

FORRESTER PERSPECTIVE:

Four Strategies To Survive The Mobile Mind Shift

Mobile has transformed customer expectations.
How will you respond?

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Your customers are in the midst of a total mind shift. As a result of perpetual mobile connections, their expectations have changed. They aren't interested in your marketing messages. They want utility, and they want it now.

This Forrester Perspective helps you understand how your customers are going through a mobile mind shift, and provides strategies for dealing with the increased demands of your mobile customers.

WHAT IS THE MOBILE MIND SHIFT?

What's actually happening when you pull out your smartphone seeking information or service? Whether you're looking for details about this afternoon's weather, the location of your next appointment, or the calorie count of your lunch, every successful request you make trains your mind. As a result, you eventually change from expecting information or service to demanding it. You give your loyalty to companies that support you in those demands, while you dump the others if there's a more connected alternative.

Forrester calls this the mobile mind shift:

The expectation that any desired information or service is available, on any appropriate device, in context, at a person's moment of need.

This isn't just happening to you, it's happening with your customers. As a business leader, you need to understand this shift and respond to it.



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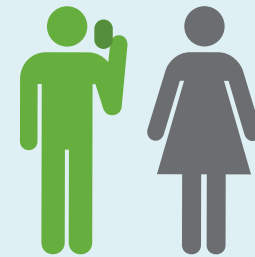


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MEASURING THE MOBILE MIND SHIFT

How many of your customers have made the mobile mind shift? How far along are they? There are three primary drivers of mobile engagement: device ownership, frequency of access on those devices, and diversity of locations. Using these drivers, Forrester has constructed a score for each consumer, the Mobile Mind Shift Index (MMSI), which ranges from 0 (completely disconnected) to 100 (the maximum possible frequency and diversity of connections).

For adults 18 and older in the US, the average MMSI is 27.9 out of 100. With an average MMSI this low, it's clear that Americans as a group have not yet fully embraced the shift, but we see clear signs of movement.



- Men score slightly higher than women.
- More affluent consumers score higher.
- Ages 25 to 34 have an average MMSI of 36.1, while those 45 to 54 average 23.9.

Mobile Mind Shift Index: US online adults (18+)



Base: 30,549 US online adults (18+)

Source: North American Technographics® Online Benchmark Survey (Part 2), Q3 2012 (US, Canada), Forrester Research, Inc.

SIX STAGES IN THE MOBILE MIND SHIFT

We can divide the population into six segments based on their MMSI. The bottom three segments — Disconnecteds, Dabblers, and Roamers — are what we call the *unshifted segments*. These are the 78% of US online adults who are just getting started with mobile access and don't show clear signs of a change in attitudes. But the top three segments — Adapters, Immersers, and Perpetuals — are the *shifted segments*, representing the 22% of the population whose mind shift generates high mobile expectations.

	Unshifted segments			Shifted segments		
	Disconnecteds	Dabblers	Roamers	Adapters	Immersers	Perpetuals
MMSI range	0 to 20	20 to 30	30 to 40	40 to 50	50 to 60	More than 60
% of US consumers	41%	21%	16%	12%	6%	4%
Female	58%	52%	49%	46%	41%	31%
Average age	52	44	39	35	34	33
Mean household income	\$63,700	\$82,600	\$89,800	\$95,400	\$99,700	\$111,100
Own a smartphone	8%	41%	74%	90%	95%	96%
Own a tablet	2%	14%	22%	29%	47%	78%
Typical locations to connect*	Home or living room	Also home office or work	Also restaurants, kitchen, bedroom, outdoors, stores, car, or traveling	Also friends' houses or commuting	Anywhere	Anywhere
Typical apps used*	None	None	Weather, games, news, or social networks	Also sports or music	Also shopping, reference, travel, finance, or video	All categories of apps

Base: 30,549 US online adults (18+) Source: Forrester North American Technographics® Online Benchmark Survey (Part 2), Q3 2012 (US, Canada)

*In the locations and apps rows of this chart, each column also includes all items listed in the previous columns.

YOU MUST SERVE SHIFTED CUSTOMERS

The Mobile Mind Shift Index for your customers determines how urgent it is that you supply them with mobile utility. If your customers' index exceeds 35, then they'll judge you on the mobile utility you offer, and dump you for a competitor if you fail to live up. If it's less than that, you have a little more time to prepare, but be aware that your customers are likely to embrace the mobile mind shift rapidly in the coming year or two.

What's the best strategy for serving shifted customers? It depends on your relationships with your customers. In the chart below, evaluate your own company's ability to deliver on these promises by placing yourself on the quality and frequency axes.



Do customers perceive their experiences with your brand to be of high quality?

Use a measure like Net Promoter or Forrester's Customer Experience Index to rate your quality of interactions.

What's the frequency of those experiences?

Answer high if your customers' interactions with you, excluding advertising impressions, are weekly, daily, or more than daily.



The average E-Trade customer has an MMSI of 38.6.

FOUR STRATEGIES TO SERVE SHIFTED CUSTOMERS

The mobile strategy that makes sense for your company depends on the quality and frequency of customer experiences.

HIGH QUALITY, LOW FREQUENCY EXPERIENCES

Create More Reasons To Interact.

Brands such as the Mayo Clinic and Virgin Atlantic Airways deliver high-quality experiences, but not daily.

If you're a brand like this, you need a way to get your perpetually connected customers to think of you more frequently. Don't limit yourself to a product — expand the range of problems you solve.

For example, Nike sells products that may be purchased just a few times a year. But Nike's fitness and athletic apps allow customers to interact daily. More than 7 million people are part of the Nike Plus community.

HIGH QUALITY, HIGH FREQUENCY EXPERIENCES

Expand Your Relationships.

Brands such as Apple and Starbucks deliver frequent experiences that are highly positive, but they can pursue even more valuable mobile experiences.

For example, Disney will soon launch a service called MyMagic Plus that will encompass a website, mobile app, and digital wristband that will act as room keys, credit cards, park tickets, and photo passes. Customers will be able book ride times, dinner reservations, and character meetings up to two months in advance — and change them on the fly with the mobile app.

LOW QUALITY, LOW FREQUENCY EXPERIENCES

Redefine Service And Partnerships.

Brands such as health insurers have a big problem — they deliver infrequent customer experiences, but when those experiences do happen, they're typically poor.

You can fight back by partnering with apps that provide better, more frequent experiences.

For example, Cigna has subsidized a meditation app to help people reduce stress for free. In one fell swoop, it created reasons to interact more frequently, gave customers a free version of a formerly paid app from an outside expert, and reinforced a core brand attribute.

LOW QUALITY, HIGH FREQUENCY EXPERIENCES

Create Better Experiences.

Brands such as Bank of America and Comcast are in a dangerous position — they disappoint customers on a regular basis.

With mobile apps, they can create more frequent, positive interactions to counterbalance disappointing ones.

For example, Verizon's FiOS app allows its television and Internet subscribers to watch 75 channels of live TV through their home networks. The app has earned three-and-a-half stars in the iTunes App Store, a big improvement over the company's poor customer experience index score.

GET STARTED

Forrester can help you build a strong mobile strategy:

Understand the Mobile Mind Shift Index of your customers. We use Forrester's Consumer Technographics® data to analyze your customers and determine the best strategy to serve those customers with mobile utility or applications.

Develop a winning mobile strategy for your company. We help you analyze and profile the mobile behaviors of your customers, develop a custom mobile strategy, and understand which technology options are best suited to meet your business goals.

Benchmark your mobile functionality. We use Forrester's benchmark methodology to evaluate your mobile presence against the mobile services of other players in your industry, identify critical mobile features, and help you plan for the future.

Perform a mobile application review. We help you identify experience flaws that prevent users from accomplishing their goals and your business from achieving its related objectives. This includes a detailed scorecard, prioritized recommendations focused on improving the user experience, and an analyst meeting to discuss the findings.

Assess your mobile application development. We help you discover the fundamentals of a great mobile application experience, identify the best strategy and technologies for your mobile application development initiatives, understand the implementation options for developing applications, and learn how to structure and build applications that engage and delight users.

Build a mobile security and operations strategic plan and road map. We help you build a strategic plan that details your current and future state, planned roles and responsibilities, and commitment to delivering enterprise mobile security and operations services. The road map links mobile strategy with business requirements, shapes future capital needs, and guides product selection.

Connect with Forrester

Talk to one of our experts about how the mobile mind shift is impacting your customers.

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Visit the mobile mind shift site to:

- See Josh Bernoff and Melissa Parrish discuss how to use the MMSI to serve mobile customers.
- See Ted Schadler and John McCarthy discuss how mobile affects your technology organization.
- Discover how Forrester playbooks can guide your mobile initiatives.
- Register for web and in-person events to learn how leading companies are embracing mobile.

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