

WARC

The State of The Industry: Mobile Marketing in MENA 2017

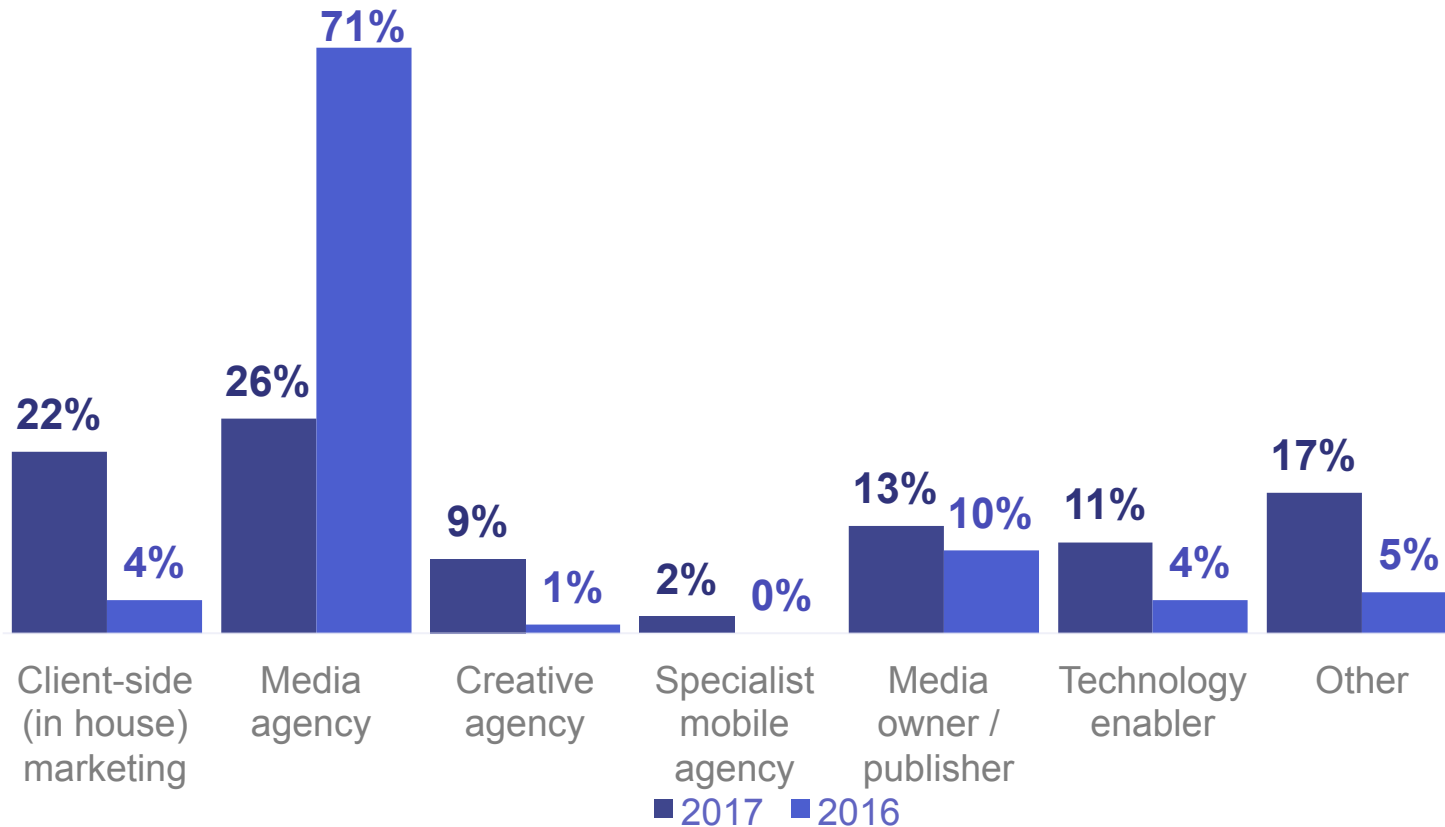
 **MMA**
MOBILE MARKETING ASSOCIATION

Chapter 1

Demographics



Respondent company types



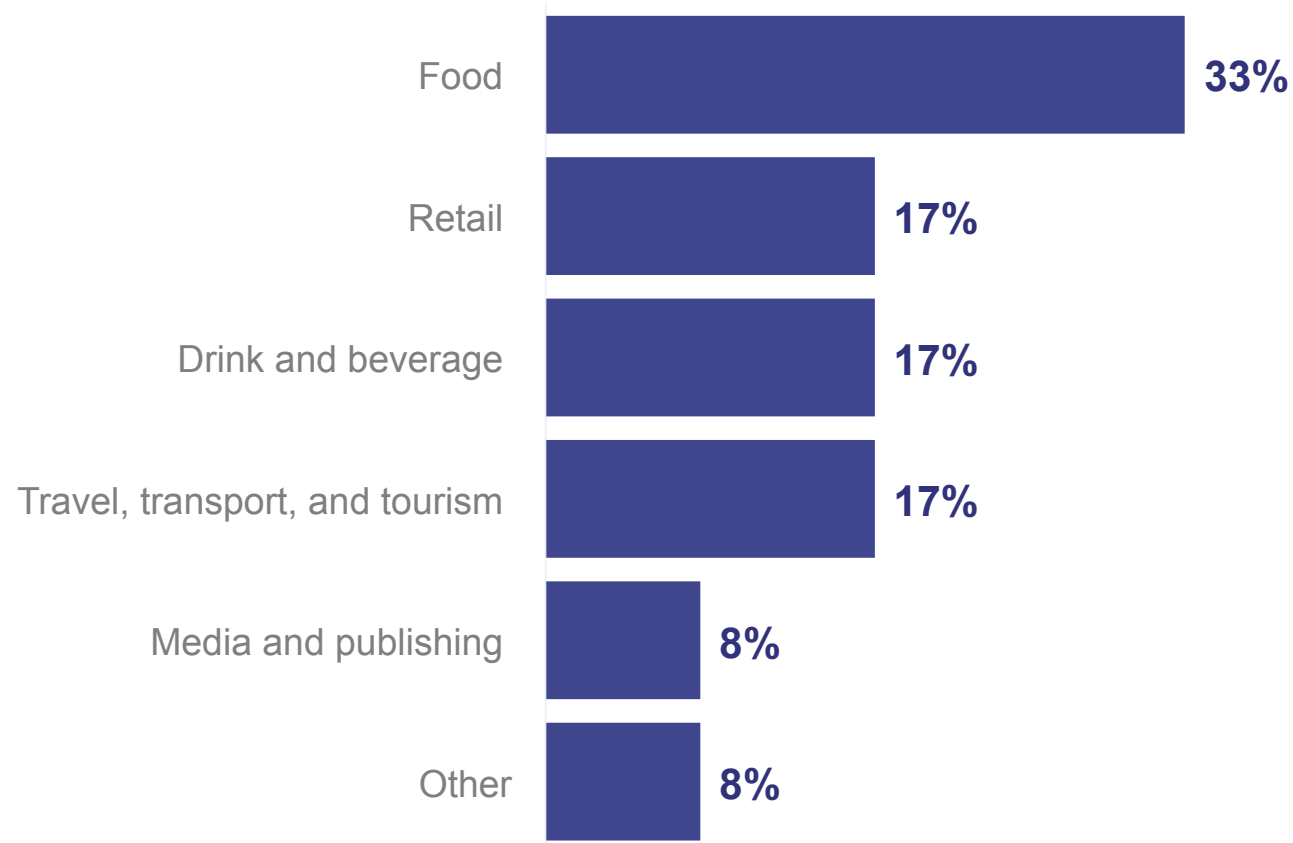
Commentary

- 22% of respondents are brand-side marketers, working in-house.
- 37% came from agencies, and the remainder from technology vendors, consultants and media owners.

All respondents

Q: What type of company do you work for? n=55

Respondent sectors



Client-side respondents

Q: In which sector or industry do you work? n=55

Commentary

- ☑ Respondents from the client-side were based across the sectors shown, with a third working in food

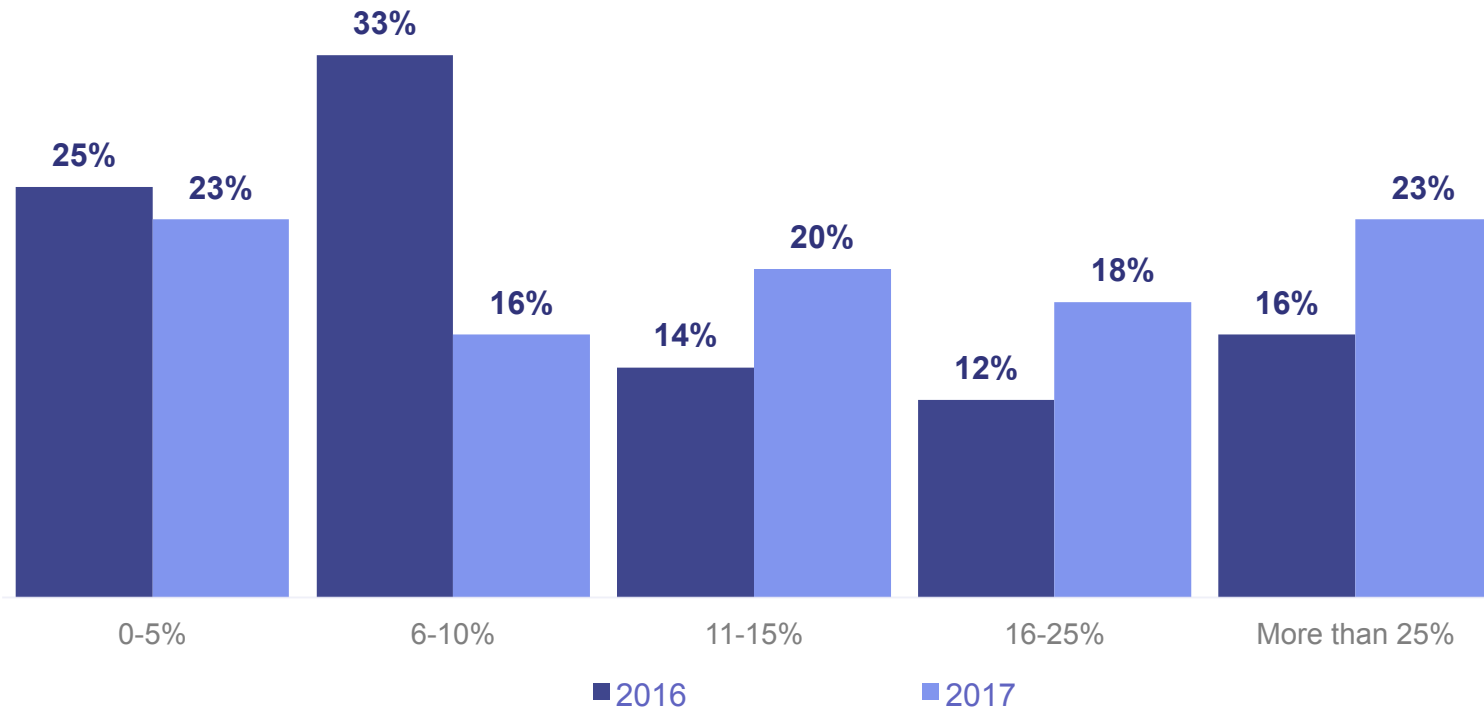
Chapter 2

Mobile strategy, budgets and integration

Key Insights

- ✓ Mobile budgets have increased since last year, with 23% now spending more than a quarter of their budget on mobile
- ✓ For the majority of marketers, mobile budgets are expected to increase over the next year
- ✓ Over the longer term, the proportion spending more than 25% of their budget on mobile will almost double by 2022

Mobile budget allocation has increased



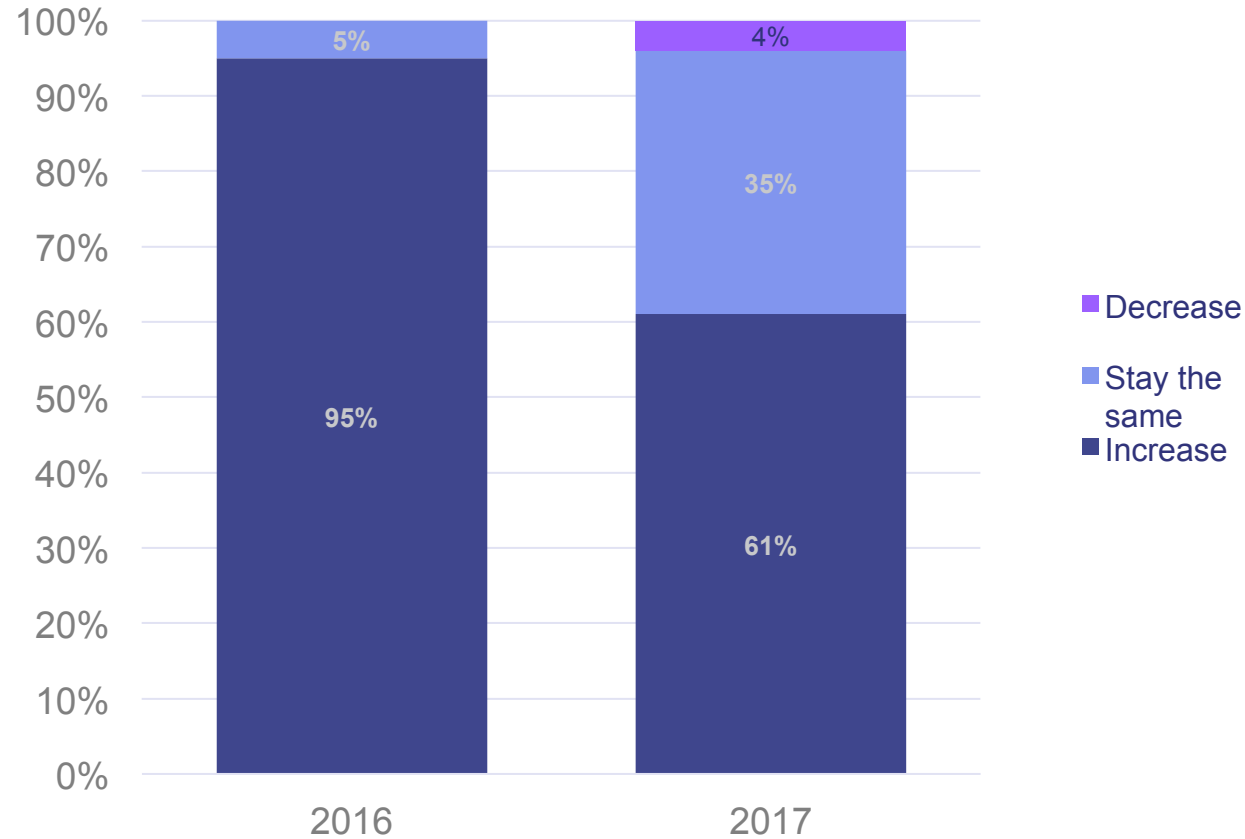
All respondents

Q: What percentage of your, or your clients' typical, overall marketing budget is being allocated to mobile marketing and advertising? 2016 n=92, 2017 n=44

Commentary

- Since last year, mobile budget allocations have increased. Almost a quarter of respondents in MENA are now spending more than 25% of their marketing budget on mobile.

Increasing mobile budget allocation is set to continue



Commentary

- ☑ Budgets are expected to grow or remain steady over the next year in MENA. Of those expecting budgets to increase, 59% expect an increase of up to 25%, and 4% expect their budget to increase by more than 100% over the next year.

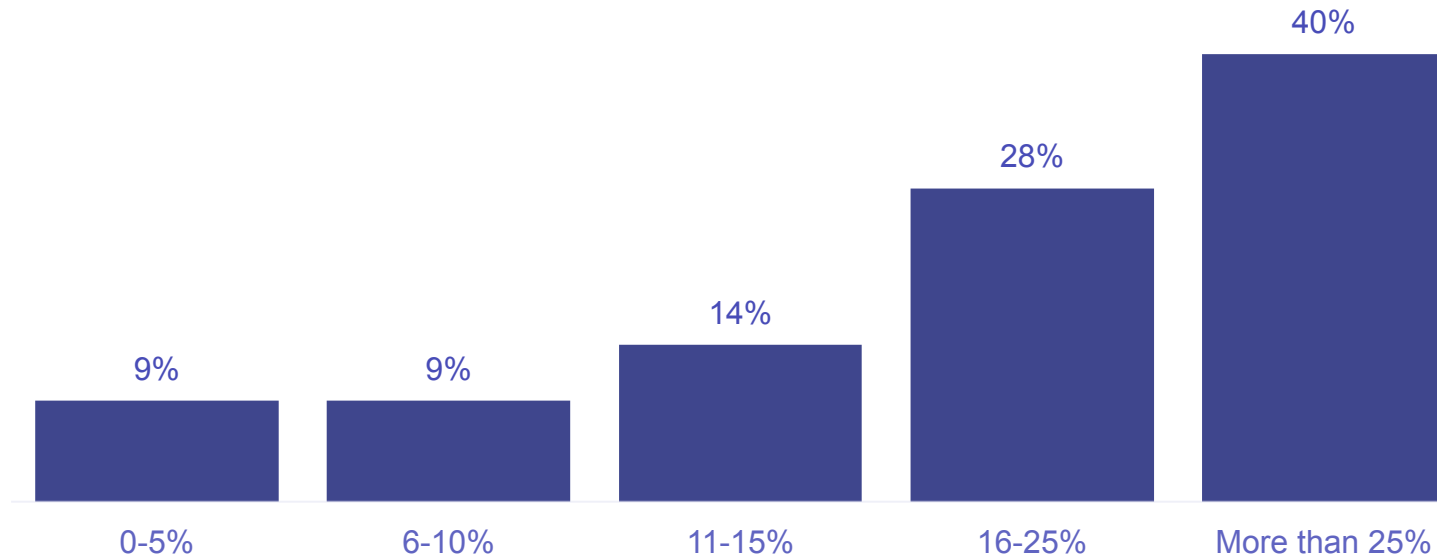
All respondents

Q: How do you expect your mobile marketing budget to change over the next 12 months? 2016 n=92, 2017 n=46

In five years' time, more than half of marketers will spend more than a quarter of their budget on mobile

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Commentary

- ⊗ Asked to predict their allocation of budget to mobile in five years' time, 40% expect more than a quarter of their budgets to be spent on mobile, compared to only 9% allocating less than 5% to the channel.

All respondents

Q: What percentage of your (or your clients') overall marketing budget do you expect to be allocated to mobile marketing and advertising in five years' time? n=43

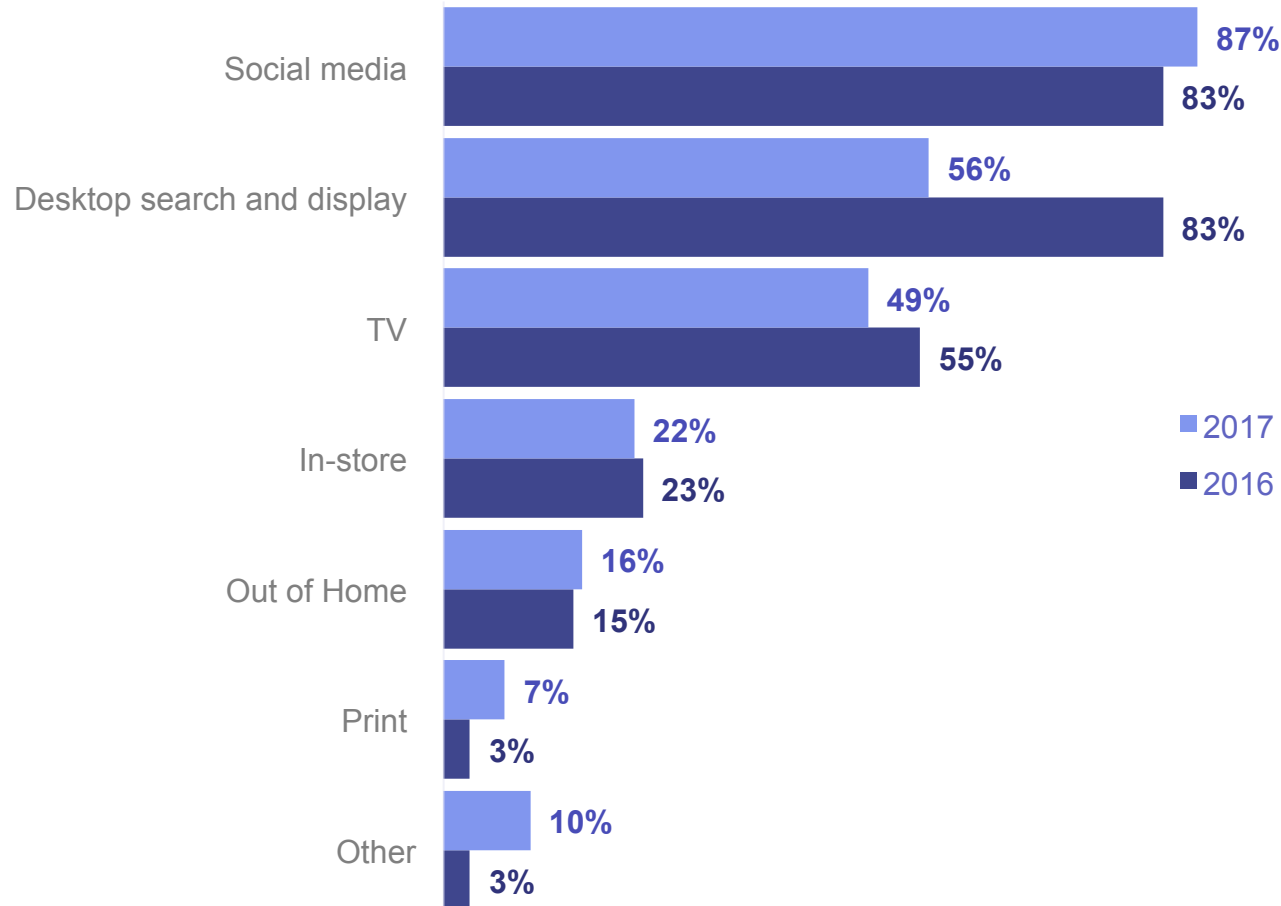
Chapter 3

Mobile tactics and technologies

Key Insights

- ✓ Social media is the most frequently used media channel with mobile; Facebook is the most used platform
- ✓ Mobile-based branded content is the most popular form of mobile advertising. Mobile-based loyalty schemes have the most potential
- ✓ Mobile video and social advertising are the focus for 2017
- ✓ Location data and video are at the core of mobile growth in 2017

Social media is the most frequently-used media channel with mobile



Commentary

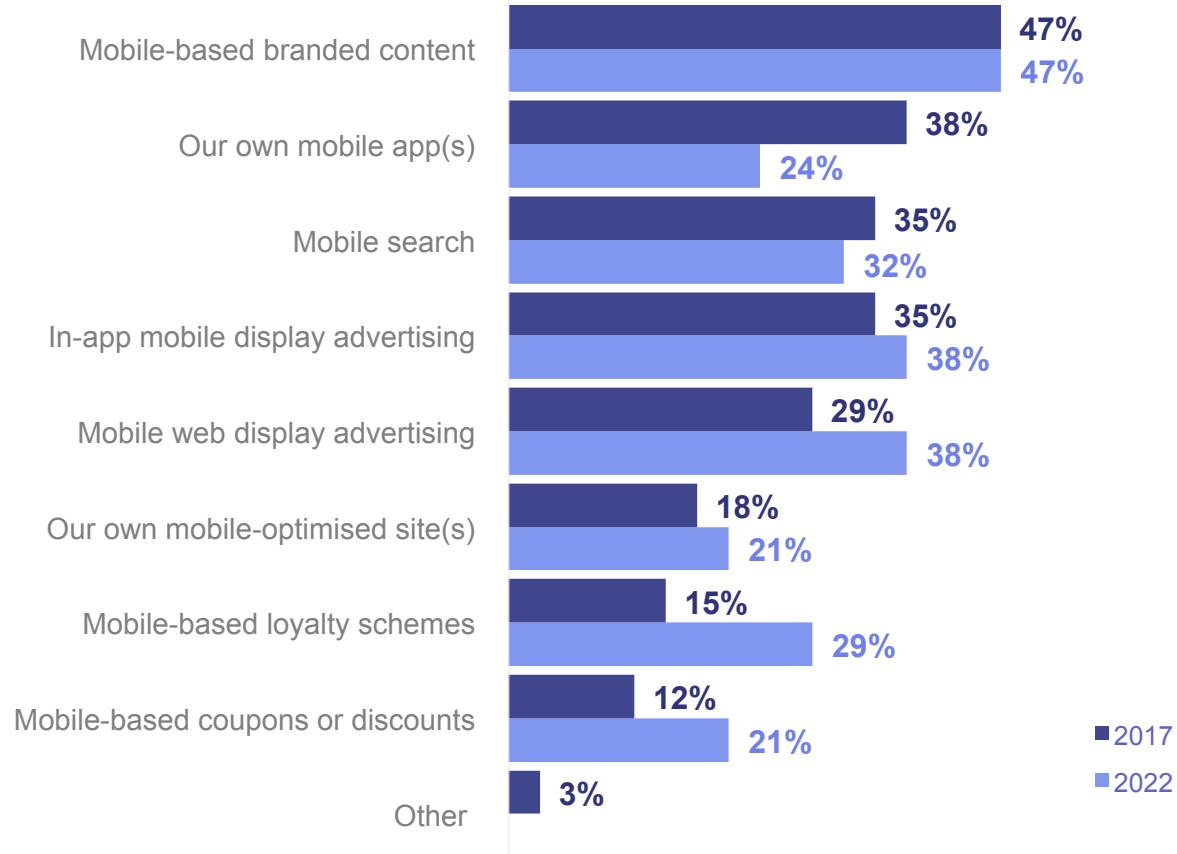
- ✔ Social platforms are used widely (87%) alongside mobile in campaigns, followed by desktop search and display being used by 56%.
- ✔ Recent innovations from Facebook and Instagram, such as Facebook Pages and Instagram Business Profiles, have brought new opportunities for marketers to reach larger audiences via their mobile phones.
- ✔ Of those who selected social media, 93% said they had used Facebook for mobile marketing, followed by Instagram (76%), YouTube (69%), Twitter (59%) and Snapchat has been used by 41%.

Nb. Desktop search and display read 'Online (including search)' in 2016 survey.

All respondents

Q: In your experience, which media channels are used most frequently with mobile? 2016 n=123, 2017 n=39

Mobile-based branded content is the most popular form of mobile advertising



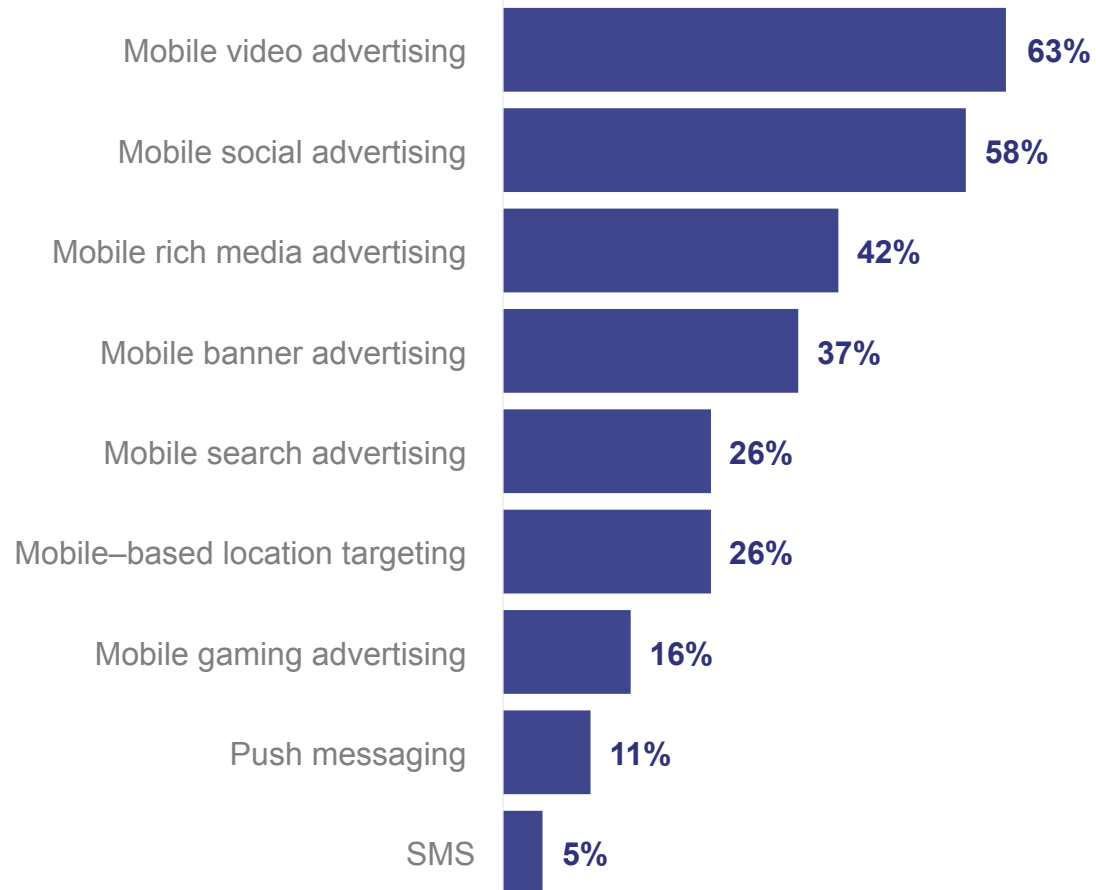
Commentary

- Over the next year, marketers are focusing on *mobile-based branded content* (47%) and their *own mobile app(s)* (38%), with significantly fewer prioritizing *loyalty schemes* (15%) and *mobile coupons* (12%).
- Asked what they expected to be focusing on in five years' time, *branded content* will continue to be the focus. This is likely a reflection of the expectation that screens and devices will become increasingly suited for consuming longer-form content, and mobile-optimised websites the norm.
- After content, *in-app mobile display advertising* (38%) and *mobile web display advertising* (38%) are expected to be a continued focus, and *mobile-based loyalty schemes* are expected to rise significantly in the priorities of marketers, from 15% to 29% by 2022.

All respondents

Q: Which types of mobile marketing and advertising are you/your clients focusing most on in your marketing activities in 2017 and in five year's time? n=33

Mobile video and social advertising are the focus for 2017



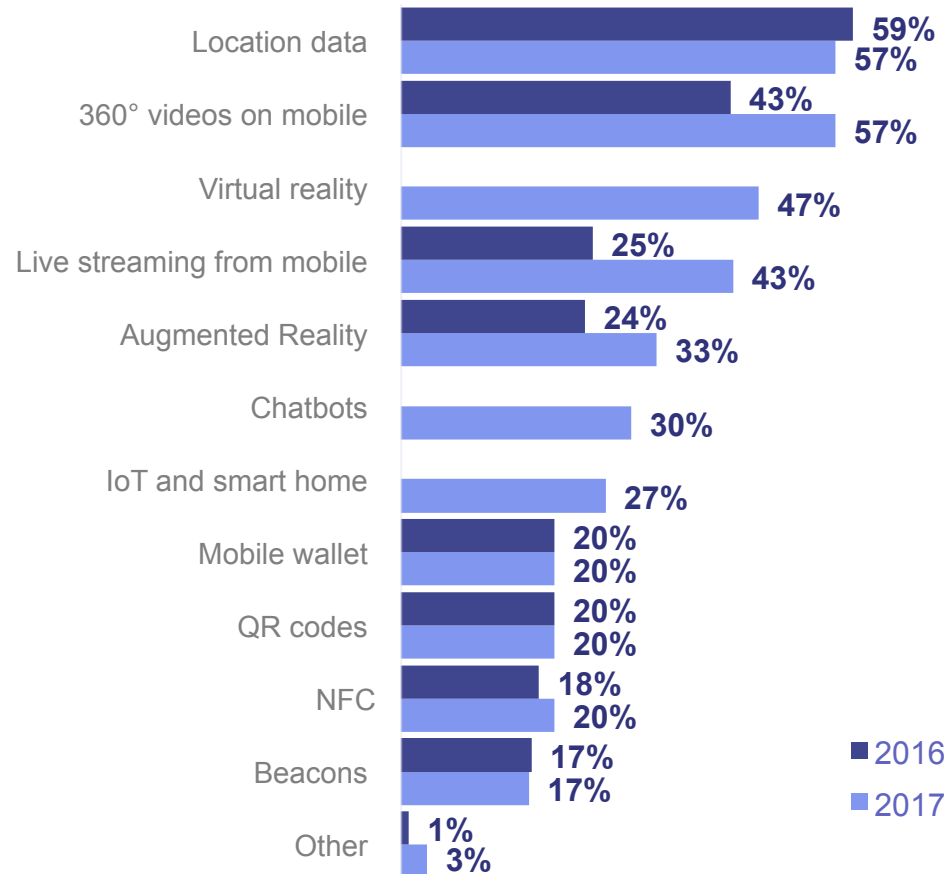
Commentary

- ✔ In MENA, *mobile video advertising* is a focus for 63% of respondents, followed by 58% using *mobile social advertising*.

All respondents

Q: Specifically for mobile advertising, which of the following are you/your clients planning to focus on in 2017? n=34

Location data is at the core of mobile



Commentary

- ✔ This year, almost 60% of marketers will use *location data* as part of their mobile marketing strategy.
- ✔ *Live streaming from mobile* has increased in significance for marketers in the MENA region. 43% of respondents are planning to use live streaming this year, compared to 25% saying the same last year.
- ✔ Chatbots and the IoT and smart home were added as options for this year's survey.

All respondents

Q: Are you/your clients planning to use any of the following and their associated mobile technologies in 2017? n=34

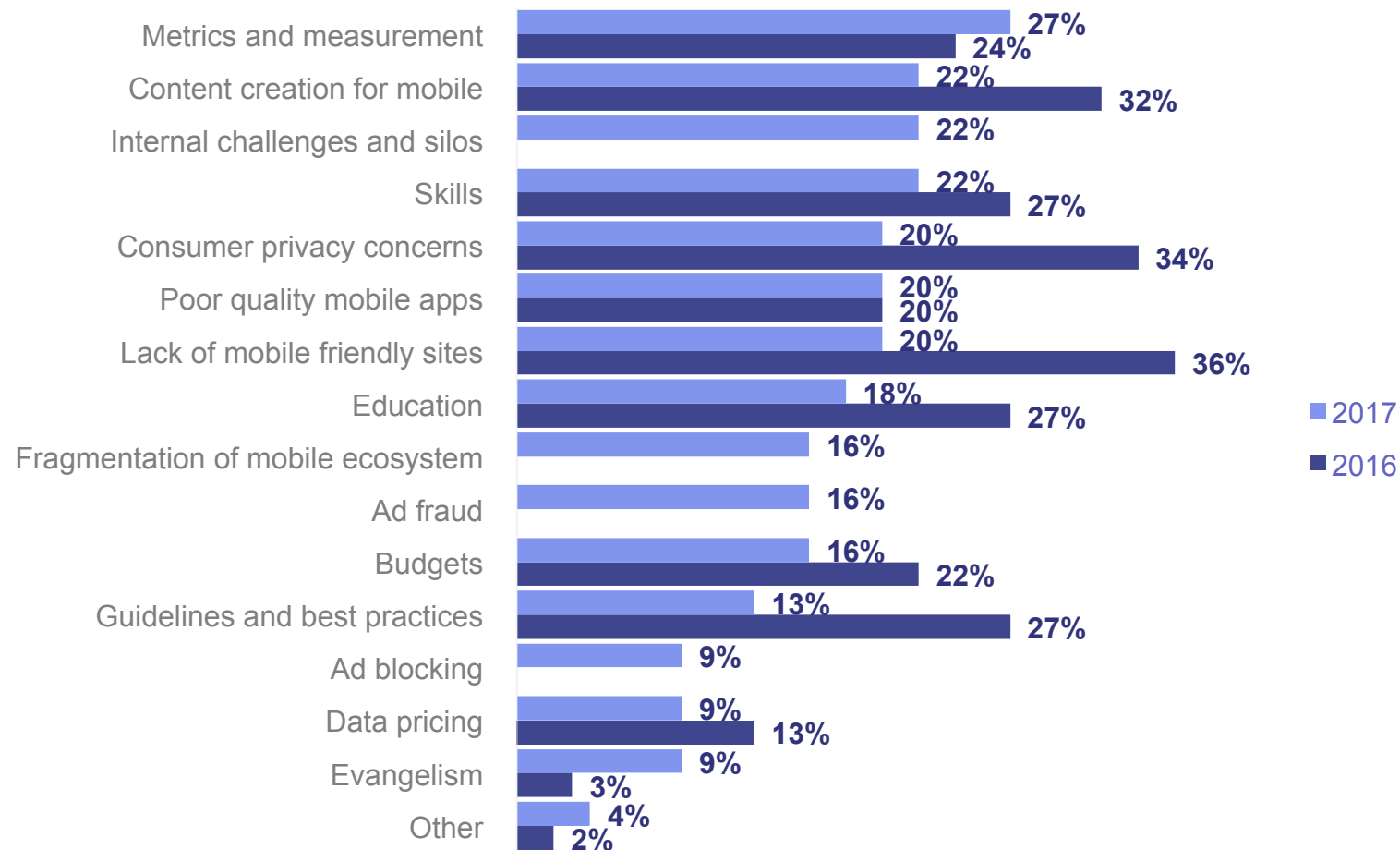
Chapter 4

Barriers and challenges

Key Insights

- ✓ Measurement of mobile is a problem for marketers in MENA
- ✓ Mobile marketing effectiveness is measured through engagement metrics like sharing and video completion rates
- ✓ Content creation for mobile is also a significant barrier, despite it being the biggest focus for marketers this year

Measurement of mobile is a problem for marketers



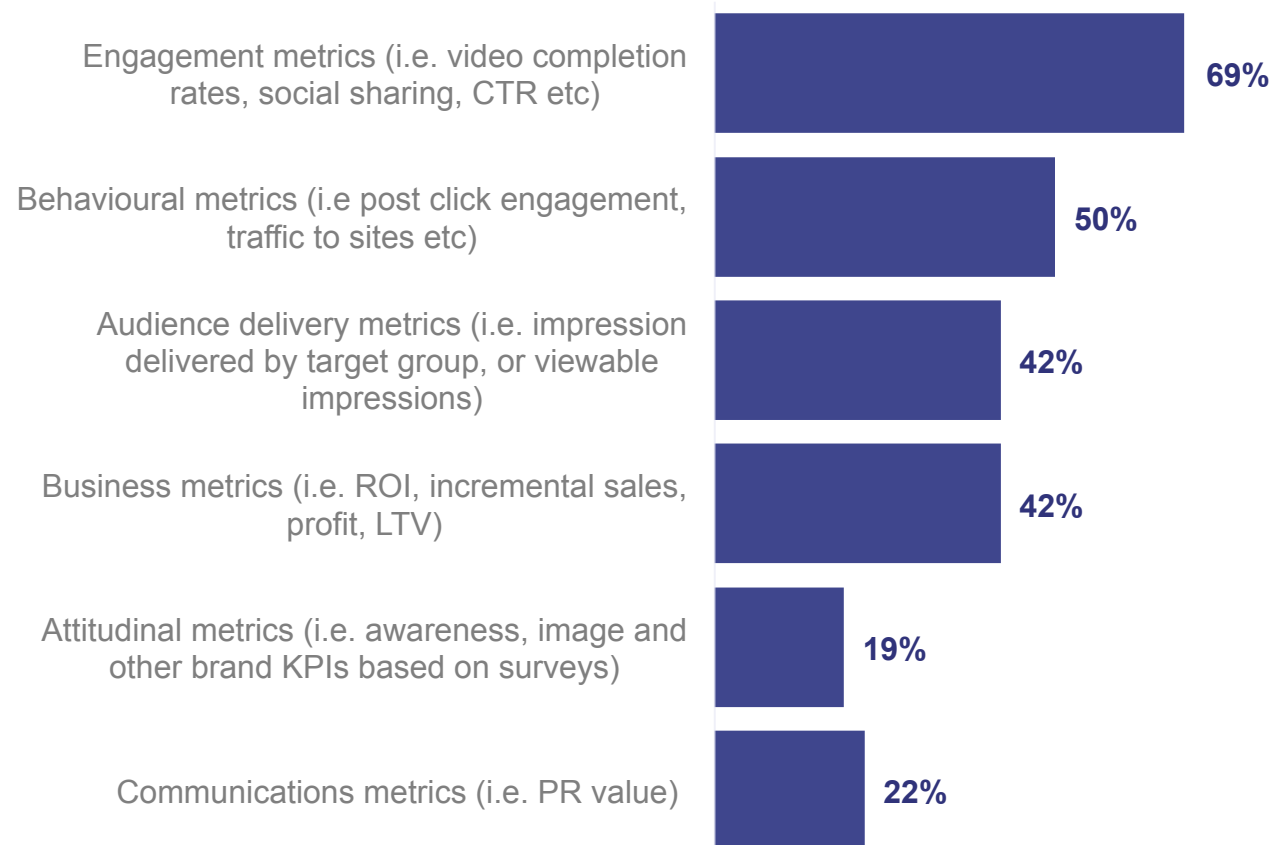
Commentary

- ☑ The biggest barrier to the growth of mobile in MENA is measurement and metrics, according to 27% of marketers surveyed.
- ☑ Mobile marketing in the region also appears to be held back by internal challenges and a talent gap; 22% said each was a barrier to growth in the region.
- ☑ Missing data for 2016 are where options were added to refresh the 2017 survey.

All respondents

Q: In your opinion, what are the biggest barriers to the growth of mobile marketing and advertising in MENA? 2016 n=93, 2017 n=44

Mobile marketing effectiveness is measured through engagement



Commentary

- ✔ Metrics and measurement are the biggest barriers to growth, indicating that work needs to be done on tracking the metrics shown on this chart.
- ✔ Engagement metrics are used by the biggest proportion of marketers in MENA (69%) to measure mobile marketing effectiveness, followed by half the respondents tracking behavioural metrics.
- ✔ Those measuring business metrics like ROI number less than half of respondents, at 42%.

All respondents

Q: Which of the metrics below do you or your clients most use to measure mobile marketing effectiveness? n=36

More from WARC

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About the study

This report is based on an online survey of 597 marketing professionals, carried out in March and April 2017.

The survey link was disseminated to WARC and MMA lists, and respondents received a complimentary copy of the report in addition to being entered into a prize draw.

This report contains the response of those based in MENA, and were a mix of client-side, agency and technology vendor marketers.

About WARC

WARC.com is an online service offering advertising best practice, evidence and insights from the world's leading brands. WARC helps clients grow their businesses by using proven approaches to maximise advertising effectiveness.

WARC's clients include the world's largest advertising and media agencies, research companies, universities and advertisers.

About the MMA

The MMA is the world's leading global non-profit trade association composed of more than 800 member companies, from nearly fifty countries around the world. Our members hail from every faction of the mobile marketing ecosystem including brand marketers, agencies, mobile technology platforms, media companies, operators and others. The MMA's mission is to accelerate the transformation and innovation of marketing through mobile, driving business growth with closer and stronger consumer engagement.

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