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YEARS OF
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LEADERSHIP

It's not a phone:

A future of mobile marketing

Foreword

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Mobile is changing the way we use the internet. In ten years' time, there will be no perceived difference between mobile and web; the phone will be the technology we use almost all of the time. Industry observers have been forecasting 'the year of mobile' for a while now. However, it has not quite happened. Mobile marketing still has not been exploited to anything like its potential. The opportunities presented by apps and the ubiquity of mobile phones in people's lives gives marketers new and different ways to get their messages across, but these are not, so far, being picked up on by many of the companies who could develop a vigorous and original mobile marketing strategy. It's not a case of adding banners or intrusive ads to mobile. Rather, it's about finding innovative, creative and customer-tailored ways to reach people. Mobile phones create a nebula of data and information that enable marketers, ultimately, to create one-to-one marketing – if the customer wants it.

Mobile is not going to kill the computer, the TV or the newspaper. Yet it is going to supersede all of them and become the preferred medium for almost every activity that currently uses other forms. The reason is its ubiquity. You switch on, and switch off, a computer or a TV to use it when you want to use it. You read a magazine, then close it. But the phone is always on. It knows where you are, and it knows a surprising amount of information about you. By 2020, it will not be a device; it will be part of our lives. Already, it's our camera, our notebook, our music library, our photo album, our calendar, our address book and our alarm clock. These changes have crept up on us without us really noticing or thinking too much about the impacts. Tapping into these insights, whilst understanding that all offerings are a choice and customers are in charge of their own personal cloud, is potentially a key to unlocking future value.

A phone is no longer a phone; it's a powerful computer, that just happens to make phone calls. The Chartered Institute of Marketing has consulted with leading practitioners from some of the largest companies in the world to extract their insights and key thinking, and to consider where this exciting and yet largely untapped area of marketing could progress in the near future.

Mark Blayney Stuart
Head of Research
The Chartered Institute of Marketing

It's not a phone:
A future of
mobile marketing

Contents

Summary

As take-up of smart phones increases exponentially[i] and usership becomes the norm rather than the exception, it is the mobile phone that becomes part of people's lives in ways that far outstrip any previous technology. Globally, more people now have mobile phones than have bank accounts.[ii] In Japan and South Korea, mobile phones are rapidly replacing cash and credit cards as the preferred method of making payments. EBay expects its revenue from m-commerce to have been in the region of $1.5 to $2bn in 2010, and an item is sold on eBay Mobile every two seconds.[iii] Usage patterns are changing too; Morgan Stanley expects mobile internet usage to overtake desktop usage by 2015.[iv]

These fast changes in user patterns create both opportunities and responsibilities for marketers. There are many ways of showing genuine creativity and innovation, rather than merely putting adverts on side of messages, or sending text messages with marketing information. An app from Ikea, for example, enables you to pull the image of a sofa from the catalogue, and drop it into a photo of your living room. The Ikea example solves a problem: I like the sofa, but I want to know what it looks like in my living room. As long as a customer need or want is answered, the app stands a good chance of being taken up. This is 'marketing that doesn't seem like marketing'; it does not solicit or pester the customer. Offering customers free benefits, that they like and want to take up voluntarily, can seem like a cost with few measurable benefits. Yet the benefit creates the brand, which in turn drives sales. When it comes to buying the new sofa, it's more likely that the customer will consider Ikea. This only works if the customer is in control and it only works if it answers a genuine customer need.

The possibilities created by personal location are wide-ranging and varied, by using GPS in interesting and previously unseen ways. Examples in this paper show some of these new approaches to reaching audiences but also indicate that frequently, people need to be incentivised to use them. That incentivisation issue also helps with privacy. Some of our preconceptions and prejudices about privacy need addressing; not everyone regards privacy in the same way, the 'bar' is sometimes set lower than we expect, and the argument is not one of youth versus age, as is often believed. Key to addressing this is a value exchange argument. As long as marketers are transparent, then the more valued is offered, the more customers are willing to share information.

"Globally, more people now have mobile phones than have bank accounts"

Location, location, location

Take-up of smartphones is reaching a tipping point. Research indicates that the number of people with smartphones has leapt from 9% to 24% in the space of a year, and this is predicted to rise next year as cheaper devices become available.[v] The impacts of this for business are huge. Every other channel that marketers might use to reach people are things you turn on when you need them, and turn off when you've finished. Mobiles are different. They are part of people's lives. They are always on, you always have them with you, and they always know where you are.

When more people have smartphones than don't have them, new sets of opportunities will open up for companies ready to exploit them. When smartphones become ubiquitous, which may take only take 3-4 years in the developed world, the phone will be the principal technology we use; and to talk of 'mobile marketing' will become redundant as it will be the default communication tool.

Personal location is a key insight for companies wanting to operate in this way. The combination of personal location and constant presence means companies have entirely

new ways to draw customers. For example, you can add convenience to customers by enabling them to pre-order a product or service whilst on the move. Burger King has had great success in doing this; if you're in an unfamiliar location, the BK app will show you where the nearest branch is. Many restaurants and food outlets might be able to compete with that; the innovation for Burger King is that the app enables you to choose and order online, and select a pick-up time so you don't have to queue or wait when you get there. Burger King's believes the app has "great potential to increase brand awareness and sales."[vi]

Companies of all sizes can take advantage of this. The technology has existed for many years to be able to offer combinations of location basis and personalised offers and we first highlighted this in a paper back in 2005.[vii] You can, for instance, receive a voucher for a product or service in the branch that happens to be across the road when the text arrives. You can also run a campaign that adapts to the weather or other external, unpredictable environmental conditions. If it's hot, the voucher can be for ice cream; if cold, it can be for soup. Most messages of this type will

very quickly be spam. To avoid this, they need to incentivise effectively – a discount that's powerful enough to interest the individual; the potential to win a prize; an encouragement that is something out of the ordinary. Incentivised will work, intrusive will not.

For David Henry, VP Media Europe at Monster, "people want recommendations, not choices". Henry's argument is that if you're looking for a restaurant, and you type 'restaurant in Soho' into your phone, too much information comes up, and it can become harder, not easier to make a decision. However, if you type 'where should I go?' you attract recommendations and this helps you make a decision. To alleviate the problem of information overload, we are all now more likely to respond to recommendations rather than an array of options. Recommendations, because they are perceived to be from real people, carry more weight than adverts and even more than objective options from search engines.

There are opportunities for marketers to tap into this recommendation culture – and indeed, it's necessary for companies to do so. Type in 'New York', Henry points out, and Google creates all the sources you need:

"When smartphones become ubiquitous, the phone will be the principal technology we use"

restaurants, hotels, car hire, theatres, clubs and bars. In future it will be vital for marketers to ensure that their companies get onto these lists, via judicious use of PPC and SEO. The issue is that only three or four options are likely to come up each time, so the skill lies in distinguishing your company to emerge in the top few hits. How can companies do this? One way is to ensure that your segmentation strategies are clearly defined and in place for search engines to extract from. For example, if your product or service is delineated as being ideal for a particular price bracket, or you have a strong target audience, that's more likely to push you to the top of the rankings when the individual who falls into your target area types in their requests.

SECTION ONE
Location, location, location

The potential problem with personal recommendation is how easily it could become devalued. It works on the principle that we can trust the views of individuals because they are unbiased; they may not be objective, but we at least know that they have not been influenced by an agenda (usually, financial incentive). Yet already, the objective nature of recommendations is being weakened by companies paying people to recommend products or services as if they are independently commenting. This doesn't help anyone in the long run because if people can no longer trust personal recommendations, they will quickly become routinely ignored, in the same way that intrusive adverts now are.

It might seem that there's nothing that can be done about this; but in fact, what we can do along with preserving good practice and helping maintain the value of personal recommendation, is to point out that under the Consumer Protection Regulations, paying for recommendations in this way is illegal – because the company is misleading the customer into believing that a commercial message originates from a non-commercial source.[viii]

Engagement rings

There's a risk of developing apps for the sake of it: exciting looking technology, that looks and sounds good at first sight but will not be picked up because they do not resonate with what customers actually want. The Ikea example above succeeds because it meets that need. So whilst most advice on how to develop apps takes the form of creativity, creativity has to come a strong second place to user relevance. Henry Tirri, Head of Nokia research, argues that as well as augmented reality, where you add digital information into the real world as in the Ikea example, there is 'mixed reality'.[ix] This is the opposite – where you put things into the digital world, from the real world. Marketers looking for the next innovation in apps can adopt these ideas and use it as the technology improves. As well as being able to put the Ikea sofa into your own living room, with mixed reality you could see what your existing furniture would look like in a new conservatory. Tirri's distinction between augmented reality and 'mixed reality' is unlikely to last long, as customers will quickly accept that they are, from the user's point of view, much the same thing.

Companies will want to find ways of monetising their apps, but this needs to be balanced against the desire for take-up. The free model of so much internet usage has devalued the perceptions of what apps can be worth, and it can be difficult to persuade people to pay for apps unless they offer a significant and universal benefit. Instead, a company wanting to monetise an app can best do so by offering free take-up, then drawing customers in with targeted offers. Guy Beresiner, Head of Commercial Development, Yahoo! UK & Ireland argues that significant loss-leading may be an optimal way to build a brand effectively in future, particularly in markets where there is so much choice.

"It has to be a literally unbeatable offer," Beresiner says, quoting instances of restaurants offering 75% discounts in order to draw people in. It's worth companies to consider the freemium model when developing apps; the basic version is free, and then particular add-ons or advanced features can be charged for. As a tactic, this may not have long-term possibilities, but while app technologies still attract interest because of their novelty, it will work.

For B2B, there are apps for retention, customer acquisition and measurement. Flowtown, for example, can provide segmentation data such as age, profession, gender the social networks customers use, when all you have is a customer's name and e-mail address.

Trackur helps you spot trends and identify what resonates emotionally with customers, by monitoring social media. Social Mention is a social media search platform that tells you which key phrases are being frequently tweeted, added as status updates on Facebook or searched for on other social networking sites such as LinkedIn. Finally, Samepoint is a 'conversation search engine' that similarly identifies what customers are interested in and talking about.

> "The free model of so much internet usage has devalued perceptions of what apps can be worth"
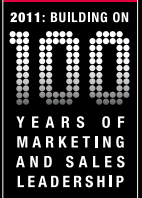
Gamechangers

Daniel Rowles, MD Target Internet Services Ltd, argues that the way people use smartphones is a game-changer for marketing at a communications level. To take a simple example, the most effective times to send an e-mail are often quoted as around mid-morning, on Tuesdays to Thursdays. However, smartphone take-up means that the way people respond to messages is evolving. A Monday at 6pm might now be a more effective time to reach people, for example. To optimise reach, marketers will want to be aware of these new usage patterns as they change and develop. 'The reality of mobile is that it's changing the way we use the web,' Rowles says. Analytics show that our resistance to what's perceived as 'mobile marketing messages' is becoming higher, because there are fewer spam filters on mobile than e-mail so we are beginning to delete any texts we don't recognise.

Historically, that hasn't been the case; because of their novelty, open-rates on texts have been remarkably high up to present. This will not last; rather as customers quickly began ignoring e-mails that they didn't recognise, the same is becoming true of mobiles.

The content of messages can be tweaked to better suit mobile usage. "The inbox preview on mobiles is different," Rowles points out. "You need to get the reasons for opening the message right in at the start, or you risk it being deleted without being read".

For marketers to be successful, it may well pay to forget about marketing messages except where they have been solicited, and find other ways of building the brand. Where advertising is needed, sponsorship has been shown to be much more effective than straight advertising.

Rowles also emphasises how vital it is to produce mobile versions of your website. "Not just a site that works on mobiles," he clarifies, "but a specific version of the site for mobile use. There are different considerations." As keyboard and screen space is more cramped, "you need to design things with these limitations in mind." Customers shouldn't be limited, for example, if they are less dexterous or have less than perfect vision. Payments need to be handled differently, from how they appear on websites. It needs to be obvious instantly where on the screen a customer needs to go.

Private lives

The proliferation of location-based services and the amount of specific targeting companies can now do, as well as the increase in usage of internet on mobile devices, raises several issues about privacy. Yet some of our assumptions about privacy can legitimately be questioned. For Don Peppers, Founding Partner at Peppers & Rogers Group, the concerns we might have about privacy are virtually irrelevant for today's teenagers. For teens and the generations after them, who will grow up taking for granted what we have had trouble adjusting to, privacy will be thought about in different ways. Consider one of the often-quoted privacy fears, which is that when today's teenagers post compromising images of themselves on social networking sites, this information will be remain there in perpetuity and it will be harder for these people to get jobs. Peppers argues that the younger generation's response will be to remain unconcerned. Peppers references his own teenage son, who once pointed out that when he's interviewing for a job in the future, the interviewer is likely to have their own embarrassing information available online, also. So, as previous

decades' assumed business etiquette has become more casual, (business suits used to be compulsory, as was referring to colleagues by surname), so will it become commonplace to accept that everyone has a public face and a private life, and that the misdemeanors of one's youth will become irrelevant further down the line.

Complementary to this is the view that different people regard privacy in different ways, and always will do, regardless of age. From this perspective there is no gradual erosion of the concept of privacy taking place. For Henry Tirri, 'how high you set your privacy bar very much depends on how you see technology as part of your life'.[x] Some teens will always remain very private; some older people won't mind sharing information.

If a customer feels they are getting value, they will be more willing to sacrifice some privacy. There will always be exceptions to this, but it is a reality of usage and a useful rule of thumb for marketers to think about. Daniel Rowles points to the Foursquare concept of becoming a 'mayor' of a town if you've visited more restaurants than anyone else, as an example of thinking in the right

way, but perhaps coming up with the wrong conclusion. "What is the value of being that mayor?" Rowles asks. You've sacrificed a substantial amount of privacy, and you haven't gained much benefit. Instead, incentivising is what's needed. "You can create competitions – or make it a game, such as treasure hunts. This is where the success will lie and the strategy will be one of mutual benefit."

For marketers, there are some important take-outs here. First is to resist assumptions about how customers do, or do not, view their privacy. Second, anything that could be regarded as intrusive can be positioned as a choice: you can have this if you want it, but you don't have to. Third is to remember the 'value trade off' – people will be more giving

with their data if there's something in it for them in return. Privacy has a value, like any other commodity, and as long as marketers are transparent about what they do with customer information, it's possible to be permitted that value if you offer the right incentive.

"Different people regard privacy in different ways"

Futurama

There are aspects of the available technology that have not been taken up as much as they could be. QR tags, for example, are akin to barcodes that smartphones can grab and send you to a website or other source of information, promotion or interest. QR tags offer several opportunities to marketers. First, if you have a traditional media advert, the QR tag can send the customer to a site that you can keep live and up-to-date (which the original advert wouldn't be). Second, with a QR tag you can get across a large amount of information without paying for the ad space, by linking the ad to the information on your own site. Third, you can target customers more individually by giving different options when they reach the website. In line with earlier recommendations, you can incentivise take-up of the QR tag with a special offer or promotion (customers need a reason to bother to scan the tag); and you can offer location- or time-based offers, rather than just having to have a generic advert as has previously been the case.

QR tags haven't been exploited to their potential partly because companies have been slow to provide incentives to take-up, and partly because QR readers are not currently automatically built in to all phones. Marketers keen to spot a competitive advantage could pick up on this; when readers become commonly installed, we can benefit from having ideas ready to go. There have been some good examples of companies getting ahead of the game in this way. Tesco has used QR tags in adverts to presell computer games and track the effectiveness of the campaign in real time.[xi]

To work though, QR tags will again need incentivisation. Why would the customer be bothered to follow the link? Several of the industry experts we spoke to felt that the problem with QR tags is the need to do something that 'only appeals to geeks'; and for Guy Beresiner, "it's got to be delivered in ways real people want".

Areas where QR tags could have more effectiveness are where people are searching for information. Galleries and museums such as Manchester Art Gallery are trialling QR tags to tell visitors more about particular exhibits, go into history in more detail than can be done on display panels, and offer biographical information. For arts, culture, education and charity marketers, there are many opportunities waiting to be exploited here. QR tags will work if they are a "call to action", Mark Carter, Director of Zapfi argues, but not when they are just used as an advertising mechanic. Carter feels that take-up has so far been laggardly because "at present, we can't link mobile with internet usage". For Carter, this is a holy grail that is currently not found, but will be in the next few years. An element that can be adopted more quickly, however, is short codes. Customers don't want to type in a whole website address but with short codes they can do this.

Virtual currency has possibilities, as we now see in Japan and South Korea. Chris Dadd, Director, Professional Services at GSM Association, suggests that many smartphone users will soon choose to pay for items directly by phone (again using QR tags), avoiding the need to carry cash or cards. "We always have our phones with us; this means we don't always need to carry any other form of payment", Dadd points out. Take-up can also be encouraged by communicating to customers the 'belt and braces' approach to virtual payments; if you forget your wallet, you still have your phone.

"Virtual currency has possibilities as we now see in Japan and South Korea"

New routes

There are two different routes that phones can take in future. One is the smart device that contains everything on it; everything you need for your day-to-day life. The advantages of this are obvious but the downsides are the risks of loss, and the problems of running out of memory, or exceeding data usage limitations. That's a particular problem when taking phones abroad, as roaming charges continue to be high.

The other direction is a dumb device that's streamed when needed; this carries no storage or lossage issues, but relies on greater bandwidth that is currently available. It's possible that as bandwidth issues are ironed out, the 'dumb device' model may become popular, with all the individual's user-specific and personal information, favourites and history stored on a separate server.

For effective use of mobile marketing, the impacts for marketers are ready and waiting to be taken advantage of. The golden rules are relatively straightforward but marketers, so far, sometimes appear unable or unwilling to exploit them to their full advantage.

- Creativity and content are key. Not banner ads or intrusive message that are little more than spam. Examples: Ikea, Guinness, Argos, Burger King.

- Where advertising is used, sponsorship is far more acceptable to users than direct advertising. It creates and builds an effective brand presence, without interrupting or irritating the customer.

- Take advantage of personal location – the fact that the phone is always with us, and it always knows where we are.

- Incentivise take-up – and make the incentives interactive. Examples: treasure hunt, Foursquare.

- Tie in payments with location. Examples: Burger King, Argos.

- Exploit the technology where others are not doing so (for example QR tags); but don't use the technology for its own sake. It must always answer a need or want. Any apps developed merely because the technology is exciting in itself will fail; the customer has to want to make an effort, and that means it has to be something that solves a problem. Examples: Manchester Art Gallery.

- Personal recommendations are now one of the key ways customers make decisions, because the word of someone who is perceived to be independent is more trusted (even though it may be no more objective, and may be less well-informed) than a message from a company. Tapping into this means recognising and accepting it, rather than devaluing it by 'faking' recommendations – which is, in any case, illegal. Examples: Trip Advisor.

And some key thoughts to remember:

- Position anything that could be regarded as intrusive, as a choice.

- Don't view mobile in isolation. It's not a separate channel; it's what people use when they visit other channels. The difference between the internet and mobile is merging and will soon be invisible.

- Ensure your website has a mobile-friendly version; not just that it works on mobiles.

- Bear in mind the frequency with which people use Facebook and Twitter on their mobiles and adjust strategies accordingly.

Privacy will continue to be debated, and the thing to bear in mind is that some people will remain very protective of privacy, and others much less so. This is not predicated on age versus youth as much as is assumed, but there is certainly a trend towards younger people being less protective of their privacy. Broadly speaking, a useful rule of

"Ensure your website has a mobile-friendly version; not just that it works on mobiles"

thumb is that the more value you add, the more privacy customers will be willing to sacrifice; whatever their age. If you want customers to share information, incentivise it and offer real value as a route to doing so. This demands ethical and responsible use of that privacy, of course; in line with all best practice, be transparent about what you use customer data for, don't sell it to third parties without permission, destroy it when it's no longer needed, and ensure everyone handling data knows what their

"The phone is an extension of us; and we don't react well to intrusion"

personal responsibilities are. There is still some misunderstanding about where the line is between data that has been shared with the customer's consent, and where that data usage crosses the line to a personally identifiable invasion of privacy. There's a chance for marketers to demonstrate their professionalism by having a clear grasp of that difference, and in communicating it consistently and openly to colleagues and customers.

Finally, a phone is not a phone. It's what everyone in the developed world will have by their sides in 2020. It will be the place we most often use the internet. We never turn it off; it is always there. And it is an extension of us; we only have to use it for what we want, and we don't react well to anyone intruding or using it in ways we don't like. Recognising, understanding and exploiting these shifts in behaviour are the armaments for effective future mobile marketing.

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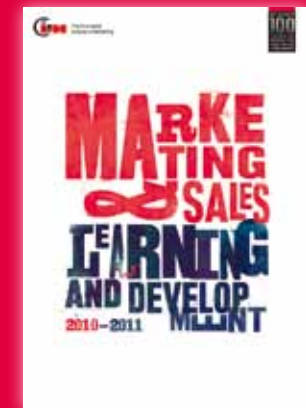
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