

The State of Mobile Strategy, and 3 Steps to Avoid Fragmentation

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Mobile devices have been one of the most transformative modern technologies, changing the way people learn, interact, buy, and engage.

With more than 5.44 billion mobile phones worldwide, 67.0% of the population will use a mobile phone in 2025, according to March 2024 data from EMARKETER. By 2026, nearly half (48.8%) of the total time spent with digital media in the US will be on mobile devices. Given that level of attention, you'd think organizations would have seamless strategies to leverage the medium. They don't.

According to new research by Airship, in partnership with EMARKETER, many brands struggle with a disconnected mobile strategy, lacking the centralized ownership necessary to create a cohesive experience, with the mobile device at the center of a customer's interactions.

While some brands have dedicated teams, many are still challenged by insufficient resources, talent, and misalignment within their organizations.

Despite those obstacles, most brands recognize the importance of a unified mobile strategy, acknowledging that fragmentation is a major barrier to success. Having a disjointed mobile strategy can create an inconsistent customer experience, which, in turn, can harm customer engagement rates and revenue generation, the top two measures of mobile success in our survey.

This report details the results of an October 2024 survey of 120 B2C global brands, designed and analyzed by EMARKETER and Airship. It explores how mobile strategy is positioned within B2C brands and how brands are working toward a more unified experience.

Key findings:

A disconnected mobile strategy can hinder success. 43.7% of brands say not having organizational alignment around mobile has hampered the customer experience and nearly all (90.3%) acknowledge that a disjointed mobile marketing strategy is a significant obstacle.

Mobile strategy is fragmented. 47.5% of B2C brands say multiple teams or an outside agency manage the various components of their mobile strategy. Additionally, only 12.5% of B2C brands have a dedicated team for mobile strategy and 10.8% for execution.

Brands face barriers in uniting mobile efforts. 71.0% of brands are actively taking steps for a more integrated mobile strategy. However, insufficient access to data and organizational misalignment stand in their way.

A **majority of brands** are **actively pursuing** a more **integrated** mobile strategy.

Mobile strategy lacks a clear, centralized owner

Mobile strategy is the organization and coordination of consumer experiences designed for the mobile device. Brands engage consumers across many channels, driving them to digital destinations for engagement. And it's happening at an increasing rate on a mobile device:

Roughly 4 out of every 5 website visits happened on a mobile device in 2023, per Semrush. The other digital destination—mobile apps—allows brands to design an experience around the needs and behaviors of the customer. This highlights the importance of having a clear, coordinated strategy for engaging customers across both of these critical digital destinations.

A well-defined mobile strategy creates a unified experience across the various channels—social, paid media, email, SMS, and push notifications—all of which are mostly or exclusively consumed on a mobile device. When done well, it creates a seamless consumer journey for the brand that bridges customer interactions across the mobile device, desktop, and physical locations.

For many brands, mobile strategy is managed by multiple teams, with little consensus on where design and execution sit within an organization.

- Our survey found 47.5% of B2C brands say multiple teams or an agency manage their mobile strategy.
- Further illustrating a notable gap in ownership, 79.2% say that goal alignment and priorities across departments are challenging and 66.7% are challenged by a lack of mobile expertise.

Brands that **invest in** dedicated **mobile teams** are in the minority, with **most brands** placing **mobile strategy** within **broader departments**.

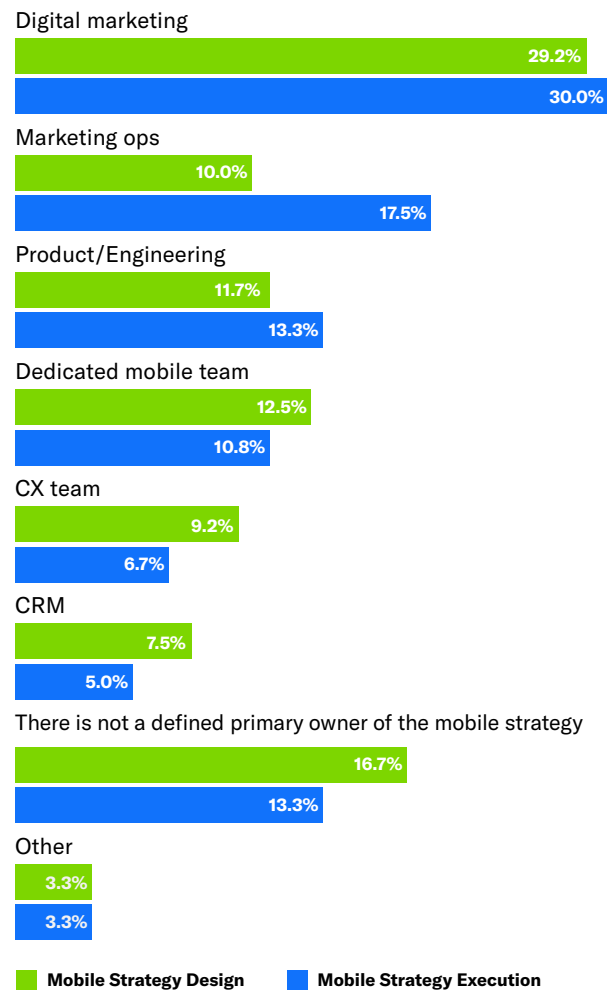
Some brands invest in dedicated mobile teams—**12.5% have a specific team for mobile strategy design and 10.8% for execution**—but these remain in the minority, with most brands placing mobile strategy within broader departments.

- Among these departments, digital marketing is most likely to own mobile strategy, leading design (29.2%) and execution (30.0%) for brands.
- Other teams like marketing operations and product engineering also play crucial roles, highlighting how mobile strategy can vary between organizations.

“Every organization has its silos. While it’s ideal to have a single owner of strategy, if that isn’t possible, you need to have a North Star metric and make sure you’re always executing against that. It’s also about transparency and communication—make sure you’re having conversations with other business leaders and teams.”

— Pietro Lambert, vice president of product management at sports app OneFootball

Who within your organization is primarily responsible for mobile strategy design and execution?



Source: EMARKETER and Airship "Mobile Strategy Survey," November 2024
n=120

Brands are working toward an integrated mobile strategy

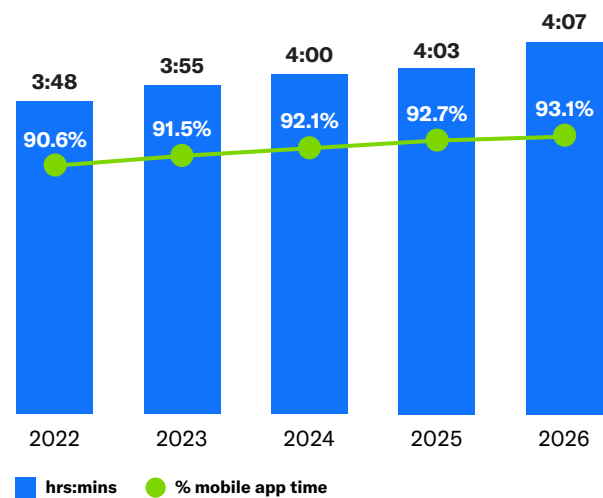
Looking ahead, it will be more important than ever for brands to provide consumers with a seamless mobile experience. **In 2025, US adults will spend 4 hours and 3 minutes (4:03) with mobile devices per day**, surpassing traditional TV (2:49), connected TV (2:25), desktop/laptop (1:02), and other connected devices (0:44), according to a June 2024 EMARKETER forecast.

While nearly half (49.2%) of respondents at least somewhat agree that their mobile marketing strategy is integrated across channels, **an overwhelming majority (90.3%) acknowledge that a fragmented mobile marketing strategy presents a significant obstacle to their success**, our survey found.

This fragmentation can lead to inconsistent customer experiences, missed engagement opportunities, and challenges in measuring campaign effectiveness across platforms.

Recognizing these drawbacks, a majority (71.0%) of brands are actively pursuing a more integrated mobile strategy.

Average Time Spent per Day with Mobile Devices & Apps



Source: EMARKETER Forecast, June 2024

Note: Ages 18+; includes all time spent on mobile apps and all time spent with internet activities on mobile devices; includes all mobile devices (smartphones, feature phones, and tablets).

Additional note: Time spent with each medium includes multitasking.

“Most brands know they would benefit from a more cohesive strategy, but many seem to be frustrated when it comes to determining how best to enable it.”

— Yory Wurmser, principal analyst at EMARKETER

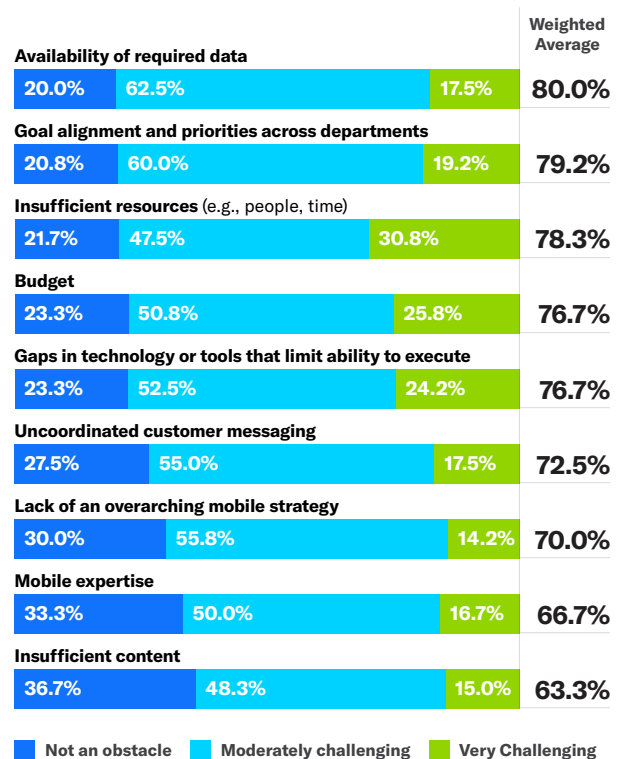
As mobile usage increases, brands are monetizing the mobile experience through ads.

- **US mobile ad spend will reach \$230.00 billion in 2025**, two-thirds (66.1%) of total digital ad spend, with 82.3% coming from mobile apps, per an EMARKETER forecast.
- **Mobile ad spend will continue to grow by at least 9% each year through 2028** as brands try to keep customer acquisition costs down—the average customer acquisition cost for ecommerce brands using Google Paid Search campaigns is \$45.27, according to data compiled by Propeller.

Commerce is another way brands can monetize the mobile experience.

- **243.0 million US consumers will shop via mobile in 2025**, and, of those, 195.5 million (80.5%) will make a purchase, per an EMARKETER forecast.
- **Mobile device users will make \$50.46 billion in in-app purchases in the US in 2025**, whether via virtual goods or subscriptions, per an EMARKETER forecast.
- **Consumers are also using mobile devices while shopping in stores**—47% of US shoppers use their phones to conduct price checks and comparisons in-store, while 40% look up discounts or promos, and 30% access or download digital coupons, according to May 2024 data from SPAR Group.

Challenges for creating a cohesive mobile experience for customers



Source: EMARKETER and Airship "Mobile Strategy Survey," November 2024
n=120

The top two obstacles to creating a cohesive mobile experience are:

1 **Goal alignment.** Brands cite a lack of goal alignment and priorities across departments (79.2%), insufficient resources (78.3%), budget constraints (76.7%), and gaps in technology or tools needed to execute (76.7%) as obstacles to a successful mobile strategy.

“Budget, resource, and technology constraints aren’t new for marketers and they will always exist in some form. Eliminating their impact on the customer experience requires a definition of the objective and a clear understanding of everyone’s role in making that a reality,” said Michael Lavoie from Airship.

“Brands need to break down silos and identify their mobile strategy goals, because you can’t do everything. Set some goals and create an overarching strategy to reach them,” said Wurmser.

2 **Availability of data.** A lack of access to required data was cited as challenging for 80.0% of brands.

“As privacy legislation grows, collecting consumer data is getting harder, making brands’ existing data even more important,” said Wurmser. “But many face challenges because their data isn’t integrated or standardized.”

As of November 2024, 19 states have enacted comprehensive privacy laws, while three states have active bills, according to the International Association of Privacy Professionals (IAPP).

Over a third (34%) of advertising professionals in the EU felt unprepared for Google to deprecate third-party cookies, according to a February 2024 survey from the Interactive Advertising Bureau (IAB) Europe.

Though Google has since reversed its decision to phase out cookies, it will allow users to choose how they want to be tracked—which will change the landscape of advertisers’ access to third-party data.

Brands that design their **customer experience strategy around mobile** are **3x more likely** to say the mobile device **is critical** to their customer engagement strategy. They’re also **2x as likely** to have **all their mobile strategy components managed by one team.**

The vital role of a CX Team

Nearly two-thirds (63.3%) of B2C brands have a dedicated customer experience team, per our survey. Here's what else we discovered about brands with dedicated CX teams.

They're more likely to be mobile-forward. Over half (51.6%) of brands with dedicated CX teams have designed CX around mobile devices, compared with 19.7% of those without dedicated teams.

- Brands with CX teams are more likely to say their mobile device strategy is critical to their customer engagement strategy.
- In addition, 31.2% of brands with CX teams say all the components of their mobile strategy are managed by the same team, versus 20.5% of those without.

They're entering 2025 with bigger budgets. Companies with CX teams are over twice as likely to say their overall marketing budget—and the mobile allocation of their budget—are increasing in 2025.

They're taking action. Some 40.3% of brands with a CX team say that while not having an integrated mobile marketing strategy is an obstacle, they are actively implementing changes to make it more integrated. Only 22.6% of brands without a CX team are doing so.

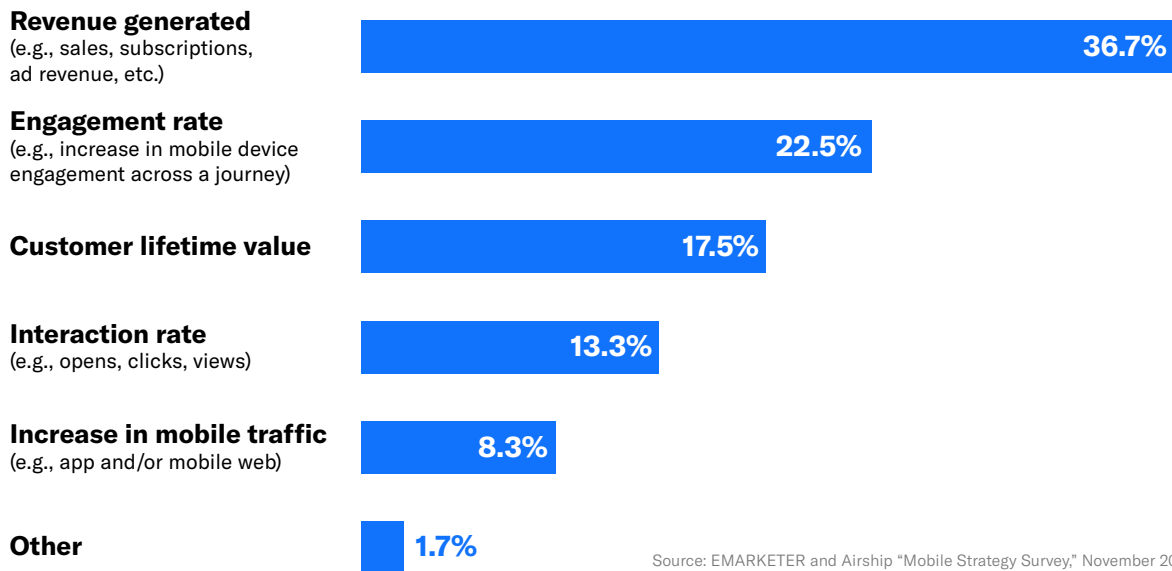
Over half (51.6%) of brands with **dedicated CX teams** have designed CX around mobile devices, compared with **19.7% of those without dedicated teams.**

Mobile strategy is key to the customer experience

Some 80% of consumers in the US and Europe say consistent and seamless interactions across different online channels, including web, mobile, and social media, are important, according to February 2024 data from Adobe and Econsultancy.

- Brands that prioritize customer experience in their mobile strategy are more likely to boost customer satisfaction and see bottom-line results.
- Half (58.3%) say their mobile device strategy is critical to their customer engagement strategy, per our survey.

How does your organization primarily measure the success of its mobile strategy?



Source: EMARKETER and Airship "Mobile Strategy Survey," November 2024
n=120

“Your mobile strategy will define your brand in the eyes of the consumer as it is the gateway to establishing engagement. Evaluating and coordinating the customer experience across the mobile channels is the most important investment a brand can make.”

— Michael Lavoie, chief solutions officer at Airship

Over half say their
mobile device strategy
is critical or very critical
to their customer engagement strategy.

The primary measure of mobile success is revenue generation, according to 36.7% of brands, per our survey, followed by engagement rate (22.5%) and customer lifetime value (17.5%).

Customer-obsessed organizations (those prioritizing customers' needs, desires, and satisfaction) reported 41% faster revenue growth, 49% faster profit growth, and 51% better customer retention than non-customer-obsessed organizations, according to Forrester's 2024 US Customer Experience Index.

“You need to be a fanatic about your core user segment; find their pain points, and build your value proposition that addresses their problems. It's all about providing value for the user.”

— Pietro Lambert, vice president of product management at sports app OneFootball

3 steps to avoid a fragmented mobile experience

Fortunately, brands are better positioned to **invest more** in their mobile strategy in the year ahead.

Nearly **two-thirds (65.8%)** say their overall marketing budget will **increase in 2025**, per our survey. In addition, **60.0%** say the **mobile allocation of their marketing budget will increase**. While budgets are increasing, **three quarters (76.7%)** say that **budget is a challenge**.

“We’re seeing a relatively strong economy as we head into 2025, and EMARKETER expects decent growth next year. This means brands are getting more overall and marketing dollars,” said Wurmser.

From increased personalization to AI journey builders, **the following section highlights some recommendations for brands to provide a more unified mobile experience.**

1 Create unified, cohesive customer journeys across the mobile touchpoints

Over 4 in 10 (43.7%) brands say a lack of alignment on goals within their organizations has hampered the customer experience.

Goal alignment is both the biggest obstacle for brands and the biggest opportunity. Organizing mobile strategy and design with a single owner is ideal. When that's not possible, cross-functional teams with shared objectives and metrics are a path to continuity across touchpoints.

To enable more complete journeys, coordinating experiences between web and app, and across channels, reduces noise and creates a more unified experience.

Imagine a customer interacting with a brand on web, app, and email. If goals are not aligned, a user may receive content from multiple brand teams with different calls to action. Alternately, when goals are aligned, a user may receive a coordinated campaign targeting conversion.

Understanding how each area of the business plans to engage the customer across the digital touchpoints is a crucial step in designing the most consistent and coordinated customer experience. When multiple teams are using the same outbound channels to engage a segment of your customers (email, push, SMS, social), it's important to understand the objective and align the tactics, otherwise the customer will experience very different brand experiences through the same channels.

“Brands must audit the customer experience across their inbound and outbound touchpoints. If you haven't experienced what customers see when engaging with your brand purchase process, signing up for a loyalty program, consuming content, etc., you won't know if the experience is coordinated.”

— Ramsey Kail, vice president of technical solutions at Airship

Tools like AI-enabled journey builders and content generators expedite the content creation process and accelerate usage of multichannel tactics. Advances in AI may help accelerate progress, but brands must gather the required data to power AI before it becomes useful.

2 Enhance access to data through targeted data collection

Many brands focus on the current state of their data, rather than what it could or should be in the future, said Ramsey Kail, vice president of technical solutions at Airship.

Combine zero-party data (ZDP) collection with first-party data to round out each customer profile.

- Gathering customer ZDP unlocks the power of personalization, and, according to research from Twilio Segment, **customers spend on average 38% more when their experience is personalized.**
- Additionally, brands that use ZDP in their audience targeting see a lift in open rates and purchase frequency, per Airship research.
- **80% of marketers worldwide are already leveraging first-party data,** according to an April 2024 survey from Funnel and Ravn Research.

Once you've achieved a robust data set you unlock the benefits of predictive AI.

Over half (56%) of marketing executives worldwide say implementing generative AI will likely result in measurable improvements to their predictive analytics accuracy, per a July 2024 survey from SAS conducted by Coleman Parkes Research.

Brands can use personalization to boost customer engagement and provide a more relevant experience for mobile users.

3 Increase access through owned channel opt-in

Customer acquisition costs are on the rise. Brands can combat this by reducing paid media spend and converting existing customers to owned channels.

- Customer acquisition costs have increased 60% over the last five years and 222% in the last 10 years, per research from SimplicityDX.
- 41.7% of brands plan to use email more within their mobile strategies in 2025, while 39.2% plan to use more push notifications and 35.0% plan to use more SMS notifications, according to our survey.

Data privacy regulations have changed the landscape of consumer expectations. The increased focus on privacy creates an imperative for brands to reduce dependence on third-party data.

“If cookies were to disappear today, email and mobile capture becomes the most important functionality of our entire site. Without it, we would have no way of tracking who’s been to our site and retargeting them again.”

— Molly Delp, vice president, ecommerce and digital marketing at True Botanicals

“As third-party cookie policies change, brands are seeking more control over their data usage to pave the way for targeted marketing, insights, and personalization. This shift is evident in advertising and other sectors.”

— Jeremy Goldman, senior director of the marketing, retail, and tech briefings at EMARKETER

Collecting customer opt-in permissions for more channels (push notifications, email, SMS, and web) allows brands to drive traffic to more destinations.

From fragmented to coordinated: The importance of mobile strategy

As consumers spend more time on **mobile devices**, brands need a **coordinated mobile strategy to stay competitive**. But many organizations are missing a centralized owner of mobile strategy and execution, making it difficult to align the varied, and sometimes conflicting, interests of the organization. Brands also struggle with access to the right data, talent, and technology for a cohesive mobile strategy, as well as limited budgets and resources.

Despite these challenges, most brands are working toward a more integrated mobile strategy, acknowledging its role in their success. A poorly planned mobile strategy leads to a poor customer experience, negatively impacting revenue generation, the top measure of mobile success. **Brands that fail to prioritize mobile will fall far behind competitors.**

To improve the mobile experience, brands should unify mobile strategy ownership and align the organization around common goals. They should invest in the right data collection and analysis tools and measure success based on key business outcomes. Personalization can deliver a seamless experience while giving brands deeper insights on customer behavior.

A top **mobile strategy** is no longer a nice-to-have; it is **table stakes**.

By taking these steps, brands can **improve** customer satisfaction, drive business results, and **thrive in today's mobile-driven world.**

About the survey

This survey of 19 questions was developed and fielded by EMARKETER in collaboration with Airship in October 2024.

We surveyed 120 B2C brands about their mobile strategy, where it sits within their organization, and the barriers they face to a more integrated mobile experience.

About this report

Research for this report was compiled by members of the EMARKETER Studio team in partnership with Airship, using reports, data, and research by EMARKETER on mobile device use, mobile ad spend, mobile measurement, customer experience, and AI.

EMARKETER forecasts:

[US Time Spent with Mobile](#)

[US In-App Monetization](#)

[US Mobile Ad Spending](#)

[US Time Spent with TV](#)

[US Time Spent with Digital Media](#)

[US Digital Shoppers and Buyers](#)

[US Mobile App Ad Spending](#)

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