

The mobile landscape - the truth behind the hype



A white paper from Mobestar



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This year, 2010, is apparently the year of the mobile. Any organisation dealing in digital media is talking about it, Wall Street analysts are lionising the potential (<http://bit.ly/4JJDq4>) and there are a growing number of major brands implementing their mobile strategy. Any international marketer worth their salt is plotting a course to get access to the pockets of the 4 billion mobile subscribers (<http://bit.ly/5bqD9c>) world-wide. Mobestar's customers are meeting the associated technology challenges head-on today and this paper points the way for innovative brands to begin implementing high impact mobile initiatives immediately.

However, executing a mobile strategy today is an evolving process, and there are significant hurdles to overcome in constructing effective, broad-based, mobile initiatives. It is not just about delivering a new piece of technology (which is getting easier) but it is also about the application of that technology to the market you are addressing and how to get your customers embracing your mobile channel. Obviously, the need to create a compelling user experience is key to the success of your campaign. We have learned through painful experience that in reality your customers will try your mobile channel only once before deciding whether or not to give it 'general air-play'.

Why is 'going mobile' so hard? In short, the mobile medium has many different players from carriers to handset manufacturers to platforms to content publishers and many others. There are few standards for moving content across carriers to different mobile devices and it is still a little daunting for the uninitiated to navigate. Despite the noise and the 'explosive' growth of this market there are only a handful of suppliers that understand how to produce and publish rich, compelling, relevant and engaging content across the multiplicity of mobile device types now available.

The first obstacle to overcome exists in the form factor of mobile devices. Consumer expectations of the interactive media experience have been shaped by the Internet, and the Internet experience does not map directly to the small screen size and is limited by the bandwidth of the mobile environment. Mobile initiatives must be conceived and designed specifically to support a compelling mobile experience. Our experience to-date has been that this is uncharted territory for the vast majority of mobile brand strategies and has been characterised more by trials than by national and international rollouts.

The next challenge is that, unlike the open, standards-driven Internet, the mobile world is highly fragmented. There are currently more than 30 major handset manufacturers producing over 500 different phones (<http://bit.ly/6oR3PI>), with significant variations in operating systems, screen sizes, display resolution, processing speed, memory, and performance. These differences mean that mobile content and applications must be adapted to run on multiple, dissimilar devices, greatly complicating the development effort. Further variations in service delivery among more than 600 carriers (<http://bit.ly/6oR3PI>) add still more development complications and cost. For these reasons, many mobile campaigns today are limited either to one carrier and a handful of devices, which compromises reach, or to the most basic of content technologies, which compromises effectiveness.

Perhaps the most important question that needs answering is: "Do you believe the hype and if so, is the timing right for me to 'go mobile' now?". If the answer to both is 'yes' the next question is "How will I gain competitive advantages comparable to those of pioneering web initiatives a decade ago?"

Given that the mobile market is in a constant state of flux and the noise level is constantly increasing – what are the possibilities open to an innovative brand?

There are five distinct tried and trusted methods for extending mobile initiatives to new audiences, which are described as follows in the chronological order of their entrance to the general market.

1. Text messaging via **SMS** has universal reach, and offers simplicity. It's also the most common non-voice use of mobile devices, accessed by anyone who texts friends and family or downloads ringtones and provides a solid delivery mechanism.
2. Rich content delivery via **MMS** (multimedia messaging service) delivers basic video, audio, and pictures in addition to text, and can be used for more colourful, animated enticements such as directions to a restaurant or a coupon for a film. SMS and MMS can team up, with SMS making the initial solicitation and MMS providing the delivery of rich content. On the downside, SMS/MMS offer very limited content delivery – only 160 characters. SMS, being text-only, can deliver just bare messages. While MMS adds basic multimedia, it and SMS share a further limitation in that they offer only two-way, walkie-talkie type communications. They are useful for alerting users to special offers and in following up offer acceptance by sending simple, static content. They do not provide an effective means to a brand experience and must also be used with caution; nobody likes receiving unwanted text messages on a mobile phone, or worse, getting stuck with usage charges.
3. **The Mobile Web** uses WAP (wireless application protocol) to access web sites. The WAP browser, which operates much like a computer-based browser but is simplified for the mobile environment, can deliver a much more satisfying user experience than SMS/MMS can, and is fully interactive. Mobile phones with browser capabilities are mainstream, and while usage is less common than SMS/MMS, approximately 75% of all mobile devices are Internet-enabled (<http://bit.ly/4JJDq4>). What those users do with their WAP browsers differs markedly from their behaviour with computer browsers, as general web surfing on a mobile device just doesn't work well. There's no mouse, no proper keyboard, the connections are slower and web sites designed for computer access typically display awkwardly on small mobile screens. That makes the mobile web best suited to utilities that target specific audiences with tailored offerings. For example, an airline mobile service that displays flight status, schedule information, itineraries, and offers flight changes and check-in. In other words, delivering a limited portion of the content and functionality available at a brand's full web site, formatted specifically for handsets. Having identified an appropriate application, the challenge of accommodating variations among devices and carriers remains.
4. **Downloadable** rich media **applications** that support a variety of environments including Java, BREW, Windows Mobile, Symbian, Android and iPhone, are now hitting the headlines. These applications enable a far richer user experience than do SMS/MMS or mobile web, with the addition of high-quality video and audio and a higher level of contextual presentation, such as menu choices that make optimum use of screen real estate at any given point in the user experience. Creating compelling mobile applications requires significantly more than simply deciding what content to include and where to reformat the full web site and necessitates the creation of fresh content and interaction designed and optimized specifically for the mobile experience. Even though most phones are rich-media capable, few rich media device independent applications exist. For example, Apple now boasts that there are more than 100,000 iPhone Applications or Apps (<http://bit.ly/803DzU>) for this specific device – but it's highly unlikely that the vast majority of these will ever be ported to other handsets. That's largely a development issue and means that the proliferation of these applications cannot be ubiquitous unless they are developed for every single type of smart phone. Unlike in the computer world, a Java version that works on one mobile device doesn't necessarily work on other mobile devices. Given the proliferation of device-specific Java implementations, brands who choose to deliver rich media applications are often forced to choose which devices they'll support, in order to control development and testing costs.

5. **Flash Lite** is a runtime environment specifically optimized for mobile phones. Flash Lite enables OEMs and operators to differentiate their devices via customized user interfaces, a more complete web experience, and the ability to access video and mobile content across devices.

Now we have covered what is available we should consider how a brand should start to implement these technologies. Most brands that have embarked on their mobile strategy have often commenced their initiative with a marketing focus and have largely limited this activity to SMS/MMS campaigns, using them with the most basic user interaction. Those who have ventured further typically partner with a vendor offering either mobile web or rich media expertise. Because of the inherent technology bias, this risks letting technology drive the implementation, rather than business goals driving the implementation. Ideally, a brand wanting to optimize their efforts would be best served by partnering with a vendor that can support their strategic initiative with whichever technology is best suited to the task, combining multiple technologies to support different aspects of the mobile initiative when appropriate. It would be a bold move to commence an initiative using 'in-house' resources that have no track record of success and at this stage of the market development there are a small but growing number of suppliers who offer robust and reliable development platforms - not dissimilar to the early days of the internet. The prudent choice should be a vendor who has been in the market for some time with a demonstrable track record of delivering exponential growth from the mobile channel.

If you are seriously interested in divining and executing your mobile strategy you will be glad you made the decision because the sooner you get started with high-impact mobile campaigns, the sooner you'll have a serious competitive advantage in reaching those 4 billion global mobile phone subscribers (<http://bit.ly/5bqD9c>).

In conclusion, there is now hard data (<http://bit.ly/4JJDq4>) showing that the mobile internet is ramping up faster than desktop internet did. There currently exists an explosion in the growth of mobile data which is set to continue for some time. Mobile is here to stay and is only going to dwarf the first internet wave due to its ubiquity, necessity, convenience, and proximity to nearly everything we do.