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Adopt An App+ Strategy

Move Beyond Apps To Win, Serve, And Retain Your Customers

by Julie A. Ask and Michael Facemire
April 11, 2017

Why Read This Report

Your best customers typically prefer your app over your mobile website but depend on both. But even your biggest fans spend far more time in other firms' apps, and as a result, you own too few of your customers' mobile moments. Digital business professionals must pursue an app+ strategy to maximize their potential to win, serve, and retain their customers in their mobile moments. This means migrating from serving customers in your siloed branded apps with your own data to also serving customers wherever they are with shared data.

Key Takeaways

Employ An App+ Mobile Strategy
Digital business professionals need to look beyond their own mobile apps to engage consumers where they already are with the best possible intelligence.

Apps Are Essential
Consumers spend 78% of their time on smartphones in downloaded apps. Moreover, your most frequent and loyal customers depend on them.

Branded Apps Alone Deliver Too Little
Retailers and banks combined own only 7% of customers' mobile moments. Digital giants such as Apple, Facebook, and Google own the most.

Adopt An App+ Strategy

Move Beyond Apps To Win, Serve, And Retain Your Customers

by Julie A. Ask and Michael Facemire
with Martin Gill, Andrew Hogan, Nicole Dvorak, Laura Naparstek, Theresa Pappafotopoulos, Jaclyn Galan, and Andrew Reese

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Your Customers Will Not Download Your App

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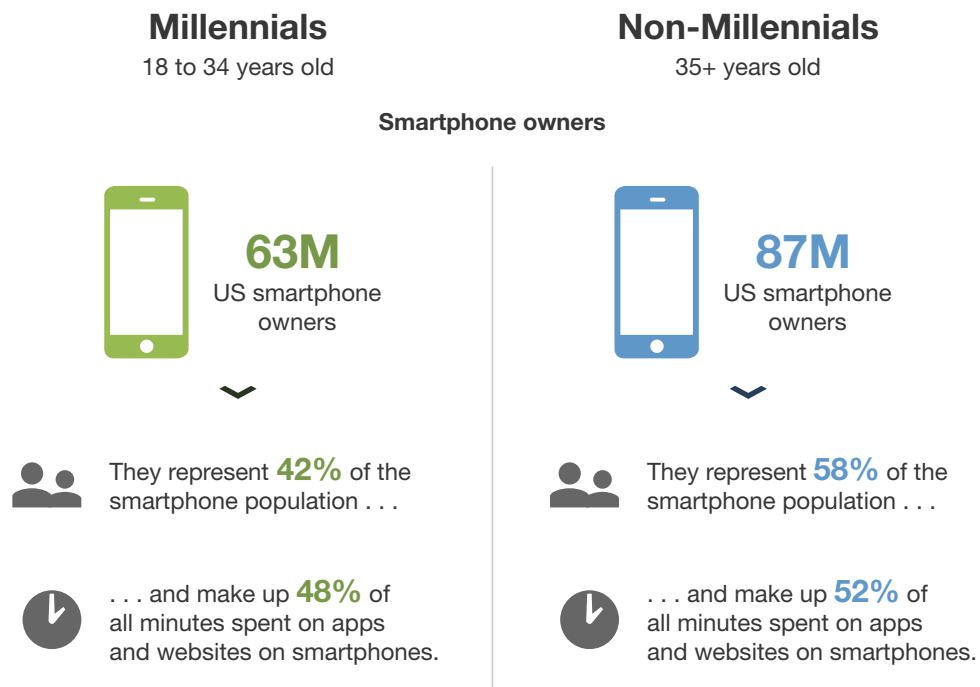## Mobile Apps Are Essential But Deliver Too Little

Your best customers typically use your app and not your mobile website. Non-Millennial US adults spend more than 2 hours a day on their smartphones, and they spend 78% of that time in apps (see Figure 1). However, consumers use only 25 to 30 apps on average each month, spending 88% of their time in just five downloaded apps (see Figure 2). Today, mobile moments are highly consolidated, with about 12 app categories owning 85% (see Figure 3).[1] Shopping, travel, and banking apps own only 7% to 8% of the average US consumer's 200 daily mobile moments.[2]

FIGURE 1 Consumers Spend Most Of Their Time On Smartphones In Apps

Millennial mobile metrics

The smartphone generation gap isn't so large after all.

It's no surprise that the average Millennial spends more time on their smartphone than an older consumer. Collectively, however, non-Millennials account for the majority of time spent in apps and on sites in the US. And while fewer of them check in throughout the day or engage in popular activities like streaming music or looking up directions, their behavior is still strikingly similar. Millennials aren't so different after all, and the gap will continue to close.
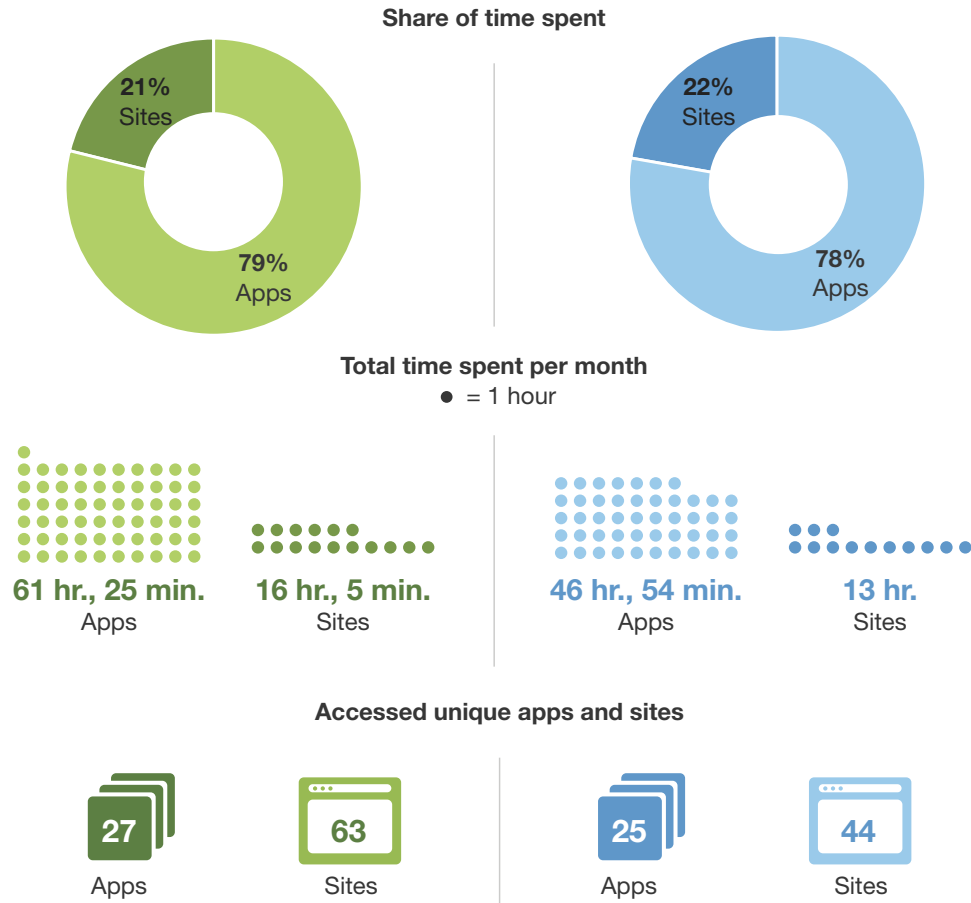
Millennials	**Non-Millennials**
18 to 34 years old	35+ years old

Smartphone owners

63M US smartphone owners	**87M** US smartphone owners
They represent **42%** of the smartphone population . . .	They represent **58%** of the smartphone population . . .
. . . and make up **48%** of all minutes spent on apps and websites on smartphones.	. . . and make up **52%** of all minutes spent on apps and websites on smartphones.

Base: 1,851 US online smartphone owners (18+)
Source: Forrester Data US Consumer Technographics® Behavioral Study, Q1 2015

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FIGURE 1 Consumers Spend Most Of Their Time On Smartphones In Apps (Cont.)

Share of time spent

21% Sites

79% Apps

22% Sites

78% Apps

Total time spent per month

● = 1 hour

61 hr., 25 min.
Apps

16 hr., 5 min.
Sites

46 hr., 54 min.
Apps

13 hr.
Sites

Accessed unique apps and sites

27
Apps

63
Sites

25
Apps

44
Sites

Base: 1,851 US online smartphone owners (18+)
Source: Forrester Data US Consumer Technographics® Behavioral Study, Q1 2015

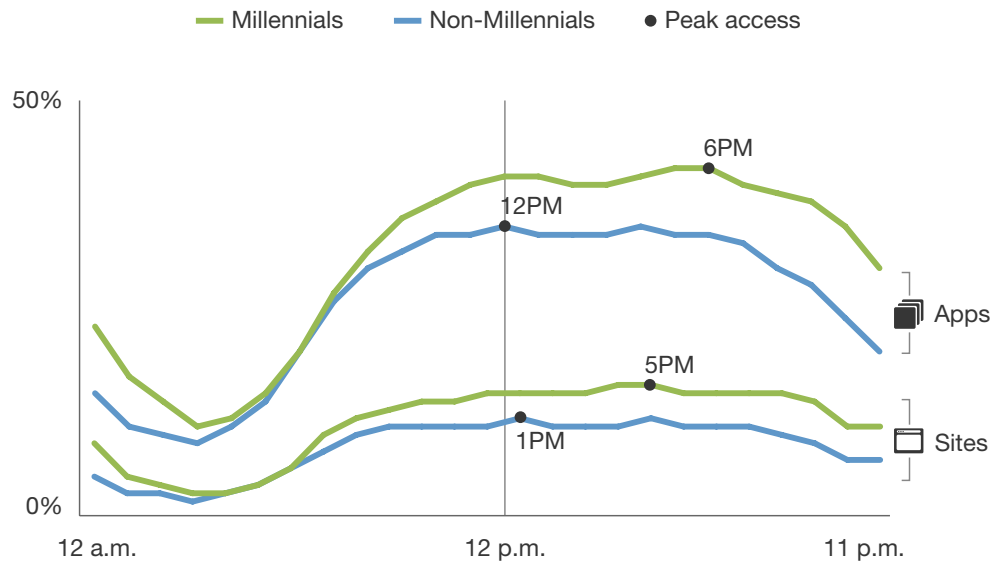**FIGURE 1** Consumers Spend Most Of Their Time On Smartphones In Apps (Cont.)

Regardless of age, consumers spend more time in apps than on mobile sites. Mobile sites offer a source of acquisition when paired with display ads or search. But when consumers really want to engage with friends, media, or a brand, they turn to apps; this is where they spend the vast majority of their time on smartphones. Peak access for Millennials occurs in the evening for both apps and sites, while most non-Millennials check in at noon.

Percent accessing by hour during an average day

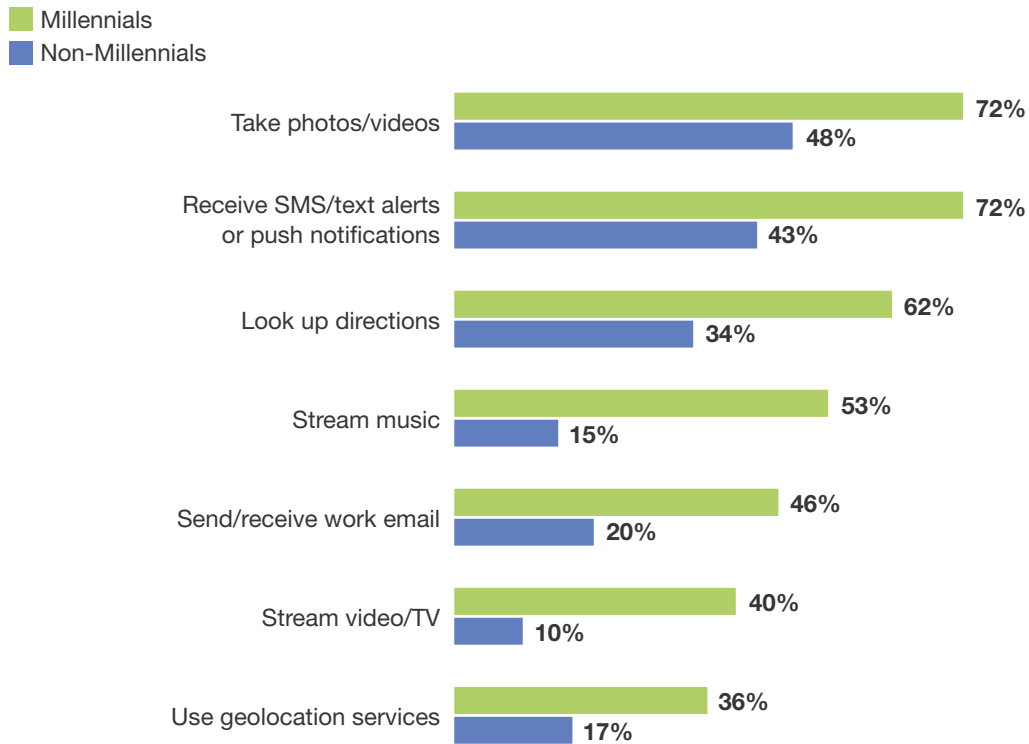Base: 1,851 US online smartphone owners (18+)
Source: Forrester Data US Consumer Technographics® Behavioral Study, Q1 2015

FIGURE 1 Consumers Spend Most Of Their Time On Smartphones In Apps (Cont.)

"Which of the following activities do you do at least weekly on your mobile phone?"

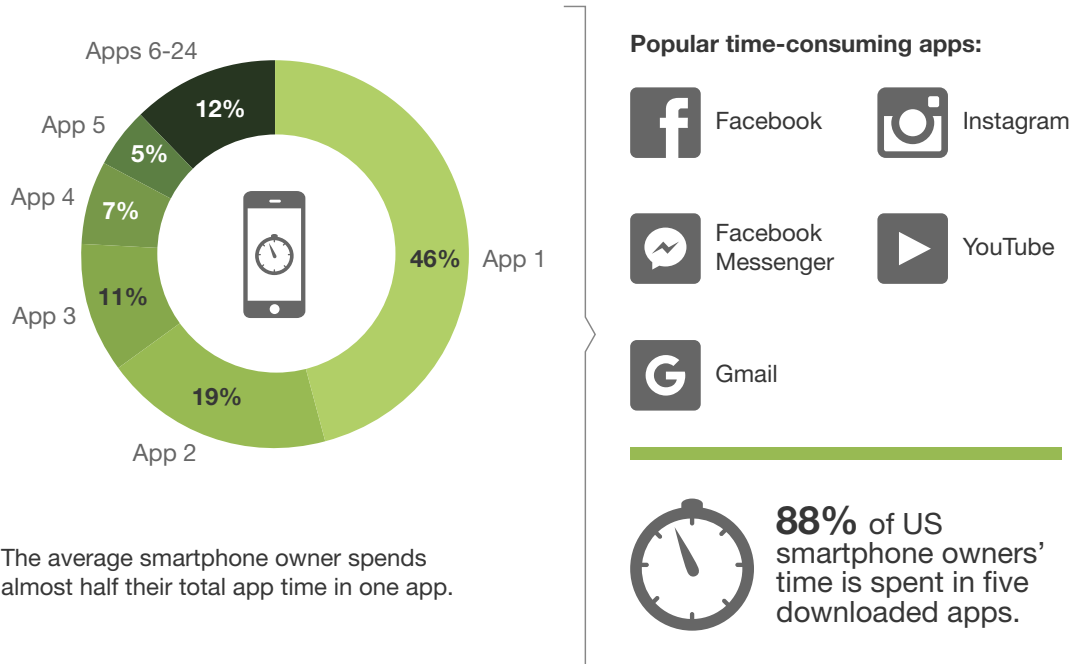Base: 56,849 US online adults who use a mobile phone
Source: Forrester Data Global Consumer Technographics® Online Benchmark Survey, 2016

FIGURE 2 Consumers Spend A Majority Of App Time In Just Five Downloaded Apps

Distribution of time spent across most time-consuming apps for the average US smartphone owner

Apps 6-24

12%

App 5

5%

App 4

7%

App 3

11%

App 2

19%

46% App 1

The average smartphone owner spends almost half their total app time in one app.

Popular time-consuming apps:

Facebook

Instagram

Facebook Messenger

YouTube

Gmail

88% of US smartphone owners' time is spent in five downloaded apps.

Base: 1,996 US online smartphone owners (18+)
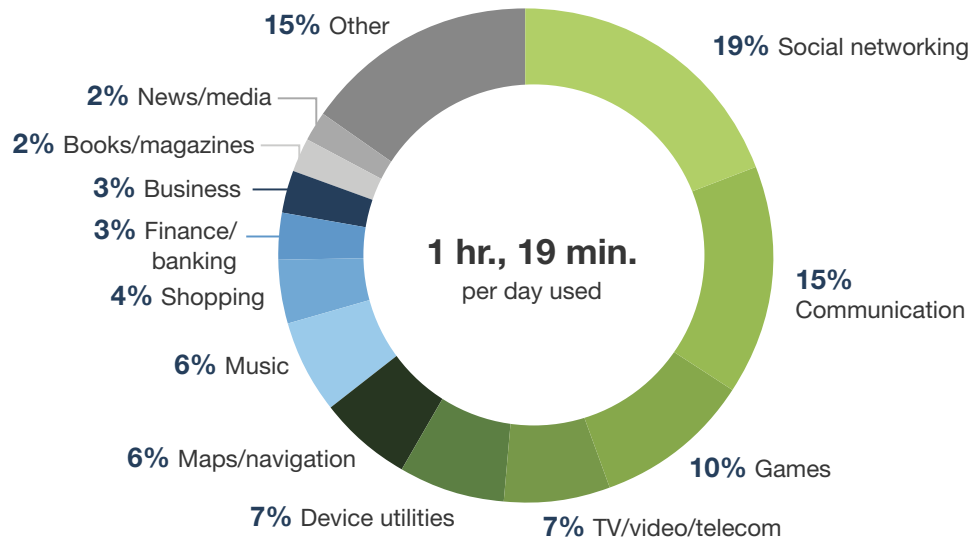Note: Preinstalled (native) email and messaging apps are not included in the analysis.
Source: Forrester Data US Consumer Technographics® Behavioral Study, August 2015 to October 2015

FIGURE 3 Consumers Spend Most Of Their App Time In A Handful Of App Categories

Distribution of US minutes spent on
smartphone apps

1 hr., 19 min.
per day used

19% Social networking

15% Communication

10% Games

7% TV/video/telecom

7% Device utilities

6% Maps/navigation

6% Music

4% Shopping

3% Finance/ banking

3% Business

2% Books/magazines

2% News/media

15% Other

The even distribution of time spent accessing a variety of app categories on smartphones demonstrates their multifunctional purpose in consumers' daily lives.

Base: 2,775 US online smartphone owners (18+)
(percentages do not total 100 because of rounding.)
Source: Forrester Data US Consumer Technographics® Behavioral Study, January 2015 to June 2015

Today's Strategies Are Myopic And App-Centric

Despite owning very few mobile moments, digital business professionals today rely almost exclusively on the mobile web and apps to engage consumers. Limiting engagement opportunities is myopic. Digital business professionals must serve customers where they are, whether via mobile or online, in their own mobile app or elsewhere within the customer's ecosystem. Forrester refers to this as borrowing mobile moments. Why?

› **Enterprises own too few mobile moments.** Owned mobile moments are the moments of truth when a customer pulls out a mobile device to get what he wants, immediately, in his moment of need. Your best customers will not only take the time to discover, download, install, and configure

your app, they will trust you enough to share data or context that allows you to better serve them. Owned mobile moments are your best opportunities to deliver timely, relevant services or information, but you will own too few of these moments. Combined, retailers and travel and financial institutions own less than 10% of mobile moments.[3]

› **Brands cannot manufacture enough mobile moments.** Companies will try to manufacture mobile moments to drive increased engagement with consumers by offering some kind of entertainment or information such as games or tips of the day. However, manufacturing mobile moments is like playing baseball: You still have to walk up to the plate and try to get base hits even though you won't get on base most of the time. Manufactured mobile moments are an essential element of a mobile engagement strategy, but they can't do everything.

› **An arms race is going on for mobile moments.** The arms race has two dimensions: audience and data.[4] Audience matters to those who want to monetize mobile with advertising. Data matters to those firms that want to drive deep, contextual engagement. Apps that offer rich context or data own fewer minutes but more critical ones. Apps in categories such as wallets, health, home, car, maps, search, calendar, and commerce offer insights into who a consumer is — who her friends are, where she spends money, her commute patterns, etc. It's within this context that companies need to serve her best in her mobile moments.

› **Apps are like silos — consumers get lost hopping among them.** Consumers may have a lot of apps on their phones, but that doesn't mean they want to hop in and out of dozens of them each day to get information or complete tasks. They get app fatigue. For example, if a consumer is planning a night out with friends and needs restaurant reviews, a schedule of events, a reservation for dinner, transportation, and the ability to check the plan with friends, she won't want to use five apps — she'll want to use just one.

Platforms Put Brands' Direct Relationships With Customers At Risk

Platforms such as Apple, Facebook, and Google are expanding their ownership of mobile moments as measured by both audience minutes and data.[5] They are doing so by expanding the number of smartphones with their operating system (OS) globally or through more native apps and services. The platforms are on a path to:

› **Disintermediate the mobile OS or become it.** The mobile OS on the vast majority of phones worldwide is either Android or Apple's iOS. The power of being the base layer of 30 billion mobile moments in the US alone each day, or 400 billion globally, is immense. Alibaba, Amazon, Tencent, and Xiaomi, among others, have built or are working on alternatives to give themselves the same power.

› **Dominate your customers' mobile moments and own their data.** Installed and native apps together know more about your customer than any single brand, or even the customer's spouse, knows. Consumers use mobile phones to do everything from banking to boarding airplanes to

buying groceries. They communicate with friends and colleagues on Facebook, Slack, Snapchat, and WeChat. They even watch full-length video programs. As a result, smartphones hold more data about your customers than you ever will.

› **Distance you from your customers with better services than you can offer.** Companies with a holistic understanding of their customers are best able to serve them. Consumers expect immediacy, simplicity, and relevancy in mobile. Enterprises depend on context both to anticipate the needs of their customers and offer them the most relevant content or service in that moment. Platforms today have the most holistic view of your customer.[6]

Take An App+ Approach To Building A Mobile Strategy

Apple, Facebook, and Google will own most of consumers' mobile moments and data in the US, just as Alibaba, Baidu, Tencent, and Xiaomi will in China. You can't change this. Just because these companies have more data about your customers and own more time with them does not mean all is lost. You still have control over your destiny. The open question for you is: What are you going to do to prevent them from distancing you from your customers? Now is the time to build a mobile strategy that goes beyond relying on a single app. Think about your app+ strategy.

Build A Technology Road Map Beyond Apps

Mobile apps alone will not drive enough engagement with consumers. Even your best customers rely on mobile web and messaging. With instant apps, your customers will lose sight of the distinction between apps and the web. Search results and messages will deep link into apps, while app functionality will appear within the browser. Move beyond apps to include:

› **App+ web.** Consumers spend most of their time in mobile apps, but only 18% of them agree that they spend more money in apps (52% disagree; i.e., spend more money on mobile sites).[7] You need both a mobile website and apps. Mobile web helps drive acquisition through search and app downloads. Apps are better suited for frequent engagement where the needs and motivations of consumers on the go are most different from those sitting at a PC.

› **App+ messaging.** Mobile apps are overkill for the vast majority of interactions on mobile phones, let alone smartwatches and connected products. Estimates from a Mary Meeker study show that 60% to 75% of mobile moments today are glanceable, what Forrester calls micromoments.[8] Micromoments are the mobile moments when a consumer needs only a glance to get the information she needs to take action. Use messaging to right-size and increase customer engagement. For example, Whistle uses notifications to let a dog owner know that his dog's activity has not been synced recently or that the battery is low.

› **App+ experience fragments.** In the future, third parties (think virtual assistants like Google Now) will extract content and experience fragments from your app and, based on context, reassemble them to create personalized content and streamlined task flows for consumers. Companies such

as Button, Google, and Vurb have already started to index apps to identify content and services they can pull out of branded apps like Lego. Domino's Pizza customers can place orders via text, on Twitter, with Amazon Echo devices, via their smart TV, from their car, through their smartwatch, and with voice recognition technology in the company's native app.[9]

› **App+ Google Instant Apps.** These are Android apps that are broken down into individual views (atoms) that your users can interact with from web search results. Your customers can now experience parts of your app without needing to find it in the app store, download it, or any of the other points of friction we continually face with mobile apps. This provides immediate value with a top-shelf experience, especially if they need something quick like store hours, restaurant reservations, or flight times.[10]

› **App+ progressive web apps.** Progressive web apps are an alternative to native mobile apps. They wrap modern web technologies in an app-like experience that lives as an icon on the user's home screen and delivers a full-screen experience. Consumers can download these apps directly from your site without the added pain of searching an app store.[11] This year they will support web push notifications, an offline mode and animated page transitions. Investing in the mobile web at Alibaba has led to a 76% increase in conversions across browsers and boosted the number of monthly active users by 14% on iOS, as well as 30% on Android, where an "Add to Home Screen" prompt has led to a 400% higher interaction rate.[12]

Rethink Your Customer Experience

Too many companies simply shrink digital experiences designed for the PC onto small screens. They do old things in new ways, rather than doing new things.[13] Mobile creates new opportunities for companies to transform offline experiences, drive more proactive engagement, and even create services for physical products like the Nest thermostat or Nissan Leaf electric car. Move beyond apps to include:

› **App+ omnichannel.** A handful of major players are accumulating your customers' mobile moments on a massive scale, but they don't own every touchpoint with your customer. Use mobile apps to enhance your end-to-end customer experience. Make mobile moments an essential element of your overall experience. One of the reasons consumers use the United Airlines app is because it easiest and quickest way to get a boarding pass (as opposed to waiting in line for one at the airport).[14]

› **App+ automation.** You need a strategy to drive ongoing engagement with your customers — not only to serve them proactively in their mobile moments, but also to collect data and insights to serve them better over time. With 30 billion mobile moments each day in the US alone, you cannot possibly create all the rules you need to ingest context or data, decide what to do, and proactively serve your customers in their mobile moments. Use engagement automation to execute your strategy and build best practices. Life360 learns what information its customers need when they need it and pushes it out proactively. It sees an app open as a failure to serve a customer.[15]

›› **App+ product.** Consider how you can layer services onto connected products. Consumers are buying connected products to attain results. They want help achieving a goal like losing weight, lowering an energy bill, or having cleaner teeth. At times, these consumers are paying a tenfold premium for these services.[16] For example, the Oral-B 7000 toothbrush guides brushing time and areas while entertaining the user with media. The market for connected products with apps is still wide open.

›› **App+ chatbots.** A confluence of factors — from high consumer adoption of messaging platforms to advancements in artificial intelligence (AI) — has pushed chatbots toward being a viable, though limited, interaction layer between brands and consumers. While the number of chatbots on Facebook Messenger may number into the tens of thousands, only 4% of enterprises surveyed by Forrester built one in 2016 — 11% piloted. Google Home lets consumers order takeout food, check account balances, and request a ride among other things. Passengers download 50,000 mobile boarding passes in just the first three weeks KLM was live on Facebook Messenger.[17]

›› **App+ conversational interfaces.** All the hype may center on chatbots, but most of them aren't ready to handle the complexities of conversation and still depend on human intervention to succeed. Use of Facebook Messenger is far higher than adoption of chatbots. Among enterprises surveyed by Forrester, 17% use Facebook Messenger and another 9% are piloting it.[18] Starting with conversations helps companies understand the needs consumers have on the go or in conversational environments. Target, for example, used this platform to help consumers choose gifts and find them in local inventory over the holidays.

Work With Partners To Engage Your Customers Where They Already Are

Build partnerships to take advantage of third-party data and audiences and to serve your customers better with richer context where they already are. Move beyond apps to include:

›› **App+ ecosystem.** Build partnerships throughout the mobile ecosystem. You share customers with many companies. Partner with them to serve your customers best. Lend mobile moments to your partners. Borrow mobile moments from partners such as Facebook, Google, Twitter, and Yelp to serve your customers. Let your customers interact with you where they already are — don't force them to come to you. You'll lose too many in the acreage between apps. Yelp embedded Eat24 within its ratings and review services to allow consumers to take an immediate action such as ordering food for delivery or pickup.

›› **App+ data.** Data is the foundation of context, and you need context to generate insights that allow you to better serve your customers. Data will be a major source of competitive advantage going forward. Create a strategy to harvest data and use it to generate insights. If you share mobile moments with partners, create a strategy to share the data upfront. Understand the value of the data. Weight-loss coaching app Lark pulls activity data from third-party apps and platforms to better coach customers.

› **App+ services.** Just because a customer buys a product or service from you today doesn't mean you are guaranteed to own that relationship in the future or that they will turn to you to buy value-add services. Apple, Google, Microsoft, and others are building platforms to allow consumers to share data with third parties that promise healthcare, home, auto, and financial services and more. No industry is safe from disruption. Develop your own services strategy. Consumers, for example, share payment data with Mint.com in exchange for analysis and recommendations to save money.

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Supplemental Material

Survey Methodology

Forrester Data Consumer Technographics® North American Online Benchmark Survey (Part 1), 2016 was fielded in February and March 2016. This online survey included 60,049 respondents in the US and 6,284 respondents in Canada between the ages of 18 and 88. For results based on a randomly

chosen sample of this size, there is 95% confidence that the results have a statistical precision of plus or minus 0.4% of what they would be if the entire population of US online adults (defined as those online weekly or more often) had been surveyed and plus or minus 1.2% of what they would be if the entire population of Canadian online adults had been surveyed.

Forrester weighted the data by age, gender, income, region, and broadband adoption to demographically represent the US and Canadian online adult populations. The survey sample size, when weighted, was 60,049 in the US and 6,276 in Canada. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) Lightspeed GMI fielded this survey on behalf of Forrester. Survey respondent incentives included points redeemable for gift certificates.

Data Methodology

The behavioral data in this report comes from Forrester's Mobile Audience Data, our ongoing smartphone and tablet behavioral tracking panels in the US. Forrester uses Research Now's passive meter tracking technology on an ongoing basis to capture and record all smartphone behaviors and, for a subset of the panel, tablet behaviors. The behavioral tracking panel in the US is weighted to be representative of online smartphone owners. Each of the panelists downloaded an application that runs a passive metering technology to measure what people do in their daily lives on their smartphones and tablets. Panelists are monetarily incentivized on a monthly basis for their participation in Forrester's behavioral tracking study. We track behavior on iOS and Android supported devices for apps that communicate with web servers, with the exception of preinstalled (native) email and messaging apps. We collect URL website data from native web browsers that com preinstalled on a user's smartphone/tablet at the truncated URL level. For non-native (downloaded) web browser apps, we do not collect URL behavior.

We apply data cleaning rules to eliminate outliers, including individual session cleaning, extremely heavy user sessions, minimum usage sessions, and extreme user daily aggregated single app usage and total app usage. We remove certain native applications that are part of the back-end process. We calculate all behavioral metrics per month and average equally across months for the date range.

Additionally, a subset of 825 panelists answered survey questions about their app and mobile web behaviors, preferences, and attitudes. All data displayed has a sample size of more than 30 participants. We do not deem any data with a sample size of fewer than 30 as statistically representative of a general population. For more information on how the behavioral tracking data is cleaned and processed, please contact data@forrester.com.

Companies And Experts Interviewed For This Report

[24]7	Amazon
Alibaba	Another
AliveCor	As well as 10 other Fortune 500 companies

Basis	MapQuest
Bosch Tools	Meeco
Button	Nexmo
Chyme (Unvired)	Nuance Communications
Conversocial	Oracle
DO	PlayKids
eBay	Pypestream
Facebook	Rakuten
Fandango	Salesforce
FedEx	SkyGiraffe
Fitmo	Small Wins
Fluid	Snapchat
Google	SoundHound
Grability	SpotHero
HealthTap	TeleMessage
IBM	Trunk Club
Icelandair	Twilio
InterContinental Hotels Group (IHG)	Ubimo
Intuit	UCIC
Jarden	Under Armour
John Deere	United Airlines
Kik Interactive	Valencell
KLM	Volvo
Kraft Foods	Vurb
Kwilt	Walgreens
Lark	Dr. Jeff Xiong
LifeTrak	Yahoo
Lycos	

Endnotes

[1] For more information on where consumers spend their time on mobile devices, see the Forrester report "Your Customers Will Not Download Your App."

Forrester has tools to measure how consumers spend time in downloaded apps, but not native apps. Therefore, the estimates are approximate. There are some apps such as messaging, maps, music, and video that ship with the phone from Apple and especially Google. The time spent within these apps is not captured. While we say that 72% or about three-quarters of time spent is in 15 categories, probably even fewer categories represent that amount.

[2] For more information on the distribution of mobile moments, see the Forrester report "Your Customers Will Not Download Your App."

[3] Source: Forrester Data US Consumer Technographics Behavioral Study, January 2015 to June 2015.

[4] For more information on the arms race going on in mobile, see the Forrester report "Your Customers Will Not Download Your App" and see the Forrester report "Mobile Platforms, Partners, And Power."

[5] For more information on this arms race, see the Forrester report "Your Customers Will Not Download Your App" and see the Forrester report "Mobile Platforms, Partners and Power." Source: Julie Ask, "Facebook F8: Important Takeaways For Digital Business Pros (Hint: Keep Calm About Bots!)," Julie Ask's Blog, April 14, 2016 (http://blogs. forrester.com/julie_ask/16-04-14-facebook_f8_important_takeaways_for_digital_business_pros_hint_keep_calm_ about_bots).

[6] For more information on how each of the major players stacks up, see the Forrester report "Mobile Platforms, Partners, And Power."

[7] Forrester surveyed consumers about their preferences between mobile apps and websites for a range of activities. When Forrester asked consumers how much they agreed with this statement, "I spend more money in mobile apps," only 18% agreed and 52% disagreed with the rest being neutral. Source: Forrester's Mobile Audience Online Survey, Q4 2015 (US).

[8] Source: Mary Meeker and Liang Wu, "KPCB Internet Trends 2013," SlideShare, May 29, 2013 (https://www.slideshare. net/kleinerperkins/kpcb-internet-trends-2013).

Source: Joanna Stern, "Cellphone Users Check Phones 150x/Day and Other Internet Fun Facts," ABCNews, May 29, 2013 (http://abcnews.go.com/Technology/cellphone-users-check-phones-150xday-and-other-internet-fun-facts/blogE ntry?id=19283674&ref=https%3A%2F%2Fwww.google.com%2F).

For more information about micromoments, see the Forrester report "Micro Moments Are The Next Frontier For Mobile."

[9] Source: Domino's Anyware (http://anyware.dominos.com/).

[10] Source: Michael Facemire, "Mobile Experiences Just Got Better," Michael Facemire's Blog, January 24, 2017 (http:// blogs.forrester.com/michael_facemire/17-01-24-mobile_experiences_just_got_better).

[11] Source: "Progressive Web Apps," Google Developers (https://developers.google.com/web/progressive-web-apps/).

[12] Source: "What are some examples of progressive web apps?" Quora (https://www.quora.com/What-are-some-examples-of-progressive-web-apps).

[13] Source: James McQuivey, Digital Disruption: Unleashing the Next Wave of Innovation, Amazon Publishing, 2013.

[14] For more information about how mobile can transform commerce and service experiences online and in physical locations, see the Forrester report "Mobile Moments Transform Commerce And Service Experiences."

[15] For an in-depth case study about Life360 and the company's use of the IDEA framework to evolve mobile services from apps to platforms, see the Forrester report "Life360 Wins In Family Mobile Moments."

[16] Early connected products such as the Nest thermostat (now owned by Google) and the Withings Health Mate sell at a price that is 10 times what a typical thermostat or bathroom scale would sell at.

[17] For more information, see the Forrester report "The State Of Chatbots."

[18] Source: Forrester's H2 2016 Global Mobile Executive Online Survey.

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