Why having a mobile site should be just the start

By Jonathan Sinton , issued by Kantar

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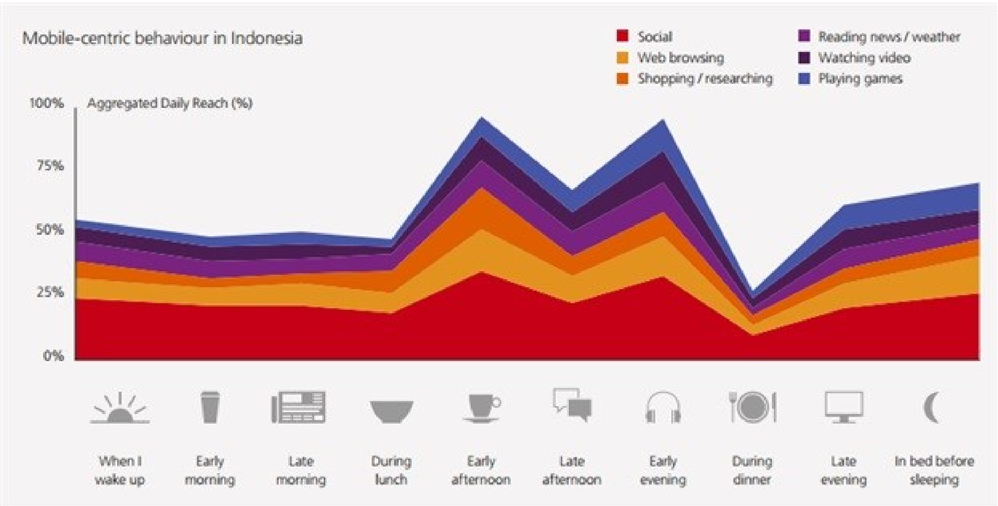
Having a responsive or mobile site is a great step forward but it shouldn't be seen as a substitute for genuinely mobile-centric planning

Today, having a mobile or responsive website sits at the top of any marketers best practice checklist. If any more evidence were needed of the importance of prioritising the user experience on a handset, then the 2014 Connected Life study provides it. However, Connected Life also shows that having a mobile site is far from a complete solution in itself. A more fundamental shift in brand planning is required if marketers are to keep up with the audiences they are targeting. The time for fully mobile-centric strategy is arriving.

The mobile-centric world and its leaders are taking up a greater share of the time that people spend on connected devices - and it is doing so in every market on earth. **Of all time spent using devices, 36 per cent of it is spent looking at a mobile.** This trend is being led by a growing number of mobile-centric markets: countries like South Africa, Kenya and Indonesia, where a mobile phone typically offers the only connected experiences available to many people; but also those like Brazil, Hong Kong and South Korea where consumers have many different digital devices available (PCs, laptops, tablets, connected TVs) but still gravitate towards using mobiles first and foremost.

The warning sign for many developed market brands and their marketers, is that they tend to be headquartered in the countries that are following the mobile-centric revolution rather than leading it. The UK, Western Europe, North America and Australia remain PC-centric markets at heart, where consumers have plentiful smartphone technology at hand but the majority would still opt to use a PC, laptop or tablet given the choice. This PC-centricity appears to have put its stamp on marketers' approach to mobile, from the disproportionately tiny share of media spend that the platform is still allocated (in the US it gets 4% of total ad spend despite representing 19% of media time) to a marketing approach that often seems to view mobile simply as a means of extending reach and frequency, rather than a real game-changer for digital planning.



Having a mobile site is just the start

There's a danger that driving your mobile strategy through your website can mask an inherently conservative approach to digital planning. Web designers recognise the importance of delivering optimised experiences for handsets, and even of serving different content to those using mobiles, but for many the mobile experience remains fundamentally a versionalised extension of the PC experience. When we look more closely at the digital routines of genuinely mobile-centric consumers, we find that this doesn't go nearly far enough. The digital platforms that mobile consumers use - and the type of experiences brands therefore need to plan for them - are fundamentally different. The biggest difference between PC-centric and mobile-centric people isn't that the latter visit brand websites using a phone; it's that, for them, websites are only a tiny part of the opportunity for brands.

In Indonesia, for example, browsing websites and researching products represent only a small fraction of the time that people spend using their phone; there are far bigger opportunities for brands in their use of social media and games, and their appetite for news and video. But they can often only take advantage of these through the purpose-built apps that mobile-centric consumers use to access them, (even feature-phones typically integrate social and gaming via apps).

The mobile-centric markets within

The mobile-centric markets within this aren't solely an issue for those targeting markets where mobile takes the lion's share of connected time. The US may remain a PC-centric market overall, but 33% of its online consumers already exhibit mobile-centric behaviour, and this group contains a big skew towards important consumer audiences such as young, affluent women. Brands targeting these demographics can't afford simply to ensure mobile compatibility for their online activity; they need a mobile-centric strategy that reflects, for example, the fact that 79% of connected mobile time is spent using apps.

A day in a mobile-centric life

Mobile-centric consumers follow a different rhythm of media consumption: small moments of engagement, focused on specific tasks and apps, which take place almost continuously throughout the day and add up to a dominant share of time online. Social media is the core mobile activity and takes the largest share of time on the device throughout the day, but even social media rarely retains a mobile-centric consumer's attention for long periods. **To engage and succeed in this world, brands need to focus on concise content with clear and compelling value that can deliver immediate engagement and communicate brand messages quickly.** They must deliver the interactivity that is key to gaining attention on mobile (creative with obvious and enticing touch-based interactivity typically gets far greater click-throughs). And above all, they must find a place within the app-based experiences that dominate connected time on handsets.

Finding a place on the mobile screen

This isn't just a case of evolving from designing mobile websites to building mobile apps. The long tail of unused, branded offerings filling out the virtual shelves of app stores testifies to the weakness of this approach. On average mobile-centric consumers use only 10 apps per day, each with a clearly defined role and function that earns them a place on the handset screen.

Rather than pinning their hopes on breaking into the group of favoured apps under their own steam, brands are best served by targeting mobile-centric audiences through the apps they already have installed. They must identify those already delivering their audience's core experiences, and work with them.

These partnerships can take a number of forms, from existing and readily available advertising opportunities through to native content and value-adding functions and interactivity. In multi-device yet mobile-centric Brazil, beer brand Skol has come to dominate the experience of music on mobile partly through partnerships with existing music apps. Nivea partnered with existing technology to create a branded app that helps parents locate their child on the beach, a protection proposition that perfectly suited the brand's equity in that particular context. Global confectionary brand Mondelez has taken things a good few steps further with its Mobile Futures investment programme aimed at identifying mobile startups worthy of joint ventures.

The mobile-centric mindshift

These brands all appreciate the functional needs that motivate mobile-centric consumers, and they have been committed enough to form value-adding partnerships that deliver against those needs.

Has the time arrived to start putting mobile at the heart of your brand strategy?

About the author

Jonathan Sinton is the Digital Director for TNS' Global clients. He has worked within the WPP group and latterly TNS for the past 14 years. During this time, Jonathan has led high profile projects around digital strategy development, opportunity development and assessment, website, social media and digital advertising development and measurement across Asia, Europe and the US. Jonathan is passionate about understanding consumer behaviour and has pioneered a number of new research techniques and approaches, leveraging digital technologies and data, to better understand consumers. He is also an active writer, commentator and speaker on consumer behaviour.

About Connected Life

Connected Life is a leading global study of the digital attitudes and behaviours of over 55,000 internet users across 50 countries, exploring how technology is transforming the lives of consumers across the world. It offers essential insight into the impact of the growing digital ecosystem on the media landscape.

Connected Life also uncovers new and exciting opportunities for marketers to connect with their consumers in this increasingly complex environment; it is a powerful tool that helps brands make better digital decisions.

The fieldwork was undertaken in all markets between March and June 2014.

Please visit www.tnsglobal.com/connectedlife for further information.

About TNS

TNS advises clients on specific growth strategies around new market entry, innovation, brand switching and stakeholder management, based on long-established expertise and market-leading solutions. With a presence in over 80 countries, TNS has more conversations with the world's consumers than anyone else and understands individual human behaviours and attitudes across every cultural, economic and political region of the world.

TNS is part of Kantar, the data investment management division of WPP and one of the world's largest insight, information and consultancy groups.

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