MMA FORUM INDONESIA
SEPTEMBER 22, 2016 | JAKARTA



Mobile Marketing Trends

Rohit Dadwal

Managing Director, MMA

@rohitdadwal

MMA
MOBILE MARKETING ASSOCIATION


THE GREATEST
TRANSFORMATION IN
CONSUMER BEHAVIOR THAT
WE WILL SEE IN OUR LIFE TIME




THAT MOMENT





CONSUMERS

Still can´t get enough



TECH & INFRASTRUCTURE

Mobile continues to evolve and excite



TECH & INFRASTRUCTURE

Mobile continues to evolve and excite

@ROHITDADWAL

MMA
MOBILE MARKETING ASSOCIATION

A. CONSUMER TRENDS: CAN'T GET ENOUGH

Prepare to chat

85% Chat is eating the world



Consumers want to be

"uber-satisfied"



Video is Mobile

85%

In APAC



You can have my data

But it will cost you



User generated content goes to

Entertainment



@ROHITDADWAL

MMA MOBILE MARKETING ASSOCIATION

1. PREPARE TO CHAT

Messaging Apps will lead in terms of overall **usage and # of sessions**

6+ of Top 10 most used apps globally = Messaging Apps

Top Apps by Usage

Rank	App
1	Facebook
2	WhatsApp
3	Messenger
4	Instagram
5	LINE
6	Viber
7	Kakao Talk
8	Clash of Clans
9	WeChat
10	Twitter

Top Apps by Number of Sessions

Rank	App
1	Kakao Talk
2	WhatsApp
3	WeChat
4	VK
5	LINE
6	Viber
7	Facebook
8	Clash of Clans
9	Instagram
10	Messenger

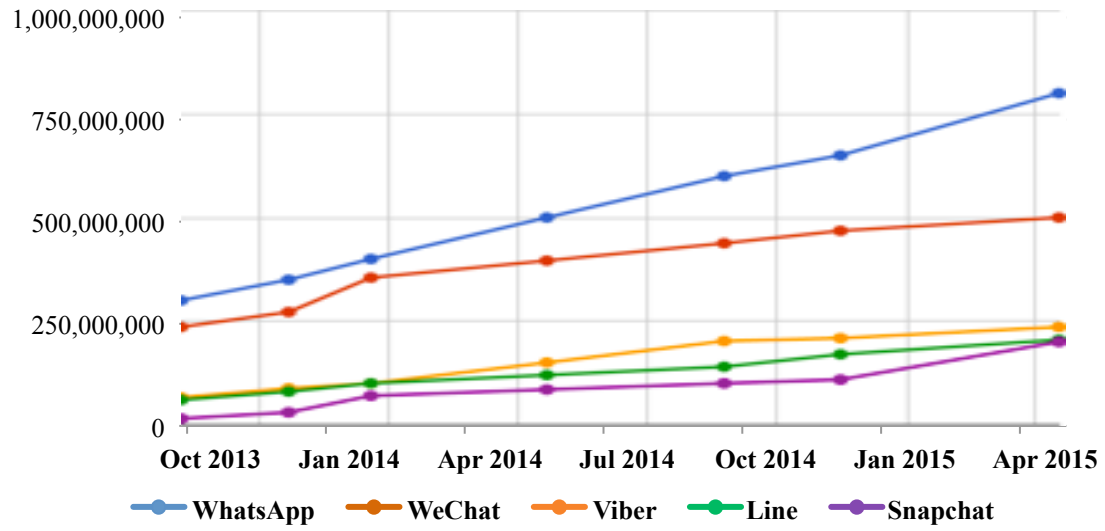
Messaging Apps→ significant app sessions

Global Usage vs Sessions

1. PREPARE TO CHAT (cont'd)

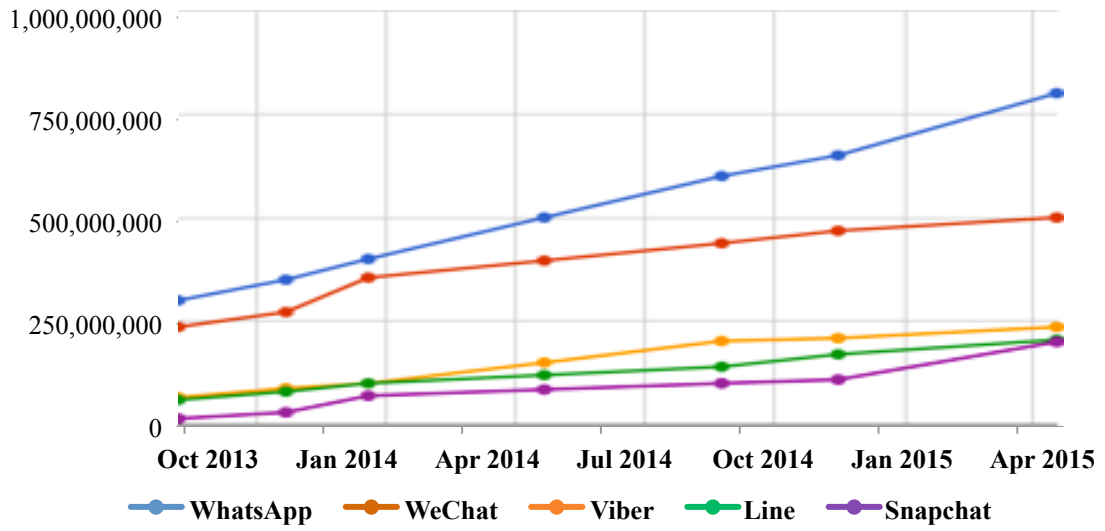
They are projected to **keep growing,** attracting new users in 2016

Chat apps: MAUs over time



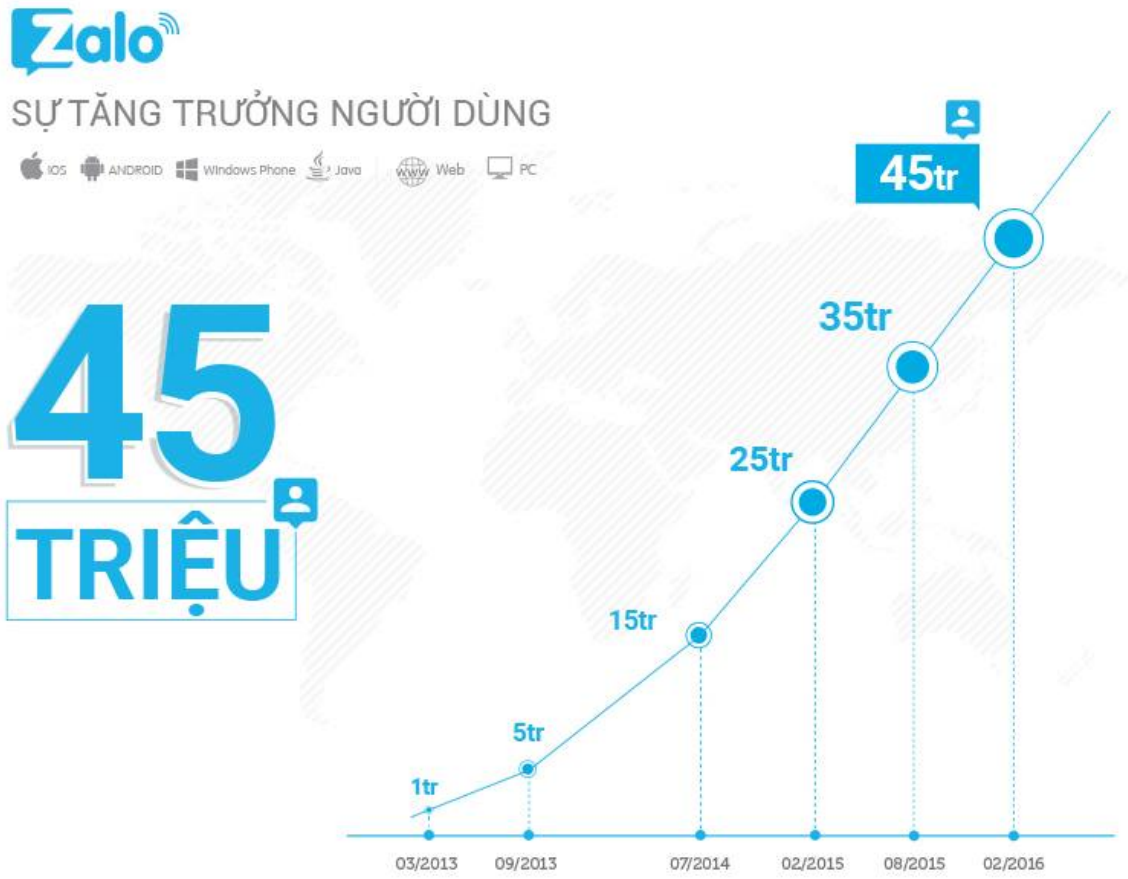
Including **Commerce** and other transactions

Chat apps: MAUs over time



Global Growth

Tại Việt Nam, Zalo đang là messaging app (ứng dụng tin nhắn) dẫn đầu:



2. CONSUMERS WANT TO BE "UBER-SATISFIED"

"**Just in Time**" products raise the bar and educate consumers in terms of **what´s possible** in any Industry.

… 'Just in Time' Products + Services
= Enabled by mobiles + Sensors + Humans

Selected On-Demand Company Fulfillment Time Estimates

Transportation	
LUXE	-10 min
lyft	Within minutes
UBER	Within minutes

Dining	
OpenTable	Instant booking

Entertainment	
SeatGeek	Instant booking

Food	
caviar	<20 min
DOORDASH	Typically within 1 hour
MUNCHERY	Typically within 20-40 minutes
Sprig	15 minutes

Food	
Instacart	Typically within 1-2 hour

Delivery	
POSTMATES	Typically within 1 hour
shyp	~20 min

Travel	
airbnb	Instant booking
	Instant booking

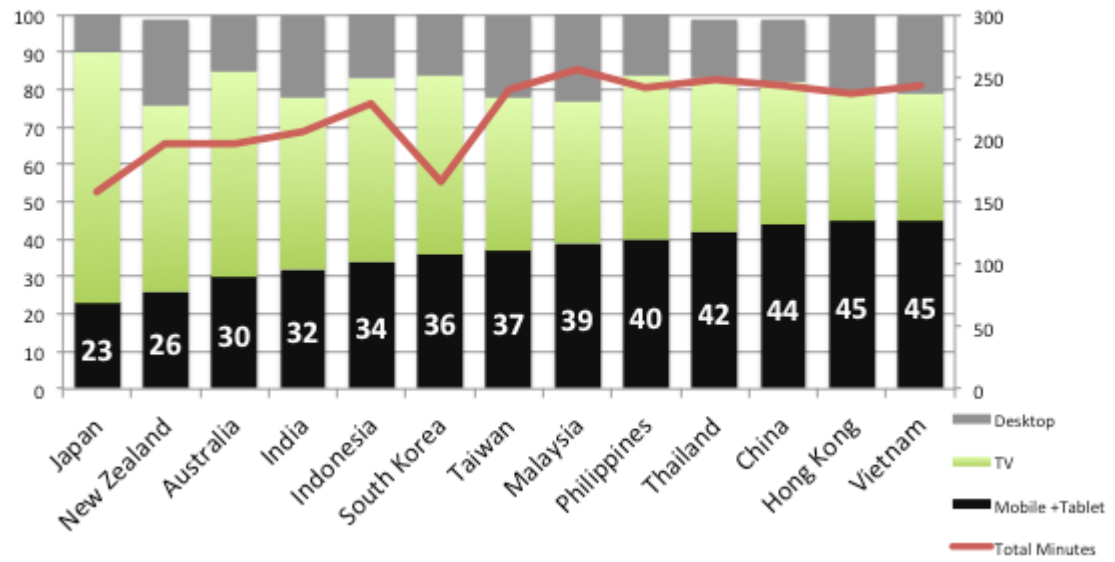
"When you're browsing on your phone, ***you're a consumer--*** *you want what you want, and you* ***want it now"***

@ROHITDADWAL

MMA MOBILE MARKETING ASSOCIATION

3. VIDEO IS NOW MOBILE

Video has already become **primarily MOBILE** in many countries



Share of Video that is Mobile by Region: **APAC 36%** **Europe 27%** **NA 27%**

Time spent with Mobile video, **doubles every year**

Average Time Spent per Day with Digital Video by US Adults, by Device, 2011-2015

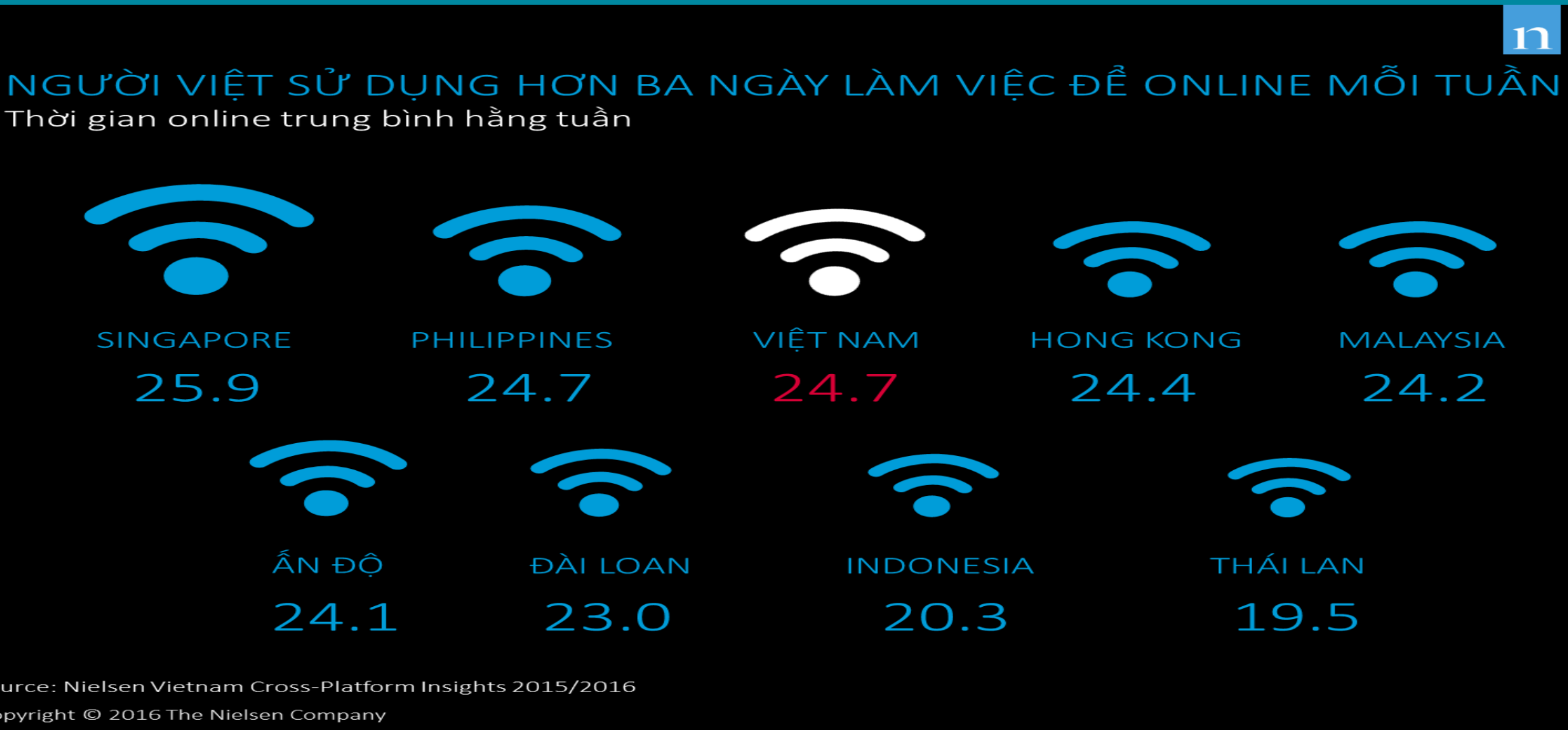
hrs:mins and CAGR

	2011	2012	2013	2014	2015	CAGR (2011-2015)
Digital video	**0:21**	**0:36**	**0:50**	**1:03**	**1:16**	**38.4%**
—Mobile	0:03	0:09	0:21	0:30	0:39	91.8%
——Tablet	0:01	0:04	0:13	0:18	0:22	119.8%
——Smartphone	0:02	0:04	0:08	0:12	0:17	81.1%
—Desktop/laptop	0:12	0:21	0:22	0:24	0:24	18.6%
—Other connected devices*	0:06	0:06	0:07	0:09	0:13	22.9%

*Note: ages 18+; time spent with each medium includes all time spent with that medium, regardless of multitasking; for example, 1 hour of multitasking on desktop/laptop while watching TV is counted as 1 hour for TV and 1 hour for desktop/laptop; *includes game consoles, connected TVs or OTT devices*

Source: eMarketer, April 2015

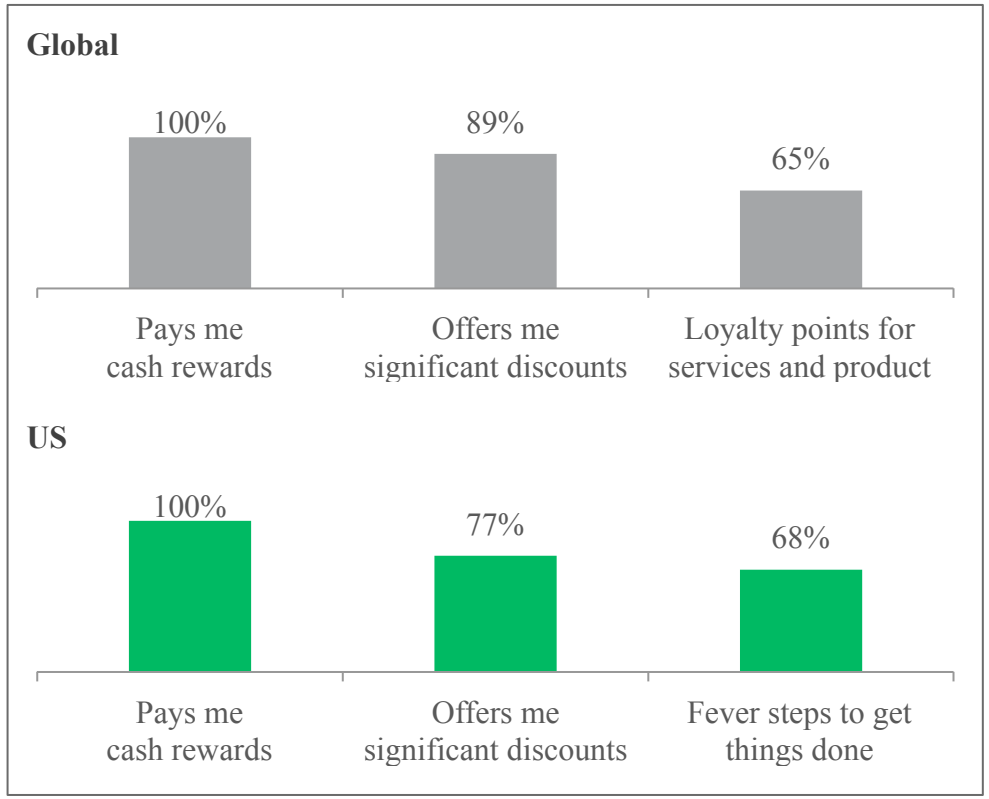
188130 www.eMarketer.com

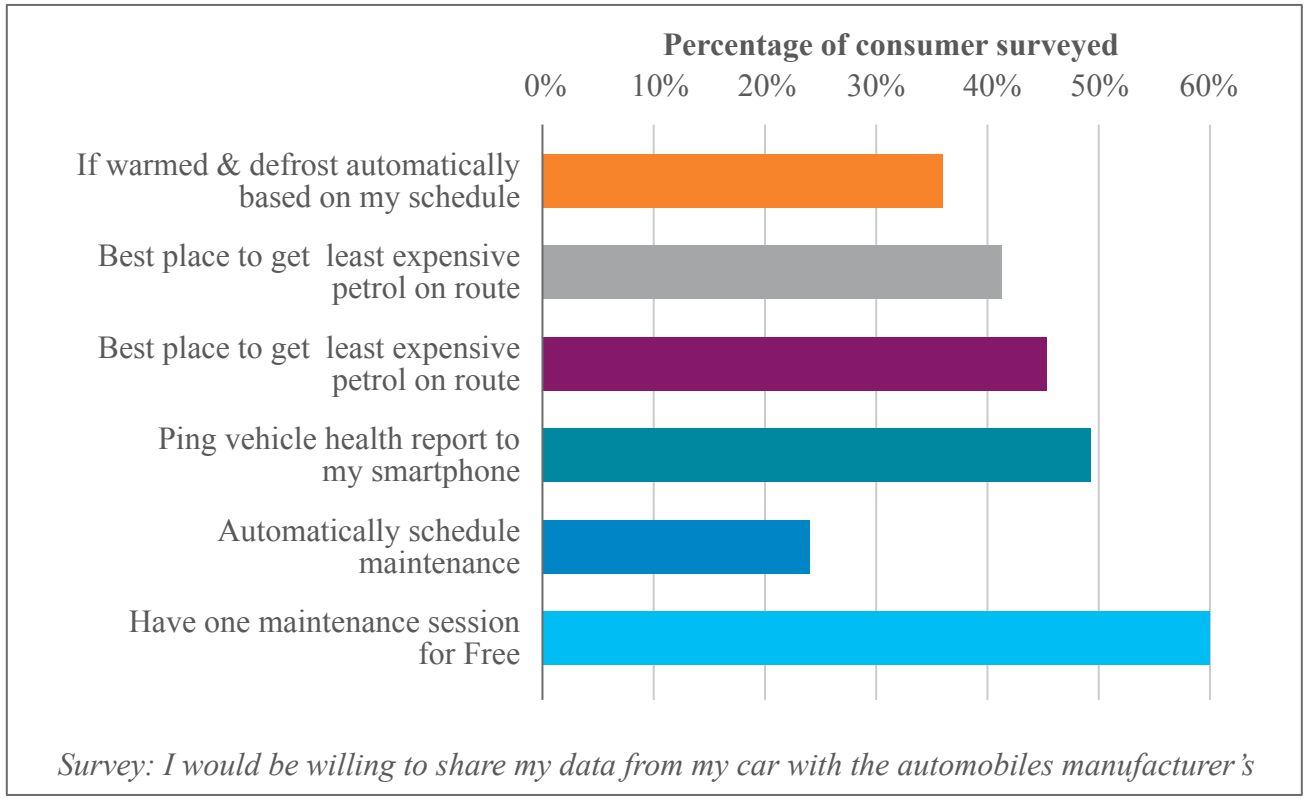


Thời gian trực tuyến (online) mỗi tuần

4. YOU CAN HAVE MY DATA .. BUT IT WILL COST YOU

Consumers become **more pragmatic** about the value exchange with brands and are willing to share data in return for **tangible benefits**





Survey: I would be willing to share my data from my car with the automobiles manufacturer's

@ROHITDADWAL

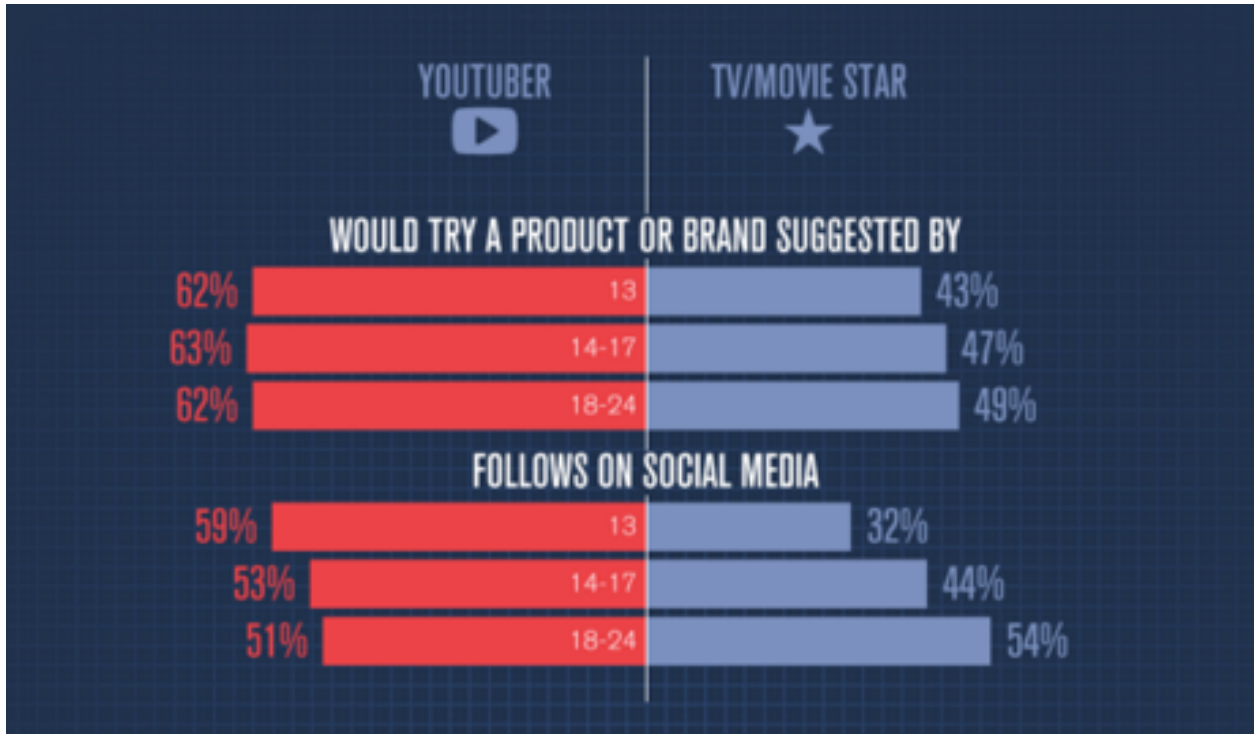
MMA MOBILE MARKETING ASSOCIATION

5. USER GENERATED GOES TO ENTERTAINMENT

Rachel Bloom becomes **the first YouTube** star to win a Golden Globe in 2016



YouTube stars are now **more influential** vs. TV & Movie Stars



A



CONSUMERS
Still can´t get enough

B



BRANDS
Start catching up

C



TECH & INFRASTRUCTURE
Mobile continues to evolve and excite

B. BRAND TRENDS: START TO CATCH UP

Mobile takes it's role in the **media mix 10-15%**



Mobile gives life to **"other media"**



Brands discover Mobile **Video** (Deal of Decade)



Geo Targeting creates next must have Marketing approach (Conquesting is King)

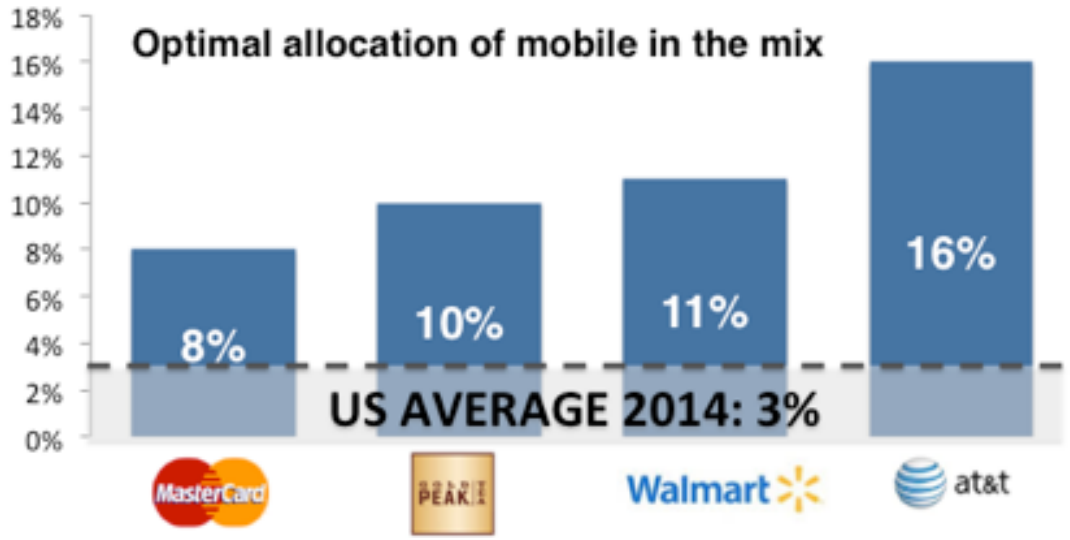


Marketing **measurement** is about to go through a complete **rethink** (it's needed)



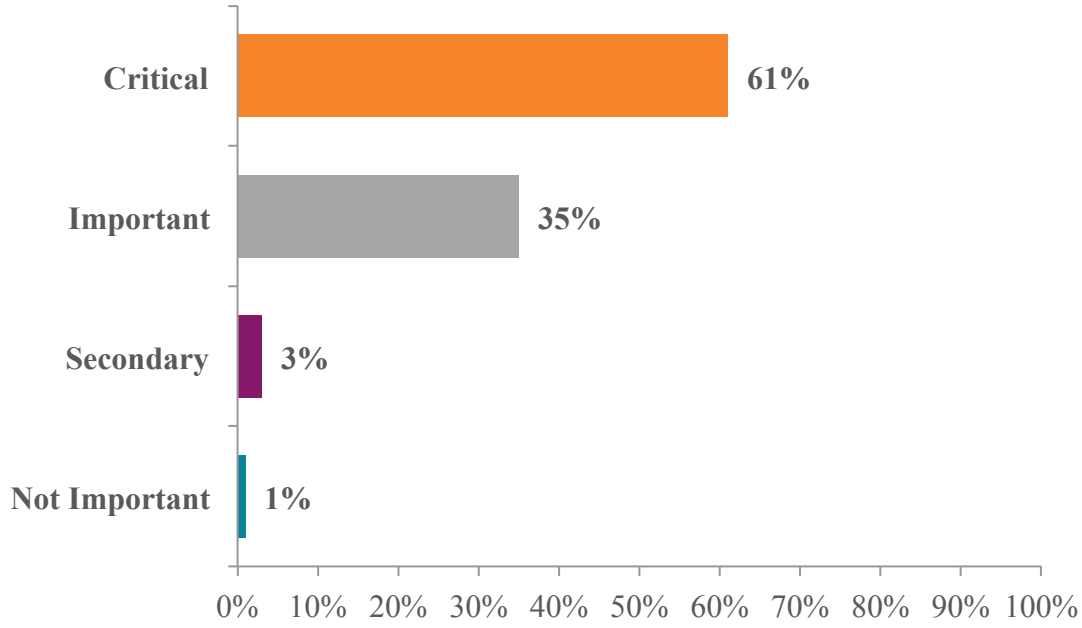
1. MOBILE TAKES IT'S ROLE

Up to now, brands are not investing nearly enough in mobile



Source: SMoX 2015

But marketers think that **Mobile is critical** to the future of their Company in 2016



Source: MMA Marketer Research

CHI PHÍ CHO QUẢNG CÁO

Chi phí dành cho quảng cáo toàn cầu (%)			
	2015	2016	2017
Truyền hình	42.0	41.4	40.7
Báo in	12.4	11.2	10.3
Tạp chí	6.9	6.5	6.1
Radio	6.6	6.5	6.2
Rạp phim	0.5	0.5	0.5
Ngoài trời	6.9	6.9	6.8
Digital	24.6	27.0	29.3

Chi phí dành cho quảng cáo tại Việt Nam (%)			
	2015	2016	2017
Truyền hình	88.3	88.7	86.8
Báo in	2.9	2.3	2.0
Tạp chí	1.6	1.1	0.8
Radio	0.1	0.2	0.2
Rạp phim	NA	NA	NA
Ngoài trời	NA	NA	NA
Digital	7.0	7.7	10.3

Source: Dentsu Aegis Network Global Ad Expenditure Report Sept 2016

2. MOBILE GIVES LIFE TO OTHER MEDIA

PRINT: Low on battery power for your smartphone? Pull this ad out to charge your phone.



TV: Synchronizing to improve results

- **87 %** of consumers engage with a second screen while watching TV
- This **second-screen behavior** means fewer eyeballs are on the TV screen at any given time, resulting in a drop in TV ad awareness of more than **50%.**
- Serving synchronized ads to reinforce the TV ad message, can improve results (**39% brand uplift** and significantly increased ad awareness in aNissan Case Study).

Source: Fourth Source

3. BRANDS DISCOVER MOBILE VIDEO

They start experimenting with new video formats



- **Vertical video** is becoming a legitimate format,
  - Driven in large part by live streaming apps

- **360-degree videos**, which social network like FB has integrated into its newsfeed
  - provide users with a new level of immersiveness

- Developing common mobile **video ad standards**
  - preventing the profusion of different formats that are currently out there may be a challenge



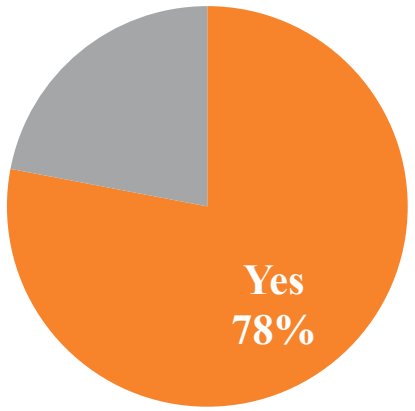
4. GEO-TARGETING (CONQUESTING)

Next must have marketing approach

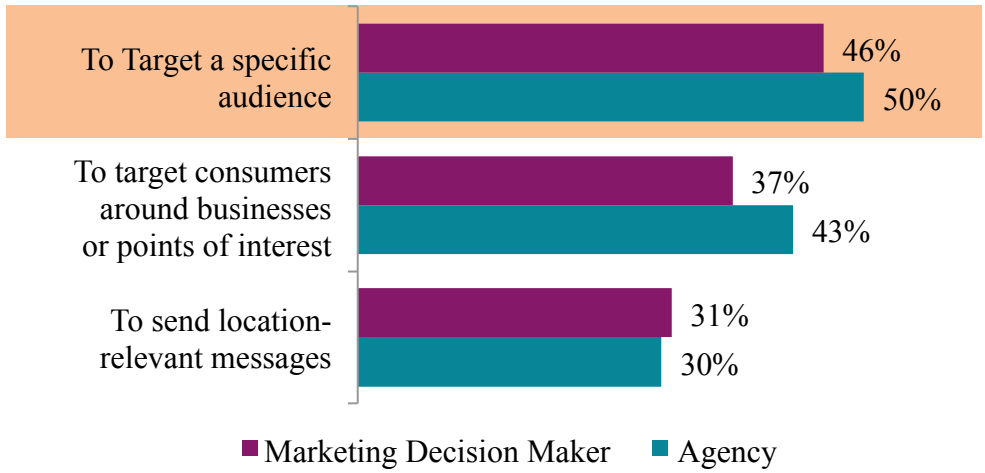
Nearly 80% of marketers are using location targeting

Audience targeting is the most common use of location, indicating marketers are aiming to reach consumers not only where they are in the moment, but also based on their behaviors and interests

Use Location for Mobile Ad Campaigns



Ways Locations is Used



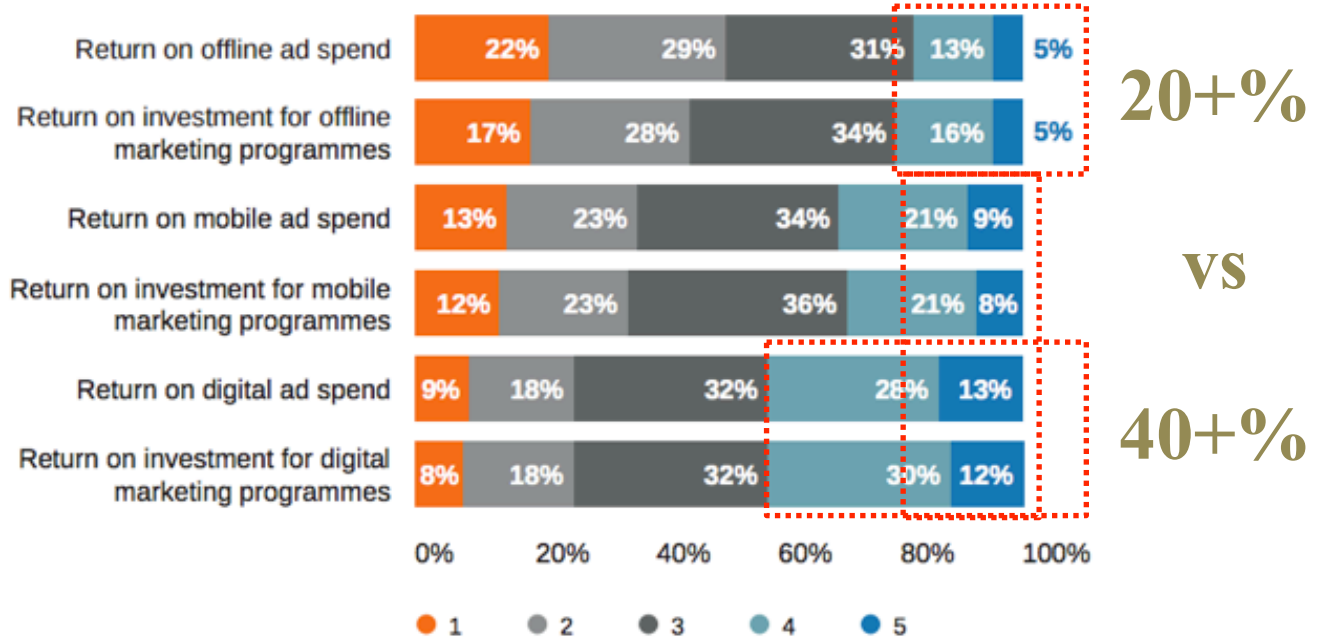
*'**Combining location-based** [big data] and **programmatic'** will likely have a dramatic impact on outcomes for marketers in 2016."*

Beth Principi
AdTech writer

5. MEASUREMENT NEEDS TO GO THROUGH A COMPLETE RETHINK

It's needed

Figure 19: On a scale of 1-5, where 1 is 'Not at all confident' and 5 is 'Extremely confident', how confident are you in your organisation's ability to measure the following?



20+%

vs

40+%

Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Respondents: 1,894

A



CONSUMERS
Still can´t get enough

C



TECH & INFRASTRUCTURE
Mobile continues to evolve and excite

B



BRANDS
Start catching up

@ROHITDADWAL

MMA
MOBILE MARKETING ASSOCIATION

C. TECH/INFRASTRCTURE

Internet of **Things** (IOT) becomes Internet of **Everything**



Mobile **payments** adds a new payment **Platform**



Virtual reality is becoming **Mainstream**

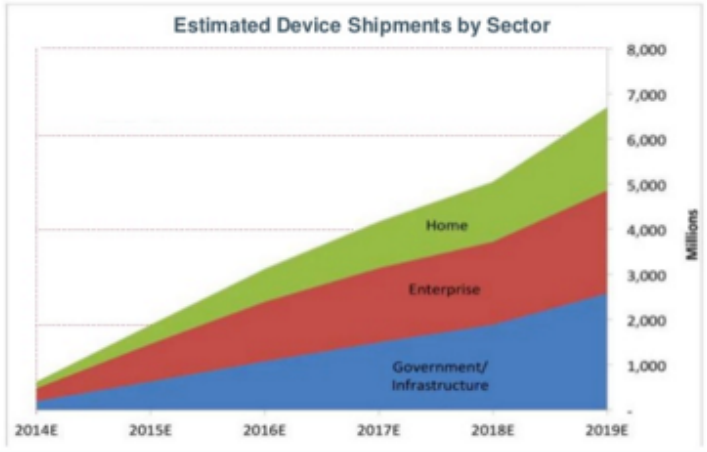


Voice is New **Remote Control**

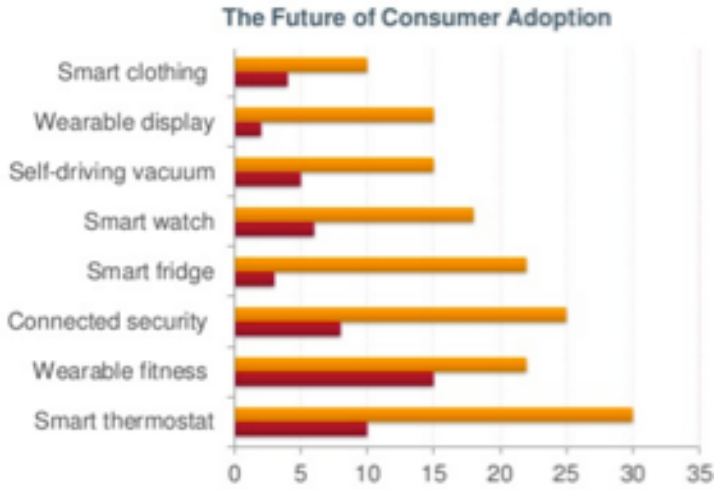


1. IOT BECOMES INTERNET OF EVERYTHING

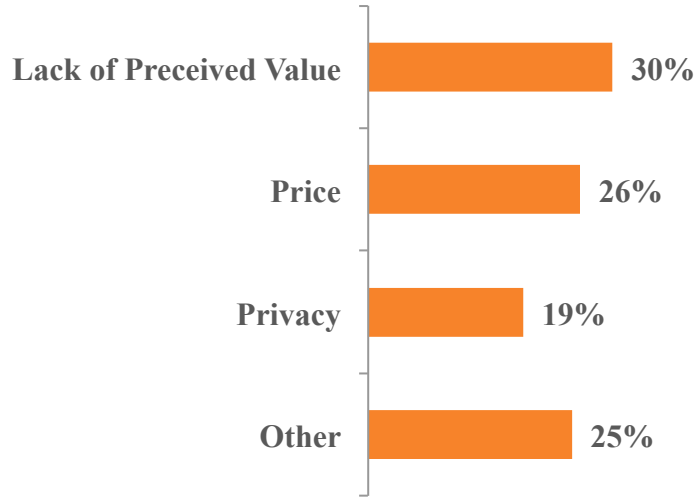
IoT will grow fast, but **enterprise** and **government** will drive part of the **growth**



Wearables & **Thermostats** are leading the charge with consumers



Low Value for Money perceptions will **limit further growth** until clear consumer benefits are identified

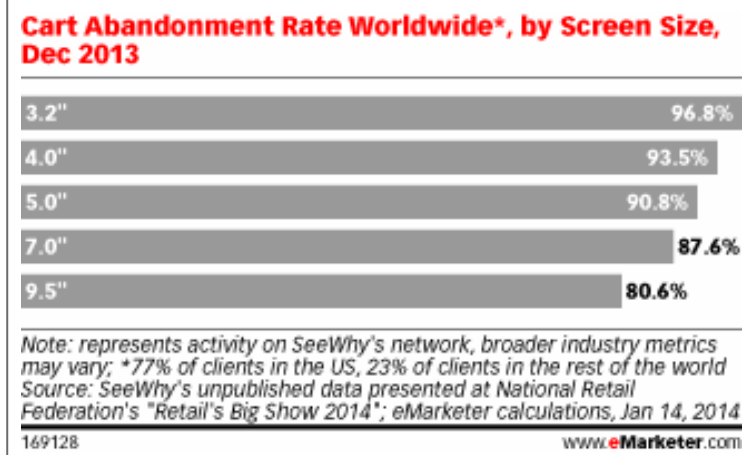


Source: Accenture, Barrier to adoption

2. MOBILE PAYMENTS ADDS A NEW PAYMENT PLATFORM

They realize it´s the *deal of the decade*

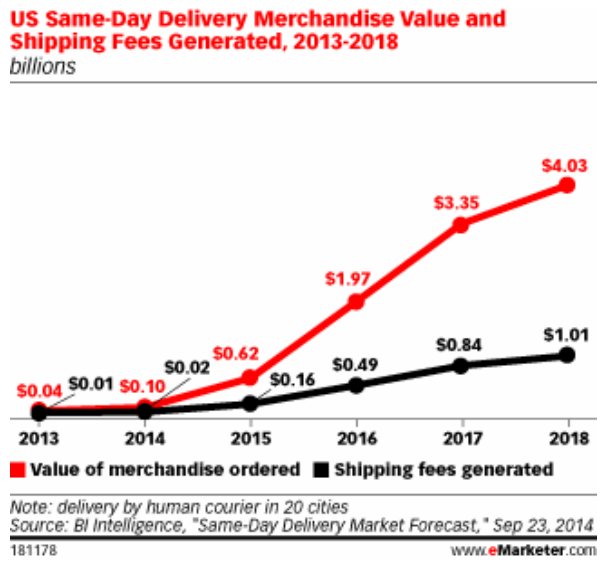
Larger Screens and improved UX will **improve transactions**



Mobile will put a **buy** button **everywhere**



Expectations for fast delivery will unleash consumers **on demand mentality**



3. "MOBILE REALITY" IS BECOMING MAINSTREAM

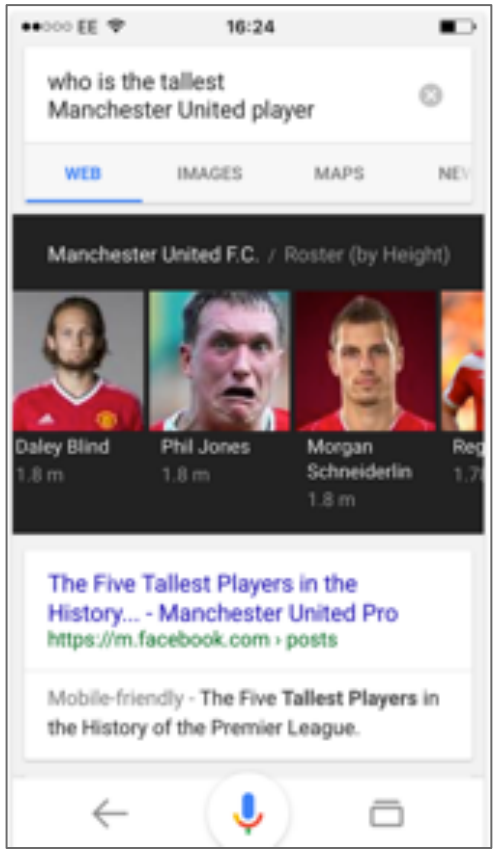
Augmented reality

Augmented reality **on the go** means that rather than scanning (or ignoring) QR/Bar codes for basic coupons: open a gateway for personalized rewards programs, mobile gaming, and non-traditional shopping experiences



200M +
Users in 2 months

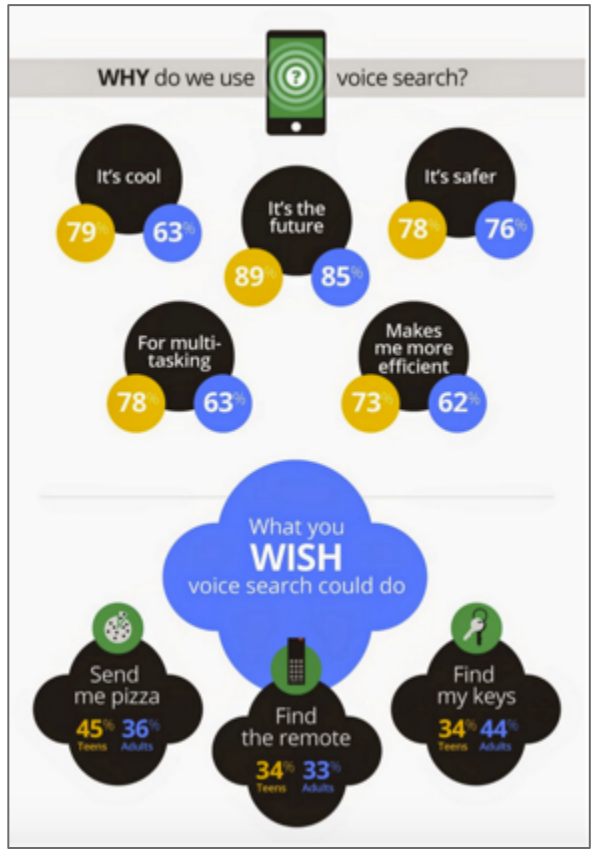
4. VOICE BECOMES THE NEW REMOTE CONTROL



Progress with speech recognition technology – making it easier and more reliable – is set to **drive voice search** in 2016.

Brands will need to **reassess their search strategies** to take advantage of the different way in which people vocalise their searches.





A



CONSUMERS

Still can´t get enough

B



BRANDS

Start catching up

C



TECH & INFRASTRUCTURE

Mobile continues to evolve and excite

MOBILE MARKETING TRENDS

Thank You!

Rohit Dadwal



rohit.dadwal@mmaglobal.com

@ROHITDADWAL