How to Choose Providers for Mobile Consumer Application Platforms

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Mike McGuire guides digital marketers on best practices for developing strategies. He specializes in how context, community, location and time — combined with a consumer’s purchase history and purchase intent — are changing the relationship between consumers and brands.

Mike's focus includes online music and media distribution, DRM, copyright-related issues, publishing and how social networking technology can provide new strategic opportunities for media companies. He covers topics such as the consumer adoption of online music services and emerging business models, and he identifies technologies that can be used to develop new business models or overhaul existing models.

Top 5 Issues That I Help Clients Address:
• What are the best practices for developing a mobile marketing strategy?
• How should I change my marketing strategy as a result of adoption of connected devices?
• What are consumer (demographics, geographic, industry, etc.) attitudes and behaviors around marketing?
• How will consumer concerns around privacy and security affect mobile marketers’ strategies and tactics?
• Which approaches work best to model and analyze mobile audiences, actions and dialogues?
How to Choose Providers for Mobile Consumer Application Platforms

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Software development platforms that deliver consumer-facing applications on mobile devices are rapidly evolving. Mobile marketers who work with creative developers can use these guidelines to evaluate HTML5-focused, messaging and native tools, and cross-platform tool vendors.

Analysis

The emergence of media tablets and the billions of mobile phones in use today are driving new business opportunities for digital marketers. Gartner is forecasting that more than 2 billion mobile phones will be sold in 2016, with an installed base of 5 billion devices. We also forecast that worldwide mobile connections will grow to 7.6 billion in 2016. Interest in mobile B2C-facing applications will continue to outpace that of mobile enterprise application adoption, as well as application and Web development in general. Follow these guidelines when evaluating and selecting offerings and vendors for mobile consumer application platforms. Review our "Magic Quadrant for Mobile Consumer Application Platforms" to learn about the strengths and cautions for vendors in this space.

Understand the Basic Approaches That Enterprises Are Using

While mobile marketers aren’t likely to deal directly with mobile consumer application platforms, understanding their capabilities helps improve working relationships with developers within your organization, or with third-party developers. There’s no single dominant way to deliver mobile B2C applications and content, but enterprises are using these basic approaches:

- **Messaging**, such as short message service or multimedia message service businesses primarily use messaging for outbound marketing campaigns, voting and query/response applications.
- **The mobile Web**, with a special emphasis on leveraging advances around the HTML5 standard to better reach across different devices/browsers and to provide improved browser experiences. Compared with native application approaches, the mobile Web is best for informational and lighter weight, forms-oriented types of applications.
- **Native/rich applications** provide, in most cases, the best overall user experience. They are written for target environments or using a mix of Web and native programming. Digital marketers need this approach for apps provisioned from app stores. Native apps are best for interactive applications that need access to resources on the device, such as camera, location, compass, and accelerometer. As HTML5 matures, however, mobile marketers need to work with developers to understand how to best transition to browser-based apps.

- **Cross-platform (compilation) tools** that generate native or rich Internet application code. Typically, these platforms employ tradeoffs in using the common functions across devices. In most cases, the applications do not take advantage of the full capabilities of the targets. Developers also don’t need to use the native coding environment to "tweak" the application for native look and feel. Enterprises often use these tools to bridge applications among multiple platforms.

Mobile marketers are likely to encounter organizations that use a mixture of these categories for different mobile business purposes, often mixing platforms and architectures, to reach the target audiences. We expect integration among the short message service, Web and native delivery systems to increase. Leading mobile consumer application vendors will offer ways to extend and integrate user experiences across these approaches.

Focus on Evaluating Cross-Platform Tools

Different mobile consumer application platform paradigms are options for many clients that may be considering, for example, a messaging or a Web solution for a mobile consumer application requirement, or a combination of the two (or three). In some cases, companies can use vendor offerings in tandem to cover multiple requirements, such as in creating mobile Web apps and then creating native shells. They can then stage them in apps stores where they’ll be discovered.

Interest in cross-platform approaches (such as cross-compilers and client-side runtime containers for applications) is increasing, as is interest in the impact and future direction of HTML5. More and more mobile enterprise application platform vendors are adding mobile consumer application platform functionality. This shows the effect of Web programming and consumerization on mobile application development, and points toward convergence of these markets.

Most toolsets for mobile application development remain incomplete. There are no market leaders in consumer mobile application platforms, because the large ecosystem players, such as Google, Apple, Research In Motion (RIM), Nokia and Microsoft, aren’t positioning their application and support platforms to support other operating systems.

Select Tools From Multiple Vendors

The vendors with platforms focused on Web or cross-compilation are still relatively small — typically well under $50 million in annual revenue — and are likely acquisition or merger targets. Most organizations will need to adopt multiple mobile application delivery tools, usually from multiple vendors, to cover the range of platforms and delivery methods they seek. Your audience and the reach you need applications to achieve will determine which tools and vendors you select.

The requirements for leadership in this market will continue to track higher in 2012. Leaders need to offer multiplatform, markup-language-based or cross-compilation approaches, as well as all three outputs:
Messaging
Web
Rich/thick client

Several vendors have the potential to meet this criterion if they can scale their ecosystems or take advantage of technologies, especially HTML5 and advanced software testing techniques. This will enable them to provide developers with ways to offer value across the underlying technology boundaries.

Adopt Multiple Mobile Application Paradigms

Mobile application development for customers remains a hot topic for consumer-facing enterprises, regardless of the industry. Mobile application development has always been a trade-off between quality of experience and breadth of audience. Native applications limited to a single platform and, in the worst case, a single model of device, albeit at a high cost, provide the best quality of experience.

Technologies, such as short message service, achieve the widest audience. These technologies are practically everywhere and low-cost, but provide poor-quality user experiences. This is one of the key drivers forcing organizations to adopt multiple mobile application paradigms. Some key metrics point to the need for a multichannel approach.

Recognize the Dynamic Nature of This Emerging Market

The market for mobile consumer application platforms is in its infancy. No provider has a complete platform for all three types of mobile consumer application styles or all target platforms. At this point, market leaders are the providers that deliver a vision for what the market may become, but don’t automatically have all the technology components an enterprise may need.

The future of this market is multiplatform. To remain a leader, providers will address devices and operating systems that are not their own. No single device, provider, or operating system will have a dominant market share in the long term. A major part of the provider selection task in this market is understanding and mapping the requirements to indicate what type of vendor you need.

This market will change radically during the next five years, as leading tools support more platforms and more mobile application paradigms. The bar for leadership will rise significantly during the next one to three years.

What to Do Next

- Expect this market to shift from native to hybrid and Web approaches within three to five years. This will occur as technologies such as the mobile Web mature, browsers become increasingly functional and capable of accessing device resources, and the toolsets provide richer features.

- Identify the relative strengths and weaknesses of mobile app developments with respect to multiple factors. These factors should include portal and rich Internet application development, mobile operating systems, the user experience, the size of the addressable consumer audience, the relationship of the mobile platform to e-commerce or Web investments, and the cost of conducting marketing, advertising, analytics, location-based services and customer care for such solutions.

- View these trade-offs as a set of tactical decisions, but realize that subplatforms and their underlying components form the infrastructure for orchestrating mobile applications and experiences for consumers.

- Use our "Magic Quadrant for Mobile Consumer Application Platforms" to select vendors that create native and Web-based experiences on smartphones and tablets, and to understand the platforms available for staging mobile Web-browser-based applications to consumers.

Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

- *Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market*
- *Context-Aware Computing: The Importance of Mobile Consumer Application Platforms*
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Our experienced research analysts talk to marketers every day — from those just entering the digital realm to the innovation trailblazers. These interactions capture real challenges, best practices and what is critical for success.

Gartner provides marketers with the research, data, tools and expert advice to rapidly deploy, optimize and measure digital technologies and coordinate diverse marketing programs into a strategy that drives results.

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