

GLOBAL MOBILE BEHAVIOR

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Globally, we now spend more than three hours a day consuming mobile media but consumers remain more receptive to TV ads. Millward Brown's Duncan Southgate assesses how to convert the time spent into brand building.

It's been a long time since mobile devices were just about making calls and sending text messages. Increasingly, we are carrying sophisticated communication and entertainment devices. And as these portable screens have added more services and more data connectivity, so the time we spend with them has grown and grown.

Millward Brown's AdReaction 2014 study compares and contrasts 30 different markets – from the US to Nigeria and China to Brazil – to assess how mobile screen time varies from country to country. Based on responses to mobile interviews from more than 13,000 16 to 45 year-old multiscreen consumers (people who own or have access to both a TV and either a smartphone or tablet), it was carried out between November 2013 and March 2014. The results show that, globally, we now spend more than three hours a day consuming mobile media (defined as using a mobile device to access the internet). Across our 30 markets, the bulk of that is on a smartphone – 147 minutes – with an additional 50 minutes on a tablet.

To put this into context, mobile minutes now represent just under half (47%) of all screen time; the rest is split almost 50/50 between watching TV (113 minutes) or using the internet on laptops and PCs (108 minutes). Total mobile minutes lead TV in 25 of the 26 markets studied, France being the sole exception. Smartphones alone are now the most-viewed medium in all countries, except the UK, France and Spain (where TV leads) and Hungary, Poland, Russia and Slovakia (where laptops lead).

The global leaders in mobile minutes are 18 to 45 year-old multiscreeners in Indonesia, where nearly five hours of the average day are spent on a smartphone or tablet. The market where people spend most time on a smartphone is Nigeria, with an average of just under three hours and 20 minutes. Tablet minutes are highest in the Philippines at just under two hours. The most mobile-shy countries in the study are France and Italy but, even here, they spend 109 and 143 minutes, respectively, with mobile devices.

By contrast, TV screen minutes are highest in the UK at nearly two-and-a-half hours a day and are just 69 minutes in Vietnam, the country where multiscreen consumers spend the least time watching TV.

What's also interesting about smartphone and tablet consumption is the daily pattern of consumption, which holds true for all markets. Smartphone use rises early and stays high from 9am until midnight. Smartphones are comfortably the most-viewed screen throughout the day, with the exception of 9pm to midnight, when it is matched by TV viewing levels. Tablet consumption builds at a much slower pace to peak in a similar manner to TV between 6pm-midnight.

Even allowing for the fact that our 18 to 45 year-old smartphone and tablet users are an advanced subset of the overall population, these numbers represent a huge chunk of media consumption. Their mobile viewing is clearly significantly more than the 4% of global screen media spend (ZenithOptimedia Advertising Expenditure Forecasts December 2013) that mobile attracted in 2013, compared with 66% for TV and 29% for laptops and PCs.

If marketers want to connect with people during this time, then they need to know which mobile advertising formats are most likely to be accepted. The bottom line is that although smartphones are now the largest opportunity in terms of minutes consumed, consumers are still more receptive to TV ads.

When asked about which ad types they are favorable towards, 41% of our global multiscreen users were favorable to TV ads, while just 25% were favorable to those on laptops, 24% for smartphones and 23% for tablets. Combined with minutes spent, this still makes TV a more appealing overall advertising medium (Figure 1).

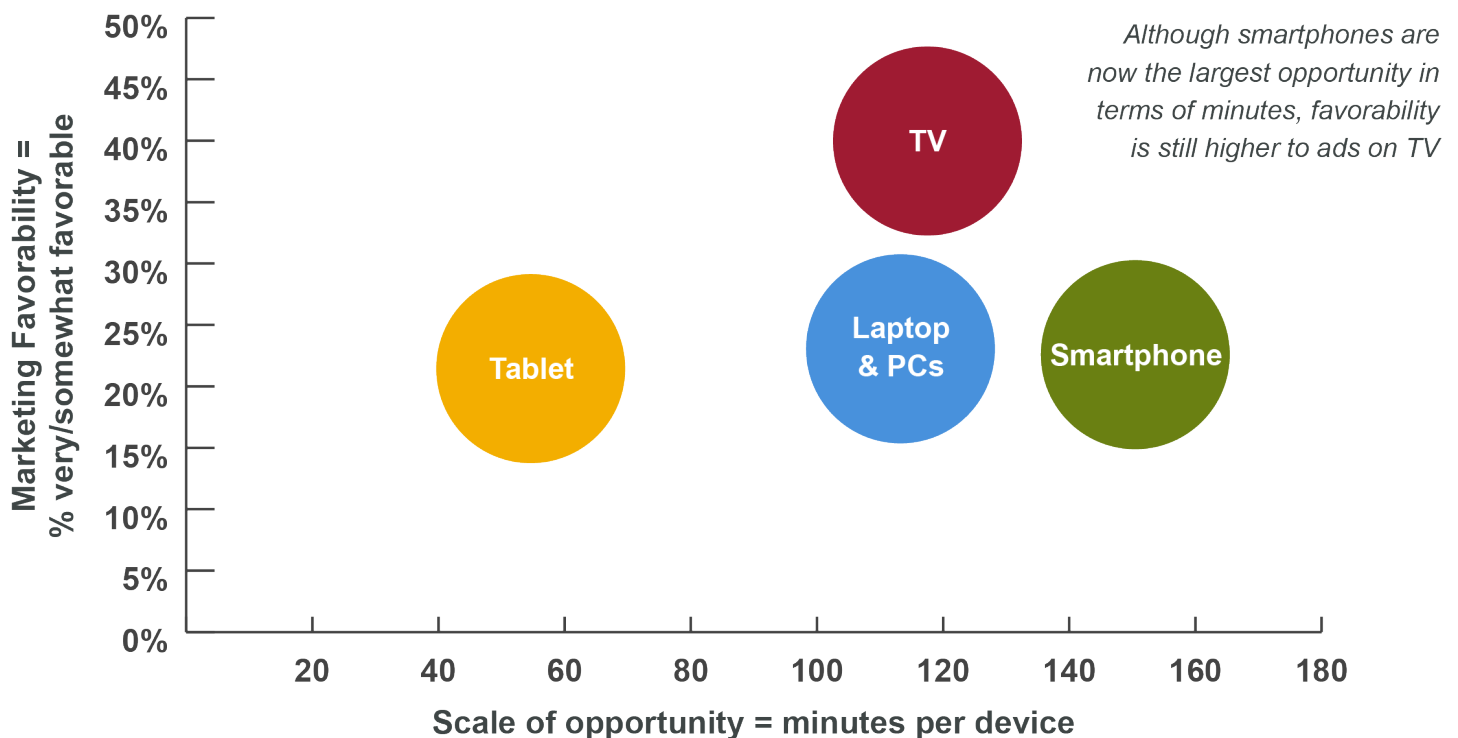


Figure 1: Global multiscreen - individual media comparison

Clearly, this is not a globally uniform picture. Multiscreen consumers in Kenya and Nigeria are significantly more positive about mobile marketing (50% favorable); attitudes are also more positive in Thailand and Saudi Arabia. But they are much lower in Russia (just 6% favorable) and also in France and Germany (both 10%).

The mobile marketing opportunity is clearly strongest in those countries where both time spent and advertising favorability are highest. Aside from Kenya, Nigeria, Saudi Arabia and Thailand, mobile marketing should be a high priority in many other Asian markets such as the Philippines, Indonesia, China and India. Mobile also represents a significant opportunity in all the Latin American countries included in this research – Brazil, Colombia, Mexico and Argentina (Figure 2).

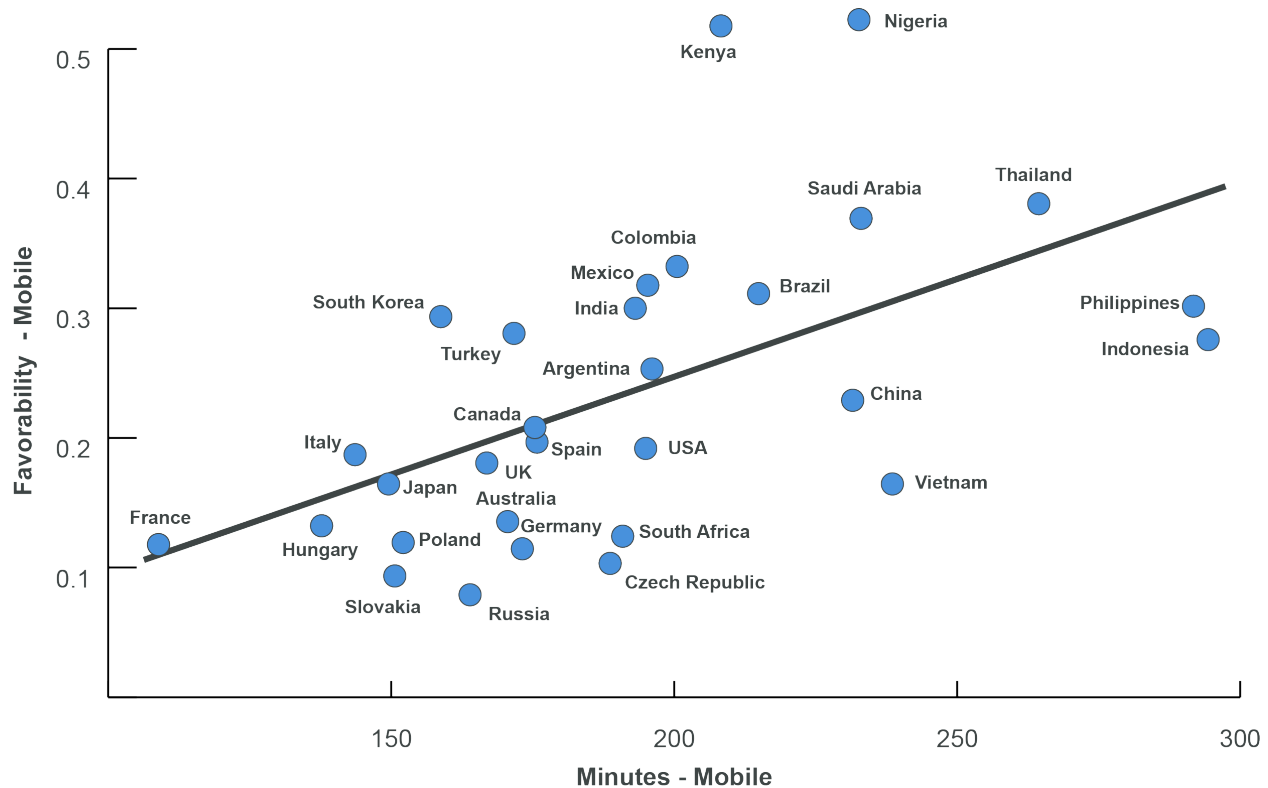


Figure 2: The mobile marketing opportunity is strongest in countries where time and favorability are highest

Receptivity is low to almost all mobile ad formats. Previous AdReaction research has shown little variation in favorability between mobile search ads (25% favorability), augmented reality ads (24%), display ads (23%), SMS Text (23%), video ads (22%) and in-app ads (21%). One mobile marketing format that does perform better are posts via social network news feeds (35% favorability), presumably since they are less likely to be considered ads in the conventional sense.

Another popular marketing format in this year’s AdReaction study was micro-video – the short mobile-friendly videos being shared via platforms such as Vine. These may be viewed favourably since the content is spreading organically via recommendations and could be considered less ‘pushy’.

While consumers say they are not very receptive to mobile ads, this is somewhat at odds with mobile advertising effectiveness studies, which clearly show mobile ads have a much stronger impact than online ads. This may, in part, be due to the novelty of mobile ads, and partly due to the less cluttered medium (when they appear, mobile ads currently take up a greater proportion of the screen than a typical laptop ad).

Advertising effectiveness norms from Millward Brown over the past three years to Q4 2013 show that mobile is more effective than online for all brand metrics by a large margin. Average ad awareness delta is 10.9% for mobile vs. 3.6% for online.

Message communication norm is 8.0% for mobile vs. 2.0% for online. And the purchase intent norm for mobile is 3.7% vs. 0.9% for online. Early indications are that this applies equally to mobile ads delivered on both smartphones and tablets.

However, the edge enjoyed by mobile ads is diminishing. As we have seen with other digital technologies, as the novelty wears off, the effectiveness of the advertising declines. Marketers, therefore, need to think carefully about how they deliver mobile messaging which will be acceptable to consumers but still deliver impact.

Our previous AdReaction research suggests that effective mobile advertising should consider the 3Rs: respect, rewards and relevance. Respect is particularly important in this medium, given the attitudes to mobile ads shown above. Don't interrupt people. Be sensitive, and wait for a natural break before offering viewers the option of engaging. People are likely to be dipping into content for just a few minutes before returning to other tasks; interrupting with a 30-second ad is unlikely to be appreciated. Consider the relationship you are trying to build.

Rewards definitely help. The AdReaction research found that consumers were most appreciative of mobile advertising that offered deals or coupons, while brand opinions are also improved for brands offering free tools.

Relevance can also overcome low favorability. One of the key benefits of mobile advertising is the ability to tailor a message to the specific time and location where contact is made with the consumer. Another way brands can drive relevance is via contextual targeting.

However, it seems odd in 2014 to be considering the power of mobile advertising as a solus opportunity. Millward Brown's effectiveness studies are increasingly showing that mobile plays a role enhancing both online and integrated multimedia campaigns. Mobile can also be deployed as a powerful second-screen device to enable exciting 'meshing' opportunities, such as interactive TV playalongs, and it will often be the device reached for when a TV ad generates interest in a Facebook page, a website, a hashtag, or even a direct purchase.

Mobile advertising executives have been hunting for the Year of Mobile for more than a decade. They clearly believe there should be a direct corollary between time spent and advertising income. Our data suggests that the time spent is certainly massive, but marketers still have some way to go to make their advertising as acceptable as that on TV.

Given the scale of the opportunity and the strong effectiveness of mobile advertising, it is clear that advertisers around the world should be investing and experimenting now to understand how they can best overcome low mobile advertising receptivity and make their mobile minutes matter.

About the Author

Duncan Southgate is global brand director, digital at Millward Brown, he has 19 years' brand, communications and media research experience with Millward Brown. He is responsible for growing the company's digital business and is based in Germany.

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