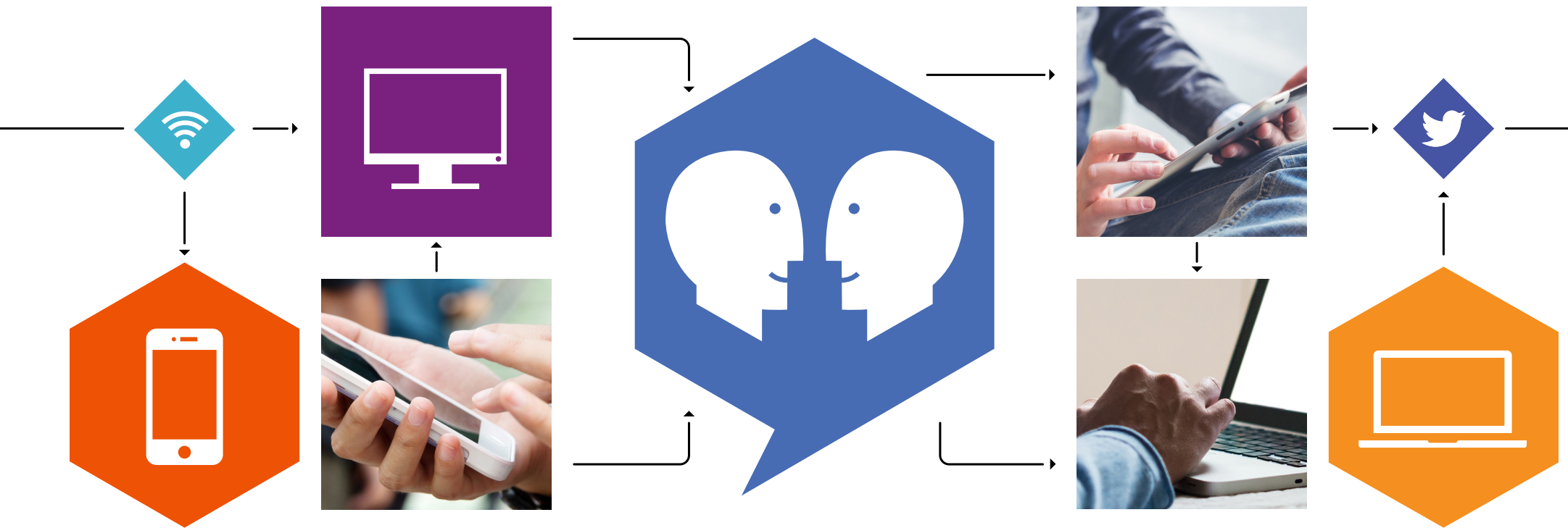


# How markets grow up And what it means for brands' connection strategies



There are at least four different personalities that digital markets can adopt as they develop; to succeed, marketers need a precise understanding of the specialist roles that digital platforms can play for each.

# Connected Life

## How markets grow up

The advance of internet access is often portrayed as a simple progression with little room for variation – and inevitable consequences for marketers. Digital leads to fragmented audiences and diminishing returns; building awareness and engagement becomes harder work with less certain rewards. The media landscape becomes a maelstrom of proliferating touchpoints and uncertain consumer behaviour.

In reality, more touchpoints mean more choice, for both consumer and marketer. Although markets grow up in a number of different ways, the consumers within those markets use their devices in a manner that is largely predictable, provided you know which devices they can access and what attitudes they have towards those devices. As the availability of different

devices increases, consumer media consumption becomes more specialised, with different roles for different platforms at different times of the day. Because this specialisation follows a logical pattern, there is a real opportunity for marketers to follow consumers precisely from platform to platform.

Understanding the role that a device or channel plays within a given consumer's day offers new opportunity to engage within a specific context. Media fragmentation may make mass targeting more challenging, but it also offers robust, precision targeting at scale – when specialised digital routines provide a rich variety of platforms and purposeful opportunities.



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## How markets grow up

### The alternative personalities of digital markets

Markets grow up in different ways as their inhabitants settle on the uses of technology that best fit their needs and their resources. The key to understanding each market lies in an appreciation both of the access that consumers have to different digital technologies – and their attitudes towards using them. Market forces and history combine to dictate access: the availability of technology and the price at which it is made available. Attitudes can be both drivers and barriers to adoption; drivers for the early adopters who actively seek out the latest devices, barriers for those habitual users who are already comfortable with what they have and are less inclined to look elsewhere.

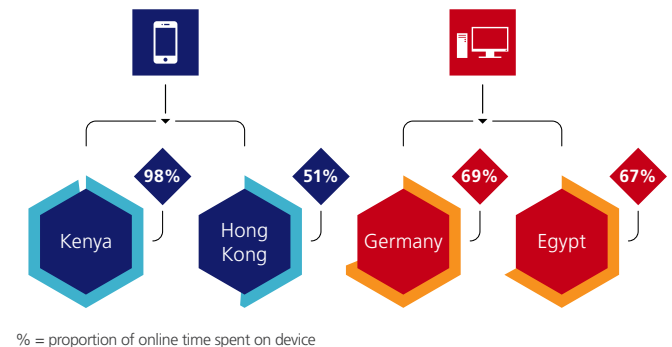
Whilst it is true that mobile is taking on a more central role across all markets, this can happen far quicker in those markets with no past history of using other devices, and where low-cost smartphones offer the most affordable route online. This lack of pre-existing alternative forms of web access distinguishes single-device, mobile-centric markets like Kenya (where 98 per cent of time online

is spent on a mobile) from those such as Egypt, where legacies of desktop use make internet users slower to migrate to other devices, and 67 per cent of time online continues to take place on a PC. Cost of data can still provide a barrier to access in single-device, mobile-centric markets, but it also provides an opportunity for brands that are alive to access and attitudes. Unilever has had considerable success in India's rural regions by offering free entertainment, served with accompanying ads, on mobile platforms.

The proliferation of alternative digital technologies helps to shift attitudes within a market, but is no guarantee that they will shift quickly. In many such markets, the PC remains central for the majority of consumers. In Germany, it accounts for 69 per cent of time online, and a willingness to wait for this preferred digital experience (rather than going online at any time through tablet or smartphone) helps to explain why overall time online for Germany stands at only 3.0 hours, whilst Kenya leapfrogs to 3.2

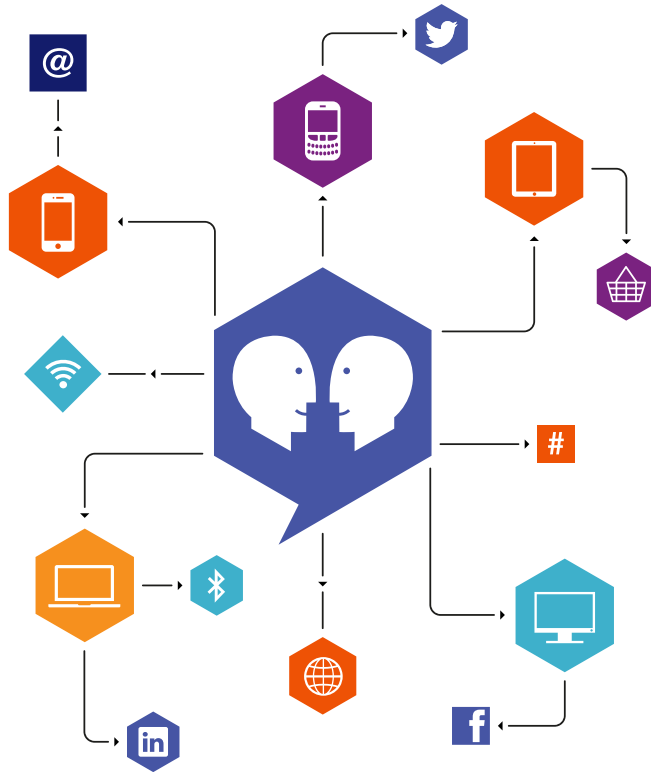
The key differentiator between a multiple-device, PC-centric market such as Germany and a multiple-

device, mobile-centric market such as Hong Kong isn't in the access to technology; it's all in the attitudes and lifestyle. Developed markets where early adoption has become a mainstream behaviour – but they have huge flexibility as to when and where that time online takes place. The fact that 51 per cent of time online in Hong Kong is spent on a mobile or tablet device doesn't add up to that much more time online overall (3.9 hours per day), but it hugely expands the range of needs that digital can meet. And it's this broadening of the roles that digital media can take on that has the most significant implications for traditional media channels.



# Connected Life

## How markets grow up



### More devices = more media

As the potential roles that digital media can play increase, the use of traditional media itself becomes more specialised. Many tend to assume that traditional platforms are simply ousted from the daily media routine once digital alternatives arrive on the scene. The reality is far more nuanced. Attitudes, as well as access, define how consumers choose to consume media.

Morning media routines are dominated by a need to catch up on news, and 15 per cent of German internet users still turn to a traditional printed newspaper to do so. Interestingly, this figure does not dip significantly in Hong Kong, where 13 per cent of internet users do the same. However, in a mobile-centric market such as this, a faster and more social alternative is clearly emerging. Almost half (47 per cent) of internet users in Hong Kong pick up a mobile device before getting out of bed; 21 per cent of those in Kenya do the same.

Traditional media consumption patterns are being similarly disrupted during evening, when the TV once reigned supreme. Amongst worldwide internet users, only around 54 per cent of TV viewing during the early evening now represents undivided attention. For the rest of their time in front of the TV, viewers are simultaneously carrying out other activities, on other platforms. This division of attention peaks in the markets that have the greatest range of digital devices available.

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# Connected Life

## How markets grow up

### More devices = more media = more opportunity

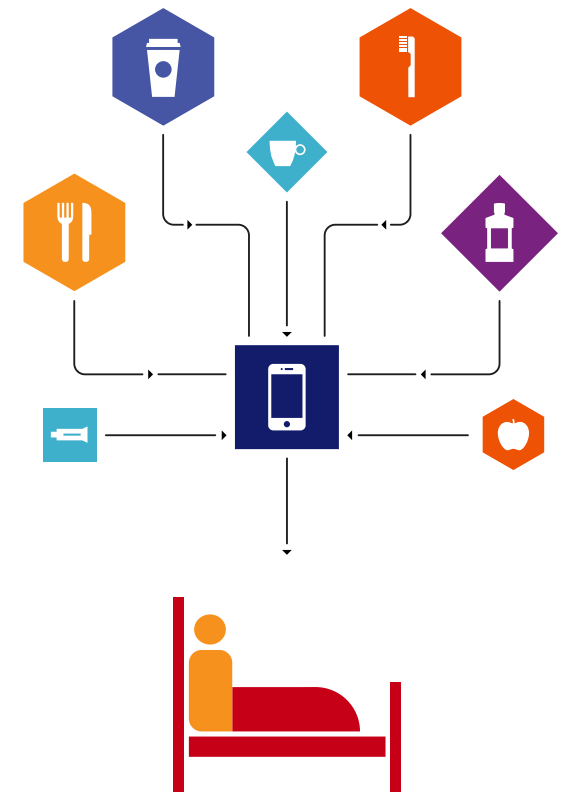
At first glance, this seems like a damaging constraint on the reach and effectiveness of TV advertising. However, the data also shows that 25 per cent of digital device usage taking place in front of the TV involves social media and other forms of communication. Fragmentation such as this undoubtedly represents a challenge to marketers – but for brands able to earn attention and generate engagement, it also represents a significant opportunity for amplification and advocacy.

Similarly, the minutes that those in Kenya and Hong Kong spend in bed with a mobile device, prior to getting up, represent a wholly relevant opportunity for messaging from oral care or breakfast brands. The key to success for marketers lies in identifying the specific context for use of particular devices, and leveraging this to their advantage.

It is through such precise understanding that brands can transform the challenge of media fragmentation into the opportunity of increased relevance and

engagement. Internet penetration levels alone do not dictate the impact of digital on media consumption, and pegging digital media spend to this metric alone misses the point. Instead, marketers must seek to understand the access and attitudes that consumers have to different digital devices. Doing so at a granular level holds the key to delivering tailored, personalised, context-specific messages to different groups – and to doing so at scale, on whichever platform they happen to use.

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# Connected Life

## How markets grow up

### About Connected Life

Connected Life is a leading global study of the digital attitudes and behaviours of over 55,000 internet users across 50 countries, exploring how technology is transforming the lives of consumers across the world. It offers essential insight into the impact of the growing digital ecosystem on the media landscape.

Connected Life also uncovers new and exciting opportunities for marketers to connect with their consumers in this increasingly complex environment; it is a powerful tool that helps brands make better digital decisions.

The fieldwork was undertaken in all markets between March and June 2014.

Please visit [www.tnsglobal.com/connectedlife](http://www.tnsglobal.com/connectedlife) for further information.

### About TNS

TNS advises clients on specific growth strategies around new market entry, innovation, brand switching and stakeholder management, based on long-established expertise and market-leading solutions. With a presence in over 80 countries, TNS has more conversations with the world's consumers than anyone else and understands individual human behaviours and attitudes across every cultural, economic and political region of the world.

TNS is part of Kantar, the data investment management division of WPP and one of the world's largest insight, information and consultancy groups.

### Get in touch

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## About the author



**Joe Webb**, Head of Digital, TNS Asia Pacific, has spent his career helping brands get closer to their consumers through digital research solutions. Since joining TNS in 2007, his experiences have spanned publishing work on how to measure brand interactions on social media, designing and launching the award-winning Digital Life study in 60 countries and delivering digital insights at conferences in three different continents.

As Head of Digital, TNS Asia Pacific, Joe continues to help brands get closer to their consumers, whether through the delivery of digital understanding that ultimately leads to improved marketing practices or the integration of digital methodologies that delivers enhanced consumer research.



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