

The dawn of the “Splinternet”

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A fragmenting world

Fragmentation. One word that has come to define much of media and advertising in the last twenty years. It's become standard in the media industry to talk about the fragmentation of TV channels and of consumers' media consumption. The days of two commercial TV channels, a few static-plagued commercial radio stations and a limited selection of print titles belong to another era. In the 1990s brands had to adapt to the rise of BSkyB, and in this decade the rapid growth of the Internet has posed new challenges for content providers of all kinds. Now, most brands have a digital strategy and the brave are placing digital at the heart of what they do – across product development, brand awareness, sales and customer service, digital can have an important role to play.

These strategies are built on the certainties that have been established in digital in the last few years, for example:

- Consumers will use a laptop or desktop to access the Internet. A few will have 3G dongles
- Two or three browsers will dominate as the software tool to interface with brands online
- Some people will consume traditional broadcast media whilst online
- Social media is growing quickly; mobile web access less so
- You need to engage with the public, not just sell to them as potential cash cows.
- Annoy them, and you will get hurt – a negative review is a few clicks away
- Search isn't going anywhere. Google dominates, and nobody is seriously challenging them

But now, in 2010, we're on the edge of a new era. Internet platforms and the methods by which the public interact with brands are as research company Forrester describes it – “splintering”. Forrester goes further, prophesising that we are entering the age of the “Splinternet”. Through Steak's own findings and what we're seeing in our own media usage, in the behaviour of friends and family, in research and in analytics reports – this trend is evident, and it has important implications for digital strategies going forward.



The Splinternet: it's all changing, again

Buzz words like “Splinternet” aside, what do these changes actually mean? Forrester’s definition is one that stands up to interrogation and summarises what we feel is happening in the digital landscape:

“The golden age of Internet standards is ending. The Web is splintering, and interactive marketing is fragmenting along with it. Welcome to the age of the Splinternet....”

The online experience started with incompatible offerings from various providers. But in the mid '90s, unified Web standards emerged...The standardized Web established links, click-throughs, and analytics, which in turn gave rise to now mainstream interactive marketing tools like online advertising, search marketing ads, and email marketing....

Just when marketers are becoming used to this online world, the unified Web is ending. The Internet will splinter due to the rise of powerful connected devices and the spread of social technologies.”

(Source: “The Splinternet”, January 2010, Forrester Research Inc.
<http://www.forrester.com/rb/Research/splinternet/q/id/56303/t/2>
<http://forrester.typepad.com/groundswell/2010/01/the-splinternet-means-the-end-of-the-webs-golden-age.html>)

What does that actually mean today?

The Internet has escaped from the shackles of the office and living room to be available anywhere in the UK there is a mobile or WiFi signal – omnipresent almost. In 2010 we can, in theory, access the Internet via mobile phones, laptops, netbooks, an emerging class of tablet devices, games consoles, televisions – and desktop PCs.

Of course, for many of these devices it is early days – nobody can guarantee we will all be using Internet-enabled TVs by 2015 for example, even if TV manufacturers are pushing 3D and Internet TV as their next revenue generators after LCDs. But one trend is clear: digital strategies of the future will need to focus less on websites or traffic driving and more on creating brand and buying experiences that are seamless and painless across all the devices consumers choose to use. That has some real implications for brands which they can start to address today.



Planning for the future, today

There are some clear trends based on real world examples that can guide brands thinking and strategy for the future – and can start informing the requirements put to technical teams and the briefs handed to agencies as we move towards 2011.

The proliferation of devices

This is the obvious trend – there are more devices than ever with Internet access and the range of types has expanded. We've seen the usage of laptops rise as prices fell and specifications rose; netbooks have provided an even cheaper, more portable alternative, and smart phones continue to grow. Now we have iPads and other tablet computers entering the market, with early analysis suggesting that iPads are cutting into netbook sales – 44% of US consumers planning to buy an iPad stated they were doing so instead of a netbook in a Morgan Stanley survey in March. (<http://www.wired.com/gadgetlab/2010/05/netbook-ipad/>)

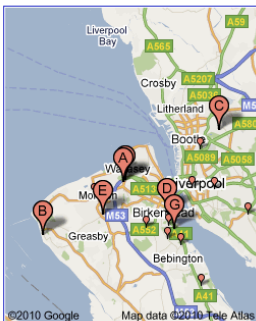
On-the-move access becoming commonplace

Note that we don't call this mobile access – laptops, netbooks, mobile phones and tablet computers all have the ability to access the web via Wi-Fi or 3G, the mobile web is about more than mobiles.

Geo-targeting grows

The increased use of devices on the move makes geo-targeting even more important for brands – and not just in search results. From the minute the consumer visits a website or carries out a search, content can be geo-targeted – discovering a consumer's location (with their permission) is built into the HTML 5 standard and already supported by Chrome, Safari and Firefox. A basic example is a Google search for DIY stores from an address near Birkenhead:

[Local business results for DIY store near Birkenhead, Merseyside](#) - [Change location](#)



- A** [B&Q Wallasey](#)
www.diy.com - 0151 637 0123 - 2 reviews
 - B** [Right Way](#)
www.rightway.ltd.uk - 0151 625 8000 - 1 review
 - C** [Taskers](#)
www.taskersonline.com - 0151 525 4844 - 3 reviews
 - D** [Wickes Building Supplies Ltd](#)
www.wickes.co.uk - 0151 647 0922 - 1 review
 - E** [Homebase Ltd](#)
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- [More results near Birkenhead, Merseyside »](#)



Browsers, apps and widgets: barnd interfaces splinter

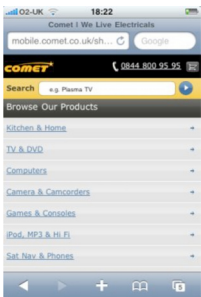
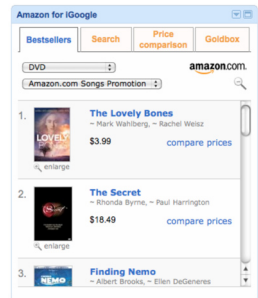
This spread of devices has created another trend that challenges web designers and coders everywhere: a diversification in the software used to interact with brands. In the browser world, alongside Chrome, FireFox, Safari and IE, there are now mobile browsers (Blackberry, Nokia, Android, Windows, iPhone), games console browsers (yes, some people do use the browser on their PS3s), and a small but growing band of tablet computer browsers (e.g. Safari on the iPad, and Chrome on Dell's Streak).

Alongside these browsers, many brands are now creating apps for the iPhone, Android mobiles and the iPad – creating another level of engineering complexity. All interact with websites differently – iPhone and iPads don't support Flash, so some sites become unusable, and the touchscreen nature of the iPad means that some sites that rely on a lot of scrolling are infuriating to use.

The trend towards providing consumers with access to the content they are most interested in (or that the brand wants to promote) outside of the browser started before apps were popularised by the iPhone – with widgets. They removed the need to wade through search results or navigation menus – anybody can download a widget that displays football results from the BBC, a quick Google map, or daily motivational quotes. Yahoo! recognised this trend when they acquired Konfabulator earlier this decade.

A good example is Amazon's US desktop widget, which places their best deals in front of regular customers on a regular basis, allowing them to purchase quickly and easily. This strategy strengthens the relationship between the customer and the Amazon brand, and acts as a direct sales tool. From Amazon's point of view, it required limited technical development as it leveraged their existing product feeds.

Several UK retailers have successfully applied this "stripped down" approach to their mobile presence, entering the market ahead of competitors. One of the key characteristics to note across these mobile sites is that they are no longer a complicated reinvention of back-end infrastructure, just a platform specific wrapper around existing capabilities.



Comet has produced an easy to use mobile site which has very small page sizes and an easy to use navigation – they've designed well for the mobile platform. Amazon are perhaps a step further ahead - leveraging their 1-Click ordering system (and a heavily protected patent) so consumers don't have to laboriously punch credit card details in when ordering on their mobiles. We predict that systems that tie low value purchases (e.g. less than £25) to mobile phone bills, or via systems like PayPal, will become common on mobiles to overcome this obstacle – which whilst new to the UK, is already popular in south east Asia.



Feeds – the arteries of the Splinternet ?

Feeds. We've mentioned them twice when discussing apps and widgets. Increasingly, brands with inventory that influences their digital campaigns – and especially retailers – need feeds to power their marketing, whether it's for a Google merchant account, for affiliate campaigns or to turn-off paid search keywords when stock is low.

We believe feeds will have a revitalised role as mobile browsers, apps, and other platforms increase their penetration. Feeds are the artery of a future digital strategy across the "Splinternet"; product details are the blood that flows along them. Feeds have allowed Comet and other retailers to showcase a selected range of products on mobile sites and in apps, achieving sales and driving consumers to stores, and we believe this trend will increase as TV widgets, tablet computers and other devices demand that brands create platform-specific user experiences wrapped around their product feeds.

Reality check: What do brands need to do?

There's a well established trend of digital enthusiasts making predictions for the future, only for them to fall flat when reality over takes them. We're not recommending brands rush to check they are ready for Internet-enabled TVs by Christmas or that every brand creates pages that work on the Dell Streak. The savviest strategy in our opinion now is to factor the "splinternet" effect into future planning in marketing and technical teams, monitor the growth of new platforms closely – and be ready.



Here are our top tips:

- Reach out to marketing and technical teams and make them aware of the changes in the marketplace
- Identify platforms with growing volumes now – and plan how to adopt them in terms of consumer experience and design, technology and media buys
- Review infrastructure – can your CMS and back-end systems provide feeds, working with multiple browses and multiple platforms?
- Consider your metrics: will they fit these future platforms? Does your measurement technology cater for change?

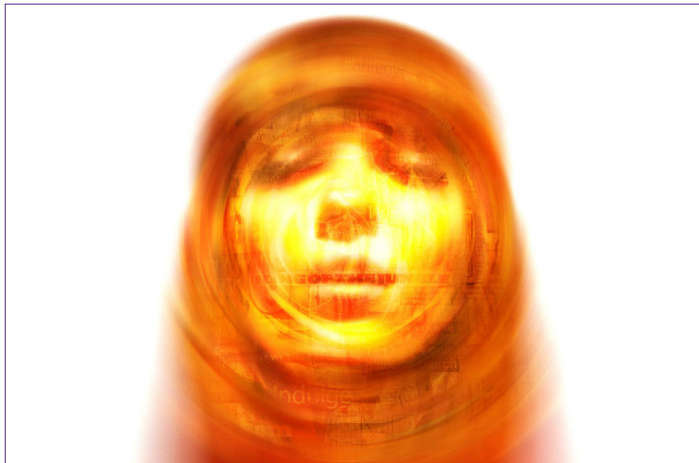
In summary

- *The way people consume content is changing. There are fewer and fewer captive audiences.*
- *There are now countless devices that can use data from the internet. Each device displays information differently.*
- *This creates problems for brands - ensuring data is compatible with all devices is difficult and requires a robust .xml product feed, or similar.*
- *But... it also creates opportunities for brands to tailor unique engagements for specific devices.*



Restless Minds

"The dawn of the Splinternet" essay is part of the "Restless Minds" series of events, research and thought leadership from Steak.



This image shows one of three unique artworks, created by artist Max Lowry, which were specially commissioned by Steak to represent one of our key values – “restless minds.”

For Steak, this value embodies our inquisitive nature and the way in which we embrace innovation and change. We constantly strive to further our clients' brands and deliver better returns, by helping them break through the mass of media that exists to reach consumers with engaging and relevant messages.

For more information about the artwork/artist visit www.maxlowry.co.uk