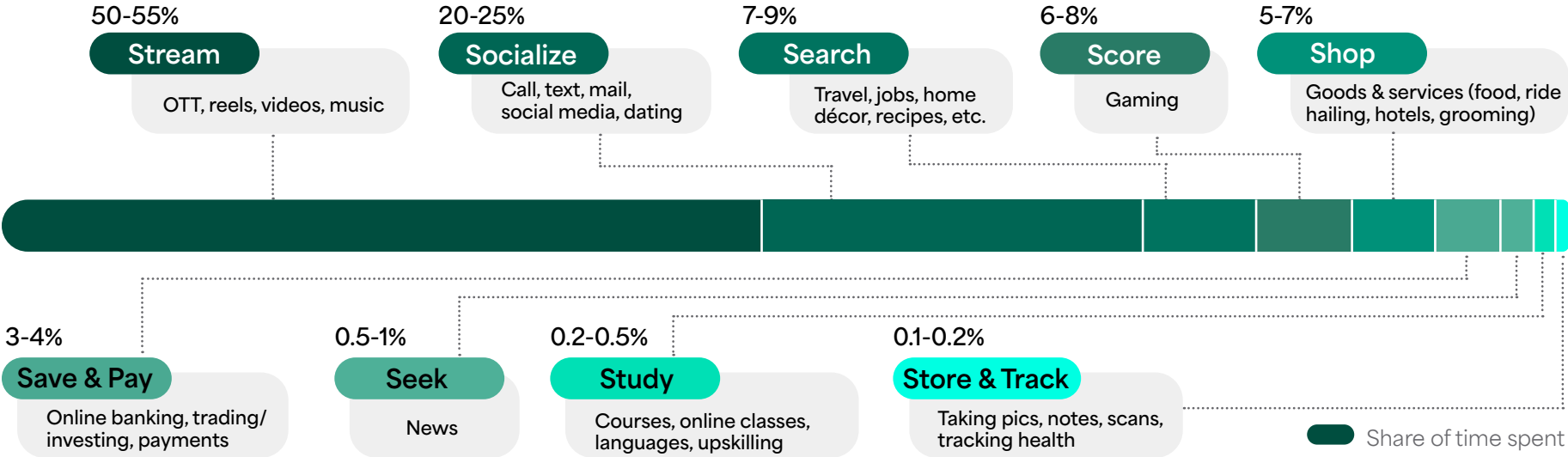
Witnessing a steep **increase in time spent from ~2 hours to 4.9 hours**, smartphones have truly expanded their role in our daily activities.¹

Streaming content is the predominant use case today, occupying of **50% of the share of time spent**.²

2010 (~2 hours)



2023 (~4.9 hours)



1. App Annie report; 2. BCG Analysis - in partnership with VTION

Time spent across use cases remains largely uniform across cohorts...

...except that on SFV* by youngsters!



5-8%

Gaming

Range of time spent on gaming apps across cohorts



5-8%

Shopping

Range of time spent on shopping apps across cohorts



25-29%

Streaming (long form)

Range of time spent on streaming long form content across cohorts



1.5x

Time spent on SFV* like reels, shorts, etc., is 1.5x higher for 18-24 than 35+ year olds.

It is similar across cities & gender.

*Short Form Videos - like reels
BCG Analysis in partnership with VTION

1 in 2 times people pick up their phones – they do so without knowing “why”

% share of all occasions

Pre-determined

Clear on both action and app

Rohan wants to pay his friend on GPay

45-50%

Exploratory

Clear on action but not app

Alisha wants to buy a red shirt online

5-10%

Spontaneous

Not clear on either action or app

Prakash decides to habitually check his phone while waiting for the bus

45-50%

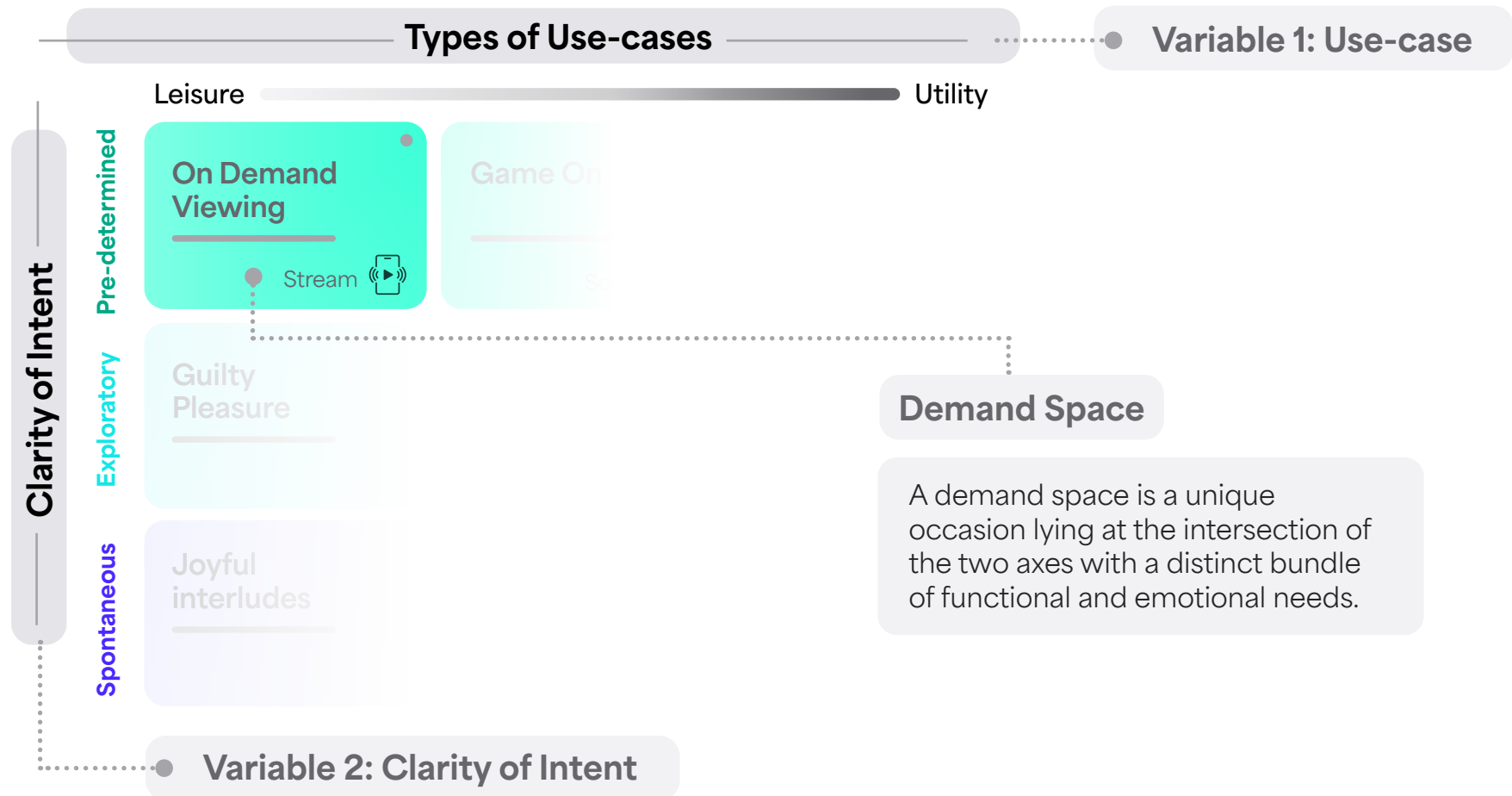
BCG Analysis in partnership with VTION



What kind of journeys do users undertake?

Based on our research, we determined that user journeys were dependent on two variables: Use-case & Clarity of intent

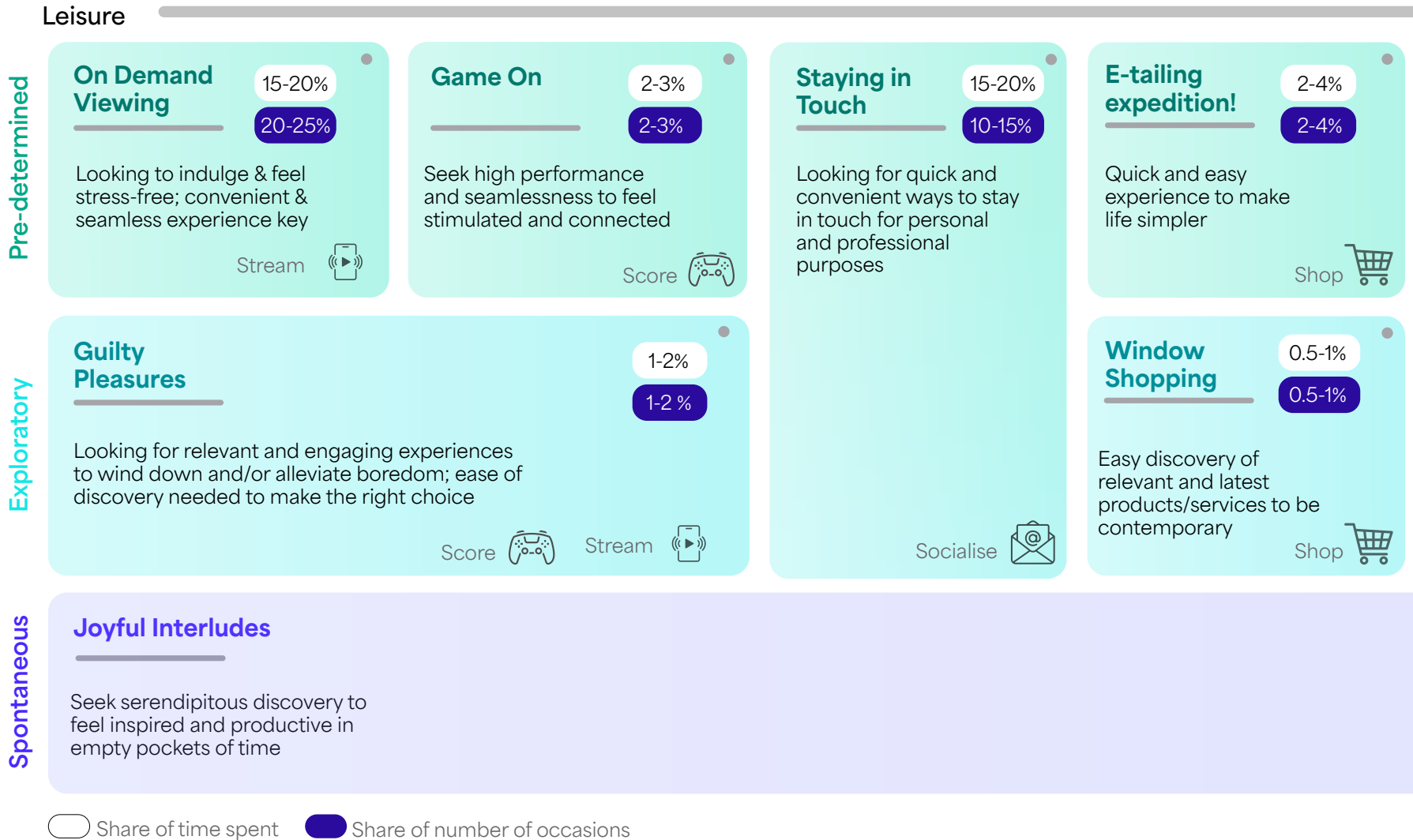
Needs are segmented basis use case and degree of intent



12 distinct smartphone journeys emerged, each with its unique set of needs

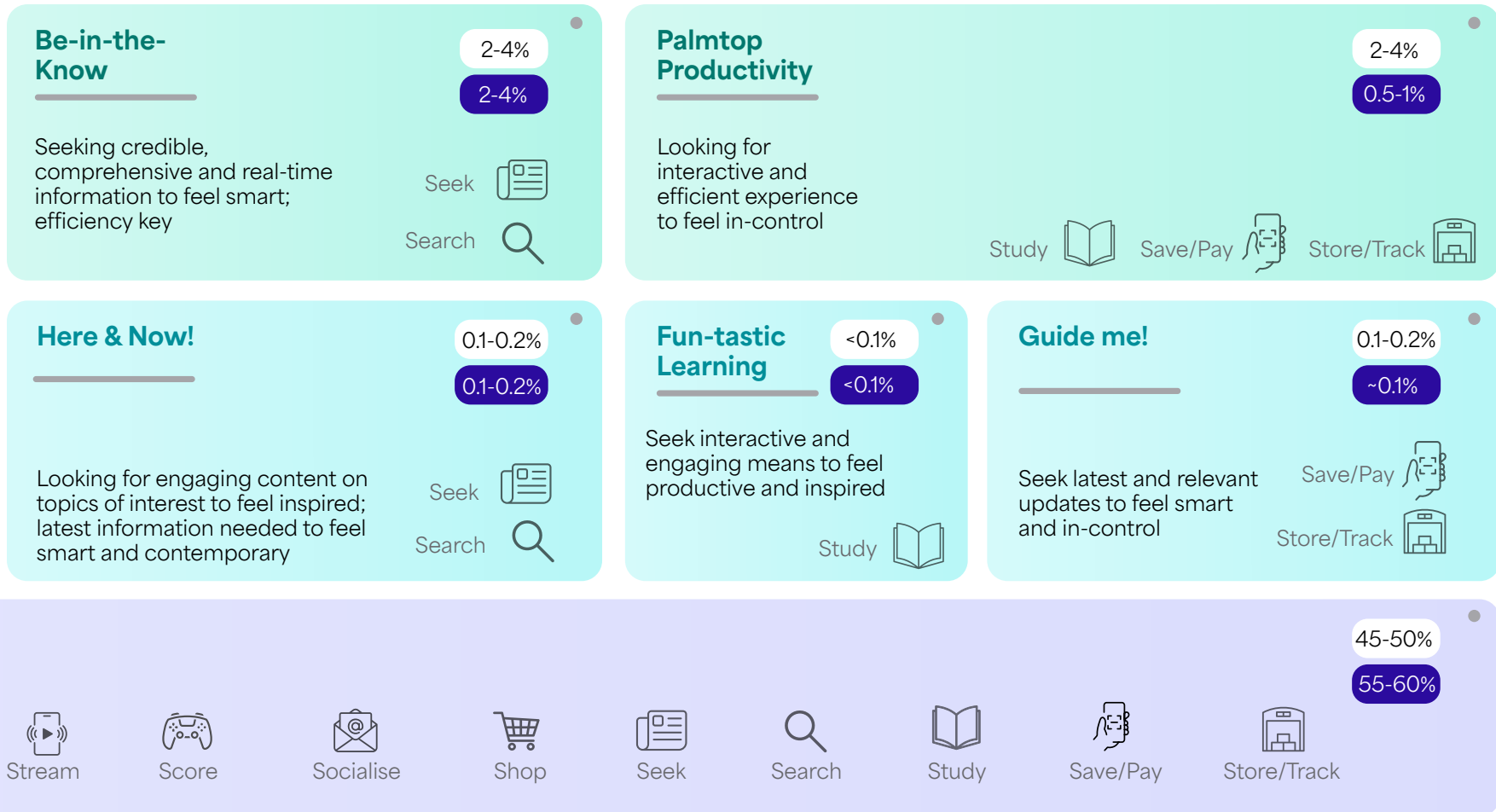
Types of use-cases

Clarity of intent



Types of use-cases

Utility



Boston Consulting Group's Centre for Customer Insight's (CCI's) conducted pan-India FGDs (n=40) and survey (n=1100, representative of the Indian population) for smartphone users across different age and income groups

Our research indicated significant potential to improve consumer experience in each demand space




Be-in-the-know

Being a businessman, I've to stay on top of market news, however, it is **cumbersome to search for comprehensive and credible news** that gives **real-time info on the stock market daily**.



Male, 37 years
Mumbai-based manufacturer of steel products

 Use case
Seek news

Journey
Pre-determined




Window Shopping

I'm a new mom and I know what I need for my baby but am not sure of where to buy - now-a-days, it is so **difficult to find relevant products** among these irritating ads!



Female, 26 years
Professor in Delhi University with a 7 months old baby

 Use case
Shop

Journey
Exploratory




Guilty Pleasures

I usually like to discover different games on my phone whenever I am free, but there are so many options on the Playstore now - it's **difficult to find fun games that match my vibe.**



Male, 19 years
Final year Psychology student at UCS

 Use case
Score

Journey
Exploratory




Joyful Interludes

I'm sure I open my phone more than 70 times a day! Usually I don't even know why I pick it - I had searched for a trip to Bali last week, now I am **bombarded with boring ads** and **can't find anything new.**



Female, 43 years
MNC professional in Jakarta, stays with husband and 2 kids

 Use case
Undecided

Journey
Spontaneous



2 Introducing 'Surfaces'



What If?

Your phone helps you become even more **productive**?

Display cab options when it's time to leave office daily

Your phone helps in **discovering** the best deals serendipitously

Flash comparison of prices & delivery of relevant products across e-tailers

Your phone helps you explore the most **relevant** among all entertainment options

Nudge when a new season of a relevant show is released

What if something can bring it all together? Introducing 'Surfaces' - the next frontier in human-device interactions

Surface

/ˈsəːfɪs/ 

Noun

plural Surfaces

Definition: Potential to be the AI powered engine, driving interaction between users and apps. Manifests as a rich, dynamic screen right from the start of a user's phone journey.

Although the phenomenon is still in its nascence, it still boasts a user base of ~220 Mn MAUs in India, with 16 minutes average time spent / user*.

Similar words:

Lock Screen

Home Screen

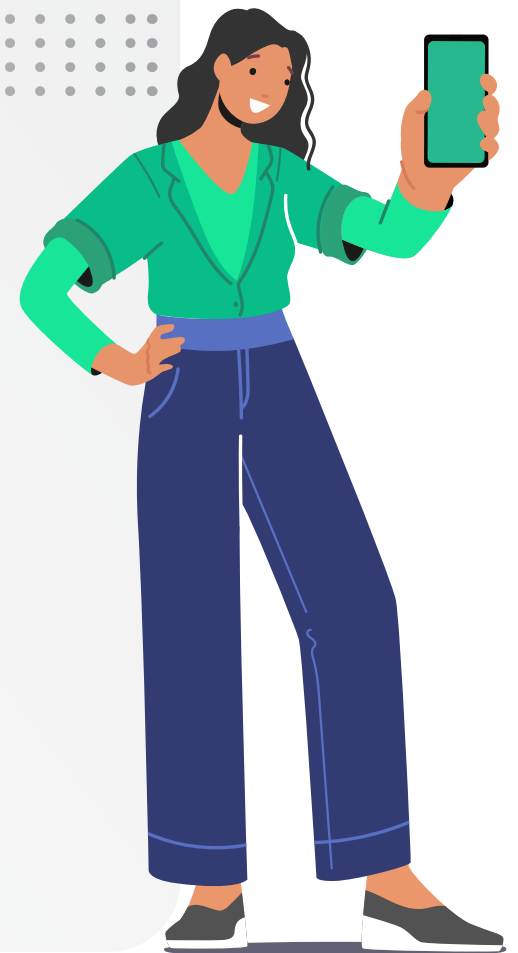
Minus One Screen

Origin & evolution

- 2019 First edition as dynamic wallpapers on lock screen
- 2021 News and entertainment content in micro doses
- 2023 Real time visibility of live order fulfillment
- ? 20xx AI on device leading to phones acting as smart assistants via surfaces

*MAU - Monthly Active Users

Considering Glance lock screen as best available proxy



'Surfaces' exist even today, driven by 3 types of players

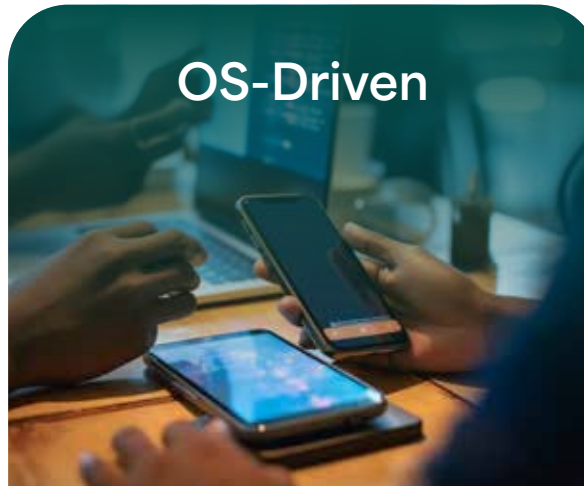


OEM-Driven



Apple brought in a **new flavor of dynamism on its lock screen** with live updates. Multiple phone OEMs source lock screen content from 3rd party providers to drive engagement.

OS-Driven



Majority of Android devices load a default Google discover news feed upon **swiping right on home screen** (also called a minus one screen).

Surface-first innovation driven



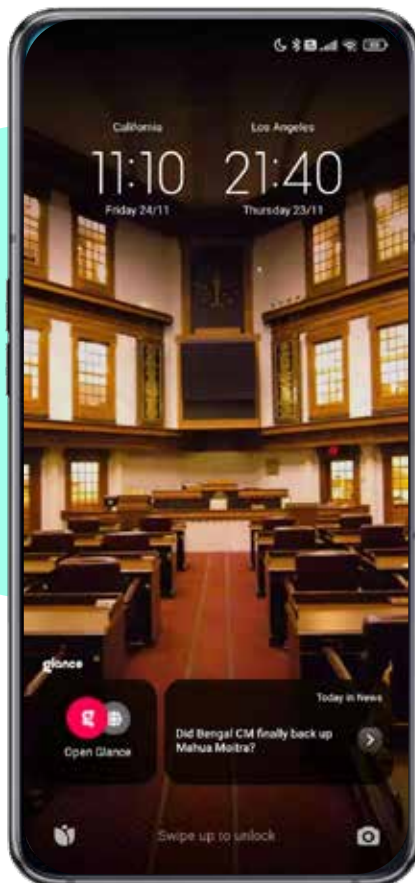
Players like Glance are the **most interesting of the lot w.r.t. innovation in AI deployed**, to serve relevant content for a user every single time.

Note: iOS is considered as an OEM and not OS, as the OS is available only on native OEM devices, unlike the News feed, which is available on multiple OEM devices

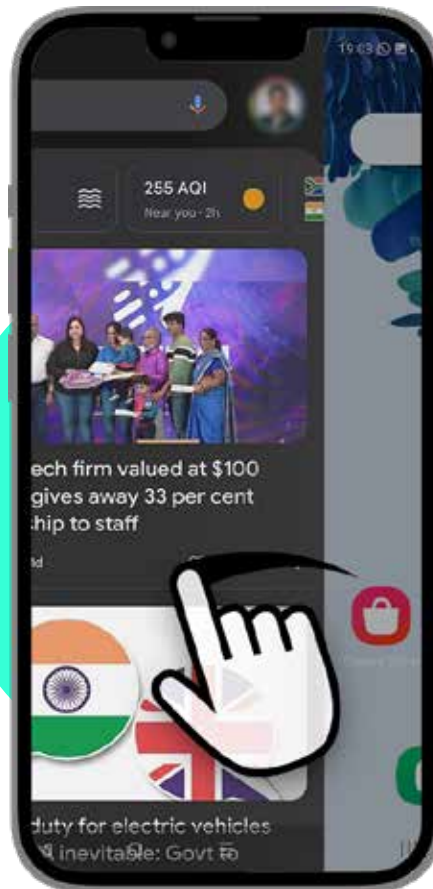
Glimpses of early editions of 'Surfaces', which are enhancing consumer experience



Lock screen as a 'Surface' - driven by OEMs & third parties

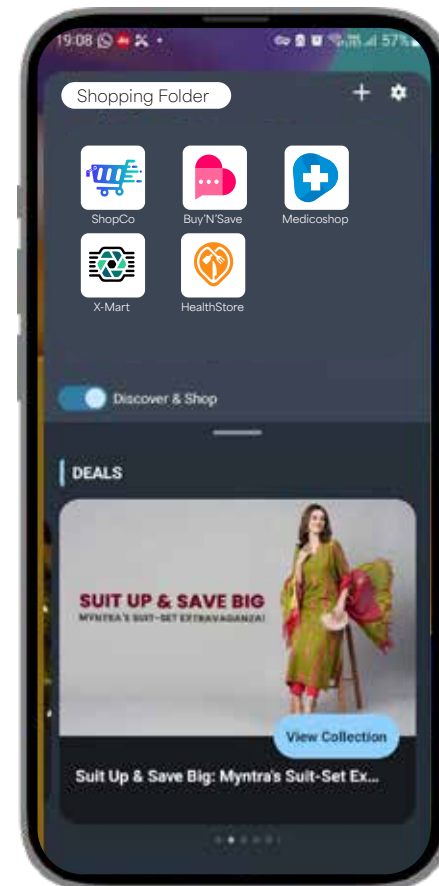


Minus one screen as a 'Surface' - driven by OS and OEMs



Usually appear upon swiping right / left on the phone's home screen

Folders as a 'Surface' - driven by a 3rd party

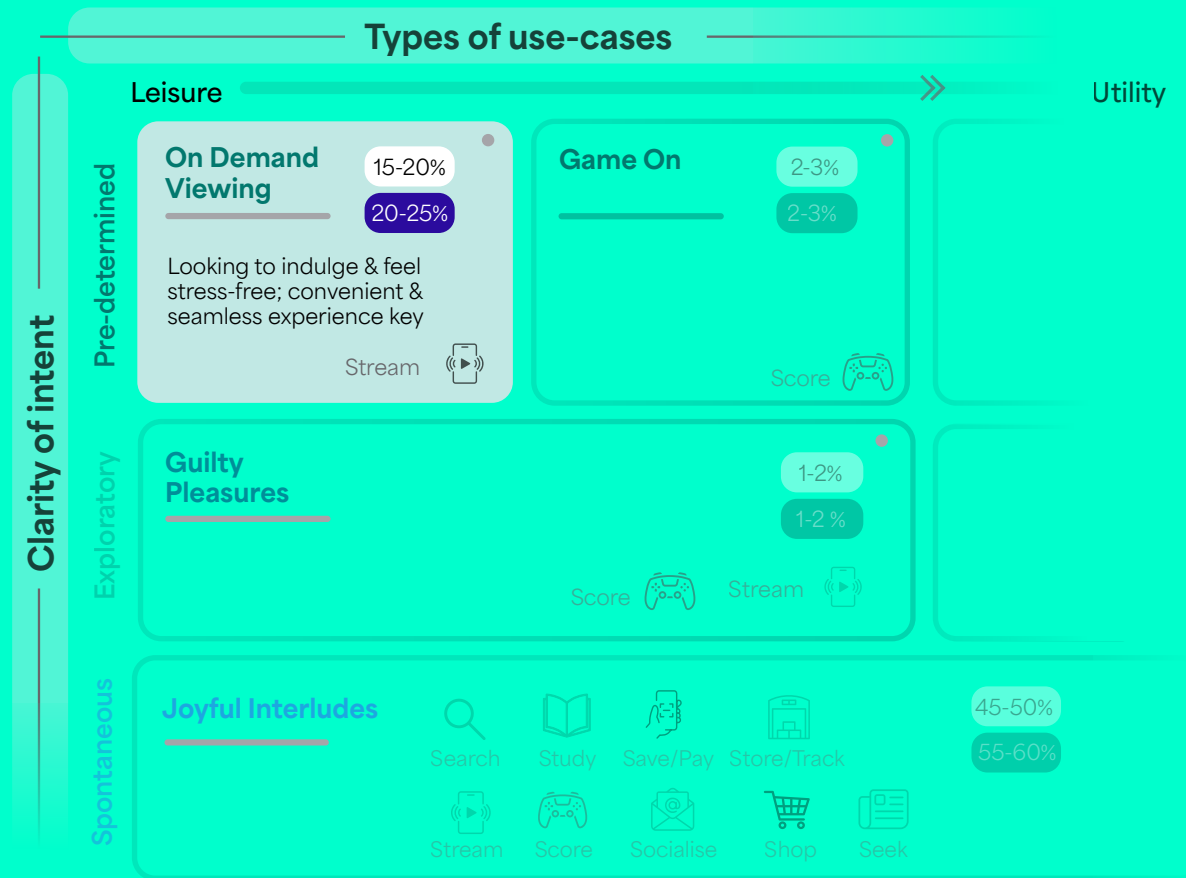




3 Reimagined Journeys



“On Demand Viewing” journey



1 out of 5 times people pick up their phone, they fire up their “go-to” streaming app



”

What if...

I am able to find the show that I wanted to watch - in one click - on my lock screen?

Male, 37 years

Mumbai, India

Associate Manager of Marketing

“On Demand Viewing” | Current user journey and opportunity to enhance through ‘Surfaces’



Male, 37 years

Mumbai

Wants to watch a movie he has added to ‘watchlist’ on his commute back from work

Current journey

1 Unable to recall on **which app** ‘watch-listed’ movie is streaming

2 Opens an app and struggles to find the “watchlist” section

3 Scrolls through a long list in the watchlist to find the movie

4 Sees trailer; **switches to browser & IMDB** to check reviews

Re-imagined journey - with Surface

1 **Watchlist widget** spanning across streaming apps; one click landing on app

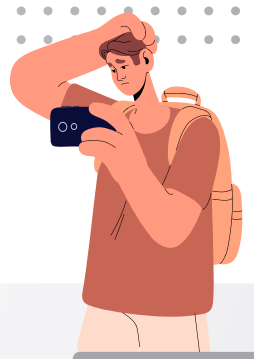
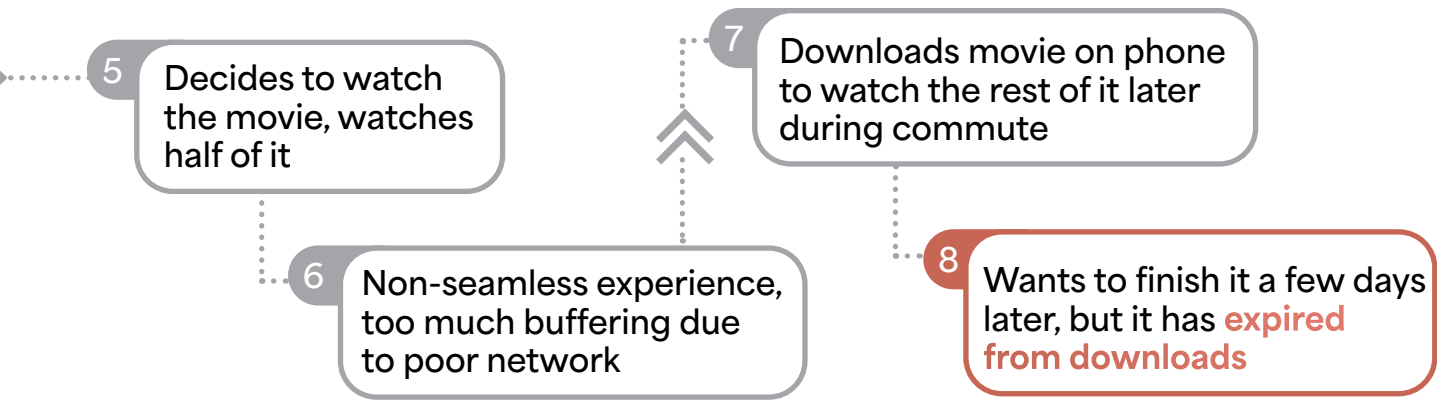
2 Opens an app and struggles to find the “watchlist” section

3 **‘Watchlist in folder’** organized by genre to allow quick & easy selection

4 **Movies folder** showing IMDB rating as **well as critics’ & viewers’ reviews**

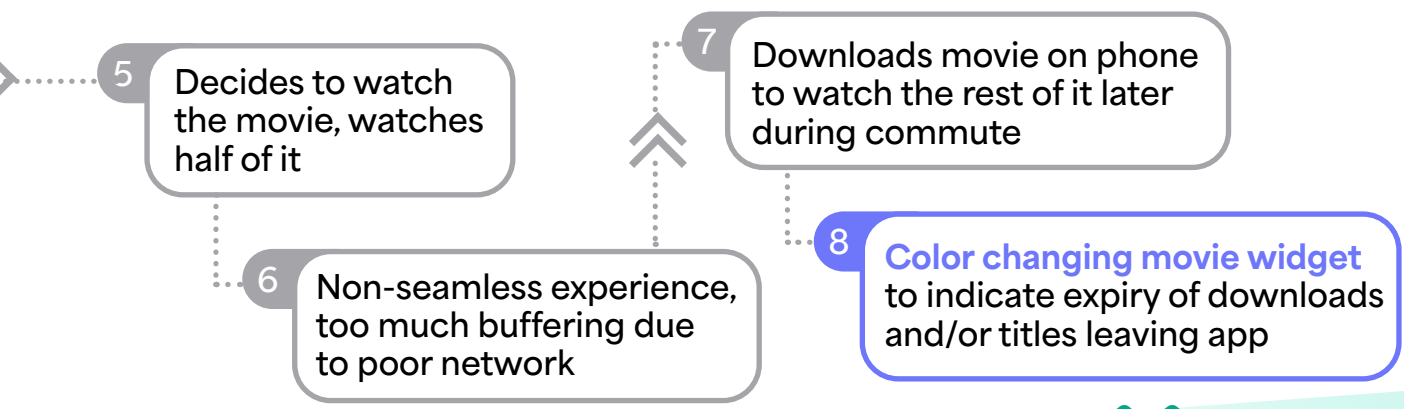
● Pain Points

● Surface Solution



Pain Points

- Disconnected experience due to multiple toggles
- Lack of efficiency due to multiple visits to check for updates

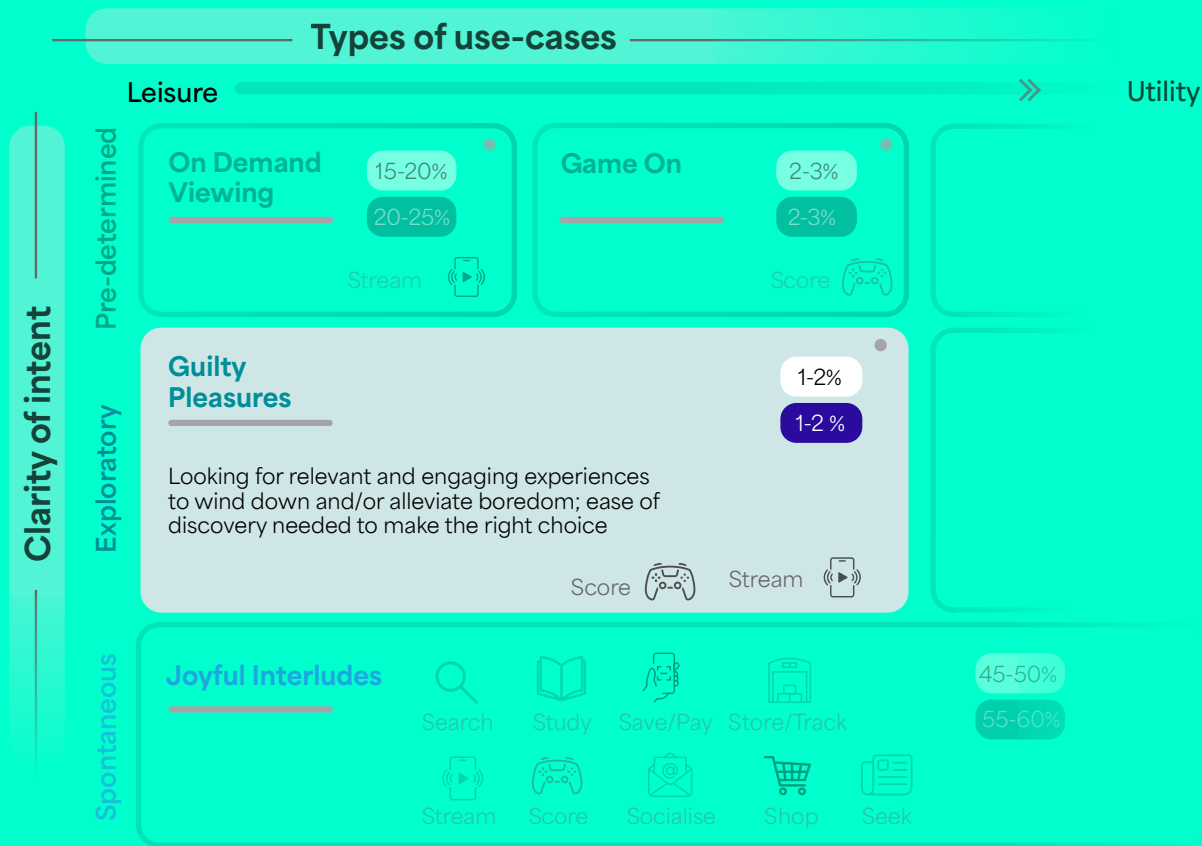


Surface Solution

- Seamless experience through consolidation of shows, watchlists etc.
- Quick notifications through widgets

“ **Surface through a consumer lens**
For some apps, I get really simple and visual notifications about my saved movies being deleted ”

“Guilty Pleasures” journey



Gaming and shopping occasions have the highest share within exploratory journeys



”

What if...

I can view the match score and highlights in real time on my phone - without having to go to an app?

Female, 55 years

Jaipur, India
Housewife

“Guilty Pleasures” | Current user journey and opportunity to enhance through ‘Surfaces’



Female, 55 years
Jaipur

A housewife, keen on cricket - wants to watch cricket but doesn't know how/where...

Current journey

1 Searches on Chrome for match score, **navigates across multiple portals**

2 Downloads app but stops at subscription page - **not familiar with clicks and tricks**

3 Receives notifications for match; but **unable to see without subscription**

Re-imagined journey - with Surface

1 **Live-score updates on lock screen widget**

2 **One-click guided 'install and subscribe' process to watch the match**

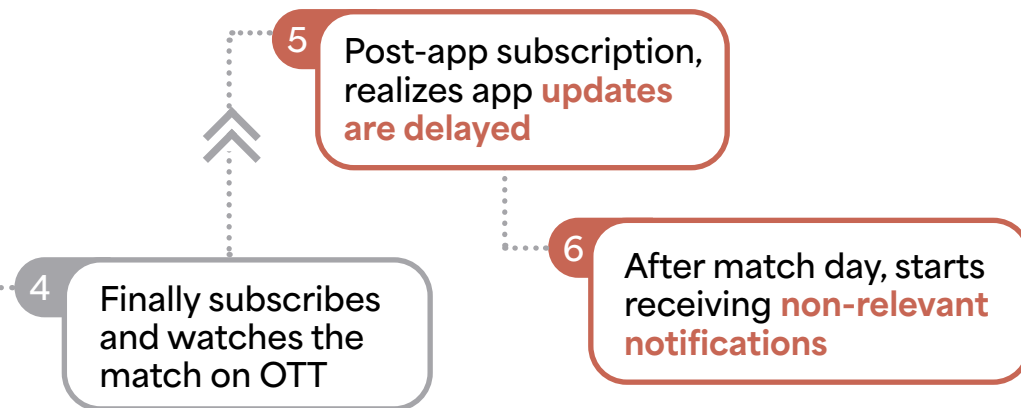
3 **Watches visuals of key moments on lock screen, while multi-tasking**



Pain Points

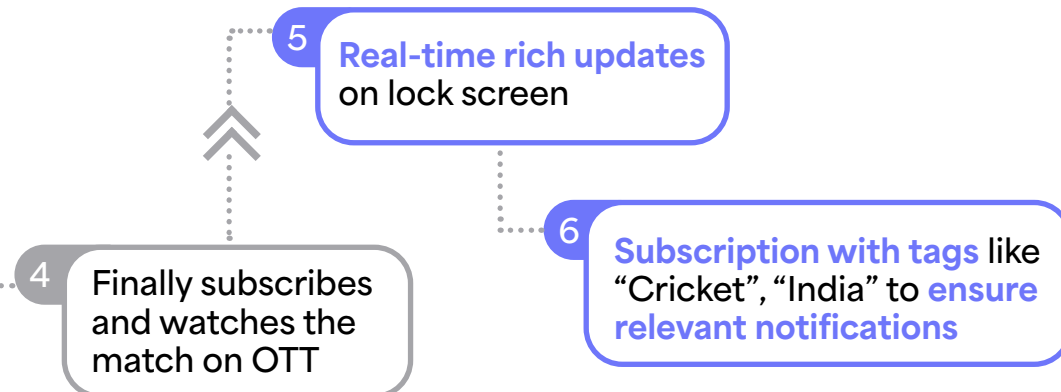


Surface Solution



Pain Points

- Irrelevant updates; updates not given in real-time
- Discovery of interests are delayed



Surface Solution

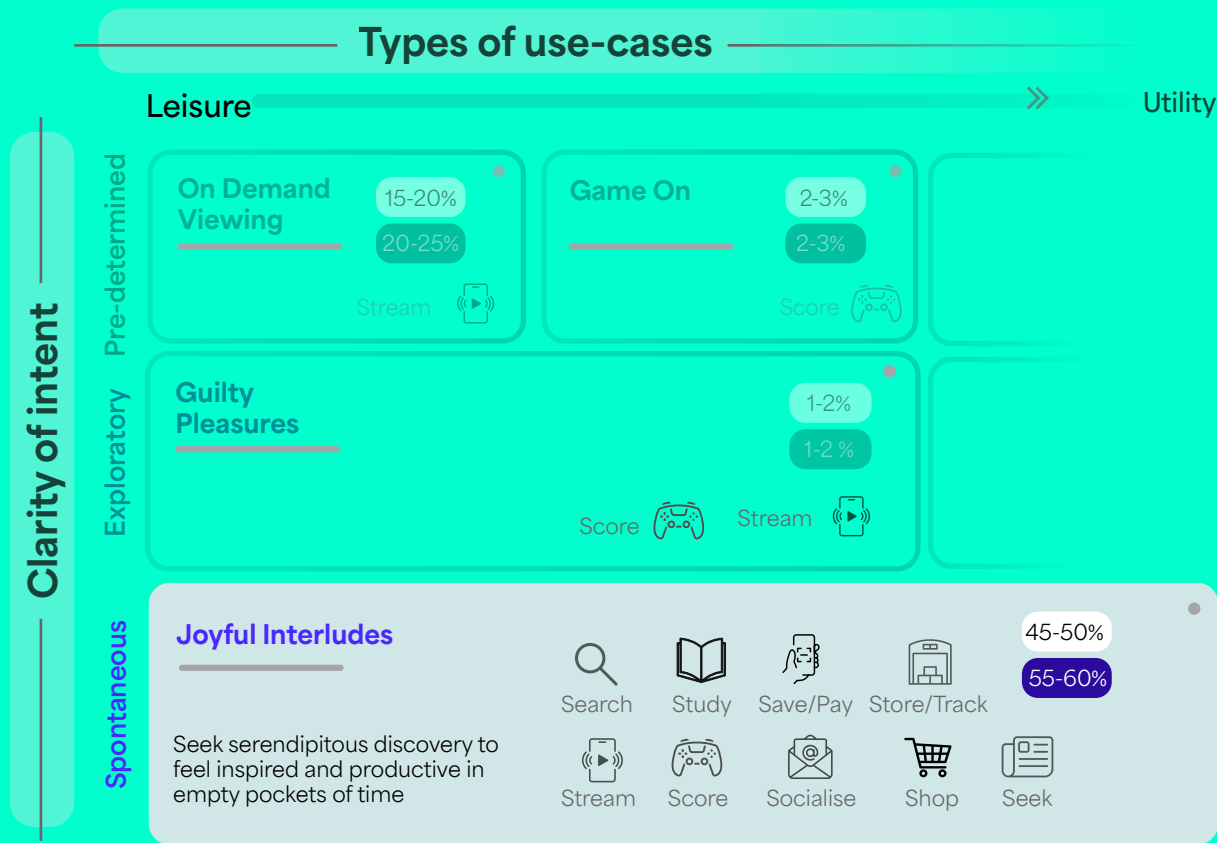
- Highly relevant notifications on surface in real time
- Discovery enabled via targeted notifications



Surface through a consumer lens

I quickly keep up with match scores by checking it on my iPhone's lock screen when I am busy

“Joyful Interludes” journey



Social media and browsing apps have the highest share of spontaneous journeys



”

What if...

my phone had the
ability to inspire me?

Female, 20 years

Delhi, India
Student

“Joyful Interludes” | Current user journey and opportunity to enhance through ‘Surfaces’



Female, 20 years
Delhi

Student, picks up phone subconsciously when waiting for the professor to arrive

Current journey

1 Picks up phone without any specific intent

2 **20 notifications** on lock screen; **difficult to identify critical ones**; ‘Clears All’

3 Habitually navigates to social media app, scrolls aimlessly

Re-imagined journey - with Surface

1 Picks up phone without any specific intent

2 **Color coded smart widgets** on lock screen to show criticality of notifications

3 **‘Smart properties’** (folder) helps to discover content in ambiguous intent moments

● Pain Points

● Surface Solution



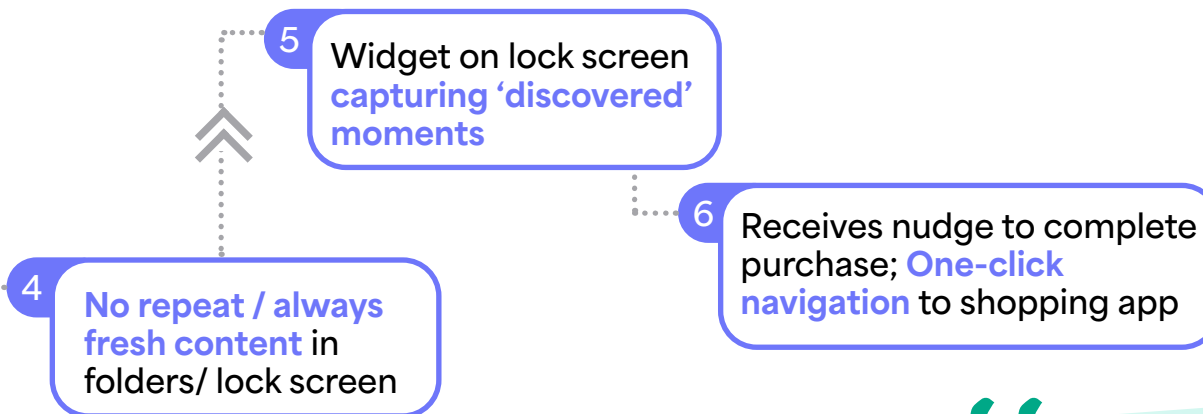
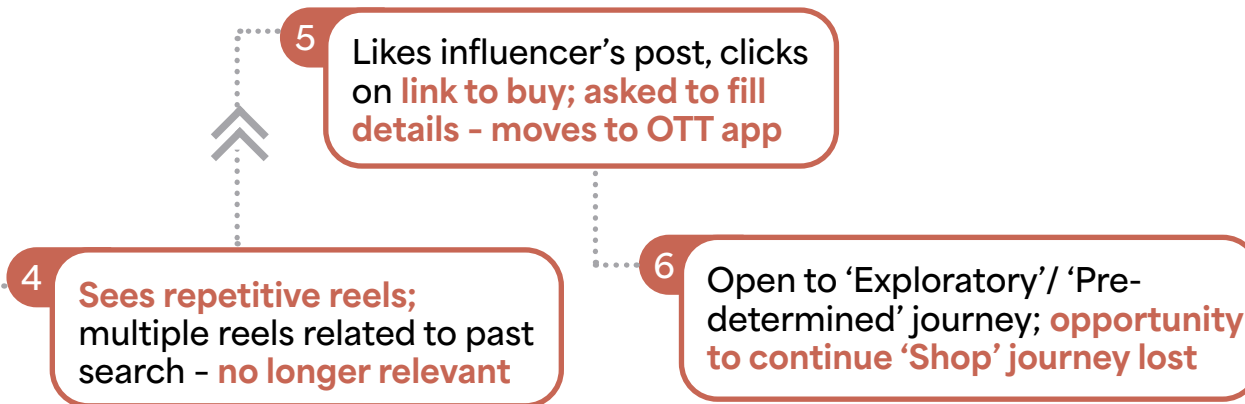
Pain Points

- ▀▀ Unengaging nudges/ information
- ▀▀ Lost opportunity to drive serendipity



Surface Solution

- ▀▀ Engaging notifications given at the right time
- ▀▀ Capitalize on opportunity to drive serendipity



Surface through a consumer lens

Sometimes I unknowingly power up my phone. Often times, images on Glance lock screen are truly inspiring and cheer me up!

Each of the 3 types of intent have some fundamental unmet needs while using a smartphone...

Pre-determined



“So **inconvenient** to keep scrolling to search.”

“Difficult to replay, **not efficient** at all.”

“**Takes ages** for me to get to the app.”

“**Waste time** going from browser to app.”

Exploratory



“So many platforms! **How do I pick?**”

“If only someone could **assist me!**”

“Missed the moment.. If only I saw it in **real-time.**”

“Reading about a goal is not **WOW!** **Not engaging at all!**”

Spontaneous



“I love it when I **unexpectedly stumble** onto some new art!”

“Some **reels I get are so boring!**”

“I get **too many irrelevant notifications!**”

“Hate **doom-scrolling** but what else to do?”

...The 3 'S's solutions enabled by 'Surfaces' - seamless, smart & serendipitous - can fulfill these needs

Seamless

Enabling a seamless, friction-free experience



Smart

Acting as a smart-assistant to facilitate discovery and decisioning



Serendipitous

Inspiring consumers with serendipitous discoveries



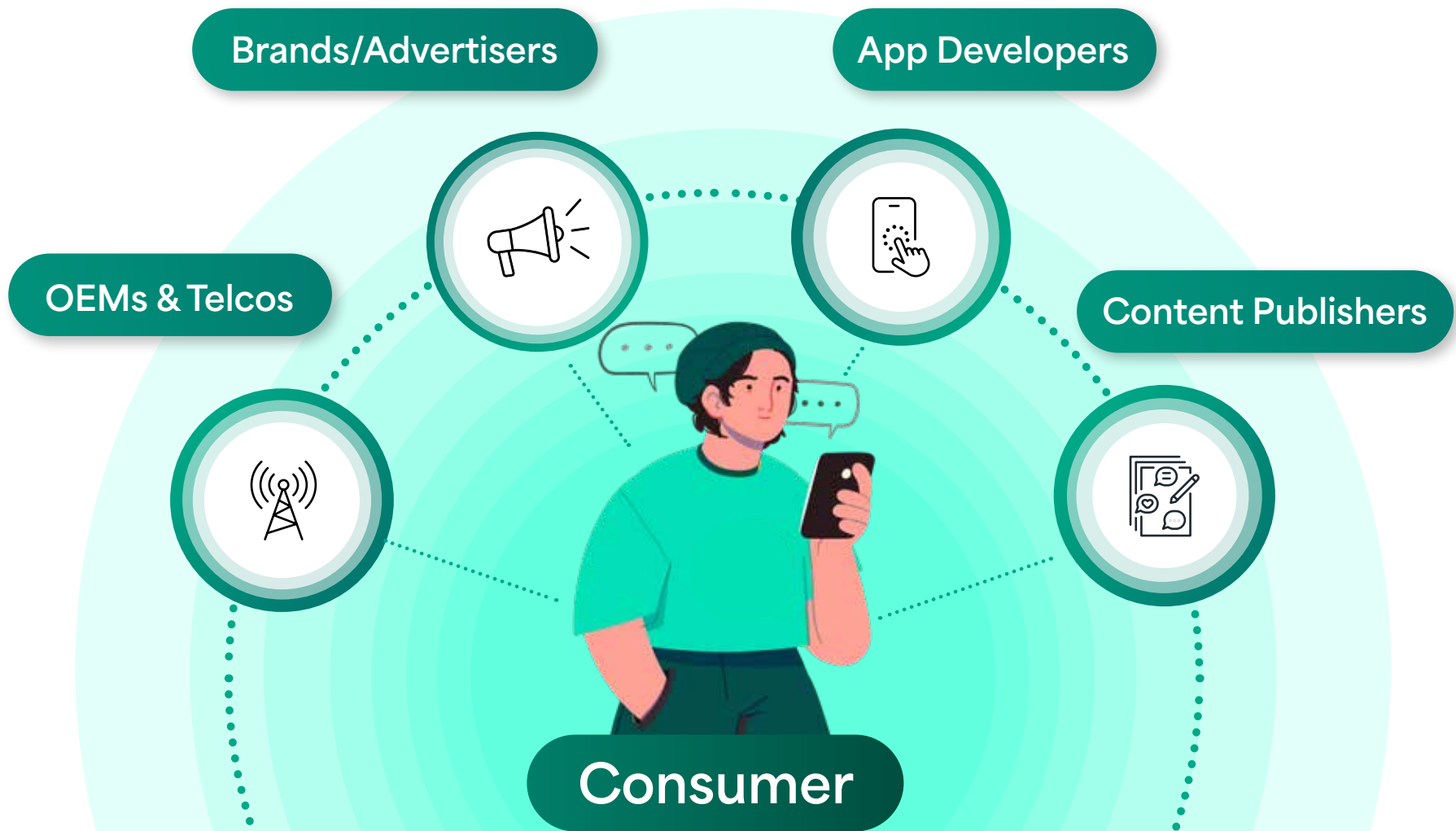


4

Opportunities for the ecosystem



All stakeholders need to come together to make it real!



Experiment, co-create, share to grow - 3 steps to realizing the 'Surface' vision!



What next?

How to proceed?



Experiment

- Look beyond app-usage/feature usage and design mechanisms to study **end-to-end interaction with phones**
- **Amplify data-privacy guardrails** - improves consumers' willingness to share data
- Marry '**stated**' responses (through surveys) with **on-screen interactions** to unearth powerful insights shaping surface offerings



Co-create

- **With partners:** On surface solutions will require data richness across apps, device makers, OS - to deliver intelligent experience
- **With consumers :** Given ~50% of time-spent is on occasions with room to drive serendipitous discovery ; content liquidity would potentially be fulfilled from user-generated content



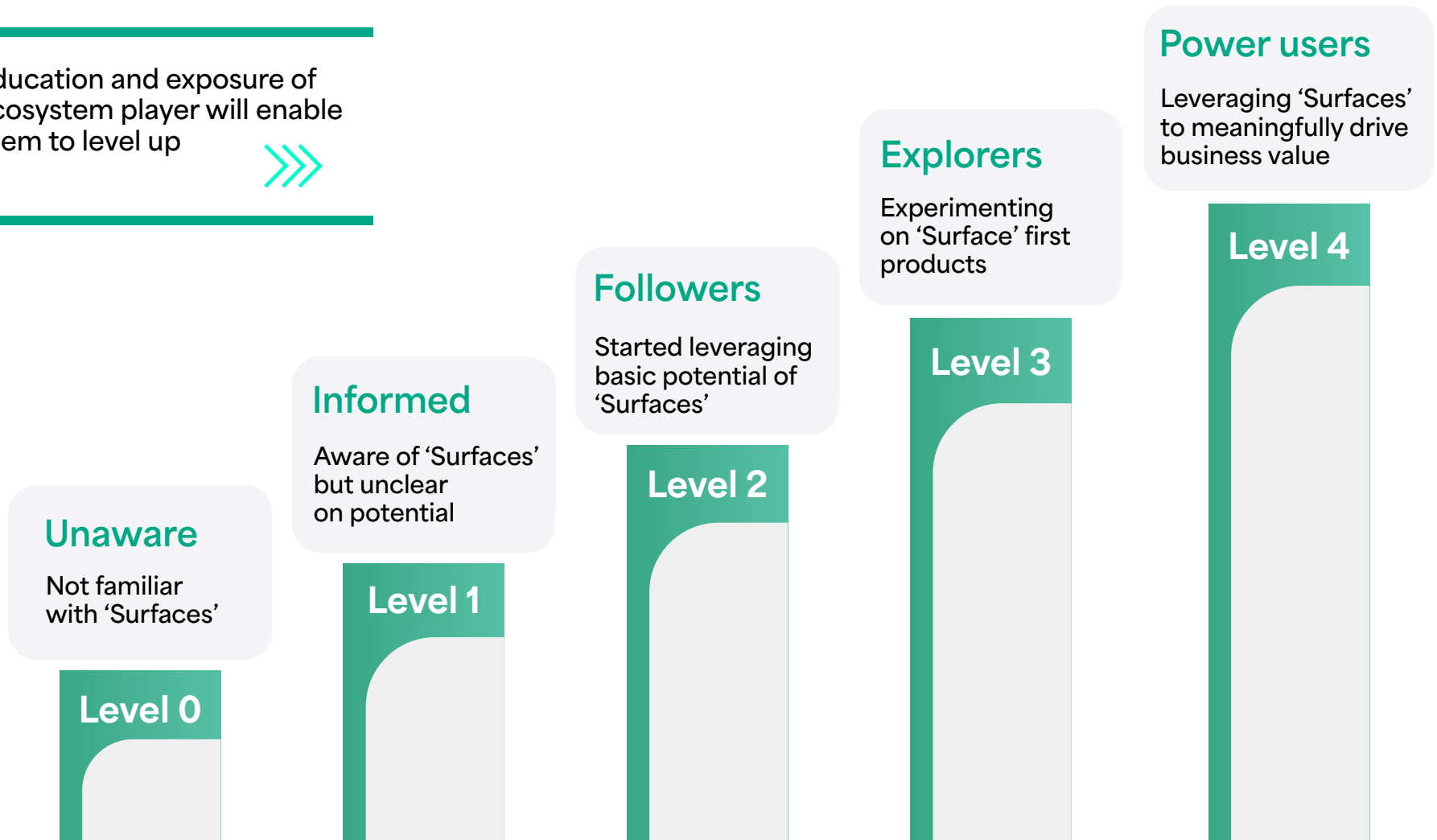
Share to grow

- **Share usage-backed insights** with consumers to help improve their phone usage; give more to get more
- Grow the consumer base by providing them **an opportunity to participate in the surface economy** - contribute to what they see on Surfaces

Embrace the climb: Ecosystem players are scattered across the 5 level maturity ladder



Education and exposure of ecosystem player will enable them to level up



Stakeholder Interviews; BCG analysis

...and each of them stand to benefit from becoming a power user of 'Surfaces'



	Traits of a Power User	Business benefits
OEM / Telcos	<ul style="list-style-type: none">Builds deep integrations w/partners - enables engagement and hence monetization opportunitiesLeverages on-device AI to offer utilities and relevant content, thereby making interactions seamless and smart - enabling consumer love and point of differentiation	<ul style="list-style-type: none">Boosts NPSImprove On device timeGrow Customer Lifetime Value
App Developers	<ul style="list-style-type: none">Gets discovered by users through surface-presence - widgets/ rich-flash at most relevant micro-momentsPushes contextual nudges - right time, right offer to the right personProvides smarter utilities with richer engagement e.g., track rides/orders, pop-quiz for study-apps	<ul style="list-style-type: none">Converts install base to DAUsIncreased time spent on appBoost transactions th
Brands / Advertisers	<ul style="list-style-type: none">Co-creates innovative campaigns w/surfaces player or OEMsCrafts branded-content to own the medium and boost discovery and engagement	<ul style="list-style-type: none">Improvement in share of mindEase of customer acquisition (registration) / lead generation
Content Publishers	<ul style="list-style-type: none">Publishes surface-ready serendipity driven contentMeasures surface behavior - to craft right genre X monetization mix e.g., genre, combination, ad-plugins	<ul style="list-style-type: none">Higher distribution and engagementIncreased monetization

Stakeholder interviews; Press search; BCG analysis

OEMs and Telcos have an opportunity to own the smartphone experience and drive differentiation



Opportunities

- Stand-out in a crowd - where features are getting commoditized - by delivering an intelligent and engaging experience
- Build a 'Service-first' ecosystem and go beyond 'hardware' - by enabling utility and engagement on devices through surfaces
- Tap into new value pools (content, ads, utilities beyond screen widgets) enabled by surfaces to increase consumer engagement

Imperatives

- Invest in partnerships which deliver content at scale through hyper-contextualized AI engine
- Co-create 'surface-first' services framework - if app-stores turbo-charged app-economy, a 'surface-stack' is essential to leverage the surface opportunity
- Build tech-integrations rapidly, to start tapping into the surface economy



Surfaces give us an opportunity to drive consumer engagement on the device, beyond the monetization - user experience on the phone is important for us



*– Head of Partnerships;
Leading global device manufacturer*



Leading OEMs experimenting on 'Surfaces' via deep integrations with daily use Apps



- ▶ A new feature introduced by a leading OS, is designed to bring the most relevant information embedded within apps to the 'Surface', and maximize utility for the user
- ▶ A ride hailing app launched a dynamic widget, which displays the progress of requested and ongoing rides in real-time
- ▶ About **41% of users** have already used the feature; **62% of these early adopters love the feature**¹ (denote it as 'exceptional / good')

Leading OEM player



*Visualization is illustration only

1. Press survey 2023, N = 11,000
Press Search

Brands and Advertisers can reach the next million, with unmatched frequency through ‘Surfaces’



Opportunities

- Obtain vast reach with high frequency (~60-70 times a consumer checks their phone)
- Capture media-dark regions - in developing economies with smartphones leapfrogging TVs
- Explore a highly effective experiential medium - going beyond plain display ads, driving a host of objectives ranging from brand awareness to performance

Imperatives

- Invest in understanding consumer behavior on surfaces - players offering usage analytics from tap to app can help maximize RoI on surface ads
- Sustained experiment - an emerging medium requires exploring, with right experts and measurement stack it will be rewarding
- Leverage surface-centric attribution models - contribution of surfaces - seen through lens of conventional ad-metrics may be elusive to measure



This is what will give you the next-million incremental reach. If you are a brand which has already done search and video; this is what you should focus on.



*– Co Founder,
Leading Ad agency*



Source: Stakeholder Interviews

Sports at a Glance



- ▶ An innovative app install campaign was **launched by a leading OTT app in India** during the 9 weeks of Indian Premier League cricket tournament - in partnership with a leading lock screen solution provider - Glance
- ▶ Ads were algorithmically served at the right moments to target users. Multiple editorialized creatives in immersive formats like - static cards and snackable videos were deployed. Each call to action **led users into the match in less than 3 clicks**, even if the app had not been previously installed on the device
- ▶ **9 Mn incremental installs were achieved** - from **100 Mn+ unique impressions**. Dormant users were targeted with a **separate sub-campaign**, resulting in 12.5% higher app opens - **thus converting install base into DAUs through surfaces**

glance



1. Brand had exclusive digital broadcast rights; 2. Compared to control groups

'Surfaces' could be a new avenue to drive discovery and re-engagement for app-developers

Opportunities

- 'Surface' above the clutter of app-stores through widgets
- Enable consumer re-engagement - contextually remind passive users and convert 'users' into DAUs
- Leverage device data and compute-power to nudge consumers with most relevant info - go notifications++

Imperatives

- Build 'surface extensions' - widgets for lock screen, plug-ins for presence on other app+ surfaces (e.g., APIs to publish data on surfaces)
- Redesign your engagement strategy to deliver contextual nudges to consumers
- Glean contextual insights by employing AI on-device, without compromising on privacy

Stakeholder Interviews



Sneak peek of new upcoming titles and trailers on lock screen is a use case, thereby lock screen acts as an ingress leading to increase in time spent on app



– Product Director,
Leading OTT App in India

App developers can benefit from the value of 3 'S's that 'Surfaces' can unlock



Key value proposition

Blue-Collar staffing

- Contextualized nudges
 - Right time
 - Right person
 - Right offer

Ed-Tech

- Ingress to app

E-commerce

- Conversions / GMV

Industry segment

Source: Stakeholder Interviews

What we heard from product leaders

There could be multiple use cases at each stage of 'Hire to Retire' cycle of a contract worker. E.g., display of pin code wise role openings; scheduling walk-in interviews; prompting for document upload for onboarding. These nudges can significantly help us reduce drop-offs in the funnel.

Flash card-based prep on 'Surfaces' is an obvious use case for test preps. Could lead to higher time spent as well. Not high on our priority, but open to understanding why it should be.

For us in e-commerce, ARPU is a critical metric. All e-tailers are looking to maximize the same. If seamless comparison of products between apps helps to ease purchase, then game to explore collaborations.

Seamless

Smart

Serendipitous

Build, test, scale and get paid while you do it! Game on?

Opportunities

- Test games at scale - allowing access to a vast community of neo-gamers
- Capture **early value on alphas** (proto versions with all in-game assets) with minimal scrutiny
- Get **discovered on multiple surfaces** - beyond just lock screen - reclaiming idle/abandoned users

Imperatives

- **Work closely with device-makers/chipmakers** to shift heavy-compute on-device/on-chip
- **Maximize discovery** and re-engagement by working with surface players to share in-game data (level drop-off, play abandoned etc.)
- Invest in cutting edge tech to enable gaming on 'Surfaces' e.g., WebGL



For a new game developer surfaces are a boon - we get a large sample to test our games and we have seen that most games which have done well on surfaces have performed well elsewhere.



– Co Founder,
Vietnamese Gaming Studio

Publishers can experience the next-frontier of content consumption driven by serendipity through ‘Surfaces’

Opportunities

- Tap into the trend of ‘serendipity’ content’ by publishing content on surfaces – with hyper-personalization and maximum ease of discovery
- Drive engagement with essence – focusing on delight in micro-moment over promoting doom-scrolling
- Get discovered – with presence on a very high-frequency (~30 times consumer pick up phone without any clear intent) – allowing you to guide their next-click

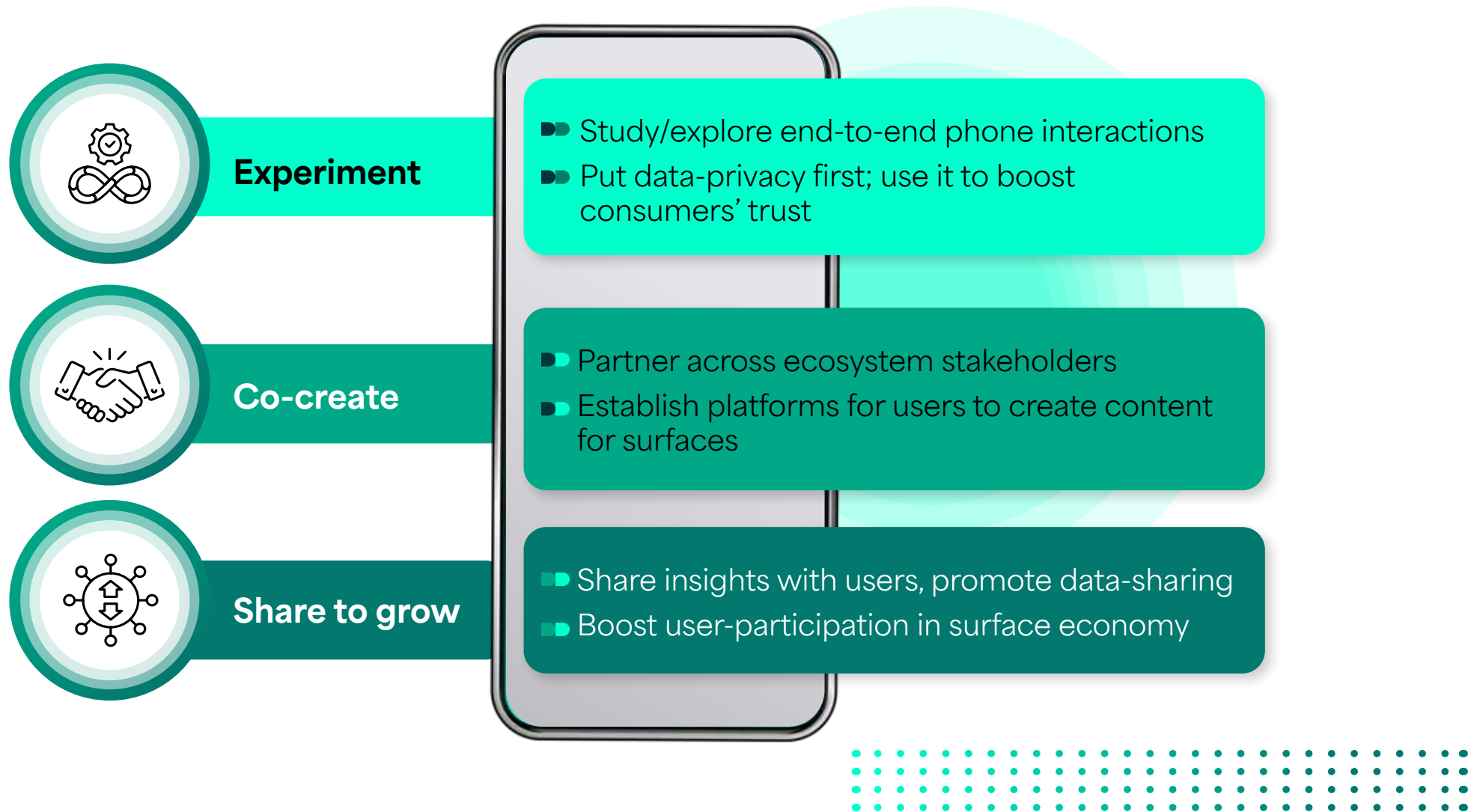
Imperatives

- Partner to maximize reach with a scaled surface players; scale is the key to hyper-personalized content
- Beyond GenAI created content – explore AI for content deployment to strike high-serendipity value with consumer
- Explore beyond lock screen; presence ‘at right place and right time’ is key – being on the front page is essential but, there is always a page 3 and beyond

If I had to foresee a future beyond apps – it would probably be a Gen AI enabled surface that flashes snippets of ‘taaza khabar’, and subsequently also allows follow up questions by the user

– Founder of a leading News App

All custodians of the smartphone experience can realize the 'Surface' vision through three strategic moves



Are you ready
to rise to the
‘Surface’?



Methodology



MindDiscovery workshops were conducted to identify the needs of smartphone users pan-India, additional 1-on-1 interactions and in-person interviews and focus group discussions (FGDs) spanning across 50+ consumers helped us understand their behavior while using the smartphone. Through this, the demand space was designed to encompass all smartphone use-cases.

To quantify each demand space, detailed smartphone usage data of 1100+ consumers over 30 days was analyzed in collaboration with VTION (Vidhi Techinnovation Opportunities Network Private Limited). Five levers were considered to determine sample composition for this analysis - age, gender, income, zone, and city tier. The sample was aligned to the demographics of India's internet population.

The end-objective was to classify every occasion of smartphone use into a demand space - necessarily a combination of dominant use-case and the clarity of intent while the user unlocked the phone. For this, the apps tracked by VTION were classified into each of the 9 use-cases.

To find the clarity of intent of the user - the app usage behavior in every occasion where users pick up their phone was segmented basis the number of apps opened and the number of use cases to which these apps belong. Thereby, each occasion was classified into one of the 12 demand spaces. This helped us determine the time-spent by Indian consumers for occasion pertaining to a particular demand space and the frequency of such occasions in a day.

Note to the Reader

About the Authors



Nimisha Jain
Managing Director and Senior Partner
BCG, New Delhi
jain.nimisha@bcg.com



Vipin Gupta
Managing Director and Partner
BCG, New Delhi
gupta.vipin@bcg.com



Kanika Sanghi
Partner & Director
BCG, Mumbai
sanghi.kanika@bcg.com



Aarav Singhal
Managing Director & Partner
BCG, Mumbai
singhal.aarav@bcg.com



Managing Director and Senior Partner in the New Delhi office of The Boston Consulting Group and leads the Marketing, Sales and Pricing practice in Asia Pacific

Managing Director and Partner in the New Delhi office of The Boston Consulting Group

Partner and Director in the Mumbai office and leads The Boston Consulting Group's Center for Customer Insights in India

Managing Director and Partner in the Mumbai office of The Boston Consulting Group

Acknowledgments

The authors would like to thank Vrushank Kanekar, Isha Chawla, Saibal Das Mahapatra and Anagha Udupa for their assistance in writing this report. Additionally, the authors would like to thank partners like Glance and VTION for collaborating on data and analysis in this domain.

A special thanks to India Marketing team for coordinating the marketing efforts, and Saroj Singh, Sujatha Moraes, Subhradeep Basu, Abbasali Asamdi, Mohit Saxena, Jahnvi Chauhan, and Yashit Shukla for their contribution toward design and production of the report.

BCG

