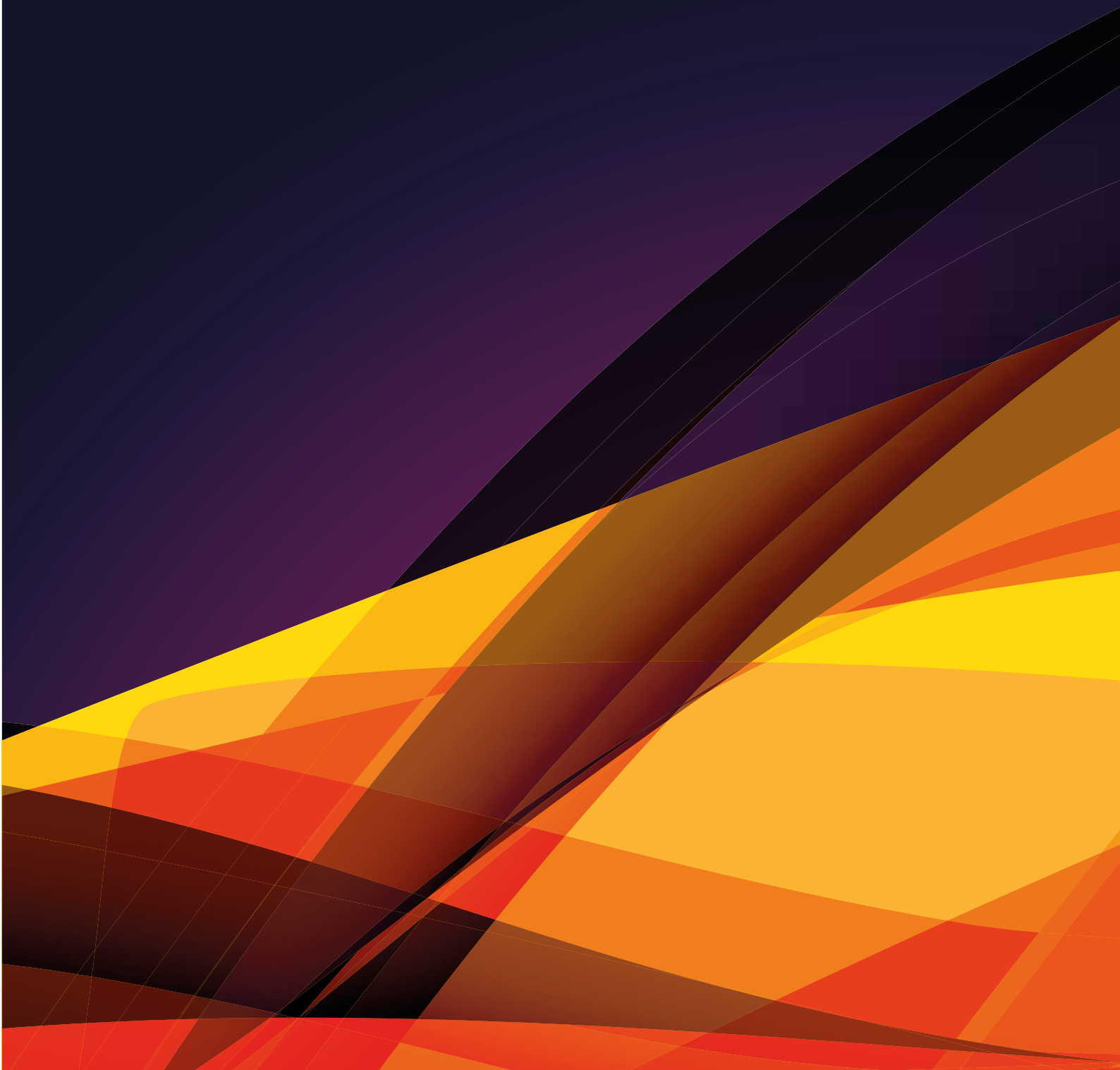# MMA
MOBILE MARKETING ASSOCIATION
APAC
2015 Yearbook

CREDITS

Rohit Dadwal, Managing Director, MMA Asia Pacific
Ammita M, Consultant, Strategic Projects, MMA Asia Pacific
Jasveen Kaur, Senior Regional Membership & Marketing Manager, MMA Asia Pacific
Preeti Desai, Country Manager, MMA India
Tam Phan Bich, Country Manager, MMA Vietnam
Yolanda Shi, Membership Manager, MMA China
Madanmohan Rao, Yearbook Editor
Nguyen Van Nam, Project Coordinator, MMA Asia Pacific
Nguyen Doan, Project Coordinator, MMA Asia Pacific

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FOREWORD

Welcome to the third edition of the MMA Yearbook for Asia Pacific.

As dynamic developments in the region's mobile marketing landscape continue gathering pace, we find ourselves on the cusp of the third wave – the age of connected devices and the Internet of Things. Indeed, we believe Asia Pacific is already at the leading edge of adoption of connected devices from consumers.

Over the last couple of years, we have seen a boom in the number of companies setting up operations in this region to provide services to grow the mobile marketing ecosystem – be they app developers, mobile ad networks, programmatic platforms (DSPs and SSPs), location based marketing, retail beacons, dynamic creative adserving platforms, telcos' own targeting platforms, and more mature technologies to target hundreds of millions of feature phones, which still exist in this region.

Marketers are increasingly using mobile devices with clearly defined roles at each stage of the consumer journey – as standalone devices to guide consumers from awareness to purchase, but also as devices to integrate their marketing programmes through the funnel with other traditional and digital channels.

This year's SMARTIES awards in the region saw more exciting work from marketers than ever before, in nearly all leading product categories and countries. At the same time, the proportion of ad spend on mobile still remains well below consumers' share of time for this platform, and we still have a long way to go.

The exciting SmoX study in China has validated the increased share of budget for mobile within the marketing mix for greater effectiveness. Yet there are still important and unanswered questions on viewability, fraud avoidance, and cross-device measurement.

This yearbook and some of the work MMA is doing along with leading marketers will hopefully shed some more light on these issues, and set the ground for greater collaboration across disciplines.

I would like to thank all the contributors who have given us their valuable time and insights, and helped put together our 2015 yearbook. We hope you find it thought-provoking and useful. Happy reading !

Ashutosh Srivastava

Chairman & CEO, Global Emerging Markets

WELCOME LETTER

2016: GALVANISING THE MOBILE MOMENTUM

It is time to go beyond 'why mobile' to 'how mobile', keeping people and their needs at the core. This will require capability building, better measurement of impact, and creative inspiration.

The mobile landscape of 2015 was defined by the question 'why mobile' and the surrounding discussions over why the industry should take a mobile-first approach. But with the global ubiquity of mobile phones, it is time we realise that mobile has grown into a force to reckon with, arguably the single channel that facilitates an unprecedented level of closeness and engagement with consumers today.

Regardless of whether you are a large brand, or a startup trying to make a mark, mobile is the one channel that gives you the desired reach and targeting accuracy in connecting with consumers. Through geolocation capabilities, mobile allows brands and marketers to identify consumers within specific contexts, then speak in their language, and engage with them on a one-on-one basis with a targeted message. Market disrupters like Airbnb, Facebook, Uber and Alibaba are fully embracing the use of mobile to boost their reach and value.

The dynamic growth of mobile is also evident in the enthusiastic participation we saw in MMA Forums held in 2015 in India, Indonesia, Vietnam, and Singapore. With membership having grown from strength to strength in the past year, MMA is also pleased to welcome a new group of esteemed industry leaders into the Board of Directors. The active involvement of these representatives from Asia's top agencies, brands and marketers is a testament to MMA's role in promoting the growth of mobile in the region.

As mobile continues gaining momentum and transforming the marketing landscape, the big question the industry ought to address naturally shifts from 'why mobile' to

'how mobile.' Building capabilities, enhancing measurement, and sparking creative inspiration – these are the three pillars that will continue to drive the momentum for the industry in 2016.

BUILDING CAPABILITIES THROUGH EDUCATION AND PARTNERSHIPS

The mobile market is growing so fast that many are inevitably struggling to catch up. Brand and marketing professionals who work in the offline marketing landscape often see mobile as a conflicting platform against traditional advertising. In fact, while mobile usage has skyrocketed over the past few years, this does not mean that consumers are glued to their smartphone screens to the exclusion of all other media. The smartphone merely serves to facilitate more immediate interactions and transactions as soon as users relate to a promotion or advertisement displayed on radio, television, or in magazines.

As such, there remains room for more education that fosters a holistic view and mindset, taking into account the synergies between mobile and traditional and bringing them together into a total ecosystem of touchpoints for consumers. Often, in our eagerness to promote the different technologies and the vast possibilities of mobile, we fail to highlight how seamlessly complementary traditional and mobile ad mediums really are.

A landmark initiative that illustrates a collaborative approach and bridges the gap between marketers and technological innovators is the Unilever Foundry. This dedicated platform nurtures startups and supports them with the necessary funding to spur iterative experimentation in the use of mobile technology. Unilever has long collaborated with tech companies, but with the Foundry, it has now expanded existing efforts to work with startups on the edge of the next big breakthrough.

Partnerships aside, highlighting pockets of excellence across the mobile ecosystem will help us move towards the next frontier. Sharing best practices in the form of global and regional-led case studies will not only increase confidence that mobile delivers great results for brands, but more importantly, highlight the mobile initiatives and campaigns that have really driven business success. With more examples to learn from, the industry will encounter less inertia in converting to the mobile medium.

One of our key initiatives is the MMA Forum, a much-needed platform for delegates and speakers to share their expertise on what mobile means for brands. Committed to elevating the knowledge and expertise of mobile marketers across the industry, we believe that the involvement of more member companies can help to further boost the MMA Forum as a vibrant marketplace of ideas and best practices.

ENHANCING MEASUREMENT THROUGH NEW, PRECISE METRICS

One of our biggest announcements in 2015 was on the SMoX study, developed in partnership with some of the world's biggest brands including Coca-Cola, Walmart, MasterCard, and Telstra. The study showed that the conversion of consumers via mobile is invariably higher than through other media.

While the SMoX study was a useful tool in educating brands and marketers on the possibilities of mobile, the industry is calling for full transparency where buyers can account for their ad spends and advertisers are able to track the degree of ad engagement from each individual user. As such, more cross-media studies and measurement metrics need to be developed in order to pave the way forward for mobile marketing.

The last thing we would want is for advertisers to stop investing in and

innovating with mobile because of a lack of accountability. Only by using robust and meaningful metrics can we expect to see stronger growth for the mobile sector in 2016.

SHARING INSPIRATION FOR CONSUMER-FOCUSED INNOVATIONS

As marketers, we need to understand consumer behaviour trends through a localized lens and look at what is driving mobile consumption in each country. A good first step we can take is to recognize how mobile is being used - whether it is for gaming, messaging or shopping, sharing videos, photos or news. Certainly, mobile today is being used for much more than messaging.

In China, messaging apps enable approximately 600 million people each month to transfer money to friends, book taxis, check in for flights, order food delivery, make doctors' appointments, buy movie tickets, and take part in video conference calls. In short, rather than pushing out discrete functions and capabilities from a technological viewpoint, the single integrated app is built around consumer lifestyle and needs.

The booming success of messaging apps in China is instructive. Consumer behaviours should be the guiding foundation for any marketing and advertising strategy, and mobile is making it easier than ever before to understand what consumers need at every step of their journey.

As consumers tap on the resources in their hands to find ways to go somewhere, buy something, or simply to find out more, marketers need to tap on the user data and real-time technologies in order to get a better understanding of where users are and increase the relevance of their ads.

Already, ad technologists are planning to unveil new technology to glean more detailed insights on consumers. One uses air pressure data taken from the barometric sensors found in most new smartphones and wearable technologies to allow advertisers to construct a three-dimensional view of where their customers are based on the latter's altitude. Facebook's Bluetooth beacons, meanwhile, allow businesses to shoot out promotional messages and check-in messages to fans when they are within close proximity. Marketers should seize this as an opportunity to thoughtfully add value to consumer experiences and build personalized messages that are contextually relevant.

Another way to engage consumers through mobile would be to customise hyper-local content for individuals programmatically, based on criteria such as weather, local language, use of data product, device, or time of day. Taking into account these criteria will allow brands to be more agile and nuanced in their mobile marketing, guaranteeing a higher rate of engagement with consumers and ultimately leading to conversions.

Clearly, the possibilities for mobile in the year ahead are vast, and as confidence in mobile continues to grow, the industry ought to come together to break down barriers, forge new collaborations and bring fresh ideas into reality to enhance consumers' lives.

This is why MMA continues to serve as the definitive platform for members to engage in conversations and partnerships that define the future of mobile. The three pillars above map out the path ahead, and the time for action is now.

Rohit Dadwal

Managing Director, Mobile Marketing Association APAC

EXECUTIVE SUMMARY

by **Madanmohan Rao**

With 22 authoritative chapters on mobile marketing, the 2015 Yearbook of the MMA presents a treasure-trove of insights and inspiration from across the Asia-Pacific. The Yearbook showcases the winners from the flagship MMA events and Smarties awards in Singapore, China, India, Indonesia and Vietnam.

The 2015 Yearbook lists organisational members in the Asia-Pacific and profiles the Board of Directors who have taken on the task of spearheading the mobile marketing industry in our part of the world. This chapter ties together the various threads and trends addressed in the individual chapters of the Yearbook, and provides an overview of where we are as a regional industry.

PART I: BIG PICTURE AND BIG PRIZE

The 'First Wave' of desktop Internet marketing and 'Second Wave' of the mobile Internet are giving way to the **'Third Wave,'** which also includes the Internet of Things. A fast, ubiquitous, and intelligent Internet ecosystem will be the norm, says Norm Johnston, Global Chief Strategy & Digital Officer, Mindshare, setting the stage for this Yearbook. Artificial intelligence will become a reality, and brands will explore a new role in this ecosystem. Swiping and clicking will be replaced by talking and waving, redefining traditional domains such as brand engagement.

Five ways to stay innovative in mobile marketing are offered by Thomas Twigg, Head of Strategy, M&C Saatchi Mobile. Companies should plan for **innovation via partnerships,** develop the best relationships, immerse in customer problems, embrace diversity and absorb the best information and insights available. For example, social media yields maximum insight into the industry for very limited investment.

Expanding on the theme of collaboration, five tips for effective brand-agency partnerships are presented by Tuomas Peltoniemi, President, TBWA's Digital Art Network (DAN) Asia. Key shifts are working in teams rather than departments, deeper engagement via workshops, cross-business decision-making, transparency in measurement, and focus on performance rather than procurement. This calls for a revaluation of **managerial incentives** between organisations, and new ways of designing and measuring business results.

Mobile is regarded as the most 'personal' medium and the most personal possession we have. Mobile isn't a companion, it is an extension of our self, argues Gregory Armshaw, Digital Product Strategist/Advisor, Topme. Marketers need to respect the preferences and behaviour patterns of their potential customers in this new context. Steps to **successful personalisation** include identification of the customer persona, individualised creative messaging, and adding value to customers' lives.

Brand marketers are always asking for new innovations in mobile – and the answers may well come from a new player in this ecosystem – startups. Nimble startups leverage local knowledge and expertise innovate faster and with the most relevant solutions, argues Milind Pathak, COO, MadHouse India. **Engagement with startups** gives new go-to-market ideas for brands in a risk-averse manner. Agencies benefit with from more diverse and efficient innovation, as well as scalability with low compromise on quality. Startup, on their part, benefit from deeper market penetration and earlier monetisation of their offerings. This calls for new ways of managing the entrepreneur ecosystem.

Addressing shifts in media patterns, Martin Nygate, Chief nanu, Gentay

Communications, observes that banner ads, pop-ups and video inserts are dying or are already dead. Such annoying, intrusive, and to a large extent, **ineffective ad forms should be rejected.** New technologies for advertising on smartphones are needed, such as voice-over messages while connecting calls which stop as soon as the call recipient answers the call. More such approaches are called for, so that callers have positive disposition to the advertising message.

Herwinto Chandra Sutantyo from Digital Business Innovation, XL Axiata, provides other broad lessons from 10 years of mobile advertising, starting off with SMS. He draws on the journey of Indonesia, one of the top markets in terms of app usage. Consumers are now data hungry: they demand more speed, more browsing time, affordable access and if possible free to use! New laws protect consumers from non-responsible advertising. This calls for multi-level and layered testing of creative messages across digital mobile media such as social, app and in-app. **'Right Data' and not 'Big Data'** is the new marketing mantra.

More mobile disruptions are identified by Tanmay Mohanty, Managing Director, Resultrix and Performics, India. More data will become available to marketers via mobile technology such as wearables and mobile wallets. There is a massive explosion of 'mobile-only' content, and marketing will have to be sensitive to user **location, context and emotion – in real-time.** Ad blocking technologies will accelerate the demise of the web banner. Marketers should distinguish between 'Application Only' and 'Mobile Only' approaches. Other trends to watch are social shopping and chat platforms for mobile retail.

This convergence between mobile media, social media and advertisement is further highlighted by Matthew Talbot, SVP, BBM,

BlackBerry. Messaging platforms have evolved and become much more rich and complex, with some becoming thriving e-commerce ecosystems unto their own right. The 'social commerce' space is defined by user behaviours that are mobile-centric, real-time and heavily intertwined with social media, as exemplified by Line, WeChat and Kakao. One-click purchasing has emerged as a sure-fire way to increase sales.

Perspectives on mobile marketing in India are offered by Avinash Jhangiani, Managing Director, Digital and Mobility; Omnicom Media Group. Mobile continues to penetrate both rural and media dark markets, and is fast becoming the starting point for consumer-brand interactions. This has important implications for brands **to break organisational silos** and integrate mobile, creative, data and analytics. Programmatic Creative Technology marries the speed of Media Buying with the speed of creativity but also layers it with relevant data. Marketers need to immerse in the data mindset and leverage analytics for better insights and impact.

The unappeasable appetite for content is something that marketers must see as an opportunity to capitalise on, argues Shobhit Shukla, Chief Revenue Officer, Near. It is necessary to plot geographical points of interest as they relate to the consumer preferences and trends. **Location is a fundamental factor** in business, and helps marketers with real-time insight on their intended target. Campaigns can then be run across the appropriate media, in the exact place they should, at just the exact moment they should be, in order to reach target consumers.

PART II: SEIZING THE MOBILE MICRO-MOMENT

Further data insights are offered by by Nitin Mathur, Senior Director, Marketing (APAC) & Head of Media (INSEA), Yahoo. There is an app for virtually everything under the sun, and users are spending more time than ever on mobile apps. Asia's app usage grew 77% YoY, outpacing growth globally. The fastest growing app categories are shopping, lifestyle,

news and productivity. **Asia also leads the phablet revolution.** There are challenges, however, for marketers trying to study consumer behaviour across apps. Still mobile is on fire and it is showing no signs of stopping.

This calls for deeper consumer insights, argues Stevy Kosasih, General Manager, Data Insight, Telkomsel. Branding and the **ability to tell a brand story** and make them stand out from the competition is key challenge for marketers. Stakeholders like the mobile operator must understand the consumer from different perspectives. Case studies are offered of audience profiling, campaign planning, media optimisation and consumer ID verification techniques in Indonesia.

Ad fraud represents a significant proportion of invalid traffic (IVT); some of these are malicious attempts to pocket advertising revenues in a fraudulent manner, warns Joe Nguyen, Senior Vice President, Asia Pacific, comScore, Inc. Controls are needed to ensure the validity of benchmarking and optimisation. A multi-point series of checks using different sources of data is needed to detect and avoid this type of activity. Among other measures, marketers must have heightened awareness of how and where their inventory is purchased.

While marketers must pay greater attention to mobile, they should also not focus on mobile solely in isolation - but as a hub across media. In the post-mobile era, marketers must make the most of **cross-screen consumer behaviours,** argues Chih-Han Yu, CEO & Co-founder, Appier. Average cross-screen behaviour varies greatly between individuals, by market, and even by gender. Consumers now own many screens, moving between smartphone, tablet, desktop PC, and even smart watches. Cross-screen is no longer optional – it is a reality, and techniques such as artificial intelligence (AI) can help resolve this complexity.

Mobile also allows marketers to close the transaction and purchase loops. The **future of payment and banking may well be mobile,** according to Kalidas Ghose, CEO and Vice Chairman, FE Credit. The mobile

phone is a financial tool capable of handling authentication and wealth management. Removing barriers to full mobile engagement is the most necessary task and challenge that marketers need to overcome. Emerging scenarios even include Augmented Reality Customer Service.

Therefore, the marketing industry needs to brace itself for such mobile disruption, explains Manav Sethi, Group CMO, ASKME India & FINDIT Malaysia. For the first time in the history of technology, **mobile is making technology a universal product.** Mobile will become the driver for not only internet traffic but also for value. Video is the next big category to witness disruption riding on the strengths of ubiquitous mobile. Mobiles have already disrupted retail and transportation. Mobile is also the epicenter of disruption across industries and across advertising formats.

Mobiles allow brands to explore deeper connections with their consumers, as show in the case study by Truc Nguyen, Connections Manager, Coca-Cola Southeast Asia. 'EmotiCokes' were leveraged in mobile messenger apps in a strategic partnership with Zalo mobile messenger. **EmotiCokes** became the hottest sticker design of summer 2015, along with lyric competitions and selfies. Ads and advocacy led to the most successful ever Coke campaign in Vietnam.

In addition to messaging, mobile marketing can work with online classifieds, and add richness and value. Amarjit Singh Batra, CEO, OLX India, shows how mobiles have become the primary mode of getting access to buyers and sellers. Mobile devices have become the **preferred mode to access online classifieds** in India. Along with the advertising opportunities, the analytics infrastructure allows advertisers to measure app installs, in-app events, cohort analysis, conversion funnels, LTV (life time value) modelling and many more functionalities. It is critical for online classifieds to optimise the mobile channel for consumer engagement.

More trends and developments from Indonesia reinforce the power of

mobile. Himanshu Shekhar, CEO, Mindshare South East Asia, shows how advertaiment, usefulness, analytics and a focus on user experience have helped mobile marketers deliver value to consumers along with strengthening brands. Mobile should be seen as a **force for good marketing** and not as just another channel that adds to the noise.

Technology advancements and shifts in consumer behavior have altered the path to success in e-commerce, according to David Resnick and Darren Tseng of Google. They advise marketers and brands to invest in a quality mobile website and app, provide omni-channel shoppers a frictionless experience, and improve their mobile metrics. **Consumer expectations continue to rise to new heights,** and marketers should offer easy payment options. In a world of infinite choice, marketers need to continually monitor customer behavior and adjust product offerings.

Traditional **SEO and SMO practices need to be revisited** via the mobile lens, argues Anita Nayyar, CEO, Havas Media Group, India & South Asia. Young consumers are on the move as never before, and are price conscious and spoiled for choice. The mobile site platform structure allows the flexibility of cross-connections and integration with web and social, and SMO rules become more critical for smart devices in urban and rural settings. There are tremendous opportunities for the agile marketer to deliver experiences that will lead to creative business with profit.

The importance of these trends and recommendations is underlined by the **MMA SMOX Study,** which draws on solid research and data to argue for the need for double digit investment in mobile marketing. Case studies and metrics show how mobile marketing increases awareness, brand image and incremental sales. The comprehensive study has helpded

quantify the mobile opportunity many marketers sensed was there, and opens the door to further research on specific sectors, mobile formats, campaign specifics and the changing role of creatives.

Dip into this Yearbook and draw your own inferences, takeaway points and action items! Get involved, get excited, and get on board for driving the mobile momentum in the Asia-Pacific and beyond!

Dr. Madanmohan Rao is the editor of the Asia-Pacific Internet Handbook and co-editor (with Peter Bruck) of Global Mobile. He has published over 15 books spanning five series, covering digital media, innovation, knowledge management and culture. He is research director at YourStory Media, and has spoken at conferences in over 80 countries around the world. Madan was editor of the MMA Yearbooks of 2013 and 2014, and can be followed on Twitter at @MadanRao

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MMA
MOBILE MARKETING ASSOCIATION
APAC

2015 Yearbook

PART 1

BIG PICTURE AND
BIG PRIZE

HOW THE 'THIRD WAVE' WILL TRANSFORM MOBILE MARKETING

by **Norm Johnston** Global Chief Strategy & Digital Officer, Mindshare

Hold on to your seats, we are about to enter the 'Third Wave' of digital marketing.

The 'First Wave' of desktop Internet marketing is long gone, while most of the industry is only coming to terms with the much bigger 'Second Wave' of the mobile Internet. Now we must brace for the 'Third Wave,' another great equalising force that will bring further disruption and even greater importance for mobile. It may feel slightly abstract, but make no mistake -- we are just beginning to feel the gravitational pull of a much broader, massively connected ecosystem of things.

people will join the current 3.2 billion people connected to the Internet in the next six years, effectively surpassing today's global population and constituting nearly 99% of the Earth's population. And many of these people will be accessing the Internet via 5G, which will deliver access to the Internet at over one hundred times faster than today's 4G bandwidth.

But it's not just more people and more speed, it's also more objects**,** which will arguably be the biggest change. Cisco predicts that over 50 billion 'things' – cars, TVs, toothbrushes, cricket bats – will be connected to the Internet by 2020. TV itself is going

and scrutinized. Juniper Research predicts the number of wearable devices shipped will increase from about 13 million in 2013 to 180 million in 2018.

The cumulative effect will be a world where a fast, ubiquitous, and intelligent Internet ecosystem will be the norm. Nicolas Negroponte's famous prediction will be realised: we will live in a world where digital will be "like air and drinking water, being digital will be noticed only by its absence, not its presence."

Arguably more connected people and more connected objects are the easier things to predict. The question is, given the exponential acceleration in technology, what in this Third Wave will truly surprise and delight and perhaps even scare us? What would knock our collective socks off? There are faint hints of all of these bigger changes now: digital whispers, nascent experiments, small startups around the world.

THE INTELLIGENT AND INVISIBLE INTERNET

First, artificial intelligence will become a reality. Ray Kurzweil, who has been unnervingly accurate on predictions over the last thirty years, has long believed that singularity will happen by 2029. Singularity is essentially the belief that you will live on perpetuity through robotics and the Cloud and the vast amount of data collected on you over your lifetime. Ray now works at Google, which purchased artificial intelligence firm Deep Mind as well as robotics company Boston Dynamics,

THE 3RD WAVE OF DIGITAL MARKETING — MINDSHARE

DESKTOP   MOBILE   INTERNET OF THINGS

Norm Johnston, Global Chief Strategy and Digital Officer   @ntjohnston

MORE OF EVERYTHING

This 'Third Wave' will bring more people on the Internet in more places in the world, primarily through more low-cost, high-performing mobile devices. Current predictions estimate that roughly 4.5 billion new

through a major evolutionary step as it becomes digital and increasingly on-demand; 40% of TVs in the US are now connected to the Internet. Wearable technology sales are booming as more people track their quantifiable self - everything from sugar levels to sleep patterns are now counted

among others. So this gives you some sense of the scale of Google's ambitions to keep people searching, either by request or predictively, and whether you are dead or alive.

For the time being, AI will take shape in less sexy and often invisible ways by simply helping you in everyday mundane tasks. The Internet will begin to predict your needs and enhance your life by measuring and monitoring everything from your connected body to your connected house and your connected car.

Your bio-metric data, with your opt-in permission, will be shared with insurance companies to automatically drive down insurance premiums. Your Amazon shopping basket and suggested recipes will automatically evolve based on your fitness levels and dietary needs. An Uber car will automatically be ordered when your Apple Watch detects an imminent medical emergency and the need for a visit to the hospital.

WEARABLE TECHNOLOGY

MINDSHARE

Norm Johnston, Global Chief Strategy and Digital Officer   @ntjohnston   Source: Juniper

Brands will also explore a role in this new ecosystem, whether rewarding fitness fanatics for their discipline with discounted products or helping you to wake up after a monitored and measured sleepless night by automatically starting the coffee machine and doubling the normal volume of caffeine. At the centre of all this connectivity will be your smartphone: a constant companion and remote control, reporting and managing and porting the data necessary to keep all of these connections alive and working.

THIRD LIFE

Second Life was the industry's notorious first foray in virtual reality. Hyped up on the cover of Time Magazine in 2007, Second Life ultimately dithered due to brand safety issues and an imperfect user experience. Now virtual and augmented reality are back with a vengeance. Anyone who has donned a swanky pair of Oculus Rift goggles has caught a glimpse of this fabricated and simulated future, which will be perfected and routinely used to virtually trial anything and to travel anywhere. Facebook plans to sell Oculus in 2016, at a rumoured price tag of $500 per device, and one can only imagine the eager gamers waiting for their Rift to arrive.
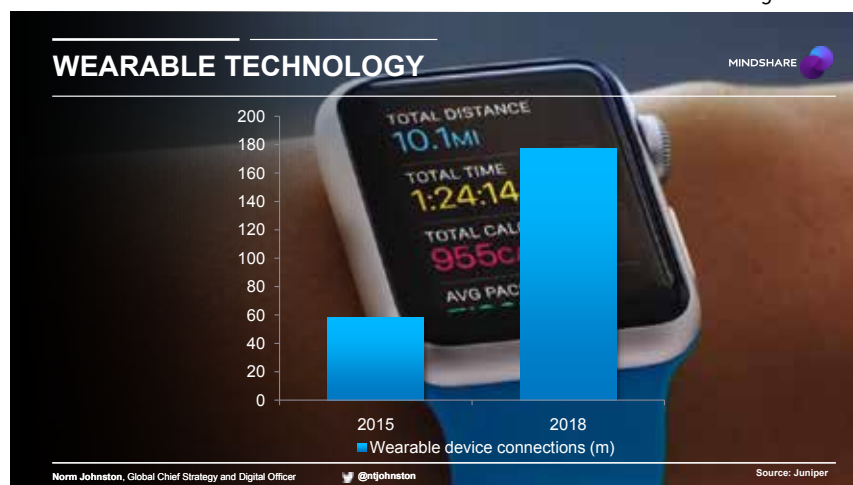
Google on the other hand won't take Oculus sitting down. Google Goggles v2.0 is in the works, and if combined with Magic Leap, a Google-invested augmented reality firm, it could finally bring some *oomph* to the wonky and universally panned Goggles v1.0. Whether virtual or augmented, more people experience a world that effectively blurs the lines between online and offline, and our definition of 'mobile' will need to extend into new devices that not only travel with you, but are also physically on you.

NEW ENGAGEMENT

Third, swiping and clicking will be replaced by talking and waving. The way you interact with everyday objects, and brands, will fundamentally change as Xbox Kinect motion sensor and Siri voice recognition type technologies improve, expand, and

get embedded throughout your house. 40% of smartphone searches in the US are already done by voice, with nearly 60% of millennials asking their phone for something while watching TV and a further 20% talking to their phones in the toilet. Amazon's Echo has put voice in our homes, enabling people to ask for recipes and re-order household goods via a simple conversation with Alexa.

Just consider this: only 5% of the predicted 50 billion objects that will be connected to the Internet will have a keyboard. The rest will often require an alternative means of engagement, in most cases your voice. And as a consequence, the way we measure our advertising will correspondingly change as we redefine things like brand engagement.

All of this will dramatically impact media and advertising by dialling up the learning and principles we have developed and nurtured over the last 20 years of the commercial Internet. Of course, similar to the last two waves of digital marketing, not every company will be prepared for or even acknowledge the inevitable. And like Borders and Kodak and many others, the failure to adapt will result in more than a few casualties. Just consider that the average lifespan of an S&P 500 company has declined from 67 a century ago to only 15 years today. In an age of Airbnb and Uber, there are always a few young entrepreneurs in a garage preparing for the next wave of disruption. As surfing legend Laird Hamilton once said: "We are all equal before wave."

The question is not whether but how well you will ride this 'Third Wave'. As another surfing legend Jon Kabat-Zinn once said: "You can't stop the wave, but you can learn to surf."

Norm Johnston (Twitter: @ntjohnston) is Global Chief Strategy and Digital Officer, Mindshare. He was earlier at Accenture and Modem Media, and has won a range of awards on behalf of clients such as Unilever, General Motors, and Citibank. Norm is a member of Mindshare's Executive Committee, GroupM's Digital Board, and the GroupM Connect Advisory Board. His first book is 'Adaptive Marketing.'

FIVE WAYS TO STAY INNOVATIVE IN MOBILE MARKETING

by **Thomas Twigg**, Head of Strategy, M&C Saatchi Mobile

Mobile is undoubtedly the fastest moving area of marketing and is showing no signs of slowing up. The Asia-Pacific (APAC) in particular presents a rapidly growing mobile market with ad spend second only to North America in 2015 at $25.4 billion, and predicted to overtake by 2018.

In such a large and competitive mobile marketing space, brands are being forced to innovate and adapt to changing formats, consumer journeys and also expectations. This is most notable in developing markets where mobile represents user's primary access point to the internet.

India specifically this year has seen multiple brands grow and diversify in their offering which reflects the fact that this is the fastest growing internet market, with a growing middle class. Both Myntra and Flipkart have capitalised on this opportunity to harness a mobile audience by forcing customers to download their app for large sales in the instance of Flipkart, and Myntra by removing their m-commerce site, presenting an app only offering. Innovation in this instance is about focusing on one area and doing it well.

When looking at APAC, China clearly stands out in terms of growth and also scale, with the highest number of smartphone users globally at 574.2million, and mobile ad spend almost doubling in 2015 at $13.98 billion. Mobile is predicted to overtake TV ad spend in 2016, representing 28.2% of total media spend. As this market reaches such high smartphone penetration, the opportunities for new apps reduces, as people rely on mostly the same set of apps for daily usage - thus making competition aggressive.

With competition comes a necessity to innovate, and every brand and agency in this space needs to consider innovation as a key pillar for their business - not just to keep up with this pace but to survive. However, it is not always obvious how to approach innovation and although each brand or agency will have their own approach, the following five principles are essential for staying innovative:

1. PLAN FOR INNOVATION

It may seem obvious, but if there is no plan in place innovation will not be nurtured. In general, we have found that a diverse team working on solving a client problem by meeting once a week is the minimum requirement to build the necessary momentum. Training is essential within this because the most innovative solutions in mobile are often at the crossing between technology, data and creative.

A good example of this is ideation for tactical campaigns where the brief is often very different from the norm. We have produced our most innovative work by bringing specialists in technology and data to these briefs alongside account management and creative teams. One such solution involved using a technology and data partner to enrich our data before retargeting segments within programmatic. This came from a tactical brief and is now that norm for many of our clients.

2. WORK WITH THE BEST PARTNERS

The best innovation in the industry has come from partners working together, whether that be innovative ad formats, tracking or data visualisation. Traditionally, brands and agencies and brands have looked to partner with large technology companies such as Google, but smaller companies should not be discounted.

In fact, we have found that nurturing relationships with small disruptive partners helps keep the industry moving with new ideas. In particular, we have seen innovation this year in tracking and attribution as a result of working closely with small technology companies and our clients.

To work with partners, we have found that finding common ground to help each other is essential. For instance, if the product helps our client we would happily beta test in order to have access to the product first. The value exchange here is that we improve their product while we work on the cutting edge of what is available. In addition, such a relationship allows us to shape the product to our needs, and we have seen many features implemented by our partners as a direct result of such feedback.

3. UNDERSTAND THE PROBLEM

If you don't understand the full problem you are trying to solve, you will miss the most innovative solution. Sometimes it can be as simple as

writing yourself a clear brief or re-evaluating the problem.

For instance we discovered this year that the biggest challenge for one of our clients was retention and not acquisition. It turned out that a high proportion of sales that we were optimising towards were returned. This resulted in a new strategy to advertise to new customers to reassure them that they had made the right purchase with a supporting new customer programme. Without looking at the bigger picture, we would not have changed our tactics in this innovative direction.

We have also found that a fuller understanding of our clients' business helps us diversify our offering. For instance, conversion is a product of the advertising and the actual user journey and clients are open to improving conversion in whatever way works. An open brief like this for a current client has seen us investigate a series of solutions that would not be available with the traditional agency client relationship.

4. BE DIVERSE

Innovation can come from anywhere and you need to be open to that. Outside of encouraging a culture of diversity in ideas, we have found that innovations can come from simply being in the right place at the right time.

One internal technology project we embarked on this year actually resulted in the technology staying the same, but the process for using it changed. It turned out that the best solution was a human one that technology itself couldn't solve. The turning point came from a meeting about trading which was totally unrelated to the technology platform. In implementing this we have seen tangible time savings and improvements in accuracy.

In addition, the mobile industry has a good parallel in the desktop which helps us better understand how mobile will develop. Keeping an eye on developments within this space is in our opinion just as important as mobile for staying innovative.

5. ABSORB THE BEST INFORMATION

There are many sources of information available on the world wide web, and we encourage all our employees to absorb the information around them. In particular, we are finding that following the best minds in the business on Twitter and Medium with regular internal updates on the industry gives us maximum insight into our industry for very limited investment. There are also many free sources of good information online from the larger technology companies such as IBM, Adobe and Google.

Thomas Twigg is the lead Global Strategist within M&C Saatchi Mobile. He is from a multi-channel comms planning background, working on the likes of Lastminute.com, the RAF and PlayStation. His earlier projects ranged from operator loyalty programmes to mobile technology. A prolific speaker at key media events, including Cannes Lions, Tom has given talks on topics such as gamification and mobile's role within the multi-channel-mix.

FIVE TIPS
FOR EFFECTIVE BRAND-AGENCY PARTNERSHIPS

by **Tuomas Peltoniemi** President, TBWA's Digital Art Network (DAN) Asia

The nature of brand-agency partnerships has changed significantly in the past few years. This change is driven by the speed of culture, the aspirations of 21st century brands, and the changing media landscape. This change has been accelerated by the rapid growth of digital, social and mobile marketing channels. Consumers also have different expectations of brands than they used to. They expect brands to be in sync with culture, respond to customers in real time, and focus on creating products and services that match their fast evolving needs. Incumbent and modern marketers are becoming more nimble, while operating in a media landscape that is significantly more complex than it used to be. This is also forcing agencies to evolve, and to change the way they approach collaboration and partnerships with brands.

So how can agencies and brands build effective relationships in this new economy? Here are the five most significant shifts that enable these partnerships to flourish.

1. FROM DEPARTMENTS TO TEAMS

Too often agencies and brands operate in silos. If marketers want to speak with someone in the agency, they contact the account management or project management teams. They write a brief, and then get the larger agency involved internally. Specialists from across the agency are not necessarily involved in projects early on, or exposed to information that may spark a big idea or a business solution.

Likewise, on the client side, a limited number of people are often involved in creating marketing campaigns and making key decisions. This may limit the amount of innovative thinking needed to create disruptive marketing solutions to business problems that may arise from different departments within the brand organizations.

In the new economy, the expectation of clients is to be interacting with the right people from agencies; the creatives, the strategists, the data analysts, and other specialists. Agencies also want exposure to the wider brand organizations, especially in the age of digital and social media, where creative solutions can influence much more than just marketing.

Agencies and clients should move away from this departmental thinking to create cross business teams that are custom built for each project, and include all the necessary specialists from the agency and brand teams.

2. FROM POWERPOINT TO WORKSHOPS

The agency process hasn't changed for decades. Clients brief agencies, and they go and work on campaign strategy. Agency then presents the strategy back to the client who will provide their feedback. The agency goes back to revise the strategy and presents it back to the client. This cycle repeats until both parties are happy with the outcome. The same process is repeated for creative and execution. The problem with this model is that a lot of time and

energy goes into crafting beautiful presentations for internal and client approval purposes. These presentations are often done independent of having client brand specialists as a part of the strategy or creative process – specialists who often have deep expertise of their industries.

More collaborative workshops are often only used in special cases and not widely used as the operating model for solving marketing and business problems. The old way of working is simply too slow for today's world. Customers and brands are expecting a more efficient approach to marketing, and the varied business challenges and channels available to communicate with customers, have created a world where solutions need to come from people with a wide array of expertise.

Agencies and clients should spend more time in different workshop formats, in the same room, working through marketing and business problems together. These workshops should include people from across the different specialisms of agencies and brands, who can bring unique perspectives to the strategy and creative process. This creates a more efficient partnership and focuses time and effort into solving problems.

3. FROM COMMITTEE DECISIONS TO CROSS-BUSINESS

Too often marketing decisions are made in small committees, who only look out for the interest of their

own department. This is particularly true in two cases: 1. When client organizations have separated their brand, digital, social, or any other marketing area into different teams, and 2. When agencies are tasked to work on only one aspect of a brand's marketing, for example only on social media.

These organizational models can create an environment where brands actually dilute the results of their marketing. Where a lot of time and effort is invested in building the brand, can hurt from conflicting messaging in another department's effort to drive sales through performance marketing. This style of marketing by committees has in the past, for example, been guilty of driving up the price of their own search keywords by bidding on the same keywords across the organization. This is a real client example.

Instead, marketing should be aligned through the entire business. Since in today's world, creative solutions can influence much more than just marketing, it's beneficial to work on a cross-business model where other brand departments get involved in the marketing process. For example, through a social business model that's driven by marketing, Nissan's HR department has been able to hire 1500 engineers. This is a great example of cross-business thinking.

Agencies and brands should ensure that they both involve cross-business teams in the marketing process to ensure that creativity and marketing innovation fuels business results across the organization.

4. FROM SUPERFICIAL METRICS TO FULL TRANSPARENCY

A critical component of successful marketing partnerships, is the ability for agencies and brands to optimize their campaign performance on an on-going basis. The proliferation of technology and availability of affordable and efficient data and insight tools make this possible. However, in the past, agencies and brands haven't always paid enough attention to what makes the work successful. Too often the metrics behind campaigns have been superficial, and haven't allowed for the optimization and learning of all aspects of marketing from creative all the way to the method of buying media.

Agencies and brands should invest time in creating their own success metrics that not only measure the outcome of a particular marketing activity, but also enables on-going optimization. These are often very different types of metrics, and they need to be designed and align on by agencies and brands before any campaign runs.

Full transparency in the data, along with the empowerment to test and learn is critical to success. It takes a mindset change for both parties to embrace this thinking, and takes some getting used to. However, when done properly, creative work becomes more measurable and the real results get better every time.

5. FROM PROCUREMENT TO PERFORMANCE

The commercial model between agencies and brands is often based on the time that different people in the agency spend in coming up with the work. This isn't necessarily the best way to value creativity and the business problems it helps solve. Brand marketers also have their own success metrics. These two metrics are not always aligned, creating a situation where agencies and brands are incentivized for different things.

For example, Airbnb, one of the most successful 21st century brands today pays a part of their agency fees based on how many nights are booked on their website. This aligns the commercial success of the brand to the commercial success of the agency, ensuring that all teams are working towards a common goal. This can be the best way to incentivize the agency in coming up with creative solutions that drive clients' business as well as build the brand.

Agencies and clients should find ways to align their business targets, build compensation models around those targets, and therefore share a certain level of the risk and reward of marketing campaigns.

In today's world, the expectations from consumers and brands have fundamentally changed. This has resulted in a marketing landscape that requires a shift in how agency and client partnerships can operate efficiently and drive better marketing and business outcomes.

By breaking down the company silos, working in a more collaborative way across the organization, by promoting cross-business decision making, having joint metrics for campaign success and on-going optimization, and aligning their business objectives, brands and agencies can enjoy more efficient partnerships, and drive incremental marketing and business results.

Tuomas Peltoniemi is President, TBWA's Digital Art Network (DAN) Asia. He has more than 15 years of experience in advertising. Previously, he was was the Head of Digital Arts Network in Singapore. He has spoken at events such as as ad:tech, Spikes Asia, MMA, Mobile Interactive, SES, Google Squared, and Google's Think Agency, and lectured at SMU, NUS, and INSEAD. He was earlier with digital production agency, !NOOB. Tuomas is also an advisor, mentor, and angel investor for startups.

THE ART OF ENGENDERING RECIPROCITY – MEANINGFUL CONNECTIONS

by **Gregory Armshaw** Digital Product Strategist/Advisor, Topme

Of the traditional media, radio is always the most personal as evaluated by the everyday folks we marketing people like to call the 'consumer.'

Radio is with you in the bedroom as you get dressed for work, in the kitchen as you cook your breakfast, in the café as you order your coffee, at work, and even directly plugged into your ears through headphones as you travel home on the bus. Listeners tune in to hear a friendly familiar voice of a radio host, to hear local news. It is up to date, travel news is updated almost instantly, weather is reported accurately, and news is reported as it happens. For many, radio was always on, and referred to as a companion.

In the digital age, radio has been usurped by the mobile device. It is without doubt the most personal medium (if it can accurately be called that) and for many of us it is the most personal possession we have. Up to 75% of us admit to using the phone in the bathroom, the majority of us sleep with the phone next to the bed. A few of us will even interrupt sex to use the phone. For most, mobile devices usually facilitate the first and last activity of the day.

Test yourself:

List any other possession or person that you spend more time with.

Hopefully your partner and maybe your bed are on that list. It is probably not that long a list though.

Mobile isn't a companion, it is an extension of our self.

With this in mind, how are we to ensure we are communicating with our potential customers in the right way?

How many of us consider that our customer may be reading our carefully crafted advertising message while they are sitting on the toilet, or in the middle of trying to break off a relationship, or consoling a friend over the loss of a loved one, or trying uplevel on Clash of Clans. Potentially, all at the same time!

This is the reality of mobile marketing: we are talking to customers at the nexus of multiple threads in their lives. Mobile devices carry their social identity, bank accounts, for some a wallet, and for most a life story in pictures.

So what is the answer to communicating to our potential customers in this most personal of contexts?

In my view, it is summed up by a single word – **Respect.**

The rise of ad blockers has shown us that perhaps we have not respected our potential customers enough.

With all the conversations about technology and data that take place in our industry as we 'target our consumer,' it is very easy to forget about the soft and warm human being at the other end of the process who is probably enduring a very busy day. Does he or she really need us to poke them in the arm with a badly targeted irrelevant message?

Let us look at our lovely customers lives through their phone:

Everything about their mobile experience is personalised. They have their own favourite apps laid out in a completely unique way. Their social feed is unique to them. Their news, movies, music, chats, and games are all personalised.

Our potential customers expect the services on their phones to be personalised. Whenever they see an ad that is not contextually and personally relevant to them, it stands out as disrespectful to its environment.

THREE STEPS TO SUCCESSFUL PERSONALISATION

STEP ONE: IDENTIFY YOUR POTENTIAL CUSTOMER

How can we show respect to these mobile potential customers? The first step is exactly the same as you should do with every piece of marketing - find out who they are. Luckily, the mobile device reveals such an incredible amount of data about our revered customers, that we have at our disposal the ability to tailor our engagement with them very well. Any of your ad tech vendors will be more than happy to show you how to more tightly personalise your messaging.

I asked Marco Koeder, one of the authors of the book 'The Six Immutable laws of Mobile Business' (Sugai/Koeder/Ciferri) to explain why contextual targeting is so important.

"When we carried out the research for the book, we found out that when developing mobile services and offers it is crucial to know the 'intention of the

moment' of the user. Once known, these services should either only serve one specific moment or be able to adapt to different moments for a specific user.

Our approach was partly based on network and communication theory with the user in the centre, as the main central 'node.'

*By giving the user access to the right content at the right time, at the right place, matching the right mood, **messages or offers would not be seen as advertisements anymore but as meaningful information or entertainment**. Thus the objective is to create a moment where brands help users and bring true value to them."*

STEP TWO: SHOW RESPECT

No more spray and pray. Insist on multiple levels of targeting and use appropriate creative.

A great example is the work that Hulu and Pizza Hut have done to allow customers to order pizza direct from an ad unit within the free service of Hulu. In the words of the Hulu CEO Mike Hopkins"

"With our effective targeting capabilities, this new innovation allows advertisers to target the right demographic, at the right time – all while allowing viewers to immediately pick up where they left off once their order is placed."

STEP THREE: SHOW RESPECT

Add Value to the customers' life

It is a privilege that your potential customer chooses to spend time with your brand. Unless you can truly say that your brand has no competitors then your potential customer has a choice, and is making a choice to engage with your brand. On mobile, that also means that he or she is also paying for the privilege through their data allowance.

Research by William Halfond USC and researchers from, Rochester Institute of Technology (RIT) and Queen's University in Canada in 2015 found that on average, advertising supported apps consume more battery life and 79% more mobile data.

(See https://news.usc.edu/79081/ beware-of-an-ads-hidden-costs-in-free-mobile-apps/)

As the use of mobile video increases, this advertising 'toll' is liable to significantly increase (due to the higher bandwidth required for video). Ask any marketer working for a mobile carrier how difficult it is to shed the reputation that you are stealing from the customer with hidden fees and data theft. The marketing industry does not need that reputation, so we need to add value.

A great example of a brand adding value to their customers lives is Nike (check out their case study on the MMA Case Study website here).

The Nike+ platform allows them to keep contributing to the everyday life of runners. In this MMA Smarties award winner, they integrated the Air Pollution Index into their app, thus alerting runners in real time whether it was safe to run outside or if they should train inside instead.

It is no excuse to say that it is easy for a brand like Nike or Coca Cola to add value in this way. Even a soap brand when thinking creatively can add value into their customer's lives. Have a look at what Lifebuoy did in Indonesia with flood warnings delivered through an ad campaign (the case study is also on the MMA website: 'Lifebuoy Flood').
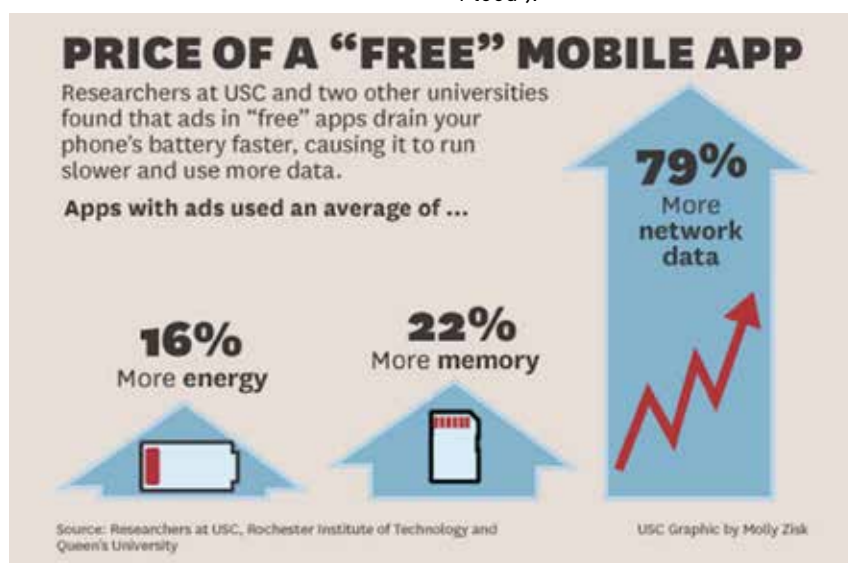
The Asia Pacific now counts and the biggest mobile commerce region in the world, thanks to our friends at Alibaba and Tencent. So, we must now consider what the online equivalent is of free parking at the mall. Are we expecting our customers to pay to shop?

Berniaga (now OLX.id) Indonesia's premier online classifieds market place, didn't think that was fair. So they paid for the customer's data while they browsed their site. Because they worked very closely with the operator, they also secured exclusivity on the advertising units served within the free browsing period.

The Opera Mediaworks case study explains the value added to the customer:

"By sponsoring the cost of consumers' internet use for 3 hours, Berniaga was able to get its brand in front of Telkomsel's customers in an extremely positive light — providing consumers with free access to the internet, while at the same time promoting their website and driving traffic to it."

These are all elegant marketing solutions that think about the customer - and instead of interrupting the mobile experience of the customer, they add value to it.

In South East Asia alone there are over 20 million brand new mobile internet users every year. Brands greeting these new users with respectful mobile marketing experiences and investing in their online lives are likely to engender a great deal of reciprocity in their potential customers.

THESE ARE NOT MARKETING EXPERIENCES TO BE BLOCKED, THEY ARE EXPERIENCES THAT WILL BE ENJOYED AND SHARED.

SUMMARY

The mobile device is the most personal marketing channel, we should respect that in the same way that we would

if we met a customer in the store. We should respect our potential customers and value their attention and their mobile data. By adding value and respecting our potential customers, all of the reputational challenges of our industry fall away.

Gregory Armshaw is Digital Product Strategist/Advisor at Topme, a mobile rewards and top up platform. Greg has hands on multi-national experience from the fields of Indonesia and the broadcasters of the Philippines to the modern trade of China. He has worked with brands such as ABS-CBN, Coca-Cola, Globe, GSMA, LINE, L'Oreal, Mastercard, Maxis, Nestle, Smartfren, Tata Communications, and Syngenta.
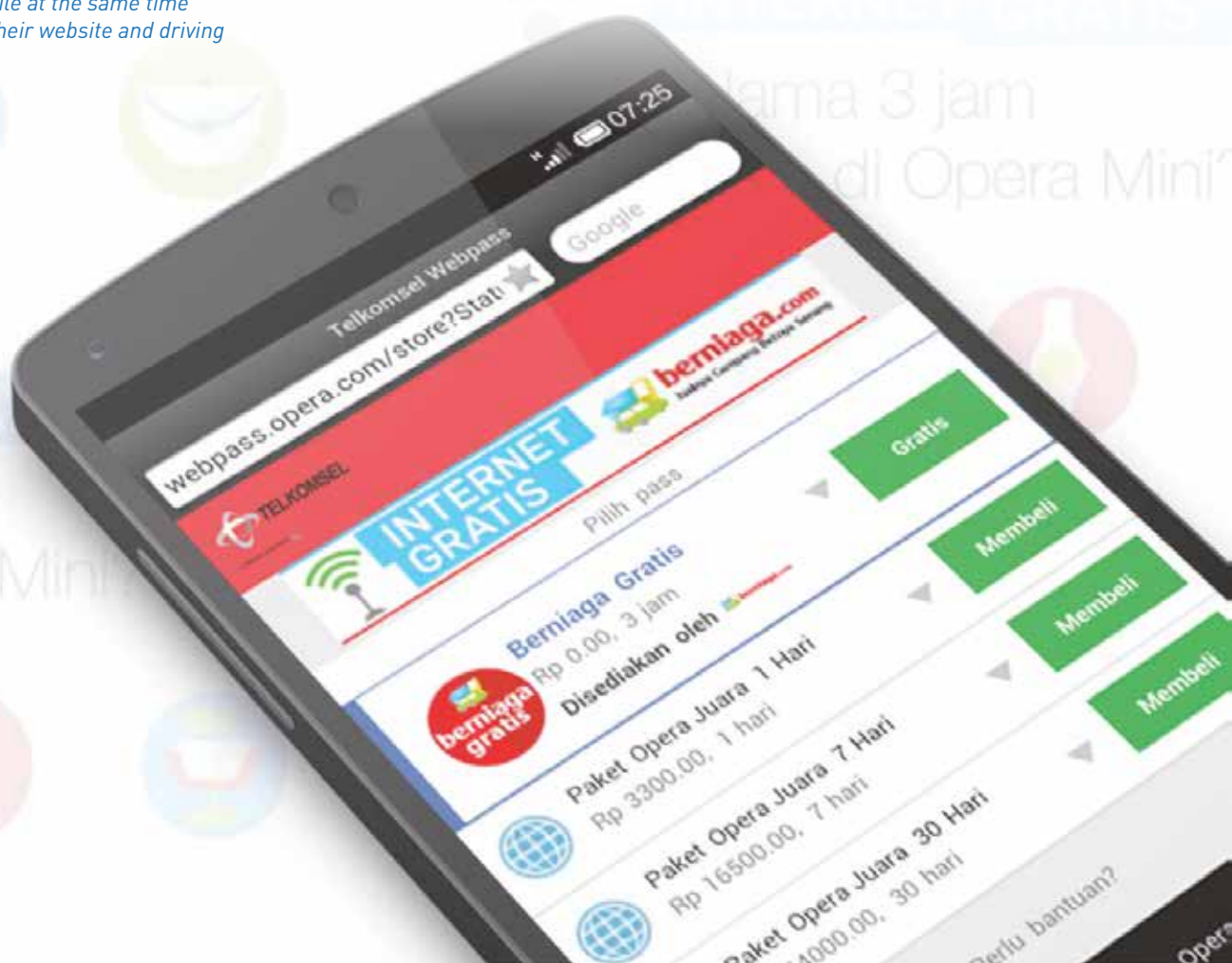
IDEAS POWERED BY STARTUPS!

by **Milind Pathak** COO, MadHouse India

Let's start by accepting that mobile isn't the future, it is the 'Now,' and this has been accepted by marketers across the board.

People today spend more time with their smartphones than their families and can't even think about a day without accessing their smartphones (on an average a person looks at the smartphone every six minutes). Programmatic, performance marketing, integrated campaigns and the like aren't buzz words any more but a hygiene for most brands. It's not only demographic now - we now have contextual, behavioral, geography and interest-based targeting possibilities.

For several years, we have been localising breakthrough global solutions and technologies to cater to our needs. This replication drives innovation from example and leads to delayed innovation as a result. Here is where we need our right brains to work their magic. Are you familiar with this question? 'We already do this or have done this before, WHAT'S NEW?'

Brand marketers are always asking for new innovations in mobile. The answer to this question is: startups.

Startups either fill a gap or create a new market need, and - funded or bootstrapped - provide immense opportunity for agencies and brands in the Indian market. They get to leverage local knowledge and expertise to innovate faster and with the most relevant solutions made for the market we aspire to serve better.

The new trend that's emerging in MNCs - be it an agency, a product company or a brand - stepping forward to put marketing dollars in startups is 'What is in it for them?'

What's in it for the Brand?

A FIRST-MOVER ADVANTAGE

A new technology that your company owns/partners/uses for a year or more, and no one else has access to it. This gives a brand an upper hand and a new go-to-market idea they can cash-on till the innovation is opened up to their competitors.

Target's Retail Accelerator Program is one good example, where they are only looking at startups that have interesting innovations in the retail space. What's in it for Target? With a small investment amount in a startup, they get to create a community to retail innovation startups and use their solutions for the brand before they hit the market in the open.

BREAK THE CLUTTER

Once the consumer has related your brand to an innovation, whether it be a product/solution/communication, your image in the mind of the consumers has changed forever. Not only will they remember your product, they will also map your brand as cool and innovative and this will definitely improve the brand recall.

Looking at what the brands want, Unilever and Coca-Cola have nothing to do with digital space in their core business and still are investing in digital startups. The biggest success is mobile marketing solutions company BrandTone a co-founded company by Unilever Ventures. Coca-Cola with its founders are looking at startups from all walks of life. So what's in it for Coca-Cola? Stated on their website: *"[I]f we can commercialise the startup's product or service within Coca-Cola, it can drive topline growth via product or service sales, as well as bottom line growth via operational efficiencies."*

HEDGE AGAINST THE RISK

Brands are risk-averse, they are looking at their current employees to work on projects that concentrate on their current KPIs. However, for any company to grow you need additions to their product and brand value and expand what you can deliver. To achieve this, companies align with startups that complement their capabilities and create new opportunities without negatively impacting the core business.

Continuous innovation is the only constant, and brands know it.

What's in it for the Agencies?

DO THE NEW

Innovation as a process streamlines the influx of new ideas and inventions. This gives agencies a constant barrage of ideas knocking on their doors. When KRAs are assigned to innovation as a business unit, efficiencies are brought into the process of innovation.

Ideas like Disney's Augmented Reality Colouring Books take the activity of the colouring experience one notch up. Via this solution, when a child colors inside an AR enabled colouring book, an augmented avatar of the

same drawing gets coloured as well when they look through the Disney mobile application. Thus, the child sees their creation come to life. Such innovations are sitting ducks if not introduced into the market.

Looking at innovations closer home, we can talk about Greedy Games, India's first mobile gaming ad platform. This platform gives ad inventory native in-game and makes the brand visibility within relevant games on hoardings, T-shirts, car wings and such. This makes the brand non-intrusive and most relevant.

SCALABILITY OF STRATEGIES

Ideas that the agency/media takes to the brands get an innovation push. It constantly showers the brand with the new and upcoming and answers their question of 'What's New?' before they even ask for it!

A case in point, Glamour Magazine used SnapTag, an advanced, customised form of QR code, to turn its magazine advertising pages into mobile shopping experiences, giving consumers the opportunity to purchase products directly from the magazine. The 'Buy-it-Now' mobile commerce campaign enabled advertisers to activate a sale where and when consumers were motivated to buy. Consumers received incentives for buying directly from the pages of the magazine, and the products were delivered to their doorstep.

COST ADVANTAGE WITH NO COMPROMISE ON QUALITY

Startups enable ideas that augment the capabilities of the agencies. Startups own the resources and the deployment capabilities that help keep the agencies lean while expanding their portfolio of offerings.

Agencies can benefit by aligning with startups in on-boarding better talent. The concept of an established brand has become stereotypical and the pool of marketers and product creators are not interested to work in the closed hierarchical structure. They are looking for startups to work with and to add new depths to their portfolio to work independently and to have a voice of their own in the company's growth agendas and new

innovative ideas. When an agency has a startup onboard, it also opens a window for them to get a better talent pool and hence give new direction to their company's thought process.

What's in it for Startups?

A ROBUST GO-TO-MARKET STRATEGY

Experience in the market is paramount to achieving business goals. The startups that are aligned with an agency/media partner have an advantage in the market, powered by the capabilities they have gained as a result.

Agencies and product companies are in the forefront of this new culture of helping and aligning in startups. We have Indian companies and Madhouse India with Madlabs works, with the mission to accelerate commercialisation of innovation in mobile marketing and advertising. They mentor startups to create products that are more brand-ready and are easily consumable and also are almost market-ready.

MARKET ACCESS

Some brands and markets come with big barriers to entry. These barriers are easily surmounted by aligning with those agencies/media partners that have deep roots in the industry.

With people, mentorship and expertise, you have access to talent who have been facing the market for decades and know what the consumer wants. You have access to them via a mere phone call, which a startup can't easily access if working independently.

Brands have been working for decades and they know people. Their circle includes sub-brands, vendors, advertisers, partners and media. A brand that invests in startups gives them an opportunity of beta testing the product on their campaigns. Startups get to beta test on a live client without any repercussions. Brands introduce startups to media and vendors, they get free coverage and build new relationships that they can cash on when they go independent of the brand.

Fostering **innovation as a process** helps design an innovation ecosystem within the media/agency side, and creates a ready pool of innovations waiting to be used by brands to take their message across in the most innovative way.

In sum, this approach represents a win-win for all stakeholders to deliver on KPIs: startups, brands and agencies. The only answer to the over-arching question 'What's New?' is bringing a process to the madness that is Innovation. And the movements like Madlabs by Madhouse and Groupm Next are the torch bearers to bring innovation thinking into the marketing ecosystem.

Milind Pathak is Chief Operating Officer at Madhouse - South Asia. He was earlier part of the leadership team at One97, where he was heading Mobile Marketing unit and also International Business. Previously he was at Comviva (later acquired by Tech-Mahindra) / Mitsui / Buongiorno. Milind has been contributing to various forums and associations and held positions of Co-Chair at MEF for the Asia Chapter, Co-Chair for Mobile Marketing at IAMAI, and jury for mBillionth Award for three years.

REDEFINING THE BANNER AD:
THE END ON AN ERA!

by **Martin Nygate** Chief nanu, Gentay Communications

Banners on mobile phones and their derivatives, the pop-ups and lately the video inserts, are dying or are already dead. We are watching the last gasps of breath before their attractiveness as a form of revenue generating advertising is finally put to rest.

Historically, banners were conceived for display on desktops and later on laptops as a way of generating revenues to subsidize the cost associated with free-to-use websites. Progressively, we all became accustomed to viewing these banners that took up a small fraction of the screen whilst enjoying the content displayed on the desired web site.

Over time, these displays became more intrusive and more sophisticated, prompting the majority of users to install various ad blockers or other tools to combat the blatant and unwelcome intrusion on their screens.

However, a small majority of users still benefited from the exposure to these adverts and the advertisers did derive benefits from these forms of advertising - as demonstrated by the websites that displayed their adverts using advanced algorithms and quantitative measurements.

The arrival of smartphones with significant processing power and enticing display screens got the advertisers excited even more.

However, with a surprising lack of creativity and appreciation for the comparatively small screens when compared to desktops or laptops, the industry simply copied the same 'technology' used on large screens and imposed them on smartphones.

As a consequence, we were bombarded with intrusive banners which, due to the screen size, are impossible to read and have become truly ineffective as a call to action. Users have assumed a new attitude of banner blindness where the eye simply ignores these banners and, as one industry observer highlighted, you are more likely to get hit by lightning than to purposely click on a banner!

This has resulted in a dramatic decrease in CTR's (Click Thru Rates) with campaigns forced to incentivise users to click on banners by offering tangible rewards. This has reduced to virtually zero the revenue generated by banners.

With the demise of the effectiveness of banners as a source of revenue generation for various websites and free-to-use services, the industry then decided to force feed users with highly intrusive pop-ups. This has resulted in user frustration as demonstrated by the drive to introduce ad blockers on smartphones.

Fig. 1: Global view of ad blockers
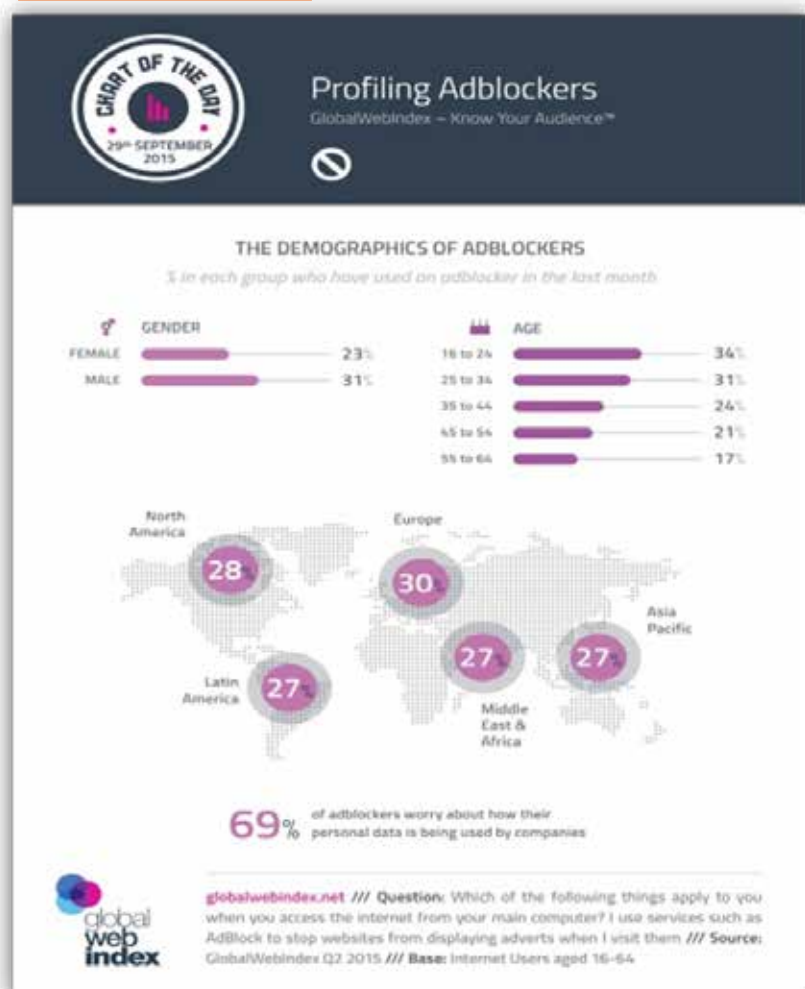
With Apple introducing ad-blocking tools on its handsets, it is highly likely that smartphone users will start to block pop-up ads on their gadgets as they do on their PCs and laptops. The numbers back that theory.

According to GlobalWebIndex, 29% of smartphone users globally block ads on their computers. Male smartphone users are almost 10 percentage points ahead of women for ad-blocking. There is also a key age-based trend; the younger smartphone users are most likely to block ads (with 33& saying they have done so on their computers).

What is striking is that the numbers are consistent all across the globe: at least a quarter of internet users in all places are already blocking ads, with Europe leading the charts at 30%. These numbers clearly show that people have become tired of seeing banners pop up on their screens. If this is the case with computers, imagine the future (or lack of it) of such banners on smartphones.

But the situation is not improving, in fact, it is getting worse – much worse!

The industry is now promoting videos on smartphones as a way of reaching out to the public to promote the advertisers' products and services. This means that we now have the 'pleasure' of waiting 15 or sometimes 30 seconds whilst a video plays, before we can consume the service rendered by the app or the website.

I suppose the argument is that there is no such thing as a free lunch. If we are consuming a free service from an app or a web site, then it is only appropriate that we pay with our time to be delivered a sales pitch. It is understandable, but do we also have to pay with our own money to be sold to?

Let me explain what I mean. These videos consume data – often 5 Mb or more.

In developed economies where we pay a fixed monthly fee for unlimited data, perhaps this may be acceptable. However, with many operators looking at ways to either increase revenue from data or to decrease the amount of cellular data the user can consume by 'throttling' or reducing data speeds once the user has exceeded a predetermined amount, these increasingly widely distributed videos simply serve to accelerate the speed to reach the throttling rate.

The situation is much worse in emerging economies with low speed data connectivity.

In these countries consumers usually buy pre-paid data plans. The implication of an unwanted video ad consuming data is that the user is indirectly paying to watch it. At the same time, to overcome low connection speeds, videos are often buffered in the background without the user's knowledge, to ensure smooth viewing of the video. Thus, the user actively pays to watch a video that he or she did not want to watch in the first place.

The advertisers are also increasingly rejecting the current forms of advertising that are annoying, intrusive, and to a large extent, ineffective. Consumer frustration and anger at these forms of advertising is often in direct conflict with the brand equity and image, and consumers are directing their anger and frustration at advertisers. Given this backdrop why would advertisers want to continue to advertise on smartphones?

Perhaps this explains why the global spend by advertisers on mobile phones is disproportionate to the amount of time users spend on the smartphones. According to eMarketer, total worldwide ad spending is set to reach US$569.65 billion in 2015. However, the ad spend on mobile is expected to be just US$42.35 billion. This is despite reports showing that consumers are spending more time on their mobile devices than on TV – which still accounts for a large chunk of global ad spend. According to a report by digital analytics firm Flurry, the average American consumer spends three hours per day on mobile devices, while time spent on TV is two hours and 48 minutes per day.

Perhaps advertisers recognise the flaws in the current forms of advertising over smartphones and the negative effect this may have on their brand. However, with the dramatic and sustainable growth in smartphones new technologies for advertising on smartphones is desperately needed.

One such technology deployed on the free call VoIP app 'nanu' inserts a 7-second highly targeted message over the ringtone on the caller's phone. This voice-over message is completely non-intrusive since the message stops as soon as the call recipient answers the call. In addition, brand and message recognition rates are extraordinarily high due to the fact that the caller is actively listening to the message with full attention whilst waiting for the call recipient to answer.

However, probably the greatest advantage that this form of advertising has over others is that the callers' call is delivered for free as a nanu outgoing call to any land line or mobile, anywhere in the world. This results in the callers positive disposition to the advertising message since the advertiser has 'given' to the caller the free call.

Martin Nygate is the Founder & CEO of Gentay Communications. He is the architect behind nanu, a free-calling app. He was earlier VP at Ulysses Systems and MD at Firstwave Technologies. His product expertise includes CRM, ERP, CCTV, and banking software. He graduated from Middlesex University.

10 YEARS OF MOBILE ADVERTISING:
LESSONS LEARNT, UNLEARNT AND RELEARNT

by **Herwinto Chandra Sutantyo** Digital Business Innovation, XL Axiata

Indonesia has seen some of Asia's best digital and mobile advertising tools being used, tested, improved upon and sometimes abused at many levels. The tools are not only shaping the country's approaches towards mobile and digital marketing, but also making it probably the only country in the Asia Pacific where all stakeholders are self-regulating the new marketing media.

It all started with SMS marketing among the banking industry back in 2001, which introduced advertisers to the early version of mobile advertising. At that time, the self-regulated players decided that branding is crucial and therefore the birth of so called 'masking' or alphanumeric headers to mask senders' mobile number was introduced. The masking function not only helped boost brand relevance in the SMS campaign, it also provided clarity and trust among recipients.

However, this didn't last long; over time with new digital and mobile businesses flourishing among content providers, SMS marketing was heavily abused to such a level that consumer drove class actions against telecom industry to stop such activities. The day we knew as Black October almost killed VAS (Value Added Services) among telecom and content providers. When greed took over common sense and privacy, the self-regulated industry became a regulated one. Today, even for owning a 'short code,' one must go through regulatory body known as BRTI and be approved of before even masking and numbers are given by telecom companies.

Nevertheless, the events that followed have strengthened the mobile marketing presence in the country, in particular for SMS and MMS, for many years before smartphone entered the market.

Indonesia's internet penetration may be one of the lowest in APAC, but 70% of its users access them from their mobile phones - making it among the biggest mobile internet activities in the region. Then came social media - Facebook, Twitter and many more - putting Indonesia again among the world's highest social media users and Jakarta as world's most populated 'tweet city.' These have helped boost digital and mobile advertising to leap and bound in less than five years.

As smartphones are getting cheaper - you can even get a decent Android one for less that US$80 these days in Jakarta - more and more consumers are downloading apps, games and so forth making Indonesia again one of the highest in usage of apps. In-app advertising has also seen significant growth ever since Opera entered the smartphone market, where they dominated the feature phone smart browsing capability with added in-browser marketing.

We are also seeing programmatic buying, DSP, SSP, and ad networks growing year on year as the population is absorbing more and more internet, and thereby advertising. Even Facebook and Twitter are faced with ever growing demands for mobile advertising on their network.

The telecom industry is also faced with high data demands as smartphones are penetrating more and more rural areas in Indonesia. Consumers are now data hungry: they demand more speed, more browsing time, affordable access and if possible free to use! These all add up to new services being developed and offered to the ever hungry subscribers. Pre-paid and post-paid are no longer about segregating economic status, they are only means of paying for services.

With 95% of Indonesia's MNO (mobile network operators) subscribers being pre-paid, the government has recently released new regulation where subscribers will not be able to easily swap SIM cards. The new law must have subscribers registering their actual ID card when they join telecom services regardless of whether they choose to be either pre-paid or post-paid users.

Will the new law also affecting mobile advertising? In many ways they do, as consumers are obliged to follow the regulation and are also entitled to not be served by advertising - hence the possible ads-supported mobile marketing service looming soon. The new law also protects consumers from non-responsible advertising. Since 2010, the Financial Regulator (OJK) is also placing control over banking and insurance sectors to be more attentive towards the use and misuse of mobile advertising when promoting their services.

Furthermore, Indonesia's consumer watch and ICT (Information, Communication and Technology) ministry are putting pressure on

26 ≡ MMA APAC 2015 Yearbook

the advertising industry - including telecom companies owning and operating digital and mobile marketing arms - to regulate the type of advertising contents that are allowed to be published. Pornography and any related or supportive images, text and contextual messages are a big 'No.' Despite stricter pressure and regulations, the sanctions and penalties are not well thought of; however, knowing how Indonesia runs, those may be very severe and all players are respectful to not break them.

Mobile has definitely changed the nation. Indonesia has always been a mobile-driven country ever since Nokia entered the market and wooed its entire population. With vast geographical boundaries divided by seas, Indonesia is not exactly easy to get around, and therefore having good infrastructure is a must and that includes telecommunication.

Being a mobile driven country also means we are never far away from our phone. We use it when we watch television during commercials or when a great scene is on. We are also very social and that is one of the many reasons why social media is popular. The majority of the population are quite narcissistic, hence the many tweets and posts of selfies! We use any available digital channel to sell stuff; we may even have invented social commerce where we abused social media to sell and offer services as well as products to others. Have you seen Instagram being used for social commerce? Only in Indonesia!

We lapped up advertising since we expected to be entertained or rewarded. Some of us have lived through the time when advertising was forbidden in Indonesia only to have it rebooted at its special time before becoming the norm. We despise billboards yet we always thought of one when planning a campaign. We hate mobile banners when browsing on our smartphone, yet we do not mind seeing one if it is rewarding us with free internet or air-time.

We are suckered for sexy women, hot men, and cute cats, - yet hate them when they are overused and exploited commercially. Indonesia has a large diversity of race and culture, which are unique from one place to another. Thus, creating a memorable and successful advertising campaign is tough as it needs to cater for those differences, and even tougher for mobile advertising creatives as phones are personal.

Some tips: you may want to create at least 100 creative messages with A/B testing for each, using mixed digital mobile media such as social, app, in-app, and so on to even have us interested.

Hence, 'Right Data' and not 'Big Data' is the only new way to market your services and products to Indonesians using mobile. There is no other way: at least for the next five years!

Herwinto Chandra Sutantyo (Twitter: @gfunkerwin) is the Digital Business Innovation Advisor at XL Axiata. He has more than 20 years of experience in the advertising and telecommunication sectors. He was earlier creative director for numerous advertising agencies, managing key accounts such as Unilever, Phillip Morris, Coca Cola, Danone and Garuda. He graduated from De Montfort University, and also has degrees in system information design and marketing from Middlesex University.

乐视视频

乐视2016独播全景图
ALL OF THE BEST ALL IN LETV

Q4
- 长城 — 电影
- 吃吃的爱 — 电影
- 中国式关系 — 大剧
- 羽泉圣诞演唱会 — 音乐
- 你看起来很好吃2 — 综艺

Q3
- 猎场 — 大剧
- 蒙面歌王2 — 综艺
- 斗志飞扬 — 综艺
- 28岁未成年 — 电影
- 爵迹 — 电影
- 盗墓笔记 — 电影
- 冠军面对面 奥运 — 体育
- 国际冠军杯（ICC） — 体育

Q2
- 锦衣夜行 — 大剧
- 新三味聊斋 奥运 Q2+Q3 — 体育
- 女神的欧洲杯 欧洲杯 — 体育
- 星球大战之超级对决 欧洲杯 Q2+Q3 — 体育
- 十周嫁出去2 — 综艺
- 极境 Q2+Q3 — 综艺

Q1
- 亲爱的翻译官 — 大剧
- 隐藏的歌神 — 综艺
- 你看起来很好吃 — 综艺
- Shake run Q1+Q2+Q3 — 体育
- 英超 Q1+Q2 — 体育
- 高跟鞋先生 — 电影
- 睡在我上铺的兄弟 — 电影
- 荒原 — 美剧
- 她很漂亮 — 韩剧
- 极品模王 — 自制剧

MOBILE DISRUPTION:
PERSONALISATION, AD BLOCKING AND BEYOND

by **Tanmay Mohanty** Managing Director, Resultrix and Performics India

This article identifies key waves of disruption in mobile, with tips for marketers on how to respond and innovate. Marketers are already sitting on a wealth of data; in future the amount of available data will only increase. This is primarily due to the emergence of mobile technology like wearables, mobile wallet, Smart Cities Mission (SCM) and acceptance of IOT (Internet of Things). The WHO predicts that by 2050, 70% of the world's population will be living in smart cities.

1. DATA FOR 'ME'

In India, due to SCM, vernacularisation of content is going to rise as it is enabling data penetration in rural regions. Making full use of this data to truly understand consumers and offering personalised services and content for them will be the secret of successful marketing. But the success of mobile technology is primarily dependent on the entrant of superior quality data connectivity and affordable smartphones. Therefore, it is very important that as marketers we closely watch the following trends.

We will see a massive explosion of 'mobile-only' content. Mobile-only content is typically glanceable content or responsive content adapted not only for your phone screen but also for your type of data connectivity. Faster connectivity will result in seamless, lag-free, and highly enriching video experience on smartphones. This coupled with the on-the-go access to video content will make mobile the first choice for watching videos,

popularising the trend of 'TV on the go.' Players like Hotstar and Vuclip have already set the trend of optimised video delivery as per screen or connectivity access. Players with similar scale like VOOT and JIO plan to follow and contribute to the growth of the market at a rapid pace.

Fig. 1: Growth of 4G

Environment in which users are consuming data today. The graph here clearly states that by 2018 we will see an exponential growth of 4G users from 5MN to 90MN.

It also clearly demonstrates the growth of 4G enabled smartphones(sophisticated devices) which is predicted to be double the number of 4G users ,i.e, 180MN by 2018

This growth will spur demand for more evolved forms of advertising. Till date, we have been only talking about mapping location and context advertising as marketers. Mobile is the only medium that offers accurate targeting to quite a large extent. But due to technology enhancement, we will realise that there will be the
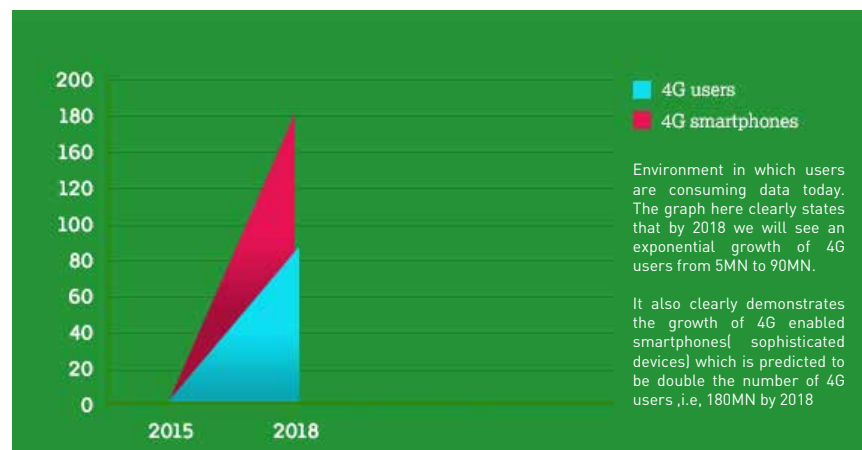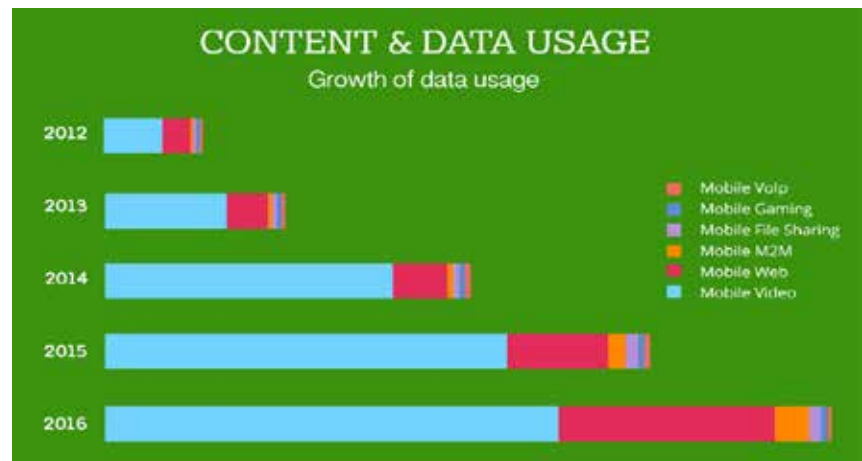
Fig. 2: Growth of Mobile Video

Content consumption is dominated by Mobile Video. Source: Cisco

need of targeting beyond location and context - and extending it to location, context, **emotion and real-time.** Brands identifying your true emotion in real time will be most successful.

Marketers will be able to map the TG's emotion by the type of content he is consuming, and technology will help track facial recognition, voice activation, eye tracking, and the like. This will provide the audience impetus to buy products while he is at a retailer through sensors such as beacons. This will help marketers to efficiently drive 'data for me.' But to deliver the right message at the right moment will be the most critical factor for its success.

2. AD BLOCKING AND NATIVE PROGRAMMATIC

Despite of the rich real-time data availability, marketers will be struggling with a very significant hindrance in the mobile advertising ecosystem: ad blocking. To date, this has been largely a desktop issue. But with the release of Apple iOS9, which comes with a built-in feature for ad blocking, this has stepped into the mobile domain too. But the twist is that the majority of mobile ad blockers will work on mobile browsers but not in-app. An estimated 84% of mobile time spent is in-app (Source: Flurry). Therefore, this will accelerate the demise of the web banner.

Furthermore, along with the demise of the web banner and acceptance of mobile technology, seamless or contextual messaging in real-time is predicted to be in demand. To sum it up:

"Rise of Native Advertising"(due to web banner demise) + "Rise of Mobile Programmatic" (due to data availability) = Mobile Native Programmatic

As we look at optimising real time data and exploring native advertising, we can conclude that the market's need of the hour would be mobile native programmatic.

3. MOBILE FIRST IS 'APPLICATION ONLY' OR 'MOBILE ONLY'

Another important callout in the ecosystem would be shifting strategies

from the **'Application Only'** approach to the **'Mobile Only'** approach. Two basic questions that strike at this time arise here. Can both the scenarios in isolation be considered as Mobile First? Is the ecosystem already ready for Application Only?
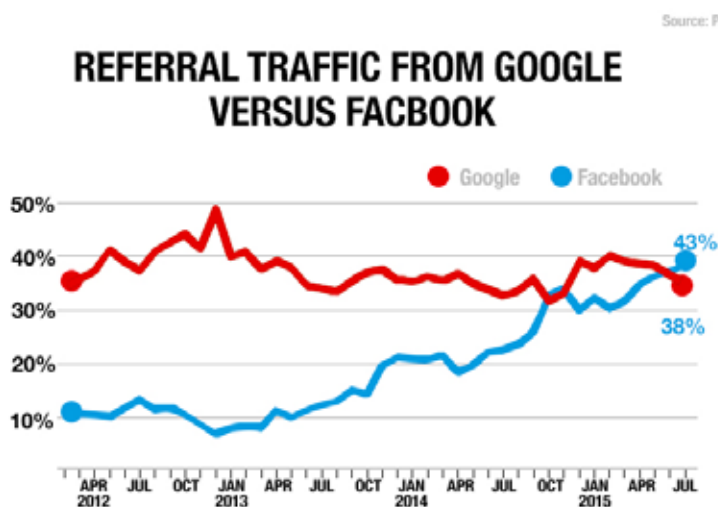
First, it is important to understand the basic difference between 'Application Only' and 'Mobile Only.' It is incorrect to conclude that you are a Mobile First organisation if you are not able to cater to your audience whenever he wants you (WAP or app). You might be disappointing a lot of your customers who would want to have access to on-the-go content as per their preferences. Hence, to be categorised as Mobile First, it is important that you are present for your consumers whenever they want you. Adding to this, if you cater them a seamless experience (like what Flipkart is practicing on its site), then classification as Mobile First becomes imperative. This will drive loyalty towards your product too.

But how do we take a step further and drive engagements for consumers who already have the app downloaded? It has been observed that if the application is downloaded, consuming the real estate of your phone, and if it does not have much utility or value, there is a high probability that it is going to be forgotten very soon or deleted. This will lower the engagement rating. So, it is important that consumers see value and are continuously engaged

to drive the engagement level.

One of the easiest, most convenient, and cost effective options would be through notifications about the benefits of the application downloaded. While responding to the communication, he can be immediately taken to the destination where he can reap the benefit instead of landing him on the entry page of the application.

Deep linking of the application needs to be incorporated to make this happen. In addition to notifications, there are more avenues like search and social that a consumer is exploring in the mobile Internet space. We have seen that information-seeking behavior has evolved and is highly dominated by social media. Facebook has reportedly been driving higher traffic as compared to search in some cases (see Fig. 2).

Fig. 2: Google and Facebook in search space

An estimated 89% Facebook traffic is mobile skewed. Therefore, it is fair to assume that information seeking is mobile dominated. Deep linking in contextual ads will lead your consumer will directly land on to the relevant page driving enhanced experience and higher engagement.

4. SOCIAL CHAT AS A NEW MEANS OF SHOPPING

Young travellers research well before they start their travel. Peer influence or choice plays an important role at the purchase point. Social platforms like Facebook or WhatsApp allows them share their experiences in real time, check prices, send photos of purchases or even take back orders on behalf of friends. These experiences have given a new definition to retail shopping today. These activities can be tracked intelligently and used for a brand's messaging to deliver the right message at the right time with technology enhancement.

Understanding this shopping behavior, ecommerce players are taking the shopping experience to the next level. Mobile shopping has always been an isolated experience. Players like Flipkart, which is today one of the leading m-commerce destinations in India, has analysed this behavior, and launched the 'Ping' feature to give users a social shopping experience. It is a chat platform where shoppers can share their basket and take recommendations as they would while shopping with your friend at a retail store.

CONCLUSION

In sum, what is causing disruption in the mobile ecosystem is the demand by consumers for access to OTT services or content. Initially, operators perceived OTT services as a threat to their revenue, but eventually they have realised that with advanced technology and sophisticated screens, it has become imperative for to either partner with them or develop new in-house services to compensate for the shrinking revenue from voice and SMS: for example, Wynk from Airtel, or Box Office from Vodafone. Market reports predict that by 2016, around 45% of global smartphone users will be using OTT services which will be an important element for operators' revenue stream. These new OTT services will bring in new innovations or disruptions to the ecosystem. Operators have to embrace these changes in the ecosystem if they have to grow and expand their consumer base as the consumer is very much in charge.

Tanmay Mohanty is the managing director of Performics and Resultrix, part of the ZenithOptimedia Group. He has rich and diverse experience of over 15 years, and has handled management portfolios at companies such as Jasubhai, Merchant Media, Dalal Street and Urja Communications. He was previously the chief operating officer at Interactive Media & Communication Solutions (id8 Labs).

BRINGING TOGETHER SOCIAL, COMMERCE AND ADS

by **Matthew Talbot** SVP, BBM, BlackBerry

Just as the early 2000s were defined by the 'race to the internet,' with traditional retailers rushing to ensure they could market and transact online, the mid 2010s have been shaped by brands deploying increasingly sophisticated ways to target an ever more mobile customer. And while some developed economies are nearing saturation point when it comes to smartphone penetration, two million new smartphones are still sold every day, globally.

This presents brands the ability to target an audience increasingly reliant on their smartphone as their number one route to the internet – and drives massive opportunity, for customers and brands alike. However, it also creates significant challenges for businesses, in how to reach and effectively influence an audience.

What is undeniable is how mobile technologies have disrupted traditional markets and retail. Instead of merchant-created marketplaces, today, brands must seek out and attract customers in a number of places – online, but increasingly, in the physical world too – where they are already spending time, congregating, conversing or engaging.

The world's major chat apps have been a force for change in this respect. Most started out as simple chat apps; often, the beginning of their fledgling appeal was simply that they offered a free replacement for SMS text messaging. Yet, referring to the larger players today simply as 'messaging apps' inherently devalues how rich and complex these true platform players have become. Many have become thriving e-commerce ecosystems unto their own right, appealing to and then hooking in their

users, to the point that the majority of their smartphone lives start from within, and often won't leave, the confines of the app.

This shift – from 'chat' to e-commerce ecosystems bringing together social, ads and ecommerce – is significant, and has seen the emergence of an entirely new business model for many of the brands who own the apps. The brands have realised the potential to monetise the communities of users dependent each day on their app, through one of the most effective examples of truly targeted advertising. Equally, companies who could never afford the often huge sums of money involved in above-the-line advertising, can suddenly afford to reach a customer base with the confidence that their targeting is accurate – and with the levels of immediacy and relevancy only mobile can enable.

The major messaging apps continue to revolutionise both the technology space, as well as commerce more broadly, because of the customer dynamics they enable. They have forged a new space, at the meeting point of social media and commerce. The 'social commerce' space is defined by user behaviours that are mobile-centric, real-time and heavily intertwined with social media. They are a community of buyers familiar with the mechanics of selecting and buying online, and who – because they have become accustomed to real-time chat – expect real-time gratification; hence the growth of the 'buy now' button.

Understanding and capitalising on these behaviours has enabled many of the messaging apps to become significant m-commerce platform

players; and in turn, has meant they have been able to leapfrog many established e-commerce companies. They are now in a position to leverage this scale to partner with many of the larger content houses, positioning themselves as guardians of one of the most engaged audiences an advertiser can expect to reach.

The shift to social commerce with the messaging app as the 'centre of gravity' has also disrupted players in mobile who traditionally owned the customer experience – whether operators, device manufacturers or operating system providers -- enabling a unique sense of ownership over users, because of the powerful network effect their communities bring to bear. To put it bluntly, users find being cut off from the messaging apps they depend on to connect and communicate with friends and family a much bigger hassle than switching between mobile operating systems.

What has fascinated me is the contrast between US brands and the pioneering approach to the market several of the bigger Asian players have taken:

1 > **Line**, from Japan, offers corporate accounts to interact and target consumers that follow brands and businesses. They have also shifted to allowing targeted ads to a broader user base. And they continue to extend and experiment, with other services including content, TV, games, payments, taxi-bookings and food delivery services.

2 > **WeChat,** part of the massive Tencent group from China, was among the first to activate advertisements in feeds. Companies can place in-app advertising

messages direct to individual users, linking to external ecommerce sites. Other services include payments, taxi-booking services, money transfers, content, music service and games. WeChat has truly evolved into a lifestyle commerce platform many Chinese are dependent upon.

3 > **Kakao** in South Korea facilitates direct marketing through a number of interfaces. Users can become 'friends' of brands, allowing the brands to push content like coupons, product information and media files. Other services include mobile payments, games and online purchase of goods and gifting.

These are just three examples of companies who first enticed their users with the promise of real-time chat – but have come to provide considerably richer experiences beyond. Similarly, **BBM**, BlackBerry's social commerce platform, first won over users with its engaging chat experience. But like counterparts in Asia, the growth we see in BBM today is primarily fueled not by people wanting simply to chat with their friends. Our global community of users has also come to expect BBM to provide them a greater selection of ways they can communicate, collaborate, engage and transact – hence moving to more of an eco-system for users, ads, content and ecommerce to come together versus pure 'Chat.'

This shift in the mobile channel dynamic is why we continue our hard work to make it easier to shop on BBM. We are already helping consumers and brands connect in meaningful ways. Now, we are working on launching one-click payments in our top markets. We recently updated BBM Pay, which includes BBM Money, an instant mobile payments service, as well as credit card and bank transfer services to users of the app on all major platforms in Indonesia – the second-fastest e-commerce growth market in the world. Next, we're looking to provide similar services in Africa and the Middle East.

Why one-click payments? Amazon pioneered one-click payments in the 1990s, making it faster than ever to get what you needed. Apple licensed the patent for its iTunes store, which effectively became one of the first successful mobile payment processes with the launch of iPhone. One-click payments are a big reason Uber and similar services are so popular. Simply put: one-click purchasing reduces barriers to purchase, which as any marketer knows, is a sure-fire way to increase sales.

New mobile advertising technologies are becoming increasingly sophisticated in the way they enable brands to reach this type of user – as well as in measuring the effectiveness of the message. However, ad-tech for mobile is still immature, despite there being robust solutions for delivery into a web browser. Businesses can address this shortcoming by working with multiple ad-tech providers, as being tied to one technology platform at this stage prevents collaboration with other industry players.

And as consumers enthusiastically embrace mobile shopping, we will continue to innovate in finding new ways to bring together social, commerce, ads and other services, providing the tools consumers want to connect with the brands they care about, so they can take advantage of the real-time 'shopping moments' wherever they are, and easily make purchases.

Matthew Talbot is Senior Vice President – BBM at BlackBerry. Matthew is a 15-year veteran of the mobile industry, and has served in senior leadership roles at SAP and Sybase after sitting at the helm as CEO of a leading wireless application service provider. He can be followed on Twitter at @Talbot_MCJ

MOBILE MARKETING IN INDIA:
HOW BRANDS CAN PERSONALISE USER EXPERIENCES

by **Avinash Jhangiani** Managing Director, Digital and Mobility, Omnicom Media Group

India is undoubtedly a mobile-first country. With e-commerce companies moving to app-only experiences, we are now pushing for a mobile-only country. Mobile continues to penetrate both rural and media dark markets, where TV and other mass marketing channels have little or no reach. Consumers are shifting to mobile for a variety of activities including video consumption and mobile shopping. Mobile is fast becoming the starting point for consumer-brand interactions.

The Indian government's emphasis on building digital infrastructure and literacy in 2016 and beyond will increase mobile penetration across urban and rural markets even further.

Smarter options for search and more integrated media types are creating many micro-moments (want-to-know, want-to-go, want-to-do, want-to-buy). The emphasis on increasing visual, contextual and vernacular communication also makes mobile the chosen platform for many advertisers.

In a world where digitally empowered consumers are taking control of who, what, where, when and how brands are allowed to communicate with them through various media channels, brands need to personalise experiences for consumers in a dynamic manner that can only happen by combining the power of mobile, data and creative.

In order to implement such dynamic hyper-personalised strategies, here are three must-do's.

1. KEEP CONSUMER AT THE CENTER AND BREAK

ORGANISATION SILOS

Consumers are demanding more immersive experiences across channels and devices. It is time to put the customer at the center (not mobile) and his/her journey has to be well understood. It is no more the responsibility of the CMO alone to drive customer centricity in a company. Brands need to provide value in key consumer moments with a new, more agile and collaborative mobile marketing approach.

Build infrastructure and processes to integrate mobile, creative, data and analytics to study and engage with consumers in real-time. To do this, marketing teams will need to drive collaboration by integrating cross functional teams that currently exist as silos - such as IT, consumer research, CRM, sales, e-commerce - for sustainable business value.

As mobile devices become the starting point for consumer experience, the convergence of creative with media is necessary to drive better storytelling. In an age of selling without selling, brands need to weave in the story with consumer's lifestyle and help address pain points for greater connect.

Brands today must have an always-on two-screen experience strategy. A story that goes beyond the TVC or print ad into the mobile medium is fast becoming a norm.

Also digital 'culture creators' will be the new 'brand ambassadors.' Made-for-web content creators like TVF, AIB, Y Films are partnering with brands to create short-form content that is easily consumable on mobile devices. Mobile and content go hand in hand. With Snapchat, Periscope, wearables

and experiential retail solutions, brands have ample opportunities to reach their consumers for integrated storytelling using their handheld devices.

Understanding the behavioural journey of the consumer will also become essential if a brand wants to leverage micro-moments. This results in media buying shifting from audiences to individuals in the coming future.

2. IMPLEMENT PROGRAMMATIC TECHNOLOGY

If there is any one area where Programmatic Buying reinforces its supremacy and relevance, it is with the Programmatic Creative Technology.

Showing the right message to the right audience at the right time actually gets redefined by this technology. This not only marries the speed of Media Buying with the speed of creativity but also layers it with utmost relevancy (data), thereby making the communication effective enough to resonate with the consumers and elicit any desired action from mobile consumers.

Planning Media used to be a binary choice in the past - but with the surge in multiple devices and platforms, we need to adopt new programmatic technologies to tailor messages for special passions, events, and moments. This allows us to be sequential in our messaging and storytelling and think about media as well as creative in a holistic manner. This comes with a typical Dynamic Creative process, yet it is little different from DCO (Dynamic Creative Optimisation).

While DCO is more related to retargeting users with a personalised creative depicting the last product seen with various options based on Data Feed, a Programmatic Creative is more proactive in nature. It is not necessarily based on Retargeting but shows a relevant creative made on the spur (on the first impression itself – even during Prospecting) to the user in the right context (situation) using variables like time, location, weather and placement. While a DCO is used in more performance-oriented campaigns, a Programmatic creative can be used even in delivering personalised brand messages to users.

This leads to personalised stories at scale and higher impact with more accurate targeting. The intersection of the 'Media Opportunity' and the 'Creative Strategy' coupled with Audience Data (User's Relevancy, the right context, ease of accessibility) defines the 'Win' in carrying the Brand's message across. Further, a continuous optimisation leads to results impacting creative and strategy and real time data analysis.

It is essential to optimise across the customer journey as consumers move seamlessly across screens and channels. Brands can overlay audience data with robust contextual signals like location, time of day, and even the weather to deliver highly customised creative that people will engage with.

It is a way of bringing media and creative together with data. A programmatic creative is data-driven by design and hence it results in a significant performance lift in the campaigns. What better way to weave micro-moments into campaign strategies than by making use of this technology.

3. IMBIBE A DATA-DRIVEN MINDSET

Data, the new currency, is becoming all pervasive in any campaign strategy across any medium and platform. In the mobile environment, data can be collected from various sources, such as directly from the device operating system, user profile information pulled from an app or publisher's user registration, and additional inferred data that third parties in the supply chain may provide.

As focus is shifting from buying impressions to cookies and to real people, defining a good data strategy is no more an option. Brands are beginning to appreciate the value of all types of data - first party, second party and third party. They are now asking as to how their CRM data and other offline data (POS data) can be married to the online data, so as to come out with more meaningful customer insights which can be addressed in a more meaningful way. With increasing trends around ad blocking, it has become essential for brands to understand customers better and provide more contextual value so that it does not seem intrusive.

Even Programmatic creative technology uses existing audience data from DMPs, audience data platforms (custom audiences) or leverage device language (vernacular) wherever possible. It can customise the messaging, design or ad behaviour to each type of customer in every step in the purchase decision journey by combining with situation signals like time, location, weather, placement, device or platform.

It can be further used to create new audience segments based on previous ad interaction for retargeting or custom messaging or build audience segments from data passed in custom values or parameters, such as information about the content being viewed when ad is served.

Creating personalised communications for every touch point is increasingly becoming important as people interact with multiple screens and devices. Cross device targeting can only be possible by an interplay of data (data matching), cookies and inferred demographics on many devices. An all-funnel approach becomes necessary as a user today may see an ad in one screen and possibly get converted in another. This further emphasises that just a click-based attribution modelling approach will no longer hold water, and may lead you to lose sight of the actual medium performing for the brand.

With the digital ecosystem getting more crowded, complex and entangled, brands must start leveraging data for greater RoI. Brands that are able to drive insights from big data will gain competitive advantage.

Avinash Jhangiani (Twitter: @goodthing) is Managing Director, Digital & Mobility at Omnicom Media Group and heads the digital business in India. Jhangiani is on the IMPACT Digital Power 100 list of most influential icons in India's digital ecosystem. He is a senior digital strategist and new media evangelist with more than 16 years of experience in India and USA. Under his leadership, OMG's Digital agencies won more than 100 awards, along with two Gold Lions in Mobile at CANNES.

HOW LOCATION INTELLIGENCE HELPS
BUSINESSES IMPROVE MARKETING EFFECTIVENESS IN THE NOW

by **Shobhit Shukla** Chief Revenue Officer, Near

With today's ever-evolving technological climate, mobile devices are a sort of extension of ourselves. Rarely do they ever actually leave our sides and rarely do we ever not need, or use them. Mobile phones in this day and age have completely transformed the way in which we communicate, travel, spend and shop. Mobile marketing demand is driven by the consumer's insatiable craving for content, the desire to be aware of news as it hits the press, know about big sales as they are announced, and indulge in the latest technologies as they are released.

This unappeasable appetite for content is something that marketers must see as an opportunity to capitalise on. Mobile provides massive data just waiting to be tapped. In terms of marketing, location intelligence has the capability to turn the once-problematic geographic location of consumers from an inherent challenge into a competitive advantage.

Finding relevant data is a critical component for accurately monitoring and directing sales and marketing efforts. By taking the time to strategically implement location dimensions of the consumer into tactical marketing, CRM and sales data, the maximum benefit of the data can be extracted.

In order to exploit the potential of location-based data, it has become necessary to plot geographical points of interest as they relate to the consumer trends, patterns, and distinct dependencies. Doing so will ultimately transform such data into authoritative information, capable of making a large sales-related impact for the business.

THE IMPACT OF MOBILE MEDIA ON MARKETERS

The biggest impact of mobile media and location data on marketers lies in the ability to go beyond their given selling space. Additionally, there is the engagement factor where marketers can understand consumers on a more granular level. Having such an in-depth understanding of the consumer base allows these consumer insights to be used for broader business intelligence.

This collection of knowledge that marketers can potentially gain from mobile intelligence – what the consumer mobile prime time is, where they shop, where they eat, when they commute, what they consume and so much more – is especially beneficial in ramping up sales strategies. Location intelligence allows marketers the opportunity to capture greater number of prospective consumers, by investing in the particular areas.

According to our latest consumer insights study on the QSR industry, professionals and students formed the top audience in the QSRs in Singapore. Higher number of consumers were seen visiting the QSRs on Tuesdays, between 5pm to 8pm. This intelligence can be used by marketers to reach out to their consumers via mobile, and other channels, at the most relevant time. Also, marketers can feed this intelligence back to their different stores for upselling to these audiences. For example, the QSRs can run promotions on Tuesday for students, or introduce merchandise that could help with increasing sales.

LOCATION INTELLIGENCE: DEFINING THE TARGET

Location intelligence is quite literally a combination of geospatial data and business intelligence, linked with cartographic tools that help to better comprehend location-based relationships of the geographic content that lie within given data. New-age location intelligence software has been designed to access and connect operational data stores (SCM, CRM, ERP) and business intelligence combined with cartographic and opulent spatial capabilities. These new powerful software platforms allow marketers to transform data from analytical insight into actionable strategies, which they can deliver upon.

Location is a fundamental factor in business. A number of recent studies have revealed that an average of 75 to 80 per cent of a business enterprise is identifiable via location. Such identifiers might include sales territories, addresses, delivery routes, store locations, customer's addresses, location of installed products, competitive store's locations and even the most fuel-efficient route

between the warehouse and delivery. In terms of business performance management, location awareness is key, and location analytics are crucial in terms of gaining a clearer insight of target consumers.

Location data is the key enabler to providing marketers with real-time insight on their intended target. Studying such data offers an in-depth understanding of consumer's demography, their interests, as well as their whereabouts. These added insights have the ability to reveal daily routes, commutes, and even particular types of content in which they prefer to consume on a daily basis. Armed with such data insights, businesses can continue to build on their current business intelligence. A more profound understanding of consumers will aide companies in making their store-wide merchandise selections while improving their competitive appeal with marketing solutions aimed at defined audiences.

THE ROLE LOCATION INTELLIGENCE PLAYS IN THE BUSINESS STRATEGY

Location intelligence transforms data into actionable insight that provides businesses with the knowledge necessary to improve a firm's operational performance. By employing location analytics, businesses can more efficiently and quickly implement data into action, achieve tangible results and gain a competitive advantage. Some major roles that location intelligence will prove to play in a firm's marketing strategy include:

1. Improving overall pricing strategy
2. Identifying sales territories that are underperforming
3. Enhancing advertising and direct marketing campaigns
4. Helping to define new trade areas for upcoming stores
5. Identifying potential markets
6. Analysing overall marketing & business performances.

Location intelligence gives companies a deeper understanding and more sophisticated insight of the outcomes that prior marketing efforts might have had, as well as how they impacted the firm's performance metrics.

Those businesses that implement location intelligence into their marketing strategy benefit by gaining improved information that helps them to reveal insight on their consumers, allowing them to take action involving customer bases, distribution channels, networks, as well as to maximise marketing decision making.

For example, consider a beverage company. This beverage company is looking to increase its sales and to maximise its sales force efficiency. Ultimately, the company is targeting a total of a million potential consumers, which include bars and restaurants within the Asia-Pacific region. The sales force consists of a total of 500 sales representatives. Bearing these numbers in mind, each and every sales rep is therefore required to visit 2,000 potential clients; or broken down further, that is eight to ten potential consumers every working business day.

The optimal sales productivity solution in this scenario would enhance territory coverage models and make routes more efficient for the representatives, not to mention prioritise the most profitable potential clients first. Location intelligence offers a better insight into such location-based relationships and geographical context. These types of solutions help businesses to enhance their predictive analytics, modeling potential outcomes to improve their tactical marketing campaign and augment sales planning.

LOCATION-BASED RELATIONSHIPS

It is critical that businesses take advantage of location-based relationships that are found within CRM data. For example, if businesses can understand where existing or potential consumers are in relation to a precise point-of-sale, this data will help to uncover how far traveled in order to reach the store location. It will help to map exactly where these consumers are in relation to the store, in addition to evaluating market penetration and so much more.

With better insights into their consumer location, marketers can more effectively and efficiently run

marketing campaigns. With such understanding, these campaigns will run across the appropriate media, in the exact place they should, at just the exact moment they should be, in order to reach target consumers.

THE BOTTOM LINE

Location intelligence plays an optimal role in allowing enterprise and merchants to overcome previous market impossibilities. Collecting and analysing mobile location data enables them to make effective and efficient marketing decisions like they have never been able to before.

This is the dawn of a new age, as marketers can use the knowledge gained through location intelligence to more appropriately allocate their spending from across multiple channels to assigning it to specific moments in time. Location data now makes it possible for marketers to understand consumers at a much more intimate level, target them with pertinent messaging across relevant channels, measure the impact that such real-time targeting has on the consumer, and to stay relevant to target audience by broadening business intelligence through consumer insights.

Shobhit Shukla is Chief Revenue Officer, Near. He was earlier Head of Business Development at InMobi, driving publisher partnerships and alliances across South East Asia, Greater China, India and Australia. He has also worked with Qualcomm Ventures and Morgan Stanley. Shobhit holds an MBA from the Indian Institute of Management and is advising multiple early stage startups on their growth strategy.

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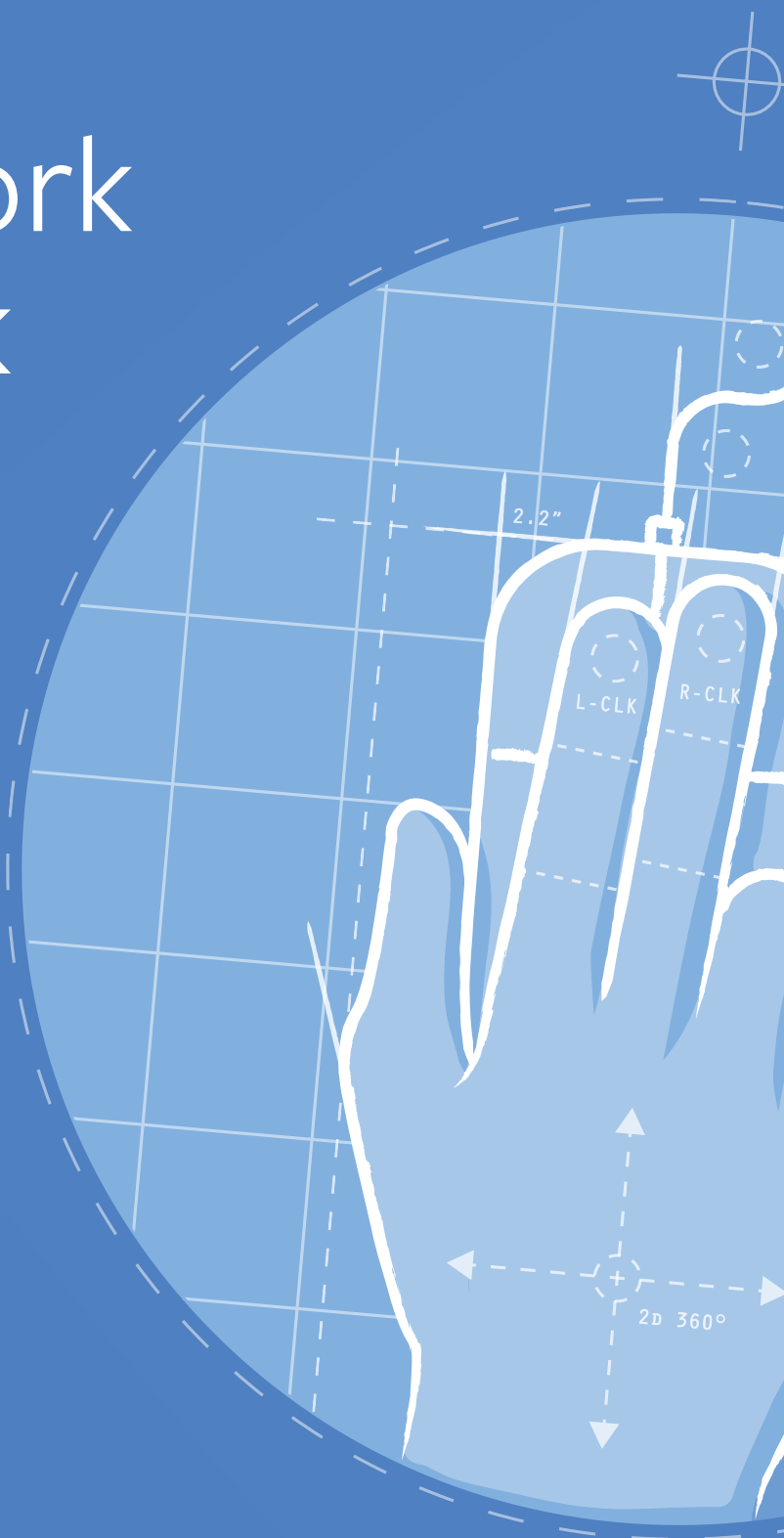
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PART II

SEIZING THE MOBILE MICRO-MOMENT

STATE OF APP NATION IN ASIA -
AND WHAT IT MEANS FOR MARKETERS

by **Nitin Mathur** Senior Director, Marketing (APAC) & Head of Media (INSEA), Yahoo

According to a recent global report by Flurry from Yahoo, there are globally 280 million 'mobile addicts' in the world – people who use apps more than 60 times daily and whose apps take up 90% of their time spent on smartphones. The number of mobile addicts has increased nearly 60% since 2014. To contextualise the size of this group, which grew from 176,000 to 280,000, if the number of mobile addicts were the population of a country, it would be the fourth largest country in the world.

From music apps that allow us to sequence, download and listen to our favourite numbers and calorie counters to time-management tools and travel organisers—there is an app for virtually everything under the sun. Not just that, users are spending more time than ever on mobile apps, downloading on average nine apps per month.

With all this in mind, we thought it was high time we took a deep dive into mobile app activity in Asia as we have done in the past for other areas around the globe. Flurry from Yahoo currently tracks 610 million devices monthly in Asia, allowing the Flurry team to have a comprehensive view on how Asian consumers engage with their mobile devices. This study examines how app users in the top 30 Asian countries differ from the rest of world, where they are driving growth and how that growth is impacting smartphone use.

Asia is a large, diverse region, with both mature and emerging Internet markets, and varying levels of smartphone penetration – so one trend does not fit every country. Having said that, we've seen nothing but growth in app usage across the region. All Asians love their smart devices, but there are marked differences in usage and preferences across the continent. Let's take a look.

Key Insights and Trends from Flurry: State of the App Nation in Asia
(All data as measured by Flurry: YoY May 2014 - 2015)

Asia's app usage grew 77% YoY, outpacing growth globally. The double-digit growth in the region - from an already large base - is astounding!

Diversification of apps: App use is shifting from entertainment and messaging to more functional categories that are utilitarian and enhance productivity. The fastest growing app categories in Asia are:

- Shopping & Lifestyle - 278% session growth YoY
- News & Reading - 134% session growth YoY
- Utilities and Productivity grew - 89% session growth YoY

Asia leading the phablet revolution:

- The phablet is the fastest growing mobile device globally, with growth in Asia outpacing growth in the US – 42% of user sessions in Asia are on phablets as compared to 31% globally
- However, when we break it down, we find that South Korea, Hong Kong and Taiwan are among the countries driving phablet adoption and dominance in Asia. 63% of the South Korean smartphone users are on phablets, having almost completely abandoned their full-sized and small tablets.
- Phablet users in Asia engage in apps 78% more than the average smartphone users in Asia.

Always-On Shopping:

- This is very good news for mobile advertisers as 19% of time was spent by users in Asia on Shopping & Lifestyle apps, a category second only to gaming in Asia.
- Asia is very large and diverse, and shopping trends differ by country. For example, we see that shoppers in Singapore prefer traditional e-commerce and brick and mortar locations, whereas in India, online shopping destinations, such as Myntra, are shutting down their websites in favor of an app-only strategy.

Gaming remains one of the most engaged categories in Asia

- App users in Asia spend 25% of their total app time on Gaming apps
- Singapore loves Action games! Almost 40% of games sessions here fall within this category (just behind South Korea, which leads with almost 50%).

- But we see variations too, based on user interest from country to country. For example, while 17% in Singapore enjoy Brain and Puzzle games, only 5% of game sessions in India fall within this category. Users in India love action and arcade games.
- The next largest category is Lifestyle and Shopping, with 19% of total time; coming in third is utilities and productivity with 17% of users time spent.
- Utilities and Productivity accounts for 40% more time spent in Asia than it does for users in the United States. Although messaging is a large driver of sessions in Asia and around the world, it only represents 13% of users time spent in their mobile apps.

Compared to the rest of the world, Asia is a unique app market
- Asia is a unique market when compared to the rest of the world, specifically for the Photography, Lifestyle & Shopping, and Personalisation categories.
- 81% of Asia's photography app users are female, men in Asia are 1.9x more likely to use photography apps than men in the rest of the world.
- With Life & Shopping, women in Asia dominate the category in terms of use, but are also 1.4x more likely to shop in mobile apps as compared to women around the rest of the world.
- Globally, 81% of personalisation app users are men. In Asia, usage is split evenly between men and women, with 51% and 49% respectively.

THE NEED `TO MEASURE APPS

As users' time continues to shift toward smartphones and app experiences, marketers should be thinking about building experiences where their users are spending their time. Clearly, what becomes evident from the above Flurry insights is that this shift has made it critical for

advertisers to understand consumer behavior on apps.

The biggest hurdle here is that unlike the web, apps exist in silos. This presents a challenge for marketers trying to study consumer behaviour across apps in order to draw out useful insights. For it to be effective, measurement should be scalable, open and actionable. Today, there are

several tools available for measuring online and offline behavior, brand impact, and verification across devices. This is where mobile analytics from Flurry can give brands and advertisers an edge.

Flurry sees behavior across apps - for advertisers, this translates to important signals and insights on targetable groups of consumers, with shared interests based on their use of apps and when they perform a particular action, eg. new mothers: shop for baby clothes, track baby's feeding time, search for baby-food recipes.

Across the globe, Flurry draws in data from the app usage on two billion devices, across 720,000 apps. It is able to create a robust picture of a consumer's interest patterns based on the apps they use because it is able to see an average of seven apps per device. Marketers can use this data advantage to help pinpoint and reach the right mobile consumers with a relevant message, at scale. Ultimately, this level of analysis is a win-win situation for both – where brands can better understand users and users benefit by having a better experience catered to their needs.

In sum, if there is anything to say about

the mobile and app industry it is this: mobile is on fire and it is showing no signs of stopping! If advertisers want to leverage the myriad opportunities out of this mobile app revolution, they need to evolve to the next orbit – use mobile analytics to understand users and profit from it.

Fig. 1 Dissecting the Form Factor: Asia is leading the Phablet Revolution

Session % by Form Factor

- Asia: Small phones 7%, Medium phones 45%, Phablets 42%, Small tablets 3%, Full-size tablets 2%
- Global: Small phones 3%, Medium phones 60%, Phablets 31%, Small tablets 3%, Full-size tablets 4%

■ Small phones ■ Medium phones ■ Phablets ■ Small tablets ■ Full-size tablets

Note: Globally, 60% of Smartphone owners are using medium size phones, such as the iPhone 5 and 6 or nexus 4s, and 31% are using phablets. In Asia, there is a 50% split between medium phones and Phablets, with 45% of users preferring medium phones and 42% using Phablets.

Source: Flurry Analytics, State of the App Nation

Fig. 2: Time Spent by Category in Asia

Other 7%
Health &Fitness 2%
News & Magazines 2%
Personalization 6%
Music, Media & Entertainment 10%
Games 25%
Messaging & Social 13%
Shopping & Lifestyle 19%
Utilities & Productivity 17%
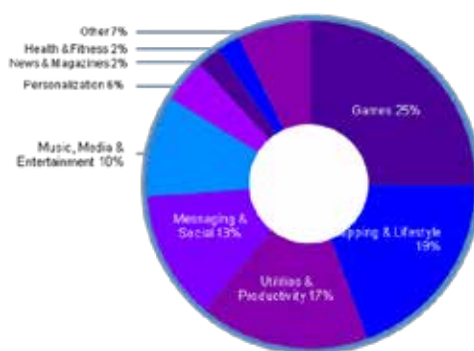
Nitin Mathur (Twitter: @nitinmathur) leads marketing for Yahoo INSEA region. He has over 18 years of experience in building brands across diverse sectors - Internet, media, technology, consulting and aviation industries. Previously he was Director of Marketing at Sapient, and Product Manager at Times Internet Limited.

MOBILE CONSUMER INSIGHTS:
STRENGTHENING AUDIENCE RELEVANCE IN MOBILE MARKETING

by **Stevy Kosasih** General Manager, Data Insight, Telkomsel

What are the biggest challenges and priorities of a Chief Marketing Officer (CMO) in 2015? A survey called *The 2015 Global Survey Result* asked more than 1,000 senior marketers from around the world to respond to the questions - and the result was shocking.

Branding and the ability to tell a brand story and make them stand out from the competition was the biggest challenge, with 49 percent of marketers citing it as an issue throughout the year. The interesting thing is, the same survey conducted last year resulted with the same issue as one of the biggest marketing challenge, but only 39 percent of the respondents flagged it as such.

Customer acquisition, which is basically finding and acquiring new customers, was the second-biggest challenge – reported by 45 percent of the marketers involved in the study. This point, interestingly, was not included as an option last year. Despite of its high rank challenge, fewer name this as a Top Three priority.

In the era of modern day consumers, standing out from the competition by creating unique brand experiences that encourage retention and loyalty is imperative. To understand their customers through profiling and then translating the understanding into relevant interactions is crucial, which is probably the reason why as much as 39 percent of the respondents put it as a challenge.

2015 was an impressive year for all things digital, with aspects of internet, social media and mobile use showing impressive growth. This is happening all around the world. We Are Social's *Digital Social & Mobile in APAC* (2015) report indicated that over one-third of APAC's population uses the internet, and more than one quarter of the 4.026 million inhabitants have used social media.

Mobile continues its dramatic rise too, with the number of cellular connections in the region growing by more than 11 percent from last year. This trend also occurred in Indonesia. According to the same report, the country's mobile penetration reached 121 percent in 2015; nine percent higher from 2014. The highest media engagements in Indonesia are those which are made especially for smart phones.

Since everything has gone mobile, it enables the mobile operators to profile consumer behavior better. By examining the activities that a certain user conducts with their smart phones, operators can derive many insights.

Take for example, a teenage female consumer. From her mobile activities, the mobile operator she uses will have loads of data, both telco and non-telco. This is the data revealed from her activities done with her mobile phone. She is an introvert who loves movies and music. She lives in South Jakarta, loves to chat and belongs to the high class community. She is a

junior high student who comes from a big family. Her favorite place to hang out is Plaza Senayan and her favorite destination is Singapore. That is a lot of information.

With that valuable information, mobile operators can give meaningful insights for advertisers.

UNDERSTANDING CONSUMER FROM A DIFFERENT PERSPECTIVE

How does one obtain valuable data from the consumer? First, the mobile operator must understand them from different perspectives. These are many such ways in which mobile operators can understand the consumers better.

1 > Detailed call destinations and habits:
One of the methods that can be used to profile a consumer is by looking at his/her habits in making phone calls. The mobile operator keeps data of every phone calls made by each mobile unit. From the record, we can understand the consumer's profile. For example, if the consumer makes frequent phone calls to a certain hotline number such as a taxi operator, it might be safe to conclude that it is his habit to take this kind of transportation.

2 > Nationwide people location and movement (up to rural level):
The advantage of profiling customer through mobile

operators is that you can have detailed information, especially when it comes to location. Mobile operator will retrieve location data from their BTS, located in the most rural administrative unit up to the village level.

3 > Spending power based on mobile transaction:
Mobile transaction details say a lot about user habit and behavior. If a person spends more money per month for their mobile needs, it is most likely that he/she has higher spending power. Mobile operators can also estimate whether the particular consumer owns a credit card or not, from their mobile transactions.

4 > Browsing and apps usage behavior:
"There's an app for that," or "Let's Google the answer," is a common response to most questions nowadays. That's why we can make profiling of the consumers based on their browsing and app usage behavior.

5 > Based on actual behavior 24/7:
To make a reliable profile, observing a consumer's behavior 24 hours a day would be necessary. In contrast to traditional research which was done only in a certain time frame, data collected from the user's mobile phone can be taken non-stop. Since the data is measured by the system (rather than a respondent's claim), it reflects the consumer's actual behavior.

HOW BUSINESS CAN BENEFIT FROM MOBILE CONSUMER INSIGHT

We present here four case studies on how mobile consumer insights can benefit business.

Case 1: Targeted Audience Marketing
Consider these statistics from *Internet Live Stats Q1* (2015). In March 2015, each day 205 billion emails were sent, 3.5 billion searches conducted on Google, and 8.4 billion videos watched on YouTube. There's so much noise. So, how do you cut through the noise? The answer is by being relevant in your communications. One way to being relevant is to use profiling data accordingly.

The easiest way to set the targeted audience is by using basic profiling, such as demographics. This includes gender, hometown, age, spending, handset type, and data service usage. In addition to that, advanced data profiling will result in a more detail user profile. Call pattern, browsing and apps usage behavior, people movement or product consumption behavior are some of the methods used in advance data profiling.

Knowing the complete profile will allow advertisers to make an engaging interaction, and in the end would allow them to make a personalised ad for each consumer.

Case 2: Designing Relevant Campaign Planning
To make a campaign, the advertiser needs data about their targeted audience. For example, a cigarette brand wants to sponsor or host a music concert in Java area. Mobile operators can provide data about the people's profile who live in the surrounding area.

Some of the data that the brand can use include, for example, the number of citizens who are active smokers and love music. From that report, the mobile operator can estimate the size of the potential audience in the selected region.

Case 3: Media Campaign Optimisation
A billboard commercial, in order to reach its full effectiveness, should be placed in the most appropriate location. The following example is a method of making a billboard location analysis in order to have it exposed to the right audience.

An advertiser wants to place a billboard advertisement at KH. Mas Masyur St. – Prof. Dr. Satrio St. The target audience is male, age 18 and above, SES ABC. Using mobile data, the mobile operator spots which street is traversed by the advertiser's target audience at a specific time.

The result shows that the street, KH. Mas Masyur Street – Prof. Dr. Satrio St., is a good spot for the advertiser to put their ads. The street is crowded with 8,800 people per day. The traffic peaks at 12 to 1 PM and then again at 5 PM every day. But from the relatively long street, which point is the best place for the advertisement?

Billboard No.1 is 92% effective in reaching the targeted audience. Those who pass the location of Billboard No.1 are: male (58 %), age 25-39 (49%) and SES ABC (43%), just as the advertiser wanted. In addition to the basic profile requested by the advertiser, there are additional profile insights of the targeted audience. They are: spend more than IDR 100 K per month for mobile usage (52%), resident in South Jakarta (21%), and are interested in sports (38%), gadgets (27%) and music (24%).

Case 4: Incorporating Mobile Consumer Insights into ID Verification
This method is used to support financial institution to verify the identity of loan applicants. Traditionally, financial institution or banks will send their representative to check the applicant's data at their home or office.

Telkomsel offers an alternative solution to the traditional process. Location information will be able to be seen from the applicant's telco data. In addition, we can also provide data of spending behavior as a consideration for loan approval.

In conclusion, these are the key ways in which a business can benefit from mobile consumer insight:

1. In-depth insight through mobility and reach will help the business owner make a **better decision**.
2. Real-time information will lead to a **faster decision**.
3. Staying ahead of the competition will result in **high business performance**.

Stevy Kosasih (stevy_kosasih@telkomsel.co.id) is GM, Data Insight Sales, PT. Telekomunikasi Indonesia. He was earlier Director for Client Leadership in The Nielsen Company Indonesia, and was with Wings Group, Philip Morris Indonesia and Danone Aqua Indonesia. Stevy has a degree in industrial engineering from Surabaya.

AD FRAUD IN MOBILE ADVERTISING:
THE NEXT BATTLEGROUND

by **Joe Nguyen** Senior Vice President, Asia Pacific, comScore, Inc.

The often-quoted suggestion that 'The only thing necessary for the triumph of evil is for good men to do nothing' was first uttered long before sophisticated digital advertising fraud threatened marketing budgets around the globe - but the principles have never been more relevant. The tools to combat fraud exist, but a proactive and informed effort from all sides of the digital ecosystem is required to successfully implement them.

IVT: AN ACRONYM WORTH YOUR ATTENTION

Figure 1: Different Types of IVT
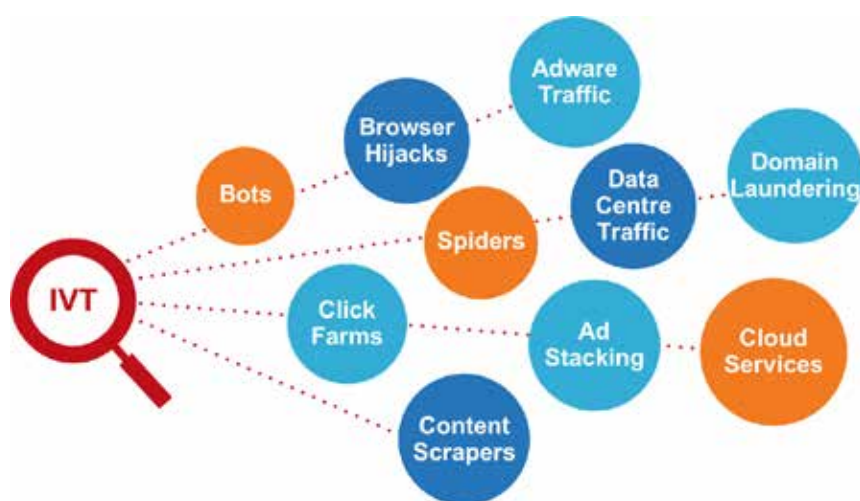
Ad fraud represents a significant proportion (though not all) of a phenomenon formalised in many markets as invalid traffic (IVT). Based on a comScore study, in the United Kingdom, 95% of the Top 100 display sites have below 5 percent IVT, however 44% of those sites have sections with above 5 percent IVT. In Australia, 95% of the Top 100 display sites have below 5 percent IVT, while 34% of those sites have sections

with above 5 percent IVT. So this is not an issue that only affects small publishers or networks.

Unlike impressions that are served to real people who do not happen to fit a marketer's intended target, IVT impressions are served to a wide array of bots, spiders and other non-human actors. Some of these are harmless necessities of digital functionality, but a growing number are malicious and sophisticated attempts to pocket advertising revenues in a fraudulent manner. At best, IVT impressions are entirely wasted, and at worst, they are direct theft.

Figure 2: An Example of How IVT Contaminates Viewability

If marketers have traditionally been obsessed with reaching an ideal target group of people, then they should be even more fastidious about keeping their campaigns away from all forms of IVT, and their budgets out of the hands of fraudsters.

IVT, VIEWABILITY AND LIFT: GETTING THE MOST FROM YOUR MARKETING BUDGET

The problems caused by IVT extend beyond the money lost at source in the form of wasted impressions. The effect of this traffic on impressions served carries forward to other metrics, including viewability, brand uplift and sales – metrics against which marketers themselves are likely to be evaluated. Without controls in place, the varying levels of IVT from campaign to campaign erode results, as well as render benchmarking and optimisation on other metrics both irrelevant and largely impossible.

In response, forward-thinking brands and their agencies have recognised the risks, and are employing advanced technologies to both monitor and prevent fraud in their campaigns. This becomes even more complex when the fraud which they must detect is performed by vast networks of bots that have been designed to harness the added credibility of using real devices (usually without the owners' knowledge or permission) to act in a convincingly human way, albeit one

	Served Impressions	Excluded as IVT / Fraud	Impressions post-IVT filtration	Disposition: Viewable	Reported Viewability
Provider applies IVT Filter	13,000,000	4,000,000	9,000,000	7,200,000	55%
Provider does not apply IVT Filter	13,000,000	0	13,000,000	10,400,000	80%

that leads to advertising revenue for inventory chosen by the bots' owners.

Only a multi-point series of checks using different sources of data, ideally with a reference to what constitutes real human behaviour, can detect and avoid this type of activity. There needs to be traffic data from tags and SDKs of a publisher, and similar data from a network of publishers, as well as panel data from real users, in order to determine what app, mobile browser, IP address or device ID is based on real human traffic and not IVT.

MOBSTERS AND ADVERTISING: MORE IN COMMON THAN YOU MIGHT THINK

The evolution of fraudulent activities in any sector mirrors the changing landscape in which they operate. In 1920s America, mobsters knew the demand for alcohol existed, and many were prepared to turn a blind eye to the legality of its sourcing. In the case of digital, mobile continues to deliver growth in every market. In the United Kingdom, smartphone and tablet

devices now account for 60% of all digital minutes according to recent comScore data, and this rises to 65% in the United States. It is likely that this share is even higher in some of Asia's mobile-heavy markets such as Indonesia, India and China. As a result, marketers have a thirst for mobile inventory, and although fraudsters cannot rely on prohibition-esque overlooking of their activities, they are likely to bet on a lack of diligence from some buyers.

Mobile presents new challenges because of its more fragmented ecosystem. With varying devices, operating systems, media formats and existence of both mobile browsing and app access, the rich opportunities for mobile advertisers also offer multiple points of attack for would-be thieves.

Already, examples of the same malicious techniques that have existed for some time on desktop devices are occurring on portable devices, but they have been joined by new ones that are more unique to these platforms. Apps can be programmed to serve ads continuously in the background long after a user has finished actively using it, multiple impressions can be served

to both browser and app when a user only sees one, and devices can be hijacked to go on ad-interacting sprees without the knowledge of their owner.

Indications also show that mobile ad fraudsters do not discriminate, with suspicious or malicious activity detected on handsets of all descriptions, on both iOS and Android, and within both apps and mobile browsing – there are no shortcuts to avoid IVT on mobile.

TIME FOR MARKETERS TO FIGHT BACK

With all forms of digital ad fraud, a realisation that this is a crucial and controllable part of planning and delivering campaigns is the first step. The reach, frequency and uplift in both brand attitudes and sales that marketers are working towards cannot be reliably evaluated if a large portion of the inventory they buy is not being served to human eyes. It is time to recalibrate expectations based on validated impressions as a first step, before considering other success metrics.

After this important change of mindset comes a proactive and sophisticated approach to detection and prevention of IVT. With the sums of money at stake, the fraudsters are more than willing to evolve and develop new vehicles to obtain them – simple blacklists cannot keep up, so it is vital to employ technology and services that are dynamic and more sophisticated than the people trying to deceive them.

Finally, marketers can also protect themselves with an increased awareness of how and where their inventory is purchased. Premium

inventory displays significantly lower levels of IVT than on non-premium sites. When buying inventory indirectly through intermediaries or via sophisticated programmatic platforms, it is important that media buyers remain mindful of inventory quality alongside the audiences which they are targeting.

The metrics on which they pay for media are also a factor, with CPM campaigns being the lowest hurdle for an IVT generator to overcome. By optimising to metrics such as cost per acquisition, marketers can make the challenge more significant for bots and other IVT.

IVT and fraud have been around for years siphoning money from desktop display advertising, but with smartphones and tablets delivering growth in consumer usage and time spent, it is not just the advertising community that has recognised an opportunity to make money through mobile. The white collar criminals are following this trend too.

Joe Nguyen is Senior Vice President, Asia Pacific at comScore, Inc. He has more than 20 years of experience in Asia Pacific and is a veteran of the online analytics industry. Joe is the co-founder of iamWednesday Singapore and is on the Mobile Marketing Association Asia Pacific Board of Directors. He has also held a seat on the ad:tech Singapore Advisory Board and the Interactive Advertising Bureau. Joe was previously with Omniture and Millennium & Copthorne Hotels. Joe holds a BSE degree in Mechanical Engineering from Princeton University. He was born in Vietnam and emigrated to the U.S. after spending a year in a Malaysian refugee camp.

Figure 3: IVT Varies by Type of Site

THE POST-MOBILE ERA:
MAKING THE MOST OF CROSS-SCREEN

by **Chih-Han Yu** CEO & Co-founder, Appier

I'd like you to meet Mary.

Mary is a 32 year old career woman who works at a tech company here in Asia. Like many of us in the region, she owns a smartphone, a tablet, and a laptop -- and uses a desktop PC at the office. In many ways, she is a typical consumer -- and she is definitely a consumer you would want to reach.

Mary's day begins at 7:30 AM when she awakes up to her phone's alarm. She rolls over to turn it off, scrolling through the social networking notifications that have come in overnight. On the bus to work, she uses it to search for a new winter jacket, reading an article one of her friends shared in between browsing different retail websites. She is hard at work all morning, but during a morning coffee break at her desk she browses a few more coats -- and finds one she likes.

After a solo lunch accompanied only by her trusty smartphone, she reads a few online news articles at her desk about her company and her industry before getting back to work. Later on the way home, she plays Candy Crush and messages her friends; after dinner, she's back on her laptop to take care of a few more emails. Later, watching TV, she finally enters her credit card information and buys the coat using her tablet.

Sound familiar? If you're sitting in the Asia Pacific region, it probably does. Our research shows that eight Asian markets experienced growth in both two and three-device usage in the first half of 2015. Among multi-screeners across Asia, 42% use three or more devices. And in some countries, like Japan, that number is even higher: one in two in Japan use three or more devices. Increasingly, Mary's cross-screen behavior typifies a growing number of consumers in our region.

But of course, while we are all very similar, in other ways we are very different: we browse different websites, take coffee breaks at different times. We might prefer to buy that coat on our PC instead of our tablet. We might be shopping for different things. And even Mary is going to look very different on a Saturday, when she is not in the office, but is instead waking up late, meeting her friends for brunch, and hitting the shops in the afternoon, or Sunday, when she spends several hours catching up on her favorite TV show before heading out to do some errands.

Indeed, our data shows that people's average cross-screen behavior varies greatly between individuals, by market, and even by gender. Consider smartphone usage: across the region, smartphone usage tends to peak on Wednesdays. But that is not the whole story. For example, in Taiwan and in Vietnam, there is a second peak on Sunday, whereas in Hong Kong, usage declines steadily throughout the rest of the week.

Tablet usage too sees local variations. Across Asia, tablet usage rises as the weekend approaches; the most extreme example of this is Japan, where tablet usage jumps 360% on weekends. In some markets, like Australia, Japan, and Vietnam, usage peaks on Sundays; in others, like Indonesia and Singapore, it peaks on Saturdays.

We can even observe differences in how different genders cross-screen. For example: in Australia, Japan, Malaysia, Taiwan and Vietnam, the intensity of PC usage differs between male and female users. However, in other countries, like Indonesia, we see little to no difference between male and female users.

So what does this mean for advertisers? I would like to argue that we are living in a post-mobile era: the era of cross-screen. When we first talked about mobile, we imagined it as a one directional shift from PC to mobile. However, the reality has turned out to be more complicated. As Mary's story demonstrates, consumers now own many screens, moving between smartphone, tablet, desktop PC, and even smart watches. But instead of a clear shift away from one device to another, we have seen that people actually continue to use all screens -- in interconnected ways.

Cross-screen is more than the number or even type of devices people own and use. Cross-screen is a set of behaviors, such as when and where consumers like to use these screens and what they like to do with them. In the post-mobile world, you can no longer identify your audience by focusing on a type of device; you have to consider their behavior across screens. Remember Mary's story: on her path to buying that coat, she used smartphone, tablet, AND PC. If that retailer runs a mobile-only campaign, they miss her when she is using the other two devices, and they lose the chance to reach her when

she switches back to PC to make that purchase. In fact, a campaign that treats all three screens separately might as well be talking to three different people.

Any business hoping to reach consumers in Asia has to understand that cross-screen is no longer optional – it is a reality. Those advertisers trying to reach customers online face mounting complexity as the number and types of screens multiply. That is because people interact with ads differently across screens, and prefer different content and ad formats depending on their usage scenarios and the size of the screen they are using. Who to reach, on what screen, with what message, when: it is almost impossible for you to anticipate these things and manually program each campaign to reach consumers with the ad they are most likely to respond to.

We believe artificial intelligence (AI) is the best approach to resolve this complexity and make cross screen easy. AI is the development of computer systems able to perform tasks normally requiring human intelligence. And when it comes to cross-screen marketing, AI offers several clear cut benefits.

The first is that it helps you advertise to users instead of devices. This is a crucial component of cross-screen. Think about it: every time Mary switches between devices, you as advertiser have an opportunity to reach her with your message. But if you do not understand which devices she regularly uses, you will miss out on many of these cross-screen moments.

At Appier, our approach to solving this problem is AI, which analyses millions and millions of patterns to understand which devices share a common owner. It is possible to do this if you have specific information like email addresses and login data, of course. But AI offers much greater reach (if at less accuracy) than login-based systems. So a coat retailer which Mary had browsed at the office would be able to show her a cross-screen re-marketing ad on her phone (as she left work) one more time on her PC at home, as she hones in on her purchase -- rather than waiting for her to get to the office again the next morning. (Incidentally, cross screen campaigning helps marketers do a much better job of frequency capping, making sure they do not waste budget or their customer's goodwill).

Second, Mary's story illustrates another key change in consumer behavior: people are constantly shifting between screens in ways that can be hard for marketers to predict, and as our data shows, in ways that differ market to market and individual to individual. How are you supposed to understand and anticipate this behavior? AI can help here, too, because it is very good at looking at a great number of variables and finding patterns, which means it can predict people's behavior to show them ads they are most likely to respond to.

So that is the theory. The question is, of course, does cross-screen actually deliver a better result for marketers? A major international beauty brand we worked with wanted to drive brand recognition while boosting sales -- and was running up against the limitations of 'traditional' device-based digital advertising. So they ran a campaign that aimed to reach users across at least two screens with ads for seasonal merchandise; those users were then shown re-marketing ads to collect mailing list signups. The results they saw were telling: people reached across two screens were 1.6-8 times more likely to click on their ads than those reached on a single screen alone. For those reached across three screens, the numbers were even higher: they clicked on ads between 3-11 times more often than their single screen counterparts.

So when people ask you what your mobile strategy in 2016 is, tell them you are not thinking about mobile. You are thinking cross screen. In a post-mobile world, it is your only choice.

Chih-Han Yu is the CEO and Co-founder of Appier, the leading Artificial Intelligence (AI) technology company that has enjoyed fast growth since its founding in 2012, offering Cross-Screen marketing solutions enabling brands and advertisers to reach customers across all screens. Before founding Appier, he ran an independent game studio that focused on developing mobile and social apps.

Previously, he was also a researcher at the Wyss Institute, Harvard Medical School, and obtained his doctorate degree in Artificial Intelligence from Harvard. Prior to this, he earned a master's degree from the Stanford AI Lab. He has authored tens of research articles in the fields of AI and machine learning, and has been awarded two US patents. His doctoral thesis was nominated as the best thesis of the year in the field of multi-agent AI. He was also on the champion team of the DARPA Grand Challenge, the renowned autonomous vehicle competition run by the most prominent research organization of the United States Department of Defense.

MOBILE TECHNOLOGY AND RETAIL BANKING:
OR SHOULD WE SAY THAT THE FUTURE OF BANKING IS MOBILE?

by **Kalidas Ghose** CEO and Vice Chairman, FE Credit

Just the other day, while searching on YouTube, I came across an ad for a bank where the fiancée asks her future husband as to when did he think about proposing to her after he presents her with a ring.

The guys mind drift to the moment he had taken her to his family, especially his child received her well and accepted her as a member of the family. Great emotional piece but what really catches the attention is the thread which links his moment of love with his final action - and that is saving for buying the ring. As soon as he decides to propose to her, he reaches for his mobile phone and opens a goal based savings account and starts tracking it till he reaches his objective and buys the ring to present her.

This is what the future probably looks like – people reach for their mobile phone to open their favorite application rather than visiting the branch or speaking to their banker when they need a solution for their financial needs!

MOBILE PHONE IS A FINANCIAL TOOL

Many people believe that the financial services sector, especially retail banking and may be even consumer finance, is on the verge of a disruption just like WhatsApp did to messaging a few years ago. This is because of following aspects:

Authentication is becoming easier with the two factors of phone and biometric identification such as iris and finger print. People can download mobile banking applications from banks which offer this authentication technique, then hold the phone in front of their eyes or touch it, and immediately get authentication.

Opening an account is also becoming easier thanks to two-factor authentication. The record of the signature and relevant documents is kept and managed in e-vault that supports the KYC (know your
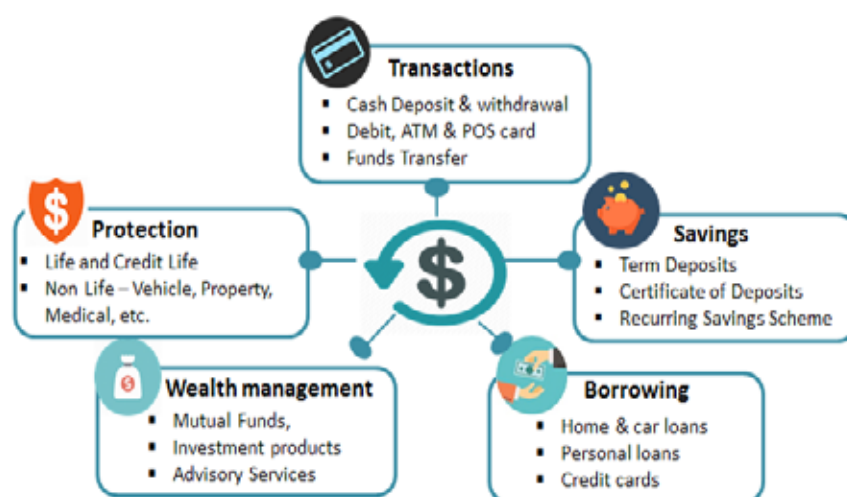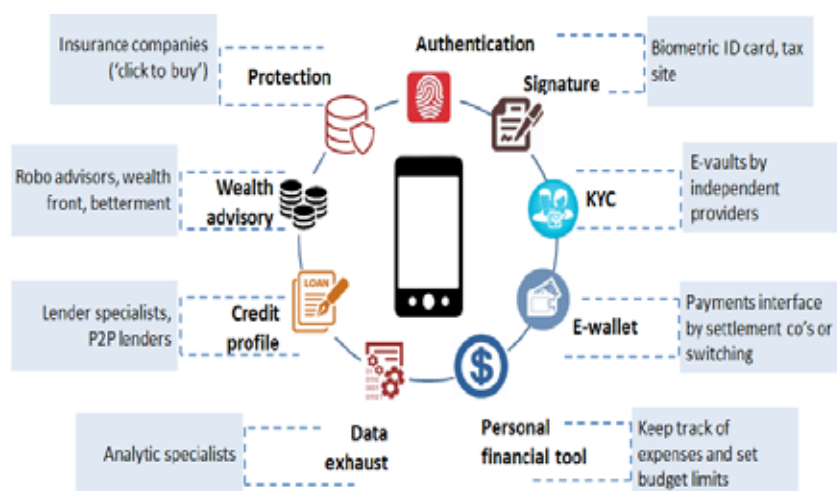
customer), which can be done in few minutes. Subsequently, opening an account is faster than ever.

Payment transactions are getting revolutionised. People can load money into an e-wallet, and make P2M transactions such as taxi bill, electricity bill, mobile top-up and P2P transactions. Imagine the impact of this service in a country which has the mechanism to connect all wallets in the market just like connecting accounts to cheque books, or to debit cards. If one person doesn't have cash, he can transfer the money to another person who can then distribute the cash to others: technically, each individual can become an ATM machine.

With the e-wallet, people can effectively do transactions. Through this, people create a **data exhaust,** which is the data generated as a byproduct of people's online actions and choices. Data exhaust consists of the various files generated by web browsers and their plug-ins such as cookies, log files, and temporary internet files. Collecting and analysing *data exhaust* can provide valuable insight into the purchasing habits of consumers. This creates credit profile for any institution to come and give the consumer a credit. Then **financing** becomes a specialised activity. It may start with a small credit which people can use for a payment transaction or it could end up slowly over time into a larger credit balance.

People can get **wealth management**, called robo advisory services, from which customers can buy a mutual fund or investment product. Some of these robo advisors are now managing multiple billions of funds, which means that they become personal bankers of immense capacity, especially for those who may have millions to invest. Finally, people can also be protected from a financial perspective by buying insurance products on their mobile phone on the spot.

If people have a mobile phone in their pocket, they may rarely need to visit a bank branch to find solutions for most of their financial requirements.

OPPORTUNITIES FOR MOBILE BANKING

The traditional retail banking model recognised the individual customer having five types of financial needs. While the needs remain the same, the solutions are assuming different shapes with the development of mobile banking that delivers experience which customers will love, offers more high-value services in a secure manner, and stays protected against threats and fraud.

Retail banking channel interactions (projected in 2016)

Mobile	Desktop	Call center	ATM	Branch
20-30 times per **month**	**7-10** times per **month**	**5-10** times per **month**	**3-5** times per **month**	**1-2** times per **year**
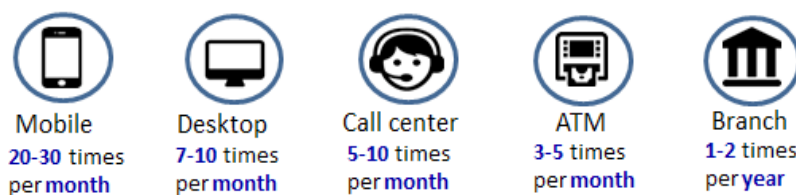
Source: AlixPartners © March 2014 The Financial Brand

Estimated cost per transaction by channel

Mobile   Desktop   Call center   ATM   Branch
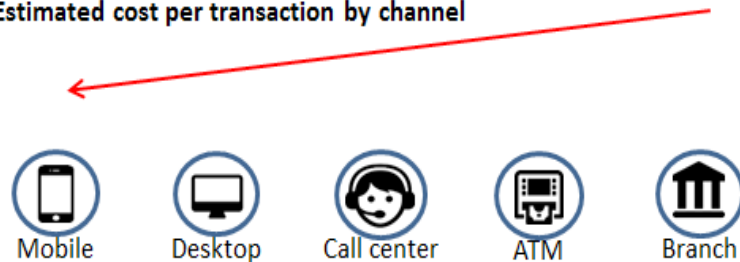
Source: Bank 3.0 by Brett King © September 2014 The Financial Brand

In fact, mobile phones will gradually replace many of the functions of a bank branch that presents a whole new set of opportunities to everyone concerned with the financial ecosystem. The greatest beneficiary is the customer who can control, manage and perform all financial transactions conveniently and simply on their smartphone, without having to go to a branch or wait to be attended by phone call.

While mobile banking can enable new services and open up new opportunities for customers, it also delivers the added benefit to the banks. In particular, mobile banking improves customer services and gets greater engagement which in turn improves bank branding and increases market share. According to projections of The Financial Brand, retail banking channel interactions in

2016 will shift to mobile and online channels on average 27-40 times per month as opposed to visiting a branch 1-2 times per year.

One of the key benefits that the banks can reap from mobile banking is cost optimisation. Transaction cost is up to 43 times lower via the mobile channel than in a branch. The potential return on investment for mobile banking will increase as customers shift to the faster, more convenient and less expensive channel.

Through data exhaust and digital exhaust, bankers can gain customer insight in order to offer personalised products and services. It is no surprise that mobile banking capabilities are playing an increasingly important role in primary bank switching decisions.

THE ROLE OF MOBILE MARKETING SPECIALISTS WILL GROW

Channel synchronisation, or synchronisation in multi-platform campaigns, brings huge value. It is time for marketers to integrate their campaigns across corporate websites, social media pages, and mobile assets. Customers just want to engage, whether they are on the corporate website, Facebook page or on their own mobile device – and that means marketers must present consistent branding and messaging and synchronize user data across campaigns. Furthermore, removing

barriers to mobile engagement is the most necessary task and challenge that marketers need to overcome if they want to maximise their brand's reach. Mobile devices are always in consumers' hands at the key moments in the purchase cycle, such as when the consumer is in a retail store, selecting a restaurant or movie, booking a trip and so on.

The importance of email is growing significantly. Nowadays, many people access their emails on mobile devices that enhances the importance of email in promoting mobile banking. A study by Yesmail, a company focused on email marketing solutions, analyzed data on more than 5 billion marketing emails and found that 49% of all emails were opened on a mobile device (*from Financial Brand*).

Delivery of marketing messages is based on analytics. The core of efficient messages delivery is getting a deep understanding of customers. Collecting and analysing *data exhaust* can provide valuable insight into a customer's purchasing behaviors. Analytics and personalised messaging highly increases the engagement of customers. In order to not waste any acquisition efforts, engagement strategies should be based heavily on analytics. From there, marketers can start to engage via push notifications, in-app messages, email and social messaging to optimise for the best possible outcomes.

THE FUTURE OF MOBILE BANKING

If the future of banking is mobile, what does the future look like? The video of Avanade Inc. shows glimpses about that future.

Talk Transfer: Voice authentication controls the fund transfer service. It lets customers transfer their money by simply telling their mobile phone who they want to pay and how much. Authentication of customer voice combined with verification of their PIN, helps fund transfers instantly. Payments are made even faster and more secure.

Intelligent Personal Budgeting (IPB): IPB delivers predictive personal financial advice helping customers to save the way they want to. They can

just set their savings goals like buying a new TV or budget plan for holidays, and IPB will intelligently analyse the customer's spending pattern to provide flexible savings options. Thus, customers can choose how, when and where they save.

Frictionless Banking: Customers can enter any branch and it will automatically identify them using near field communication (NFC) technology. Simply dock the phone or tablet on 24-hour frictionless terminals and provide instant access to services like cash withdrawal, fund transfer or paying for facilities.

Self-pay: With the self-pay mobile application, customers can now pay for goods and services simply by scanning the QR code; the fund is then automatically debited from their current accounts with the purchases verified by the shops' NFC. Thus, service payments are in the palm of customers.

Augmented Reality Customer Service: Customers can speak to their own personal finance manager anywhere at any time. Just book an appointment on mobile app and their personal finance manager will be available to talk to them in augmented reality to answer the questions. Thus, the customers' personal finance partner in their palms.

So if the future of banking is mobile, let us realise the potential of tomorrow!

Kalidas Ghose is CEO and Vice Chairman of FE Credit. He has nearly 25 years of experience with global leaders in financial services across various geographies. He was earlier with VPBank, ANZ Bank, Prudential Vietnam Finance Company Ltd and CitiFinancial Corporation Philippines. He started his career Citibank India. Kalidas has an MBA from XLRI and a graduate degree in mechanical engineering from Jadavpur University.

THE MOBILE INNOVATION CYCLE:
WHAT'S BEGGING FOR DISRUPTION

by **Manav Sethi** Group CMO, ASKME India & FINDIT Malaysia

"When wireless is perfectly applied, the whole earth will be converted into a huge brain, which in fact it is, all things being particles of a real and rhythmic whole. We shall be able to communicate with one another instantly, irrespective of distance. Not only this, but through television and telephony we shall see and hear one another as perfectly as though we were face to face, despite intervening distances of thousands of miles; and the instruments through which we shall be able to do his will be amazingly simple compared with our present telephone. A man will be able to carry one in his vest pocket."

-Nikola Tesla, Jan 30, 1926

This is 2015, and I am from India, the largest growing mobile population on this planet! On my recent visit to AD Asia 2015 Taipei, as I hailed a cab using Uber on Mobile and intended to communicate the destination to the driver, we both realised that he couldn't understand English and I couldn't speak Taiwanese/Chinese. But what he did next was remarkable: he switched on a real-time translator app on his passenger-facing iPad and we could communicate with each other through the data-connected device. We both achieved our goals and in some form created value for the country or for humanity, whichever way you choose to look at it!

If you realise this fundamental change, then for first time in the history of technology, mobile is making technology a universal product.

Today, there are well over 2B smartphones in use, and there are between 3.5B and 4.5B people with a mobile phone of some kind, out of only a little over 5B adults on earth. By 2020, 4B out of 5B adults (80% of adults on earth) will have smartphones. Hence not too far in the future, it's the end of the disconnect!

We witnessed disruption in mobile handsets with Apple creating demand for a $600 phone on an unprecedented scale, and the $35 Android then took computing everywhere.

It is also safer to assume that the internet for the next two billion would be enabled by these next two billion smartphone buyers, as has happened in India, where mobile became the first platform for internet consumption - and mobile will become the driver for not only internet traffic but also for value. And remember that even today for most of us, mobile is the only device we go to bed with and wake up with the next day - thankfully with the same one!

Going back to the Taipei cab anecdote, you will also realise two very important and fundamental shifts. One, the mobile has made people move beyond the single unified paradigm of web browser to smartphone apps, and I believe this disruption cycle will continue (already, half of all time spent online in the US is on apps today) and would create more forms of interactions (eg. web apps, APIs, browser notifications) beyond just apps and these would have potential to create value for billions.

Secondly, mobile communication is going to include in its universe a range of other devices: tablets, watches,

wearables. The biggest impact of all this will be on TV!

Furthermore, the mobile today has the capability to know where you are, whether you are moving or not, what selfies and other pics have you taken (800B photos were shared on social platforms in 2014 alone), who your friends are, your phone book and your payment information in some form. Taken together, this creates a vastly bigger opportunity and scale!

WhatsApp accounts for 30B messages a day whereas global SMSs for all telcos combined globally still stands at 20B - and WhatsApp achieved this with some 40 engineers! Telcos have been the only one player in the mobile ecosystem who have yet to go through a disruption. That disruption for them in all likelihood would come from making the data channel available both in quantity as well as quality at 'bits-parity.' They have been been traditionally operating in walled gardens and have always strived to become the custodian or comptroller of innovation, without realising that they have to just play their part!

So unambiguously, mobile dominates our attention. And communication is going pure digital and pure mobile. Video is the most-used format for content consumption as well as content creation, as it cuts across language and usability barriers. In fact, globally TV is becoming a minority computing device for video consumption. Video is the next big category to witness disruption riding on the strengths of ubiquitous mobile.

Mobile also helped apps like Ola, Uber and Lyft to disrupt categories like travel. Similarly Amazon, Flipkart, Snapdeal and AskMeBazaar have

the potential to disrupt categories like retail. Essentially, these are software to manage transportation and commerce and have used mobile as a platform to acquire scale in consumption. The scale of mobile coupled with the scale of software would create more such companies in time to come, disrupting incumbents in many more industries.

Industries like commerce and travel would experience disruption in payments space, and scale would be driven by mobile. Software makers and regulatory regimes across the world are gearing up to create an ecosystem that negotiates currency in the mobile world rather than the offline world.

In sum, mobile is the epicenter of disruption across industries and across advertising formats, thereby displacing Internet incumbents such as Google (mobile Ads are now 68% of revenue and brought in $7.4B in 2014 for Facebook).

As Benedict Evans has said: "The best way to think of this is as a solar system - the smartphone is the Sun and everything else orbits around it. Those other segments might be big or small and near or far, and there will be moons too. Some will be full of life, some interesting, some important, others boring but worthwhile. Some, like Pluto, might not seem to have much to do with the smartphone at all, really (smart meters, perhaps?), but the pull is always there in some form. Some devices will have their own computing and UI and leverage smartphone components, and others will just be dumb glass, sensors or pipes that are explicitly dependent on a smartphone. But for almost everything, the smartphone industry supplies the components and manufacturers, and the smartphone itself is mostly how you control and interact."

Manav Sethi (Twitter: @sethimanav) is Group CMO at ASKME India and Findit Malaysia. In his earlier stints, Manav exited a startup in stealth mode that created an IP that helped telecom towers reduce their energy costs. He has also led corporate strategy for Reliance Entertainment India. With formal education in management and law, he is very active in the startup ecosystem across India and Silicon Valley.

BRAND HAPPINESS:

HOW COKE SUCCESSFULLY USED MOBILE TO RECONNECT WITH TEENS IN VIETNAM

by **Truc Nguyen** Connections Manager, Coca-Cola Southeast Asia

How to make teens reconsider and be convinced of their choice of beverage with thousands of options around them? Clearly, trying to stand out on the convenience store shelf is not enough. Teen drinkers need a stronger reason to completely switch.

THE NECESSARY STEP-CHANGE

For the 129-year-old beverage brand, staying relevant among millennials is no longer a new challenge. Despite always being one of the most loved brands[1], Coke has not been the No.1 most consumed beverage by Vietnamese teens. The brand needed to turn that love into actual purchases.

Coke's step-change was identified as a completely new approach. We needed to dig deeper into teens' behaviors, know what they do and what inspire them to act. We needed to create a new 'spark of love' that helps Coke reconnect with its young consumers.

THE CHALLENGE: CHOICES THAT NEED TO BE EMPOWERED

Our core target audience is teenagers from 15 to 19 years old, whose behaviors are highly influenced by peers, including their choice of beverage. Almost 80% of their drinking occasions are when hanging out with friends at street cafes, or restaurants.[2]

In different focus groups, we noticed

that among teen groups, social media and mobile messengers play a critical role as a means for them to stay connected with each other. In addition, they get vital energy from expressing what they feel in the groups, via posts, texts, videos, GIFs, and emoticons. Those messaging tools liberate them from getting stuck with texts, allowing them to express freely, and have become a universal language that strengthens (or spices up) the bond among friends.

That drew us to three conclusions:

(1) Vietnamese teens don't like to be told what they should do, and love;

(2) The strongest influence often comes from their groups of friends; and

(3) Teens always crave for crazy fun and exciting moments with their friends, and boredom is not their friend.

From our learnings, we found that past campaigns led by contest-based promotion formats for teens did not seem to work very well, simply because they were all heavily restricted with ten pages of terms and conditions.

THE EMOTICOKES

To engage with teens, we needed to speak from the group voice rather than an individual's voice. We needed a sport that allows them to involve their networks and lets them tell their own stories, without any cliche or fixed format. With 78% of our teens engaged on mobile, and 65% using

mobile messaging every day[3], we knew that teens get vital energy from expressing what they feel to their groups, via mobile. So we decided to make Coke that vital source of energy. We wanted Coke to be the language that connects teens with each other.

Emoticons are used in mobile messenger apps to express one's feelings with an aided animated image. Often, stickers come in various designs and themes. Sticker users, especially teens, want to identify themselves uniquely with their messaging language, and they always look for new sticker designs.

Inspired by Emoticons, we helped Coke to launch the new EmotiCokes label, uniquely and specially designed for teens. We launched our initiative in a strategic partnership with Zalo mobile messenger, currently the largest mobile social network in Vietnam with 30 million active users, 85% of whom are our core target. Through Zalo, we made EmotiCokes the hottest sticker design of summer 2015. During summer, mobile messaging usage among teens peaks due to more availability of redundant time.

THE CREATIVE THAT SPREADS

Our initiative was called 'Say it with EmotiCokes,' a simple call inviting teens to try our stickers. Launched from May to August 2015, the campaign engaged our audience with a unique mobile-first approach:

1   Coca-cola Brand Love Tracking, Vietnam 2015.
2   MediaCom – 3D Panel Questionnaire 2015, Base: People 15-21, Vietnam.
3   Vietnam Consumer Barometer Research, Google 2015.

◗ In the first four weeks, we excited teens by promoting EmotiCoke as a unique way to chat via Zalo network. It quickly became the most favorite sticker design among millions of Zalo users.

◗ We then launched 'EmotiCoke lyric,' knowing that music is the second most consumed content among teen groups. As they sing along with the lyric showing on the screen, an EmotiCoke will appear next to an emotive word, such as 'happy,' 'sad,' and so on. Moreover, our EmotiCokes appeared on other teens' favorite websites, in a series of customised ads. They could even use EmotiCokes to comment on their favorite content!

◗ In the last phase, we let teens create their own EmotiCoke chat stickers, with their own 'selfie' photos, and took over Zalo messenger network and Facebook for the last two weeks of the campaign.

The excitement was ignited further offline. We installed a live interactive billboard on the busiest street of Ho Chi Minh City. The billboard, featuring our emoticons (without the can), changes itself with a different emotion and expression every time. Passengers couldn't help but notice the fun messages from the billboard talking to them. Their reactions were then captured in a clip, which headlined top online news channels for teens for weeks.

OUTSTANDING RESULTS

The results blew our mind. With one single creative, the EmotiCokes, we hit a record of two billion ads impressions from online and offline in 13 weeks on air[4]! More than 52 million EmotiCokes were shared via Zalo messenger apps, with an average of 10 shares per user[5]. That means each teen did advocate Coke to their friends more than 10 times! Consequently, Coke sales was enhanced significantly,

compared to the 'Share a Coke with Names' campaign in the previous summer, which was considered the most successful ever Coke campaign in Vietnam.

The partnership with Zalo helped us to reach the majority of teens in Vietnam, who made up 85% of Zalo's current user base, in the most effective way. With no TV spend, we reached nearly 50% of our target within the first three weeks of launch. EmotiCoke stickers broke Zalo's record of the most downloaded branded sticker set of all time, with two million downloads within the first week of launch. At the end, we garnered a total of 11.7 million sticker downloads, 10 times higher than Zalo's current top sticker sets. [6]

Mobile messenger was not considered as a key engagement platform for brands, until the 'SAY IT

WITH EMOTICOKES' campaign. There surely have been many 'test-and-learn' cases on how to make the most out of mobile messengers, which accounted for 80% social networking activities. But it requires a deep understanding of target audience behaviors and a true partnership to start and make something like 'SAY IT WITH EMOTICOKES' a huge success.

At the end, happiness is meant to be shared, and Coke has, again, successfully delivered that message.

Truc Nguyen is Connections Manager with the The Coca-Cola Company in Vietnam. She leads solution development and marketing outreach efforts that best address customer needs. She was earlier Key Account Manager at DKSH and Category Mananger at BigC Viet Nam.

4   MediaCom Post-buy Report May – Aug 2015.

5   MedaiCom – Zalo Post-buy Report May – Aug 2015.

6   MediaCom Post-buy Report May – Aug 2015.

HOW MOBILE MARKETING ADDS RICHNESS AND VALUE TO ONLINE CLASSIFIEDS

by **Amarjit Singh Batra** CEO, OLX India

A 'shared economy'- that's what India is evolving into. From an environment where consumers preferred to own/buy products and services, we are moving to an age where renting, sharing or leasing is a preferred mode for aspiration fulfilment. This paradigm shift has been led by online classifieds and more particularly, the increased consumer trust in C2C (consumer to consumer) online classifieds.

CHANGING PARADIGMS

Increased internet penetration, advent of platforms like OLX and increasing consumerism has been key to the creation and fast growth of the 'used goods economy'. It is a large growing market with an opportunity to tap into a pool of Rs. 56,200 crores of idle used goods across households across just 16 cities in India (OLX-CRUST 2014-15 consumer survey).

C2C Online classifieds, by its very nature, is hyper-local and convenient access to buyers/sellers enables faster transactions. With smartphones becoming more affordable, and ease of access to internet on the go, mobiles have become the primary mode of getting access to buyers/sellers. OLX identified this trend early in 2012 and pivoted to a mobile-first approach enabling easy access for users across mobile platforms with apps and a customised mobile site. For OLX, 85 per cent of the traffic comes from mobile and we are touching 2.5 billion monthly page views as compared to a meagre 10 million in 2011.

This growth in usage through mobile devices is directly correlated to the increasing base of mobile internet users in India (expected to grow from 400 Mn in end of December to 462 Mn by Jun 2016 as per projections by IAMAI). In the last one year alone, India saw an addition of nearly 80 Mn mobile internet users. A further drill down shows that the growth in mobile usage is led by the increase in mobile app usage which has outpaced the global growth rate at 131%. Smartphone users in India spend close to three hours on their device every day.

MOBILE FIRST

With such massive reach and growing usage of mobile, it becomes essential for brands to leverage mobile as a marketing medium. Mobile devices have become the preferred mode to access online classifieds and it is possible to show options to buy/sell hyper-locally. Mobile marketing has thus emerged as core to the acquisition and engagement strategy of companies like OLX.

The mobile marketing eco-system has evolved extremely fast, offering abundance of advertising opportunities such as preload deals, app store partnerships, ad-networks, programmatic buying, native advertising and referral for acquisition to deep-linking, re-targeting, push notifications and in-app alerts for re-engagement.

Along with the advertising opportunities, the analytics infrastructure which forms the backbone of digital advertising is becoming robust and is allowing advertisers to measure app installs, in-app events, cohort analysis, conversion funnels, LTV (life time value) modelling and many more functionalities.

The opportunity to identify and define consumer personas based on their mobile usage behaviour and affinity towards certain genre of apps and content makes the medium even more effective for finding the right audience and personalisation of communication. It further implies that mobile marketing will play a key role as brands move from an acquisition focus to a retention focus. CLM, re-engagement and LTV modelling will be important facets of this marketing media which will be useful in allowing an enhanced focus on consumer retention.

EMERGING TRENDS

Mobile has not only proven to be an effective performance advertising channel but has also yielded strong results in terms of building the brand. Video advertising which is one of the biggest brand building levers has been growing leaps and bound on mobile as online video consumption has been on a rise and six out of ten users are watching videos on their smartphones. Interestingly, 76% of this audience is millennials which would form a core targeting group for most of the internet businesses including online classifieds.

Furthermore, 50% of the consumers watch online videos with duration more than five minutes. It will be very interesting to ride this trend as we are likely witness a paradigm shift in the accepted ways of brand building. Beyond the realms of mass brand building on offline media, we shall see how a brand and brand love is created through niche, targeted, intelligent, content based marketing on mobile devices.

Now that there is a sizeable audience consuming videos on mobile, it is essential for brands to adapt to the changing dynamics of advertising, understand the nuances of the medium and create content for it. While this format allows marketers to create longer duration content for storytelling but engaging the audience in the first five seconds is the key. Various new features like 360 degree videos, carousel video ads, app install extensions are being launched by Facebook and YouTube to drive engagement and action from the user to meet both brand and performance objectives for the advertiser.

One of the biggest advantages of the medium is its social nature which boosts virality of the content. To quote an example, one of the recent digital content items created by OLX got 57% views on mobile devices with 40% of the total views coming organically through social sharing compared to an industry benchmark of under 10%. From a business perspective we not only saw a positive impact on our daily app install numbers but also an uplift on brand searches as per Google trend (see https://www.youtube.com/watch?v=Qvj2y6cZi3Q).

A PEEK INTO THE FUTURE

Most importantly, this growth trend of mobile internet usage and video consumption is expected to continue for the next few years. Projections suggest videos will be 50% of the data consumed on mobile by 2020. Given these trends, mobile advertising spends is expected to continue growing at 50% YoY.

Evolution of mobile ad technology and analytics would continue playing a key role driving this growth as some of the game changing opportunities exist in hyper-location centric targeting, gamification, programmatic buying, customer lifecycle management on mobile, integration for insights and supplementing traditional mediums of marketing.

As the battle for consumer time on mobile devices intensifies, mobile marketing will get competitive and expensive, making it critical for online classifieds to optimize this channel for consumer acquisition and engagement. Consumer-centric online classifieds organisations like OLX understand the importance of user's convenience and portability and will focus on mobile media as a key component of their marketing and customer engagement strategy.

Clearly, there is enough evidence that mobile marketing will help shape consumer behaviour, increase usage and above all will help brands like OLX to strengthen their leadership status.

CASE STUDY – PHONE KO BANAAO 'SELLPHONE'

Objective
To promote the concept of 'SELLphone,' giving users a virtual experience of the fun in selling through their cellphone.

Solution

Instead of forcing users to download the OLX mobile app, we brought the experience of fun in selling to their laptop screens with a hands-on demonstration. We created a mobile sync web innovation banner allowing users to sell the unused stuff in their screens through the mobile phones.

The web banner showcased a frame to enter the mobile number and sync the web banner with the mobile phone. The mobile sync application allowed users to sell items on the banner using their mobile phone, hence making their cell phone a 'SELLphone.'

Results

◗ Over 6.5 mn+ user interactions recorded on the creative, including all activities on the creative. Cost per interaction: INR 0.25
◗ Over 78K direct engagements were recorded on the banner creative and mobile, with a direct cost per interaction of INR 22.
◗ In two days, the fixed placement recorded over 13Mn impressions out of which more than 5Mn impressions were unique. Total clicks recorded were 37K+

Amarjit Singh Batra is the CEO of OLX India, which offers free online classifieds in 50 languages and more than 40 countries. Amar was awarded 'Marketer of the Year' (e-commerce) by International Advertising Association (India Chapter) in 2015. He was also on the 2012 and 2013 'IMPACT Digital Power 100' list. Amarjit holds a Bachelors in Industrial Engineering and has an MBA from University Business School (UBS), Chandigarh.

MOBILE MARKETING CASE STUDIES:
A VIEW FROM INDONESIA

by **Himanshu Shekhar** CEO, Mindshare South East Asia

and **Crisela Magpayo-Cervantes**, Regional Business Director, Netbooster Asia

I could bore you with all the statistics and proof on why Indonesia is front and center of mobile marketing, but I would rather not. There are numerous forums, sites and presentations on that, including the MMA Indonesia forum.

Here are five important lessons learned in 2015 in our journey to becoming better at mobile. They also include reflections on what eventually led to Mindshare being awarded as Indonesia Mobile Agency of the year.

True to (mobile) form and because people barely have enough attention span to scroll through large newsfeeds, here are short, shareable insights from what captured Indonesians' *likes* and *shares* in 2015.

1 > **Don't add to the marketing #Haze**
When news of forest fires from Kalimantan causing haze in Singapore and Malaysia spread, we couldn't help but think that this is very similar to poorly created and targeted mobile campaigns. It is so easy to blast SMS or run display campaigns that simply add more pollution to the already cluttered mobile experience. Let's face it: you are competing for consumer attention while they are on Facebook, Instagram, Path and are in chat conversations in their WhatsApp and Line groups. So when Pepsodent needed to convince moms to upgrade their toothpaste to a more expensive variant, rather than running a banner campaign to explain its benefits, we created a mobile karaoke competiton where

they could sing to a jingle that captured Pepsodent's benefits. By entertaining them, we found a way to make it worth their time. The singing was bad, yes. But the results were good and successfully hit the high notes.

2 > **GoJek. Grab Bike. Happy Fresh**. Most Indonesians have these applications on their phones. And though they are all startups that launched in 2015, they have become a big part of Indonesians' lives - simply because they are able to solve a pain point. From on-demand cleaning and salon service and ordering motorcycle drivers (ojeks) to scheduled grocery delivery, each of these applications are good reminders of how usefulness outweights any marketing campaign. In the same way that these startups helped address real consumer needs, Bango provided a solution to find the best hawker food near one's location through the Warisan Kuliner application. Before that, people relied on asking friends, if they were lucky enough to have friends who live near that area. The lesson is this: we need to start thinking of brands as service rather than as simply products on the shelves. We need to ask ourselves how else might we add value to our consumers' lives?

3 > **"In the face of overwhelming odds, I'm left with only one option, I'm gonna have to science the shit out of this"**
This is one of the most talked about lines from the movie, *The*

Martian. While it was referring to surviving on Mars against all odds, as mobile marketers we can all take a page from what Matt Damon said. The ability to use science and data to our advantage is a reality thanks to mobile. Without the power of data and mobile, Lifebuoy would not have been able to create a flood alert camapign during the rainy season in Jakarta. By plugging into the user-generated map of flooded areas in Jakarta, Lifebuoy was able to leverage those data points to create relevant and timely flood alert messages. Those then ended with a reminder to stay one step ahead of disease with Lifebuoy during floods.

4 > **"What is essential is invisible to the eye"**
Popular among the young and old, *The Little Prince* gives marketers age-old wisdom. Mobile is an extremely fragmented experience and the entire consumer journey is not in plain sight. Content is shared from one social media to another and then to chat applications seamlessly. As marketers we need to understand the consumer journey and think of ways to shorten or enable it so we bring them closer to purchasing.

For example, letting teens submit their pimple problems via Line increased participation 3x vs. through a site. Or the case of adding consumer reviews and 'buy now' buttons within rich media banners to shorten the consumer

journey to buying Pond's White Beauty on an eCommerce site. Or how - when we first launched Walls Taste Joy campaign - we had to deal with 60% bounce rates from our mobile site, simply because it took too many steps to participate. We learned how to optimise it week on week successfully reducing the bounce rate and increasing participants. When thinking mobile, one cannot underestimate the importance of user experience testing and understanding consumer journey.

5 > **"There's been an awakening. Have you felt it?"**
Like the much-awaited, highly-anticipated launch of *Star Wars: The Force Awakens*, it seems that mobile marketing is (finally) gaining traction. Just as in the movie, old characters

(agencies, clients, ad networks) appear alongside new ones (measurement, OTT, startups and programmatic platforms) but follow the same story line. We continue to fight for mobile as a force for good marketing and not as just another channel that adds to the noise. The mobile ecosystem continues to grow and year on year the collaboration just gets better. None of the case studies mentioned earlier would have been possible without everyone stepping up their game. The Force, as they say, is strong in everyone.

As we move into 2016, may The Force be with all of us!

Himanshu Shekhar (Twitter: @himanshu29) is CEO of Mindshare Indonesia & ASEAN Markets. He has

over 16 years of diverse experiences in media across two of the world's largest emerging markets: India and Indonesia. He was earlier with Mindshare Fulcrum and BIG FM Radio. He has been an active participant of AAAI in both India and Indonesia. Himanshu graduated from BHU (Banaras Hindu University, Varanasi).

Crisela Magpayo-Cervantes is regional business director at Netbooster Asia NCR (National Capital Region) in the Philippines. She was earlier with Mindshare, Internet and Mobile Marketing Association of the Philippines, and ABS-CBN. She graduated from the IE Business School, and is a specialist in communications strategy, branding, digital media/channel planning, project management, client servicing and people management. She can be followed on Twitter at @crisely.

SOUTHEAST ASIA E-COMMERCE:
WINNING THE NEXT WAVE OF SHOPPERS

by **David Resnick** Sector Leader, Performance & Multi-Channel at Google

and **Darren Tseng** Regional Account Manager, eCommerce APAC, Google

In Southeast Asia's rapidly changing e-commerce landscape, retailers need to constantly revisit and refine their offerings or risk getting lost in the shuffle. Here's the latest on how online retailers can keep an edge on the competition and remain relevant to consumers.

When e-commerce first took off in the region, following a standard formula would lead to reasonable success: build a simple desktop experience, upload basic inventory information such as stock images and prices, throw in some smart digital marketing, and watch as customers made their way to the site.

Today, technology advancements and shifts in consumer behavior have altered the path to success. To shed light on the new formula, we have identified three trends and how businesses can adapt to the rising expectations of Southeast Asia's growing segment of mobile-first consumers and an increasingly competitive marketplace.

TREND #1: SOUTHEAST ASIA IS MOBILE-FIRST (AND OFTEN MOBILE-ONLY), DRIVING RAPID MOBILE COMMERCE GROWTH

Southeast Asia is one of the world's most mobile-centric regions with countries like Singapore leading the way on smartphone penetration, and others like Indonesia and Thailand leapfrogging desktop PCs altogether. As late adopters to the internet, most households in the region never owned a desktop, and as smartphones became more affordable and accessible, they quickly became the main device by which people connected to the web.

This is particularly true when it comes to shopping. In 2015, 58% of searches in the region were done on a mobile phone (as per Google data) While regional data for mobile commerce is sparse, data from Singapore indicates that one-third of e-commerce consumer spending occurs via smartphones (Euromonitor from trade sources/national statistics, 2015). Anecdotally, some internet retailers reported that number surpassed 50% across Southeast Asia in 2015.

Fig. 1: The smartphone gap:
the percent of people with smartphones, minus the percent of people with PCs
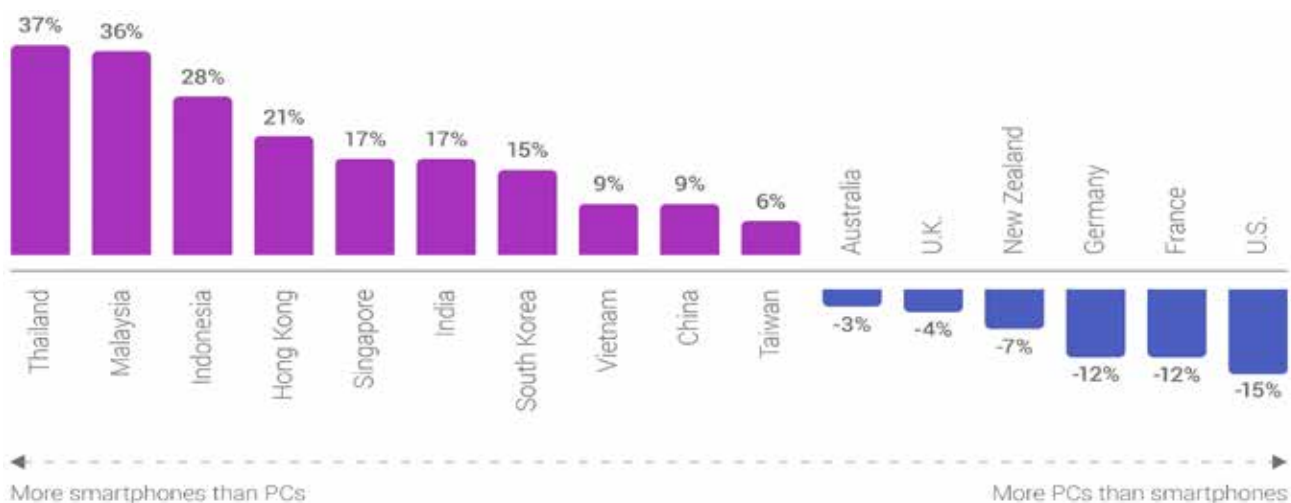
Fig. 2: In Singapore, about one-third of consumer e-commerce spend is now transacted via smartphones
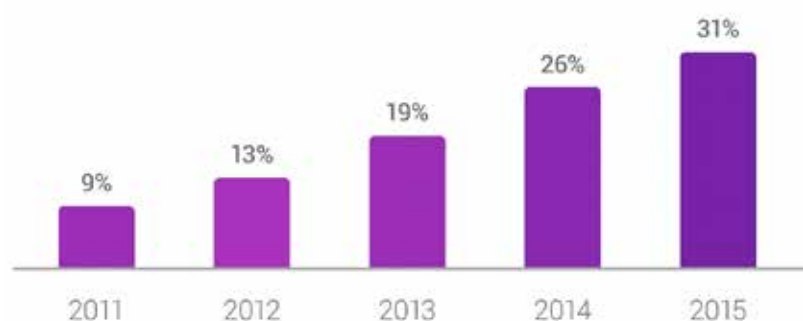
Source: Euromonitor from trade sources/national statistics, 2015.

WHAT YOUR BUSINESS CAN DO

1 > Invest in a quality mobile web-site *and* app

Consumers across APAC are nearly divided down the middle on where they like to shop: 55% prefer the app experience, and 45% prefer the smartphone browser. To capture your full customer potential, you should create robust experiences on both, or consider lite apps like Flipkart did. The Indian app-first e-commerce company recently built a lite version of its app that works in a mobile browser, giving users an alternative in case they did not want to download the app (common in India and Indonesia where smartphones have limited storage capacity).

Whichever way you choose, keep in mind that providing a simple and delightful experience is key. Limited screen space means every pixel must count. Challenge your usability team to focus on what is truly useful to your customers, instead of trying to squeeze in every marketing promotion or buying option. A good example is the new Agoda hotel booking app, which offers an intuitive user journey, inviting visuals, and helpful information such as hotel reviews and maps.

2 > Provide omni-channel shoppers a frictionless experience

Given the many ways customers can interact with your business (desktop, tablet, mobile site, mobile app, or physical store), it is critical to understand their interconnected paths to purchase - and to make their criss-crossing journeys as seamless as possible.

- ▪ RedMart, a Singapore-based online supermarket, ensures that delivery preferences and items in customers' shopping carts are automatically saved so they re-appear in the cart regardless of what device the customer picks up at any point. Creating these types of frictionless experiences results in smoother paths to purchase - and better conversion rates.

3 > Measure mobile better

Today's shoppers constantly move from device to device, and tracking that omni-channel experience is not easy. A shopper may see an ad on mobile, compare products on an app, and eventually convert on a desktop. Traditional metrics that focus solely on 'last-click conversions' will undervalue mobile's influence on the path to purchase. Some e-commerce retailers have stated that up to 40% of shopper journeys that start on the mobile site end up purchasing via the app or on the desktop site. Meanwhile, other journeys start on mobile but end up in physical channels like storefronts or call centers, making it key to create holistic KPIs that attribute value across the customer journey.

TREND #2: CONSUMER EXPECTATIONS CONTINUE TO RISE TO NEW HEIGHTS

Consumers today expect to be delighted by technology at every turn - to have magic brought to even life's most mundane tasks. Consider how quickly services like Uber and GrabTaxi caught on. Now that consumers can book a ride with a few taps and swipes, it is become rather unthinkable to wait in a taxi queue or give directions to the driver.

And while online shopping experiences remain constrained by some barriers that existed five years ago (namely not being able to touch or interact with a product), some brands are redefining the experience to meet consumers' rising expectations - attracting new customers and building brand love in the process.

Fig. 3: Smart Buy Glasses offers customers a virtual try-on
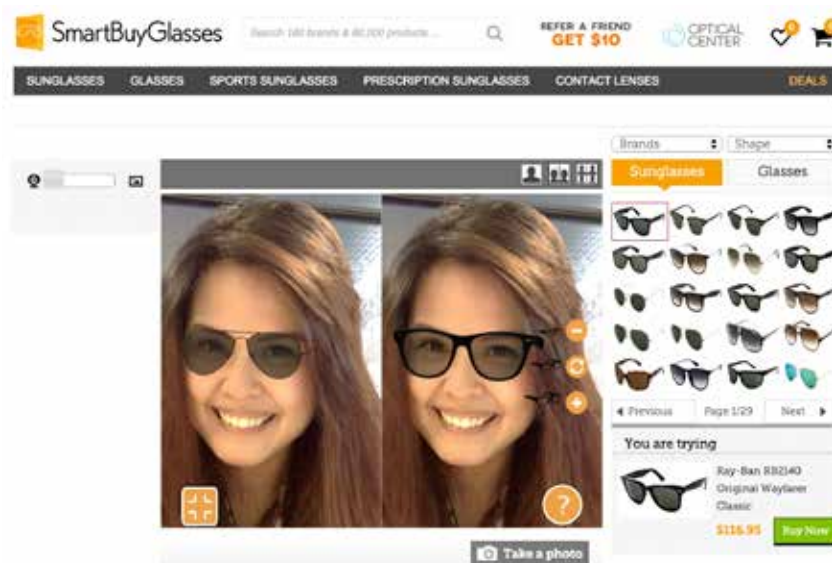
WHAT YOUR BUSINESS CAN DO

1 > **Use technology to bring your products and brand to life**

Find ways to replicate real-life shopping experiences online. Smart Buy Glasses offers different photo and zoom options for its products as well as a virtual try-on. Fashion brand ZALORA takes it one step further and hosts Hangouts On Air so that potential customers can see products in action and interact with the brand; it also uses 360° virtual reality with Cardboard viewing devices to give customers access to some behind-the-scenes action. It also uses to give customers a behind-the-scenes experience.

Services like these allow customers to get a feel for the products before clicking 'buy now,' giving them more confidence in their purchases and in the brand itself.

2 > **Offer easy payment options**

Once a shopper is ready to buy, the last thing you want is the payment to be an obstacle. To avoid this, offer flexible and easy payment options beyond credit cards and PayPal. Consumers in markets like Indonesia and Thailand expect to transact primarily in COD, bank transfers, and other alternative payment forms. Some companies, like Qoo10, have even partnered with leading financial institutions like DBS to allow for quick online checkout via mobile wallets tied to bank accounts.

Instead of focusing solely on driving transactions and competing on price, consider how your business can win by delighting customers and creating true brand affinity through better experiences.

TREND #3: TODAY'S MARKETPLACES ARE A TROVE OF INFINITE CHOICE

With rising consumer demand, it can be tough for sellers with limited inventory to compete. Consumers expect sites to have robust inventories of quality products, and in response, most larger e-commerce sites have vastly increased their selections by creating marketplaces that aggregate smaller sellers' and wholesalers' items in addition to their own inventory. Smaller merchants who can not compete on selection may elect to sell their inventory through established marketplaces like Qoo10, ZALORA, or Lazada. To further complicate things, choice has been widened through C2C marketplaces like Carousell and Shopee, which allow end users to sell directly to each other.

WHAT YOUR BUSINESS CAN DO

1 > **Create simple and seamless choices for the user**

Ensure that whichever supply-chain sources your site aggregates on the back end, users do not notice (or get confused by) the demarcations around each. If customers are seeking hairdryers on your site, for example, they should be able to view all hairdryers in the same set of search results, regardless of whether the vendor is an individual C2C seller, your e-commerce business itself, or another small business selling on your site. Allow customers to shop by product instead of solely by seller category.

- Lazada has a well-integrated marketplace setup that allows all products to appear to the customer within one Lazada experience. It also curates and organises numerous categories that are intuitive while providing helpful information like product reviews and buyer's guides. These help consumers faced with infinite choice make better purchase decisions, which, in turn, lead to more sales.

2 > **Monitor customer behavior and adjust product offerings**

Pay attention to what is selling and regularly adjust what is showcased. The best sites constantly curate their inventory as well as leverage analytics, optimisation, and testing tools to personalise the site based on specific user behaviors. For example, a young male who purchased expensive designer shoes on a site would have his future site visits customised to show similar or complementary male-focused products in higher price ranges.

FOCUS ON THE SHOPPER

These insights all share one main directive: users come first. Considering how quickly Southeast Asia is changing, businesses need to make sure their approaches and e-tail experiences are built to accommodate this shift. This is an interesting (and exciting) time for e-commerce players. They can either reinvent themselves, or relegate themselves to a commoditised race of competing on middle-of-the-road elements like price. (For the latest insights and trends from Google, please visit apac.thinkwithgoogle.com)

David Resnick leads teams for Google Singapore across eCommerce, Apps/Entertainment and Financial Services verticals. Previously he served on Google Canada's executive team as Head of Financial Services, helping C-level leaders build world-class digital strategies to gain competitive advantage. He was earlier Vice President & GM at Workopolis -- one of North America's largest online recruitment properties. David holds an MBA and HBA from the Ivey Business School at the University of Western Ontario.

Darren Tseng works with Asia Pacific partners across eCommerce, Apps and Entertainment verticals. He previously partnered with top Financial institutions in Google Canada. Prior to Google, Darren was a motivational speaker across North America and England and led leadership volunteer excursions in Ecuador, Kenya and rural China for not-for-profit organization Free The Children. He has a collection of over 100 hats and is a former Olympic torch bearer.

SEO AND SMO REVISITED:
THE MOBILE LENS

by **Anita Nayyar** CEO, Havas Media Group, India & South Asia

India is today one of the most interesting destinations of business, investment and entrepreneurship for global and local stakeholders on earth. While global sentiment in the fundamentals of policy and government are high, GDP and inflation are on course with measures in action to further boost the economy; the primary reason for all the excitement is - the young Indian consumer.

What set India free was technology (read Infosys, Tata Consultancy, Wipro and the like), the internet and now the force is mobile internet. The world and investors across the planet have seen India's recent e-commerce explosion. As on-ground real estate gets more expensive, these companies have super stores with countless choices of wares online. Digital's rapidly growing pace has turned out to be a game-changer for Indians and India's economy.

Mobile constitutes a huge part of this, and so digital driven by mobile will be a mega game-changer. It gives the Indian youth the opportunity to power their choice-sensitive, best price, consumer needs at the click of a button, on-hand, 24x7.

The young Indian customer is on the move, moves quickly, is price conscious and spoiled for choice. Switching costs are low in a cut-throat economy for consumer pockets, so being accessible at the right time, place and pace is the difference between a present or future customer and one that just moved to a competitor.

Search Engine Optimisation (SEO) is the differentiator here for a brand and constitutes one pillar to the mobile content gateway. This customer also likes to communicate, to share, to ask or comment to peers making Social Media Optimisation (SMO) the other fundamental pillar to the gateway of brand and business heaven.

Why so? As mobile usage surges along with a marketing push due to its close customer proximity, mobile websites will reign. App downloads take memory, thus limiting their future growth for an individual consumer. Furthermore, the app has more of a closed ecosystem, restricting cross-connections essential in an integrated device-media world with a hyper 'sharing' audience and 'metric' marketers. And app-only is difficult when you deal with large consumer bases. For example, Flipkart, which had decided to go app-only has partnered with Google to launch 'Flipkart Lite,' an app-mobile web browser hybrid. It remains to be seen how well this will work.

Even the mighty Google and Facebook had to remodel their business featuring 'mobile' and are driving huge profits, so there is no going back.

The mobile site platform structure allows the flexibility of cross-connections and integration with web and social, across most devices. Both mobile sites and social sites are content gateways; as pathways and arteries, social sites need to be mobile friendly. Neither of them are dying nor being completely written off anytime soon. Furthermore, as entrepreneurship surges in India, not everyone will be backed by mind-boggling investment which will become more circumspect.

Google has been clear that it will treat mobile-optimised sites differently and rank them higher. To clarify, this does not affect searches from tablets or desktops - only from mobile devices across languages and locations. This is a page-level change and not site-level. When correctly done, mobile sites can deliver on being face-up to the customer and back-end resourceful to the brand marketer.

The rules of a mobile friendly site with its roots in SEO, the first pillar, include responsive design verification with the Google Mobile-Friendly Test, mobile usability and mobile optimisation.

As more and more people use their smart devices to access social networks like Facebook, Twitter and Instagram, let us also add YouTube – SMO and its rules get critical. Short and long term goals need to be clearly defined, content must be engaging, and attempts to build relationships must be made.

According to the IAMAI-IMRB 'Internet in India 2015' report, the urban monthly active Internet users have grown 38% over 2014 to 209 million, and rural monthly active Internet users 77% to 108 million. Female internet users are growing at a rate of 46% YOY compared to 50% for males. In India one of the main drivers of the internet is the mobile. The report states that urban Mobile Internet users have grown 65% to 197 million, and rural mobile Internet users surged 99% to 80 million, which is expected to reach a base of 109 million by June 2016.

In urban India, college students constitute the highest number of monthly active users. The proportion of college students to the total monthly active user base is 32% followed by young men. Interestingly, their preferred devices to access the Internet have seen a change with more users getting active on mobile

devices. Online communication over the Internet continues to be the primary purpose of accessing the Internet. Other activities, in which close to three quarters of the population, engages in is social networking and entertainment. This clearly highlights the importance of SEO and SMO as more brands try to be accessible to an almost fixed basket of customers.

In rural India, 42% of rural population in the 18-30 years age group constitutes 76% of the rural internet users. Contribution of internet users less than 18 years of age has grown from 5% in 2014 to 11% in 2015. Mobile phones have risen to a 60% share of main access point for internet access in 2015 from 38% in 2014. Online communication has reduced as usage among rural internet users, giving space to entertainment and social networking which lead the usage categories.

Mobile Internet has made its way into the lives of Internet users in a big way. As of October 2015, Mobile Internet had a penetration of 21% in India with 276 million users. These mobile Internet users access the Internet on their mobile phones at least once a month.

In urban India, the mobile Internet user base has grown at a rate of 65% over 2014 to reach 197 million in October 2015. These users surged to 80 million in October 2015 growing at 99% over 2014. The user base of mobile Internet users in rural India is expected to reach 109 million by June 2016.

As digital and mobile dominate media, there are tremendous opportunities for the agile marketer. Clearly, the numbers, statistics and behavior underline the functionality and do-it-now attributes of SEO and SMO both on the mobile as well as on the web. Competition is heating up and the battle for the customer mind and pocket gets more aggressive, more frequent, and with some real-time battles.

Usability seamlessness across platform, across devices - driven by 'mobile' is the ecosystem in which the customer will create his actions. How industry experts track these actions, how they allow navigation and - most importantly - how they deliver experiences will lead to creative business with profit.

SEO and SMO are as alive and vital today and will be even more so, tomorrow – like simple small bricks building modern habitats!

Anita Nayyar is CEO of Havas Media Group for India and South Asia, having established and expanded the Group's footprint in these markets. She was voted the second most influential media person in India by The Brand Equity Survey in 2006. Her 30+ years in the industry have seen her as a prominent speaker, moderator, panelist and judge at all major events and awards. Anita was earlier with Saatchi & Saatchi, Ogilvy & Mather, Initiative Media, MediaCom and Starcom Worldwide. She has degrees in micro-biology, advertising and management.

LEARNINGS FROM THE MMA SMOX STUDY:
THE NEED FOR DOUBLE DIGIT INVESTMENT IN MOBILE MARKETING

Mobile is driving the most dramatic transformation in history when it comes to how consumers communicate, use media and shop. A transformation as wide as it is deep, it cuts across all population groups and is pushing the limits of what is possible in marketing and advertising, So, does it not follow that there is a mobile marketing explosion, with brands pouring dollars into this unparalleled opportunity to build closer connection with their consumers?

Not as much as you would think.

That is exactly what we at the Mobile Marketing Association sensed when we embarked on a massive, initiative – our Smart Mobile Cross-Marketing Effectiveness Research – or SMoX – an ongoing series of studies with major marketers aimed at closing the gap between consumer use of mobile and advertisers' investment in it. What we have discovered with the five studies, conducted with some of the most iconic brands in the world -- including Walmart, AT&T, MasterCard and The Coca Cola Company – is that brands should be investing at least 12 percent of their TOTAL spend in mobile.

The percentage of mobile within the broader marketing mix is currently *at only three percent*, despite the constant climb in how much time consumers spend with mobile devices. According to a September 2015 report from comScore, mobile is now the leading digital platform in the US – a country that used to be wed to its laptops and desktops -- with smartphones and tablets combined making up 62 per cent of time spent on digital media.

Fig. 1: The SMOX Study

How it works: Thanks to Marketing Evolution & Millward/Brown's Insight Express
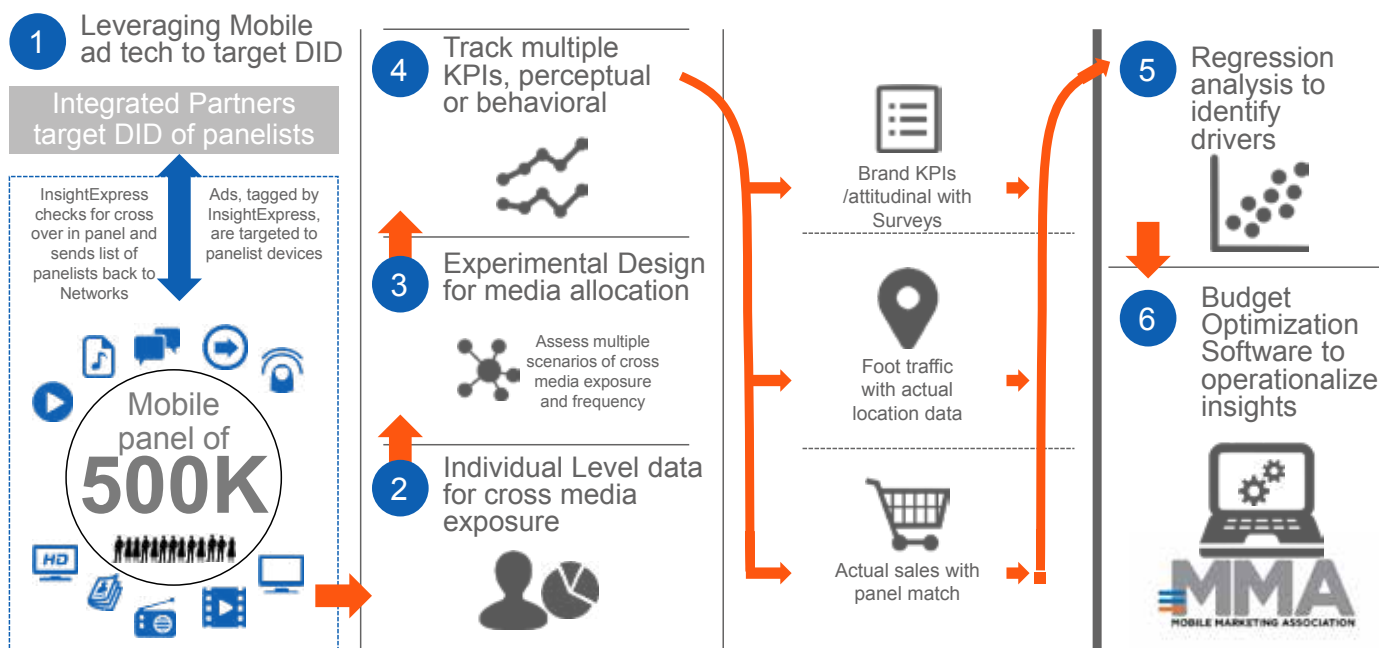
While each of the SMoX studies is unique in its goals and parameters, the evidence from all of them points in the same direction. When brands optimise for mobile, they see an increase in results across the funnel:

- AT&T saw a **12 percent** lift in awareness.
- MasterCard realized a **seven percent** gain in brand image.
- Walmart saw a **six percent** increase in incremental sales.

These data points from the SMoX research, and others, proves that such a reallocation to mobile would produce significantly better results for a campaign overall, without the need to invest additional funds.

Mobile is an untapped opportunity and a very strong driver of performance, so what are brands waiting for?

Simply put, many brands are on the fence about mobile because they need tangible evidence about its return-on-investment vs. other channels. Therefore, MMA launched an extensive industry outreach program about SMoX in 2015, to engage marketers and make the initiative's insights actionable.

Over a five-month period of evangelising the results, including four roadshows, 15 events and more than 70 in-person presentations to agencies and brands, we talked to literally thousands of marketers and can draw some initial observations in terms of how the industry is responding to this breakthrough research.

1. SEEING IS BELIEVING

SMoX provides convincing, irrefutable evidence about the value of mobile in the marketing mix.

- **Over 95 percent** of marketers and agencies who responded to our attendance satisfaction survey said they found the SMoX insights tangible, the story around mobile clear, and the evidence provided credible.
- **Six out of ten marketers** found the SMoX research drastically improved their perception of mobile marketing. It reinforced the idea that mobile deserves a

double digital allocation in the mix, and presents an opportunity to better connect with consumers.
- **Over 90 percent** of the companies that have reviewed the SMoX research became convinced that there is an opportunity to adjust their mobile investment upwards, with **more than 50 percent** declaring that they should actually invest *a lot more*.

Here are just two of the things that marketers told us:

"I knew the impact it could have, but not to this extent."
"It reinforces the sense of urgency we need in getting ahead of the game with certain aspects of mobile within our mix (percent of spend, quality of UX etc)."

With marketers, the lightbulb is going on, the first step in a mental and organisational transformation that will help brands to act and unlock the full potential of mobile.

2. REMAINING KNOWLEDGE GAPS NEED TO BE FILLED

The above feedback shows SMoX is already filling a critical market need, helping quantify the mobile opportunity many of us sensed was there. It also challenges us to evolve our learning agenda and address deeper questions that will add more texture to these findings (see Fig. 2).

Fig. 2: SMoX Learning Agenda Framework
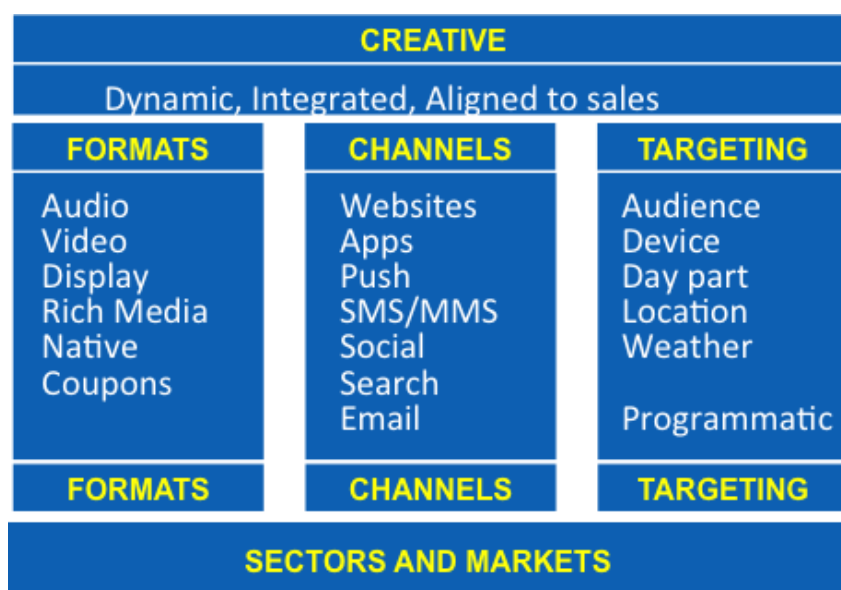
Here are some of the most pressing areas where we need to conduct additional research:

a > **Sectors and Markets:** Our studies so far cover a spectrum of sectors and campaign goals, from financial services and CPG to brand awareness, telecoms to incremental sales. We need to add studies in higher ticket and higher involvement catergories -- like automotive or travel – that are also being heavily disrupted by mobile, and broaden our product category research in other directions as well. We also need to conduct more global studies.

b > **Mobile Formats and Targeting Methods:** SMoX has already tested a number of mobile tactics and formats -- from banners to native to proximity -- but there is an opportunity to test even more formats and targeting methods. These include rich media, push notifications and contextual targeting around things like weather conditions.

c > **Understanding Creative:** We also need to dig deeper into the role creative plays in mobile success, gain greater understanding of how to design for mobile and discern how new approaches like dynamic creative optimisation impact results.

d > **Campaign specifics:** Finally, we want to understand the impact of other components that are part of the planning process, including budget size, targeting groups, media sequencing, and the like.

3. DRIVING CHANGE ALSO HAS TO COME FROM MARKETERS

Part of the MMA's role in moving mobile forward is to change perceptions about its role in the marketing mix and address some of the above questions. These are critical steps to spark industry change.

Fig. 3: Maximising Mobile Investment

But in order to create momentum and accelerate growth, we also need to find ways to support change within marketers themselves. The MMA recently conducted a series of in-depth interviews with CMOs, who identified some key roadblocks along their companies' paths to mobile maturity:

- **Internal Silos:** *"How do we break the silos and build mobile capabilities across departments?"*

- **Scarcity of Talent:** *"Our tech people are not marketing savvy, and vice versa. How do we build the right team for now and for the future?"*
- **Role of Mobile in Campaign Execution:** We often develop a creative idea for broadcast and then try to fit it to mobile. *"How do we avoid slipping into the old way of doing things?"*
- **Cross-Device Mobile Analytics:** *"How do we follow our users across devices and segment them?"*
- **Fragmentation Among Partners:** There are many platforms and multiple players that are hard to manage. *"How do we select our partners and how many do we need?"*
- **Privacy:** Mobile produces more data for the user than any other platform, but at a potential cost. *"How will policy evolve, and what precautions are needed from a privacy perspective?"*

The MMA will continue striving to address these challenges through its many programs, providing essential guidance to marketers on their path to mobile maturity. One thing is certain: mobile´s disruptive impact means that for all marketers, investing in mobile is no longer optional; it is a matter of who gets there early and who does it well.

At the expense of mobile laggards, marketing executives who choose to lead and are moving first will open a competitive advantage, driving tangible share shift, and – for the largest advertisers – hundreds of millions of dollars of additional annual revenue.

How can I make my mobile investment work harder?

Optimization area	ROI Upside
1. Optimize by Format	20%–40%
2. Leverage Location targeting	20%+
3. Leverage Context targeting	20%+
4. Build on Creative	40%–60%
Total	+100% to +160%

MMA
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PART III

BOARD OF DIRECTORS

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Prudential Corporation Asia
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Regional Director, Mobile Sales and Solutions
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CEO
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Boutique consultancy serving Asia Pacific

PUBLIC RELATIONS • DIGITAL COMMUNICATIONS • MARKETING COMMUNICATIONS

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PART IV

MEMBERSHIP

MMA OVERVIEW

Most marketers agree: Mobile is transforming marketing and businesses like nothing else we have seen or will see in our generation. Over the last few years we have witnessed how those marketers tapping into the power of mobile are driving significant business growth and getting closer to their consumers than ever before.

"The MMA's global efforts in developing mobile standards and best practices, focused on supporting our success as a marketer has greatly helped us better understand how to more appropriately increase our investments in mobile and stay ahead of our competition."
VP Mobile, CPG Marketer
& MMA Member

The MMA is the world's leading global non-profit trade association comprised of more than 800 member companies, from nearly 50 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 PURPORSE

The MMA's mission is to accelerate the transformation and innovation of marketing through mobile, driving business growth with closer and stronger consumer engagement. Anchoring the MMA's mission are four core pillars all focused on delivering the highest level of value to our members:

1 > **Cultivating Inspiration:** Aimed at the Chief Marketer; guiding best practices and driving innovation
2 > **Building Capability for Success:** Fostering know-how and confidence within the Chief Marketer's organization
3 > **Demonstrating Measurement and Impact:** Proving the effectiveness and impact of mobile through research providing tangible ROI measurement and other data.
4 > **Advocacy:** Working with partners and our members to protect the mobile marketing industry.

Mobile Marketing is broadly defined as including advertising, apps, messaging, mCommerce and CRM on all mobile devices including smart phones and tablets. Members include: American Express, AdChina, Colgate-Palmolive, Dunkin´ Brands, Facebook, Google, Group M, Hewlett Packard, Hilton Worldwide, Kellogg Co., L'Oreal, MasterCard, McDonalds, Microsoft, Mondelēz International, Inc. Pandora Media, Procter & Gamble, R/GA, The Coca-Cola Company, The Weather Company, Unilever, Visa, Vodafone, Walmart, xAd, Zenith Optimedia and many more.

MMA's GLOBAL REACH It has been said that there is no medium as global as mobile. The MMA is unique in that it delivers both global insights and access, as well as regional relevance to our members. The MMA's global headquarters are located in New York City with regional operations in North America (NA); Europe, Middle East and Africa (EMEA); Latin America (LATAM); and Asia Pacific (APAC). The MMA is governed by a membership elected Global Board of Directors on a worldwide basis and by Regional Boards in each respective region. Each board represents Brand Marketers, Agencies, Media Companies and Tech Enablers from across the industry ecosystem. Additionally we have local councils in 17 countries.

"The Internet changed the booking process. On the other hand, Mobile is completely transforming the way our customer's interact with us at every touch point including onsite."
CMO, Major Hotel Chain
& MMA Member

BIG TENT MEMBERSHIP

The MMA is the only global marketing trade group that represents all parts of the mobile marketing ecosystem. With a mix of brand marketers, agencies, media publishers, networks, technology enablers and others the MMA brings together all industry players to collaborate, teach, learn, share, build and drive against a common goal of leveraging the power of mobile for all.

OUR STRATEGIC FOCUS

The MMA is focused on building a scalable and sustainable global Mobile Marketing industry by creating standards and guidelines, best practices, effectiveness research as well as programs that reduce the friction in the buying and selling process. We believe that a successful trade association is the result of the willingness of the members to collaborate together, with each member understanding that collective action will generate better results at a faster rate than individual actions. As mobile marketing becomes commonplace, it is essential for the industry to have a strong trade association that advocates across the industry at large.

"MMA's SMoX research insights have challenged everything for us in how we look at our marketing mix and optimize our ROI. The in-depth analysis and data presents us with a significant competitive advantage and leadership opportunity as a marketer. Getting there first is key for us."
SVP Media, Beverage Marketer
& MMA Member

The MMA facilitates the development of this understanding and accomplishes its mission and goals by focusing across a number of strategic areas to deliver maximum value to our members:

RESEARCH AND INSIGHTS

1 > The MMA's proprietary **SMoX (Cross Media Optimization)** study being launched throughout 2014 into 2015, for the very first time in the industry, provides data on the effectiveness of mobile in the marketing mix. Additionally, SMoX measures mobile's optimized level as part of the mix and gives guidance to marketers on how to achieve the best ROI for a campaign. Having this type of research at your fingertips allows you to evaluate your current mobile spend against those in your vertical. Participating marketers include: AT&T, Subway, Colgate, MasterCard, The Coca-Cola Company, Walmart and others. This is

also the very first time a study like this is being conducted at a global level including North America, UK, Brazil, Turkey and China.

> *"The difference between the Internet 15 years ago and Mobile, is that you could ignore the Internet."*
> VP, Global Package Goods Company & MMA Member

2 > Over **450 Mobile Marketing case studies** as well as creative benchmarks and insights, provide marketers with wonderful examples of how others are executing mobile strategies effectively. Our members can use these case studies, as a way to understand what's possible and to inspire further innovation and activation of your own mobile efforts. Only members have access to the full case study hub. This year we intend to add close to 500 additional case studies from both the Cannes Lions Mobile Awards program as well as the MMA's Global Smarties Awards program.

> *"The MMA is clearly the primary driver in developing mobile standards and best practices that support greater investments in the mobile channel by marketers. It's their dedication to driving our business that makes them the best ROI we have."*
> VP Marketing, App Developer & MMA Member

Insights: The MMA has developed a learning agenda aiming to provide its members and the industry with solid insights that promote the understanding and successful application of mobile marketing. From mobile data to wearable technology and from CMO interviews to new approaches for pretesting mobile creative, the MMA conducts an increasing number of studies every year, offering its members the opportunity to partner and create thought leadership for mobile.

EDUCATION

The essence of the MMA's mission is to help marketers be more successful with your mobile efforts within your organization and around the world.

1 > Ensuring consistency in brand messaging and a consumer's brand experience around the world is no small task for marketers. The **Mobile Marketing Playbook** gives MMA marketer members a consistent resource to explain when, where, and how marketers can use mobile to spearhead or augment their marketing efforts. It takes marketers through the process of mobile strategy development from start to finish. It provides best practices around mobile executions, ways to leverage the myriad mobile vehicles and how companies can effectively measure and optimize mobile. This valuable tool is only available to MMA members.

2 > **Over 50 Webinars** around the world, numerous white papers and best practices provide MMA marketer members with a core base of education focused on building and refining skills and knowledge and delivering an arsenal of credible, objective selling tools.

3 > **Customized Education** can be developed based on a marketer's needs to help you reach Mobile Maturity.

4 > **Access to Mobile Experts** is key for marketers who need to make decisions quickly on which mobile companies to partner with, understand the latest trends and explore competitive opportunities. The MMA Team is just a phone call away and ready to answer your questions as you process all available options.

EVENTS AND NETWORKING

1 > With over a dozen events around the world, the MMA delivers the latest content, global thought leadership and unsurpassed mobile insights across multiple regions. MMA marketer members can leverage access to all of these events wherever relevant for your businesses FREE. This means that your marketing, innovation, technology and other teams have unlimited access to attend any MMA conference at no charge.

◗ **a. MMA Education Forums:** New York, London, Dubai, Brazil, Singapore, India, China, Vietnam, Indonesia, Spain, France

◗ **b. Flagship Events:** Mobile Center of Innovation at Cannes Lions Festival, CEO & CMO Summit, SM2 Innovation Summit (Advertising Week)

◗ **c. Smarties Awards Program:** Global (the pinnacle), Regional in EMEA, APAC and LATAM and in-country including South Africa, UK, Turkey, India, Vietnam and China.

◗ **d. Intimate Dinners, Topic Specific Panels and other Networking Events** round out the offering to bring our big tent membership of buyers and sellers closer together.

2 > Meeting other Members: The MMA helps members meet and collaborate with other members important to your business. Whether participating on a board, working group, council, or simply attending an MMA event, reach out to the MMA staff and leverage our connections to help further your goals.

COUNCILS, WORKING GROUPS AND INITIATIVES

1 > At the bedrock of the MMA are a number of industry initiatives, working groups and councils all focused on driving the mobile industry forward. These efforts provide a great way for individuals across the organization to engage very directly in the development of best practices & guidelines, standards and public policy and strategic frameworks. A listing of these opportunities can be found towards the end of this document.

2 > Leadership opportunities provide members with a unique opportunity to sit at the helm of important issues and shape the future of the industry. You can also leverage the MMA to build your company's profile and your personal standing within the industry at large.

3 > **MM25 Brand Marketer Group** is comprised of 25 of the leading global brand marketers and is focused on helping marketers to

more effectively and efficiently integrate mobile as core to their overall mix.

GETTING INVOLVED & MEMBER VALUE

MMA Membership offers the opportunity for companies to effect genuine change benefitting the worldwide mobile marketing industry. These companies provide leadership by accelerating innovation, removing critical industry roadblocks, and expanding industry awareness. Being part of the MMA affords the opportunity to make a difference, to stimulate the adoption and use of mobile, and to break down market friction and structural barriers. The MMA is laser focused on delivering critical member value to our members. Through involvement in the MMA, companies and their employees receive many benefits, including the opportunity to:

1 > Influence the direction of the industry by participating in initiatives & research;

2 > Influence industry guidelines, best practices, and standards;

3 > Develop and nurture new and existing business partnership and clients;

4 > Leverage the association and MMA community in public policy matters;

5 > Share and gain recognition for company and individual thought-leadership

"By participating in MMA committees last year - our first year of membership - I was able to do more to communicate my company's thought leadership than in the 5 previous years of doing it on my own. "
Head of Market Strategy, Enabling Tech Company & MMA Member.

6 > Gain access to MMA member only content and get previews of research and other industry insights before publicly announced

7 > Get MMA member only discounts to events and programs

"I am huge fan of MMA initiatives as they keep on generating great business for us. Plus the events have rich content and amazing networking opportunities. I am very happy."
Head of Advertising, Telecom Company & MMA Member

8 > Network with our extensive membership of buyers and sellers to deepen and further partnerships within the industry

"My sales team of course believes Mobile is a critical channel, but seeing insights from the MMA's SMoX research and getting sales training from Greg himself turned them into mobile sales experts. It's just a whole new level."
CRO, Publisher & MMA Member

MEMBERS

Hilton Worldwide

MediaBrix

Triad Retail Media

Pfizer, Inc.

Walmart Stores, Inc.

The Travelers Companies

Signet Jewelers

BP International

FRHI Hotels & Resorts

Pinterest

Quisk, Inc.

OnStar

Barclays

RealityMine

Marketo

Kellogg Co

JP Morgan Chase Bank

General Electric

Phunware

Quantcast

Tapjoy, Inc.

Bank Of America

Marketing Evolution

Ford Motor Co

PubNative

IG

Billy

Mobile Action

Colgate-Palmolive

Sam4Mobile

Intuit

Mobeam, Inc.

Mediacom

Rite Aid Corp

Safe Auto Insurance Company

General Mills Inc

Google

Las Vegas Convention and Visitors Authority

Cancer Treatment Centers of America

Fiksu Inc.

Kohl's

Nimbuzz BV

Infobip

Instantly

Chiquita

Abbott

Mblox

Procter & Gamble

Mobile Marketing Association

Vodafone Group Services Ltd.

VISA

Silverpop an IBM Company

MasterCard Worldwide

Turner Broadcasting System, Inc.

Unilever

Experian Marketing Services

Wunderman

GroupM

Facebook

Kantar

T-Mobile International AG

Hewlett-Packard Company

Campbell Soup Co.

Clear Channel Outdoor

Starcom Worldwide

Citi

ConAgra Foods

Nestle S.A.

Gemalto

BuzzCity Pte Ltd

Millward Brown UK Ltd.

Bloomberg L.P

Dunkin Brands

Turn

Electronic Arts Inc

Johnson & Johnson

The Hershey Company

Smith Micro Software Inc

The Trade Desk

Chobani

Epom Ltd.

RB Brands Ltd

FollowAnalytics

iconectiv

Mars Inc

IgnitionOne

Criteo

Teralytics

sensewhere Ltd

AppsFlyer

RetailMeNot

McDonalds Corporation

SUBWAY_ Franchise World Headquarters, LLC

R/GA

AppNexus

Near

Adknowledge

Swrve

Pepsico

Forbes Media

Samsung

Mondelez International

Bonzai Digital Pvt Ltd

OMD (Radeus Advertising)

Kantar Media (TNS Media Vietnam)

VNG Corporation

Centech Communications JSC

DatVietVAC Media

Cho Tot Company Limited

Lava Digital Company Ltd.

VietBuzz Ad

Creasia Group

Hindustan Unilever Limited

Inmobi (APAC)

Lazada Vietnam

United Spirits Limited India

Godrej Group

Novi Digital Entertainment Pvt. Ltd. (Hotstar)

AdFlex - EWAY GLOBAL

Unilever Vietnam International Company Ltd.

Vivaki (Vietnam)

Vietguys J.S.C.

Greenhat Company Ltd.

FrieslandCampina Vietnam Co., Ltd

AKA Digital

GroupM Vietnam (WPP Media Ltd)

Netcore Solutions Pvt. Ltd.

Gameloft (APAC)

Viettel Telecom

OLX India Pvt Ltd.

Millward Brown Market Research Services (India) Pvt. Ltd.

J Walter Thompson (APAC)

Pepsico India Holdings Pvt Ltd.

ANTS Corporation

One97 Communications Limited

Moore Online Solutions Corporation

Appota

Indosat

Goldsun Focus Media

Madhouse Mobile India Private Limited

RadiumOne

mGage

xAd

InMobi

The Weather Company

The Coca-Cola Company

Velti

DataXu, Inc.

Rubicon Project

Tune

Smaato Pte., Ltd. (APAC)

Opera MediaWorks (APAC)

Mobilewalla Singapore

Tyroo Media

e-Learning Edge

DeVries Global

VU Mobile

Rice Communications PTE LTD

POKKT Maiden Marketing India Pvt. Ltd.

Adadyn Technologies

ZALORA SOUTH EAST PTE LTD

Ambient Digital Group

Dentsu Asia Pte Ltd

Madhouse Inc.

SMART Communications, Inc.

Affle Holdings Pte. Ltd. (AHPL)

Prudential Corporation of Asia

Vserv Digital Services Pvt. Ltd.

Mobext (APAC)

SMSDome PTE.LTD.

Omnicom Media Group Asia Pacific Pte Ltd

OgilvyOne (APAC)

Big Mobile PTY LTD

Kimberly-Clark (APAC)

IE Business School

im2.0 Interactive Group (China)

AdMaster (China)

Youku Inc. (China)

InMobi (China)

AdSage Technology Co. Ltd. (China)

Analysys (China)

Getui (China)

GRIDSUM Technology Co. Ltd (China)

Big Mobile Group

iPinyou (China)

MediaBrands (China)

Dentsu Aegis (China)

Domob Limited (China)

MMX China

Vivaki Greater China (China)

Digitop (China)

AdChina, Ltd. (China)

Havas Media (China)

Cooguo (China)

Adsame (China)

LeTV (China)

Sinomonitor (China)

Youmi (China)

Social Touch (China)

Shanghai General Motors Co. (China)

o2omobi (China)

Modern Media (China)

Carat Advertising Ltd (China)

Touchmedia (China)

Viva Mobile Media (China)

People Daily (China)

NetEase (China)

Allyes Group Pty. Ltd. (China)

AllMobilize Ltd (China)

Uniqlo (China)

Talking Data (China)

Ping Coo (China)

247 (China)

hdtMobile (China)

OMP (China)

Trio Digital Integrated (China)

Fly Advertising Co (China)

Coca-Cola Beverage Ltd (China)

Vizeum Advertising Ltd (China)

GroupM (China)

DCCI (China)

hdtMEDIA (China)

Posterscope (China)

Maxus Media (China)

Isobar (China)

MediaCom (China)

Kinetic Advertising Shanghai (China)

Google (China)

Starcom Mediavest Group (China)

Miaozhen Systems (China)

Omnicom Media Group (China)

Rayli (China)

D2C (China)

Mindshare (China)

MEC (China)

Nielsen (China)

VPon Inc. (China)

Adwo (China)

iResearch Consulting Group (Asia) (China)

XY Media, dba wapyoo (Guangzhou Xunyou Digital Technology Co. Ltd.) (China)

Pengjing (China)

Amplifi (China)

Zenith Optimedia (China)

Dianru (China)

Verawom (Shanghai) Digital Marketing Co. Ltd. (China)

Madhouse (China)

Sohu (China)

Unilever (China)

Phoenix New Media (China)

Limei (China)

Tencent (China)

iqiyi (China)

CTR Market Research (China)

PowerStream (China)

Digital Matrix (China)

Trends Media Group (China)

Amadzing (China)

Smartmad (China)

Baidu (China)

Lomark (China)

PHD (China)

Optimad (China)

Reckitt Benckiser (China)

Sizmek (China)

GroupM Media India Pvt. Ltd

BBDO (China)

Zhang Zhong Media (China)

180 China

mJoule (China)

New NIM Advertising (China)

Unionpay (China)

China Unicom (China)

MMA

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PART V

SMARTIES

THE SMARTIES APAC 2015 WINNERS

Brand Awareness

1 **Hindustan Unilever and PHD India**
Kan Khajura Tesan

2 **MediaCom / Volkswagen and MediaCom**
Launching New Energy Vehicles through Innovative Mobile

3 **Sunlight, Unilever and Mindshare Sri Lanka**
Sunlight lights up the nation

Product / Services Launch

1 **Luxottica / OPSM and Saatchi & Saatchi Sydney**
Penny The Pirate

2 **KFC and Mindshare China**
KFC – One Man Versus the World Cup

3 **Samsung | Leo Burnett and M&T Vietnam | Starcom**
Watch it with an S6

Promotion

1 **Colgate Palmolive (India) Ltd and Red Fuse Communications2044**
Spreading a million smiles with a mobile

1 **Virgin Mobile Australia and StarcomMediavest Group**
Meal For A Meal

3 **Magnum, Unilever and PHD China**
Uber Ice Cream

Relationship Building/CRM

1 **Hindustan Unilever and PHD India**
Consumer 360

2 **Hindustan Unilever and PHD India**
Kan Khajura Tesan

3 **Unilever and Mindshare Thailand**
Enable Mobile Lifestyle - Unilever True Wifi

Lead Generation / Direct Response /Conversion

1 **Singapore Red Cross and MRM/McCann**
The Red Cross Connection

2 **Bru Coffee and Brandtone**
Bru Coffee - "360° - 365 days" always-on engagement

Marketing within a Mobile Gaming Environment

2 **L'Oréal Paris and Mindshare China**
L'Oréal Paris Men Expert Teams Up With Hydra Power Boy

Cross Media / Cross Mobile Integration

1 **Visa and OMD China**
Visa Rental Bike

1 **FrieslandCampina Vietnam/ Dutch Lady RTDM and Leo Burnett and M&T Vietnam and Mindshare**
THE FLYING FARM

2 **Cornetto, Unilever and Mindshare Malaysia**
Ice Scream, You Scream: Ghostly campaign "haunts" consumers

3 **Samsung | Leo Burnett and M&T Vietnam and Starcom**
Watch it with an S6

Messaging

1 **Colgate Palmolive (India) Ltd and Red Fuse Communications**
Spreading a million smiles with a mobile

3 **Viso, Unilever Vietnam and MindShare Vietnam**
Lifting Up Underprivileged Students through Innovative SMS Solution

Mobile App

1 **Luxottica / OPSM and Saatchi & Saatchi Sydney**
Penny The Pirate

2 **Network Seven and MNET MOBILE**
The Big Adventure

3 **AMP Capital and MNET MOBILE**
My Macquarie

Mobile Website

2 **Samsung | Leo Burnett and M&T Vietnam and Starcom**
Watch it with an S6

3 **Shakey's Philippines and Mobext Philippines**
Shakey's Mobile Site

3 **Unilever/Wall's and Mindshare Indonesia and Arcade Indonesia**
Wall's brings the taste of joy through the power of smiling

Mobile Payments

3 **Virgin Mobile Australia and StarcomMediavest Group**
Meal For A Meal

Innovation

1. **Samsung | Leo Burnett and M&T Vietnam and Starcom**
Watch it with an S6

1. **McDowell's No.1 Whiskey and Mindshare**
TV Makes friendship with mobile - McDowell's No.1 Whiskey

2. **Unilever / Lifebuoy and InMobi PTE Ltd and Mindshare Indonesia**
Lifebuoy Flood

Location Based

1. **Queensland Fire and Emergency Services and MNET MOBILE**
INCSnap (Incident Snap)

2. **Nike and Mindshare China**
Nike AQI: Saving Runners from Death by Pollution

3. **Visa and OMD China**
Visa Rental Bike

Best Brand Experience in Mobile Rich Media

1. **Luxottica / OPSM and Saatchi & Saatchi Sydney**
Penny The Pirate

2. **Samsung | Leo Burnett and M&T Vietnam and Starcom**
Watch it with an S6

3. **Lion / Steinlager and InMobi PTE Ltd & Zenith OptiMedia, Fairfax NZ**
Steinlager Pure Deep Dive

3. **Unilever Lux and Google**
Lux Sakura Dream

Most Engaging Mobile Creative

2. **FrieslandCampina Vietnam/ Dutch Lady RTDM and Leo Burnett/ M&T Vietnam and Mindshare**
THE FLYING FARM

2. **Samsung | Leo Burnett and M&T Vietnam and Starcom**
Watch it with an S6

2. **Cornetto, Unilever and Mindshare Malaysia**
Ice Scream, You Scream: Ghostly campaign "haunts" consumers

3. **Lion / Steinlager and InMobi PTE Ltd & Zenith OptiMedia, Fairfax NZ**
Steinlager Pure Deep Dive

Industry Awards

Leo Burnett/ M&T Vietnam
Agency of the Year in Mobile

InMobi
Enabling Technology Company of the Year in Mobile

Unilever
Marketer of the Year in Mobile

Samsung - Watch it with an S6
Best in Show

Tencent
Publisher/Media Company of the Year in Mobile

Mindshare Asia Pacific
Agency Network of the Year in Mobile

THE SMARTIES APAC 2015 WINNERS

THE SMARTIES INDIA 2015 WINNERS

Brand Awareness

1. **Mountain Dew | PepsiCo and Mindshare**
"Mountain Dew - Inspiring Rural India with Real Heroes' Real Stories"

2. **Hindustan Unilever and PHD India**
"Kan Khajura Tesan"

3. **Vodafone and Madhouse Mobile Marketing India Pvt Ltd**
"Vodafone Amplify – An Innovation that turned Onlookers to Curators"

Lead Generation / Direct Response / Conversion

1. **Colgate Palmolive (India) Ltd. and Red Fuse Communications**
"Spreading a million smiles with a mobile"

2. **Getit Infomedia Limited / Brand:AskMeBazaar.com and Opera Mediaworks**
"AskMeBazaar"

Product / Services Launch

1. **Lakme and PHD India**
"Lakme Makeup Pro"

1. **Airtel Wynk and Performics-TLG India Pvt Ltd**
"Airtel Wynk Launch"

3. **Getit Infomedia Limited / Brand:AskMeBazaar.com and Opera Mediaworks**
"AskMeBazaar"

Promotion

1. **Colgate Palmolive (India) Ltd and Red Fuse Communications**
"Spreading a million smiles with a mobile"

2. **Hungama and Hungama Digital Media Entertainment Pvt Ltd**
"Happy New Year: The Game"

3. **Colgate Palmolive (India) Ltd and Red Fuse Communications**
"A smile for education"

3. **Hindustan Unilever and PHD India**
"Consumer 360"

Most Engaging Mobile Creative

1. **Lay's and Mindshare India**
"Lay's hid the treasure hunt inside Google Maps "

2. **Nike and Mindshare**
"How Nike risked everything on Mobile"

Relationship Building / CRM

1. **Hindustan Unilever and PHD India**
"Kan Khajura Tesan"

2. **Hindustan Unilever and PHD India**
"Consumer 360"

2. **Colgate Palmolive (India) Ltd and Red Fuse Communications**
"A smile for education"

Cross Media / Cross Mobile Integration

1. **McDowell's No.1 Whskey and Mindshare**
"TV Makes friendship with mobile - McDowell's No.1 Whiskey "

2. **Mountain Dew | PepsiCo and Mindshare**
"Mountain Dew - Inspiring Rural India with Real Heroes' Real Stories"

3. **Kellogg India Pvt. Ltd and Mindshare West**
"Kellogg's Mobile Breakfast"

Mobile App

1. **Lay's and Mindshare India**
"Lay's hid the treasure hunt inside Google Maps"

2. **Castrol India Pvt. Ltd and Mindshare West**
"India's first Co-Created App"

Messaging

1. **Ashiana Housing and Quasar Media**
"Neha Sawhney"

2. **Colgate Palmolive (India) Ltd. and Red Fuse Communications**
"Spreading a million smiles with a mobile"

Innovation

1. **McDowell's No.1 Whsikey and Mindshare**
"TV Makes friendship with mobile - McDowell's No. 1 Whiskey"

2. **Lay's and Mindshare India**
"Lay's hid the treasure hunt inside Google Maps"

3. **Lakme and PHD India**
"Lakme Makeup Pro"

Location Based

1. **Lay's and Mindshare India**
"Lay's hid the treasure hunt inside Google Maps"

2. **Kellogg India Pvt Ltd and Mindshare West**
"Kellogg's Mobile Breakfast"

3. **7UP | PepsiCo and Mindshare**
"7UP used Technology (TemperAd Engine) to REVIVE sweaty India exactly when they were sweating!"

Mobile Payments

🥇 **Paytm and One97 Communications Ltd**
"Paytm"

Best Brand Experience in Mobile Rich Media

🥇 **Nike and Mindshare**
"How Nike risked everything on Mobile"

🥈 **GlaxoSmithKline Pharmaceuticals Limited and Mindshare India**
"Experiencing the "Mix-ability" of Instant Chocolate Horlicks on Your SmartPhone - Shake a Mix!"

🥉 **Lufthansa and Mindshare**
"How Forbes eMagazine turned into Lufthansa magazine for 4 weeks "

Industry Awards

🏆 **Lay's hid the treasure hunt inside Google Maps**
Best in Show

🏆 **Spreading a million smiles with a mobile**
Best in Show

🏆 **Mindshare**
Agency of the Year In Mobile

🏆 **PepsiCo & Colgate**
Marketer of the Year In Mobile

🏆 **Facebook**
Publisher/Media of the Year In Mobile

🏆 **PayTM**
Enabling Technology Company of the Year in Mobile

THE SMARTIES INDIA 2015 WINNERS

THE SMARTIES INDONESIA 2015 WINNERS

Brand Awareness

Unilever Indonesia/Cornetto and Mindshare Indonesia
Cornetto Red Velvet Love Song

Unilever Indonesia/ Walls and Mindshare Indonesia
Wall's Taste Joy brings the taste of joy through the power of smiling

Product / Services Launch

Unilever Indonesia, Pepsodent and Mindshare Indonesia
Mobile Karaoke Competition Bringing Dull Dental to Life

Castrol Indonesia and Mindshare Indonesia & Vserv Digital Services
Castrol Magnatec Stop Start Campaign

Unilever Indonesia and Mindshare Indonesia & Vserv Digital Services
Magnum Pink & Black Launch Campaign

Promotion

Dunkin' Donuts Indonesia and PT Telekomunikasi Selular, Tbk (TELKOMSEL)
DONUTS WONDERLAND

Unilever Indonesia / Vaseline and Mindshare Indonesia & InMobi
Vaseline Scores During World Cup Season

Berniaga.com and Opera Mediaworks (Indonesia)
Berniaga Gratis

Relationship Building/CRM

Jokowimania (jo-Man) and Berakar Komunikasi
The Story of Jokowi's Impromptu Walkabout

Unilever Indonesia / Bango and Mindshare Indonesia
Bango App - Serving Street Food to the Masses

Lead Generation / Direct Response / Conversion

Berniaga.com and Opera Mediaworks (Indonesia)
Berniaga Gratis

Zalora and M&C Saatchi Mobile Indonesia
ZALORA - New Customer Campaign

Cross Media / Cross Mobile Integration

Jokowimania (jo-Man) and Berakar Komunikasi
The Story of Jokowi's Impromptu Walkabout

Axa Health Insurance and Havas Media Group, Indonesia
Axa - Remember Your Health

Unilever Indonesia / Ponds and Mindshare Indonesia
Pond's Pimple Confessions

Mobile App

Unilever Indonesia / Bango and Mindshare Indonesia
Bango App - Serving Street Food to the Masses

Axa Health Insurance and Havas Media Group, Indonesia
Axa - Remember Your Health

Marketing within a Mobile Gaming Environment

Danone and VML Qais indonesia
Mizone Spirit Generator

Innovation

Unilever Indonesia and Mindshare Indonesia & Vserv Digital Services
Magnum Pink & Black Launch Campaign

Berniaga.com and Opera Mediaworks (Indonesia)
Berniaga Gratis

Unilever Indonesia / Bango and Mindshare Indonesia
Bango App - Serving Street Food to the Masses

Location Based

Unilever Indonesia / Lifebuoy and Mindshare Indonesia & InMobi
Lifebuoy Real Time Flood Alerts

Unilever Indonesia / Lifebuoy and Mindshare Indonesia & InMobi
Lifebuoy Shows the Way to Cleanliness during Ramadan

Aryo Djojohadikusumo and Right Hand Indonesia
CALEG - Legislative Candidate during Indonesian Legislative Election 2014

Most Engaging Mobile Creative

Danone - Aqua and VML Qais indonesia
Save Jack - An Instagram Breakout

Minute Maid Nutriboost and MediaCom Indonesia
Minute Maid Nutroboost #SahurWave Alarm

Best Brand Experience in Mobile Rich Media

Unilever Indonesia / Ponds and Mindshare Indonesia & InMobi
Pond's Picture Perfect

Industry Awards

Go-Jek
Enabling Technology Company of the Year in Mobile

BBM
Publisher/Media Company of the Year in Mobile

The Story of Jokowi's Impromptu Walkabout - Social
Best in Show

Bango App - Serving Street Food to the Masses
Best in Show

Mindshare
Agency of the Year in Mobile

Unilever
Marketer of the Year in Mobile

THE SMARTIES INDONESIA 2015 WINNERS

THE SMARTIES VIETNAM 2015 WINNERS

Brand Awareness

1. **Coca-Cola / MediaCom Vietnam & Adtima**
Share A Coke - Say it with Emoticans

2. **Samsung Galaxy S6 and S6 Edge / Leo Burnett Vietnam and Starcom**
Watch it with the S6

Product / Services Launch

1. **Samsung Galaxy S6 and S6 Edge / Leo Burnett Vietnam and Starcom**
Watch it with the S6

2. **Coca-Cola/ Fanta & CircusDigital**
Fanta Selfie Battle

Promotion

2. **HSBC / Mindshare**
Vietnam's biggest online Shopping Day

2. **Lazada Vietnam / Adtima**
LAZADA - EFFORTLESS SHOPPING

3. **FrieslandCampina Vietnam & Dutch Lady / Leo Burnett Vietnam & Mindshare**
The Flying Farm

Relationship Building/CRM

1. **Unilever Vietnam & Surf / Havas Media Vietnam**
Surf - Happiness Operator 2015

2. **Lazada Vietnam / Adtima**
LAZADA - EFFORTLESS SHOPPING

3. **Unilever Vietnam & Sunsilk / Mindshare & Adtima & Ogilvy Vietnam**
SUNSILK HAIR FINGERCOMB LANGUAGE

Lead Generation / Direct Response / Conversion

1. **Lazada Vietnam / Adtima**
LAZADA - EFFORTLESS SHOPPING

2. **Friesland Campina Vietnam / Friso and Mindshare**
Friso online acquisition

3. **FrieslandCampina Vietnam / Dutch Lady and Leo Burnett Vietnam & Mindshare**
The Flying Farm

Cross Media / Cross Mobile Integration

1. **Coca-Cola / MediaCom Vietnam & Adtima**
Share A Coke - Say it with Emoticans

2. **Samsung Galaxy S6 and S6 Edge / Leo Burnett Vietnam and Starcom**
Watch it with the S6

3. **FrieslandCampina Vietnam & Dutch Lady / Leo Burnett Vietnam & Mindshare**
The Flying Farm

Marketing within a Mobile Gaming Environment

1. **VBL / ClickMedia**
Desperados Wild Summer

3. **Coca-Cola / MediaCom Vietnam & Adtima**
Share A Coke - Say it with Emoticans

Messaging

2. **Unilever Vietnam and VISO / Mindshare & Centech**
VISO - NEW WHITE SHIRT, NEW BEGINNING

2. **Suntory PepsiCo Vietnam Beverage / Mirinda and Adtima**
MIRINDA - THE UNIQUE TET

3. **Lazada Vietnam / Lazada and Adtima**
LAZADA - EFFORTLESS SHOPPING

Mobile App

1. **FrieslandCampina Vietnam and Dutch Lady / Leo Burnett Vietnam & Mindshare**
The Flying Farm

Mobile Website

3. **Samsung Galaxy S6 and S6 Edge / Leo Burnett Vietnam and Starcom**
Watch it with the S6

Suntory Pepsico Beverages Vietnam / 7Up and Mirum
7Up Refreshing Viet Nam campaign

Innovation

1. **Unilever Vietnam and Close up / Mindshare, Adtima and Mirum**
CLOSE UP - SING IN YOUR STYLE!

2. **Uniliver Vietnam and Surf / Havas Media Vietnam**
Surf - Happiness Operator 2015

3. **Coca-Cola / MediaCom Vietnam & Adtima**
Share A Coke - Say it with Emoticans

Location Based

2. **Uniliver Vietnam & Viso / Mindshare & Centech**
VISO - NEW WHITE SHIRT, NEW BEGINNING

3. **Huawei Vietnam / Adtima**
HUAWEI - THE AMAZING HUNT

Best Brand Experience in Mobile Rich Media

1. Samsung Galaxy S6 and S6 Edge / Leo Burnett Vietnam and Starcom
Watch it with an S6

2. Unilever Vietnam & Close up / Mindshare & Adtima & ClickMedia
CLOSE UP - KISS IT YOUR WAY!

3. CoCa-cola / MediaCom Vietnam & Adtima
Share A Coke - Say it with Emoticans

Most Engaging Mobile Creative

1. Coca-Cola / MediaCom Vietnam & Adtima
Share A Coke - Say it with Emoticans

2. FrieslandCampina Vietnam & Dutch Lady / Leo Burnett Vietnam & Mindshare
The Flying Farm

3. Unilever Vietnam & Close up / Mindshare & Adtima & ClickMedia
CLOSE UP - KISS IT YOUR WAY!

3. Samsung Galaxy S6 and S6 Edge / Leo Burnett Vietnam and Starcom
Watch it with an S6

Industry Awards

MoMo
Enabling Technology Company of the Year in Mobile

Zalo
Publisher|Media Company of the Year in Mobile

Share A Coke - Say it with Emoticans
Best In Show

Watch it with the S6
Best In Show

Adtima
Agency of the Year in Mobile

Unilever
Marketer of the Year in Mobile

THE SMARTIES VIETNAM 2015

THE SMARTIES VIETNAM 2015 WINNERS

THE SMARTIES AUSTRALIA 2015 WINNERS

Brand Awareness

Virgin Mobile Australia & StarcomMediavest Group
Meal for A Meal

Product / Services Launch

Luxottica / OPSM & Saatchi & Saatchi Sydney
Penny The Pirate

AMP Capital & MNET MOBILE
My Macquarie

Cross Media / Cross Mobile Integration

Virgin Mobile Australia & StarcomMediavest Group
Meal for A Meal

Promotion

Virgin Mobile Australia & StarcomMediavest Group
Meal for A Meal

Mobile App

Luxottica / OPSM & Saatchi & Saatchi Sydney
Penny The Pirate

Network Seven & MNET MOBILE
The Big Adventure

AMP Capital & MNET MOBILE
My Macquarie

Innovation

AMP Capital & MNET MOBILE
My Macquarie

Network Seven & MNET MOBILE
The Big Adventure

Location Based

Queensland Fire and Emergency Services & MNET MOBILE
INCSnap (Incident Snap)

Victorian Electoral Commission & MNET MOBILE
Vote Victoria

Best Brand Experience in Mobile Rich Media

Luxottica / OPSM & Saatchi & Saatchi Sydney
Penny The Pirate

indeed.com & InMobi
360 degree of job opportunities

2K Games & Snakk Media
Evolve-Choose your side

Industry Awards

Penny The Pirate
Best In Show

MNET MOBILE
Agency of the Year in Mobile

Luxottica / OPSM
Marketer of the Year in Mobile

2015 SMARTIES ASIA-PACIFIC:
HOW TO SUCCEED IN MOBILE MARKETING?

by **Anggra Tidayoh** - Marketing Director

Mobile as a platform offers huge opportunity for consumer engagement. According to the 2015 global *AdReaction* study conducted by Millward Brown that examines video use and creative response across screens, we found that multiscreen users across Asia-Pacific have a total screen time of 400 minutes daily. Strikingly, smartphone screen consumption in Asia-Pacific is higher when compared to the global average figures (174 minutes in Asia-Pacific, 149 minutes globally). Millward Brown's global MarketNorm database also indicates mobile marketing is achieving more desirable results than the conventional promotions via internet in influencing brand awareness, information transmission and purchase intention.

In order to help marketers understand how to use this medium effectively to convey integrated brand experience, Millward Brown analyzed 71 entries for the SMARTIES Awards in Asia-Pacific to understand the factors common to the winning campaigns. We also observed the jury deliberations to capture their views on the campaigns. A qualitative as well as quantitative analysis of the winning campaigns gave us an insight into key aspects of successful campaigns.

1 > Set well-defined goals and have a clear role for mobile
  ◗ **Success is at the heart of winning campaigns:** There was a shift in mobile campaign strategy in Asia-Pacific. Mobile was used as a brand building platform rather than a sales generator - 75% of the campaigns focused on

improving brand perception while 54% of the campaigns focused on increasing sales. This is in line with Millward Brown's BrandZ study, which states that brands focused on strengthening brand preposition are more likely to achieve commercial growth.
  ◗ **Have a distinctive role for mobile:** It is important to have a clear and well-defined role for mobile within an integrated campaign. 92% of the entries in Asia-Pacific have a specific role for mobile within the media mix, which enables marketers to use the unique strengths of the channel to meet business objectives.
  With the high penetration of mobile phone in India, the gold winning campaign, "Spreading a million smiles with mobile" by Colgate had built their campaign strategy around mobile. Since mobile is the first thing consumers look at after getting up every morning, Colgate's strategy was to use mobile to provide information of the 35,000 free dental check-up centres at their fingertips. Consumers could access to this information by giving a missed call to the hotline. Colgate took the 'missed call' experience to the next level by creating the unique 'click to miss call' functionality within Facebook newsfeed. The clear and distinctive role of mobile in this campaign had helped Colgate to get over 4.9 million free dental check-ups during this period. At the same time, it also

helped Colgate in becoming the Most Trusted Brand for the 4th consecutive year.

2 > Tailor campaign to the audience and media
48% of the shortlisted mobile campaigns were tailored to a consumer profile. Focused targeting is key in delivering the right experience to the right consumer at the right time and place. It enhances in-context engagement and creates a long term brand impact in consumer's mind. According to the 2015 media & digital predictions report released by Millward Brown, giving the customers what they want at the right place at the right time, will be a key differentiator for cutting edge brands that seek to build personal relevance and meaning with their consumers.

Besides using the 'missed call' approach to reach out to consumers, Colgate had also used different media and strategies for different group of audience in the "Spreading a million smiles with mobile" campaign. Colgate used out bound voice calls linked to an interactive voice response system for people from the media dark area. For a little evolved audience, they returned the information just in an SMS.

3 > Apply multi-channel integration
  ◗ **Mobile should not operate in silo:** Mobile was a part of the greater integration across other medium touch points for 71% of the campaigns. However, most campaigns do not rely solely on

mobile to create an impact. As Millward Brown's CrossMedia ResearchTM learnings highlighted, the use of multiple touch points creates a greater synergy.

◗ **Be social:** 48% of the winners used social media in their campaigns. Mobile has become the primary means to connect with consumers.

The gold winning campaign, "The Flying Farm" by Dutch Lady had *used this approach to create a successful campaign.* To stand out from the intense yet repetitive activity of giving away collectibles, the gold winning campaign, Dutch Lady has done something beyond promotional freebies. Dutch Lady integrated mobile into the regular on pack promotion and introduced an augmented reality mobile app called "Flying Farm". The mobile app gives kids a virtual experience in the world of a Dutch farmland. It also provides multiple gaming possibilities for the kids while interacting with the flying farm toys they collected from purchasing the Dutch Lady milk.

4 > Enable engagement between consumers

◗ **Connects the crowd:** Winning campaigns do not dominate conversations; they spark and encourage interactions between consumers. 49% of the campaigns used user-generated content, fan page, apps as a key campaign element to encourage interactions among consumers.

◗ **Innovation:** We have found that innovation is one of the key elements for mobile campaign in Asia-Pacific, 35% of shortlisted campaigns used technological innovation to

enhance engagement and this number is higher compared to Indonesia with only 10%.

The gold winning campaign, "Watch it with an S6" by Samsung used an innovative technique in generating brand engagement for the launch of Samsung Galaxy S6 and S6 Edge in Vietnam. The team created a love story that streamed online but they fanned the audience's curiosity by inserting extra juicy bits into the narrative. To watch the juicy bites, users must sync their smartphones with the main screen and this was made possible with the dual double screen technology. This innovative technology integrated the online film on desktop and mobile at once, allowing users to connect and interact with it seamlessly on both screens. S6 smartphones users had full access to the film while the non-S6 users could only view a partial of the story. However, demo centers were set up simultaneously in 79 Samsung stores to enable non-S6 users to watch the completed film with displayed S6 phones.

5 > Embed consumer trends

◗ **Tap into the current trends:** Brands that successfully leveraged an existing consumer trend or news piece found greater adoption among consumers. 46% of the winners in Asia-Pacific tapped into an existing consumer trend or a news piece to build relevance.

◗ **Be socially considerate:** 35% of the winning campaigns aim to solve societal problems such as pollution, flood and shortage

of blood supply. Campaigns that seek to solve problems are ones that are most relevant to consumers.

In the "Saving Runners from Death by Pollution" campaign in China, Nike initiated an industry first cooperation with AQI PM2.5, the most popular app for checking air pollution levels in China. When runners check the pollution levels via the app, Nike would be integrated right then and there, providing guidance on how they could exercise safely. If the pollution levels were within the safe limits, Nike would deliver on the screen a recommendation on where and how the runners could get out for a run in their city. If the pollutions levels were deemed unsafe, Nike would then encourage runners to exercise indoors. During the campaign period, Nike Running and NTC app registered a 300% increase in download and more than 40% increase in active user rates.

In conclusion, to win in mobile in Asia-Pacific it is important for marketers to set well-defined goals and have a clear role for mobile, tailor campaign to the audience and media and deliver the right experience to the right consumer at the right time and place. Also, marketers must understand the best integration of mobile with other channels and enable engagement between consumers. Lastly, marketers need to build a more meaningful connection with consumers and tap into consumers trends in a right way.

APAC

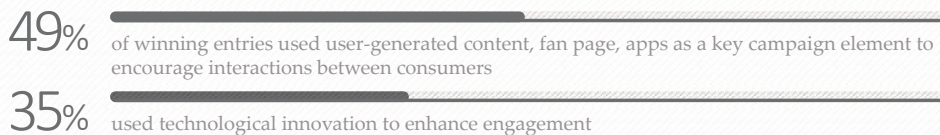# HOW TO SUCCEED WITH MOBILE MARKETING IN APAC

SET WELL DEFINED GOALS

70% of winners aimed to improve brand perceptions

54% of winners focused on sales as their objective

92% of winners had a clear and specific role for mobile

TAILOR YOUR CAMPAIGN TO THE AUDIENCE

48% were tailored to a consumer profile

39% utilized location-based and / or time-based targeting

APPLY EFFECTIVE MULTI-CHANNEL STRATEGIES

71% of campaigns showed good integration across multiple touchpoints

48% of campaigns used social media to connect with consumers

ENABLE ENGAGEMENT BETWEEN CONSUMERS

49% of winning entries used user-generated content, fan page, apps as a key campaign element to encourage interactions between consumers

35% used technological innovation to enhance engagement

EMBED CONSUMER TRENDS TO BUILD RELEVANCE

46% of winners tapped into an existing consumer trend or news piece

35% of winners aimed to solve societal problems

MMA SMARTIES   **MillwardBrown**

HOW TO SUCCEED WITH MOBILE MARKETING IN INDIA

FASTEST GROWING MOBILE INTERNET MARKET IN THE WORLD

869 MILLION active mobile phone connections

185 MILLION mobile internet users

162 MINS average daily time spent on mobile phone

BIG IDEA + SCALE

70% of winners demonstrated scale

SHARPLY DEFINED BRAND TASKS:

95% of winning campaigns were tailored to the target group

85% were tailored to the context

GET CLOSER TO THE CONSUMER

55% used technology, brands integrated ideas in many ways

CONSTANTLY INNOVATE

55% of winners integrated social media

30% of winners used mobile apps innovatively

10% of winners used gaming

MMA SMARTIES

MillwardBrown

INDONESIA

HOW TO SUCCEED WITH MOBILE MARKETING IN INDONESIA

SET WELL DEFINED GOALS

60% of winners focused on sales as their objective

70% of winners aimed to improve brand perceptions

90% of winners had a clear and specific role for mobile

APPLY EFFECTIVE MULTI-CHANNEL STRATEGIES

70% of campaigns showed good integration across multiple touchpoints

65% of campaigns used social media to connect with consumers

ENABLE ENGAGEMENT BETWEEN CONSUMERS

35% of winners used user-generated content, fan page, apps as a key campaign element to encourage interactions between consumers

EMBED CONSUMER TRENDS TO BUILD RELEVANCE

50% of winners tapped into an existing consumer trend or news piece

35% of winners aimed to solve societal problems

MMA SMARTIES

MillwardBrown

HOW TO SUCCEED WITH MOBILE MARKETING IN VIETNAM

KEEP THE BRAND IN THE HEART OF THE CAMPAIGN

75% of winners kept the brand at the centre of the campaign

BE CREATIVE IN APPLYING TECHNOLOGY

81% of winners used a new technology or applied an existing technology in a new way

UTILISE THE POWER OF INTEGRATED CAMPAIGNS

44% of winners used multiple channel strategy

ENHANCED IN-CONTEXT ENGAGEMENT FOR A LASTING IMPACT OF THE BRAND ON THE CONSUMER'S MIND

50% of winners designed the content based on a real consumer insight

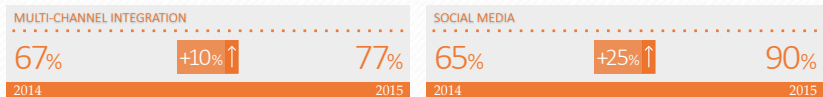**50%** of winners used co creating content via consumer interaction

VIETNAM

MMA SMARTIES — MillwardBrown

CHINA

HOW TO SUCCEED IN MOBILE MARKETING

SET WELL-DEFINED GOALS
AMONG THE 2015 AWARD-WINNING CASES:

70% had a well-defined strategy for their campaigns

90% had clear action plans to achieve goals

57% had clear objectives of improving brand awareness

40% had identified specific target audiences for the campaign
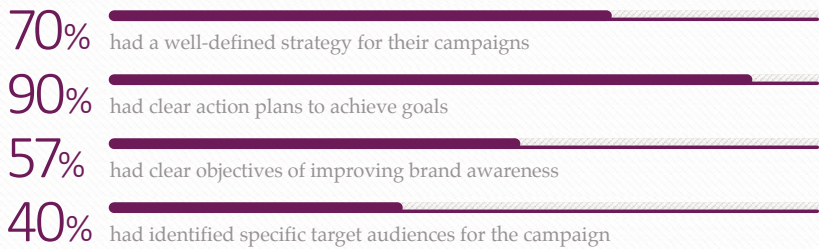
APPLY MULTI-CHANNEL INTEGRATION INNOVATIVELY

MULTI-CHANNEL INTEGRATION
67% +10%↑ 77%
2014   2015

SOCIAL MEDIA
65% +25%↑ 90%
2014   2015

More than 50% of the winners used social media to encourage social sharing and to create buzz.

AMONG THE 2015 AWARD-WINNING CASES:

USED MOBILE SPECIFIC TECHNOLOGIES	INCORPORATED INNOVATIVE MOBILE GAMES INTO THEIR CAMPAIGN
47%	30%

ENGAGE CONSUMERS ACTIVELY AND EFFECTIVELY

ENTRIES THAT ENCOURAGE CONSUMER INTERACTIONS
23%   47%
2014   2015

ENTRIES THAT INTEGRATED COMMUNICATION/SOCIAL MEDIA OR OFFLINE EXPERIENCE

24% Finalists

47% Winners

MMA SMARTIES

MillwardBrown

MMA
MOBILE MARKETING ASSOCIATION
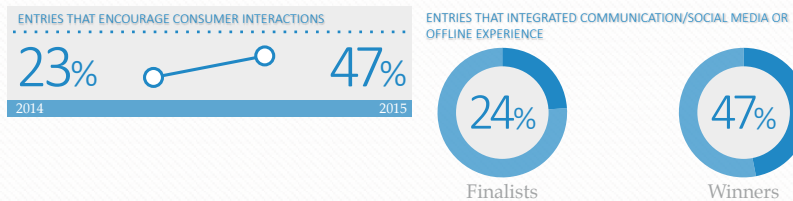
APAC

2015 Yearbook

PART VI

DATA SETS

DATA SETS:
MOBILE MEDIA IN THE ASIA-PACIFIC

This section of the Yearbook complements the qualitative analysis in Parts I and II, and presents data tables and figures sourced from comScore, ITU, GSMA, Ericsson, and other organisations. The Asia-Pacific leads the world in terms of mobile subscribers, with a wide range of network diffusion. Mobile is disrupting sectors ranging from health and education to entertainment and retail.

However, significant gaps and divides continue to exist between and within individual Asia-Pacific countries, especially with regard to mobile broadband. The startup movement is picking up across the region, with a range of innovations and alliances with larger media players.

As 5G begins to emerge on the horizon, the possibilities of transformations via mobile devices and behaviours will

challenge and enhance our absorptive capacities even more. The migration path, however, is paved with bumps and potholes, and not all companies will make the mobile shift in a smooth and harmonious manner.

From strategy to design, campaigns to conversations, periodic engagement to always-on analytics: how ready are you for the mobile shift?

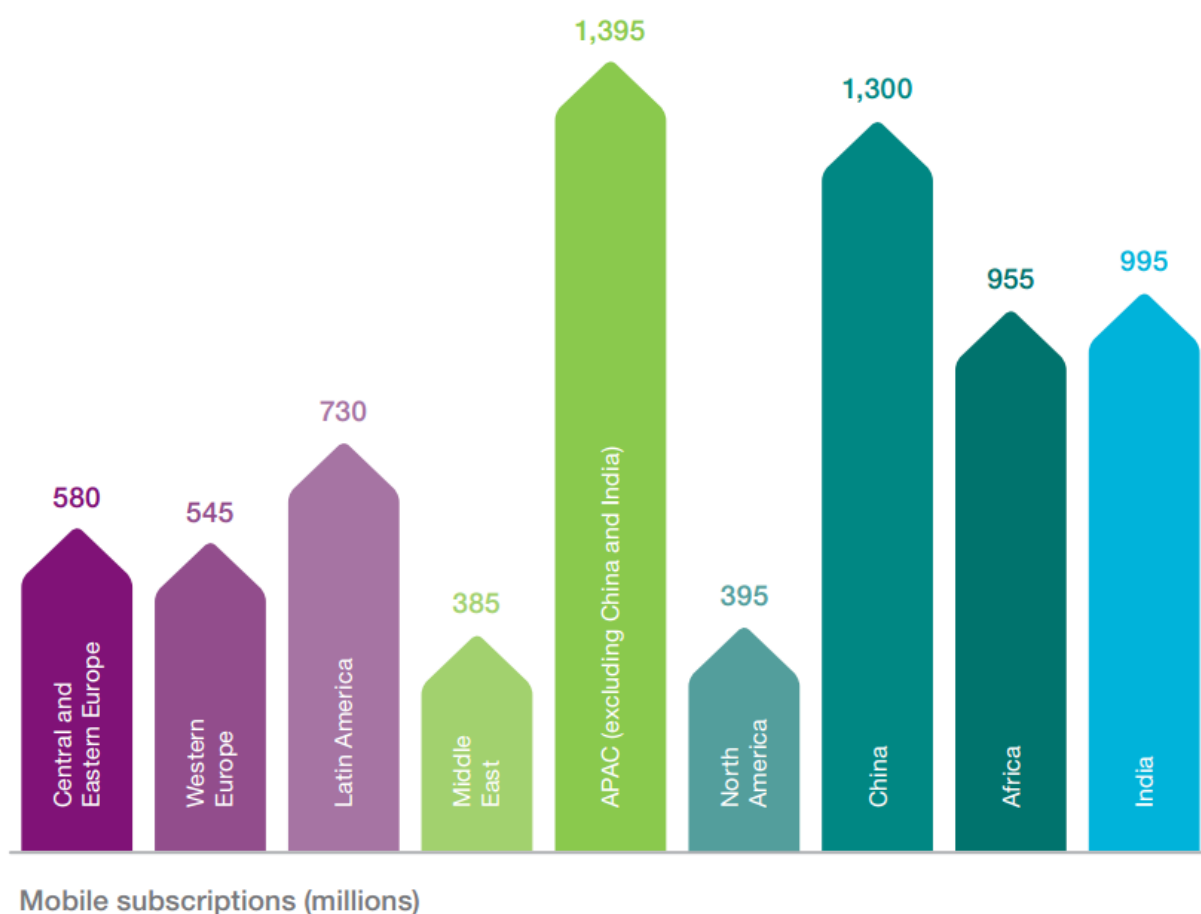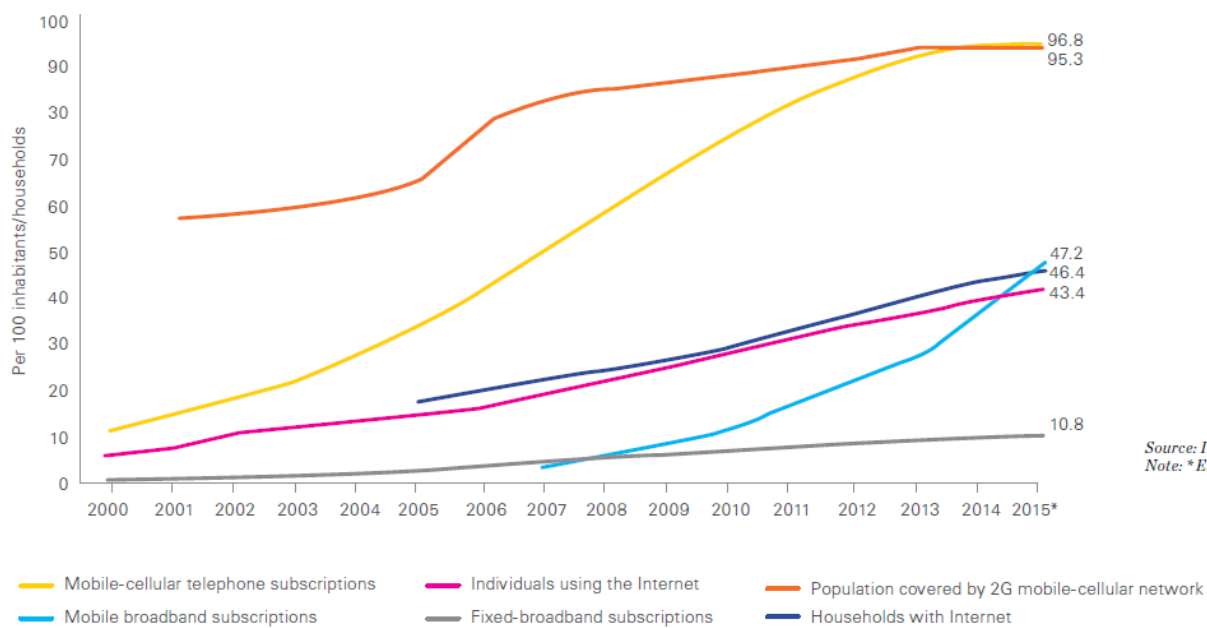*Fig. 1: Mobile penetration (source: Ericsson)*

Mobile subscriptions (millions)

- Central and Eastern Europe: 580
- Western Europe: 545
- Latin America: 730
- Middle East: 385
- APAC (excluding China and India): 1,395
- North America: 395
- China: 1,300
- Africa: 955
- India: 995

Fig. 2: Mobile diffusion (source: Ericsson)

Fig. 3: Telecom penetration (source: ITU)

15 years of ICT growth: *what has been achieved?*

- Mobile-cellular telephone subscriptions
- Mobile broadband subscriptions
- Individuals using the Internet
- Fixed-broadband subscriptions
- Population covered by 2G mobile-cellular network
- Households with Internet

Source: ITU.
*Note: *Estimates.*

Table 1: Growth of Mobile Entertainment

UNIQUE DEVICES			
Country	Dec-14	Dec-15	Change%
Australia	58.0%	60.4%	4%
China	90.4%	93.9%	4%
India	38.4%	36.4%	-5%
Singapore	57.8%	57.4%	-1%
Malaysia	57.1%	55.4%	-3%
Indonesia	51.7%	44.8%	-13%
Japan	37.6%	33.6%	-11%
Vietnam	52.7%	57.3%	9%
Philippines	58.9%	59.4%	1%
South Korea	44.6%	33.9%	-24%

Fig. 4: Growth of mobile entertainment (source: comScore)
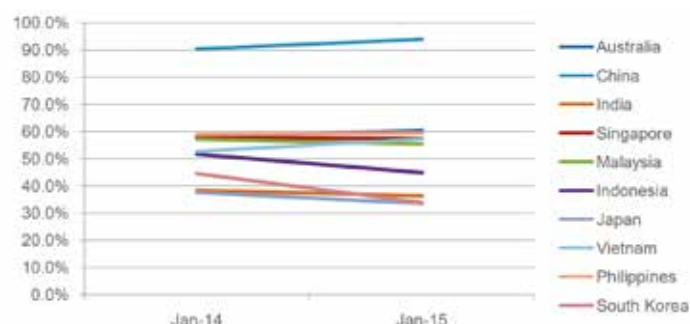
Table 2: Growth of Mobile Retail

UNIQUE DEVICES			
Country	Dec-14	Dec-15	Change%
Australia	9.4%	9.1%	-3%
China	0.2%	0.1%	-64%
India	24.4%	17.8%	-27%
Singapore	4.0%	3.9%	-3%
Malaysia	1.8%	3.5%	95%
Indonesia	11.5%	13.5%	17%
Japan	19.3%	22.5%	17%
Vietnam	7.1%	4.0%	-44%
Philippines	2.5%	1.8%	-28%
South Korea	1.2%	0.8%	-30%

Fig. 5: Growth of mobile retail (source: comScore)
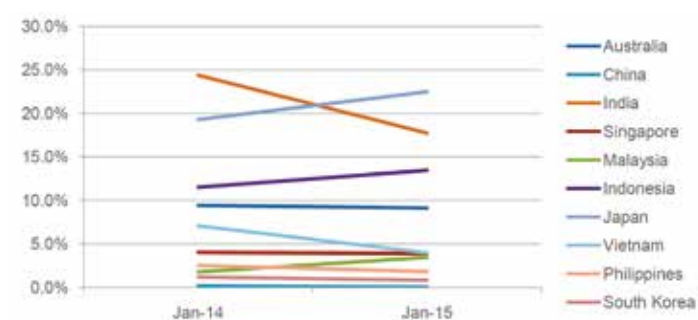
Table 3: Device breakup of mobile growth in Asia-Pacific countries

UNIQUE DEVICES			
Country	Dec-14	Dec-15	Change%
Australia	36.4%	42.3%	16%
Australia	12.6%	12.2%	-3%
China	28.1%	29.5%	5%
China	2.4%	1.8%	-26%
India	66.5%	71.1%	7%
India	2.1%	1.9%	-11%
Singapore	44.4%	49.0%	10%
Singapore	9.9%	8.3%	-16%
Malaysia	53.0%	60.9%	15%
Malaysia	8.5%	6.9%	-19%
Indonesia	66.4%	72.9%	10%
Indonesia	4.7%	4.7%	-1%
Japan	37.5%	42.8%	14%
Japan	5.9%	5.0%	-16%
Vietnam	49.3%	59.6%	21%
Vietnam	5.3%	5.8%	10%
Philippines	41.0%	49.2%	20%
Philippines	10.6%	9.4%	-11%
South Korea	52.6%	46.7%	-11%
South Korea	2.0%	2.0%	-2%

Table 4: Mobile data growth (source: Ericsson)

Mobile data traffic growth by region	2015 (EB/month)	Multiplier 2015–2021
Asia Pacific	2.1	10
Central Europe and Middle East and Africa	0.8	12
Western Europe	0.8	10
North America	1.3	7
Latin America	0.5	8

Fig. 6: Subscriber distribution (source: GSMA)
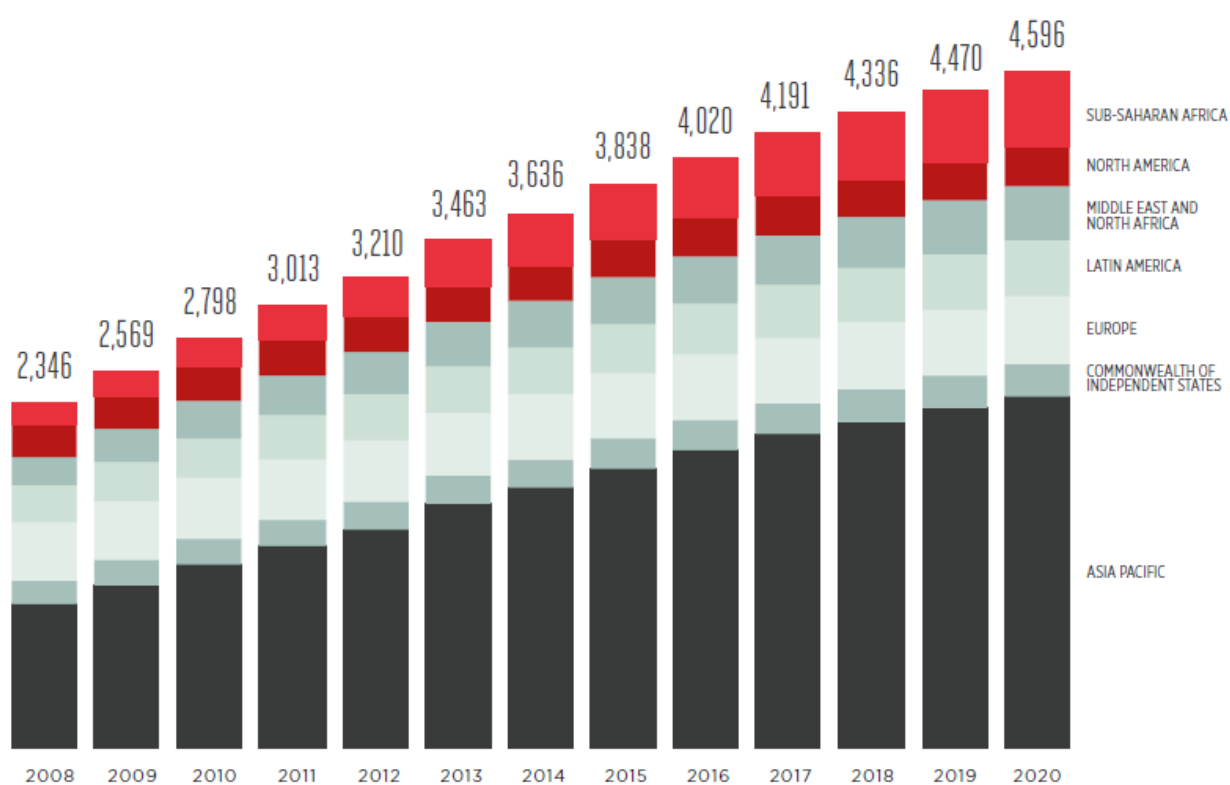
Unique subscribers by region
(Millions)

Mobile connections by region
(Millions, ex-M2M)

Region
SUB-SAHARAN AFRICA
NORTH AMERICA
MIDDLE EAST AND NORTH AFRICA
LATIN AMERICA
EUROPE
COMMONWEALTH OF INDEPENDENT STATES
ASIA PACIFIC

Totals by year: 2008: 4,016 | 2009: 4,633 | 2010: 5,327 | 2011: 5,985 | 2012: 6,381 | 2013: 6,737 | 2014: 7,057 | 2015: 7,517 | 2016: 7,910 | 2017: 8,240 | 2018: 8,527 | 2019: 8,783 | 2020: 9,015
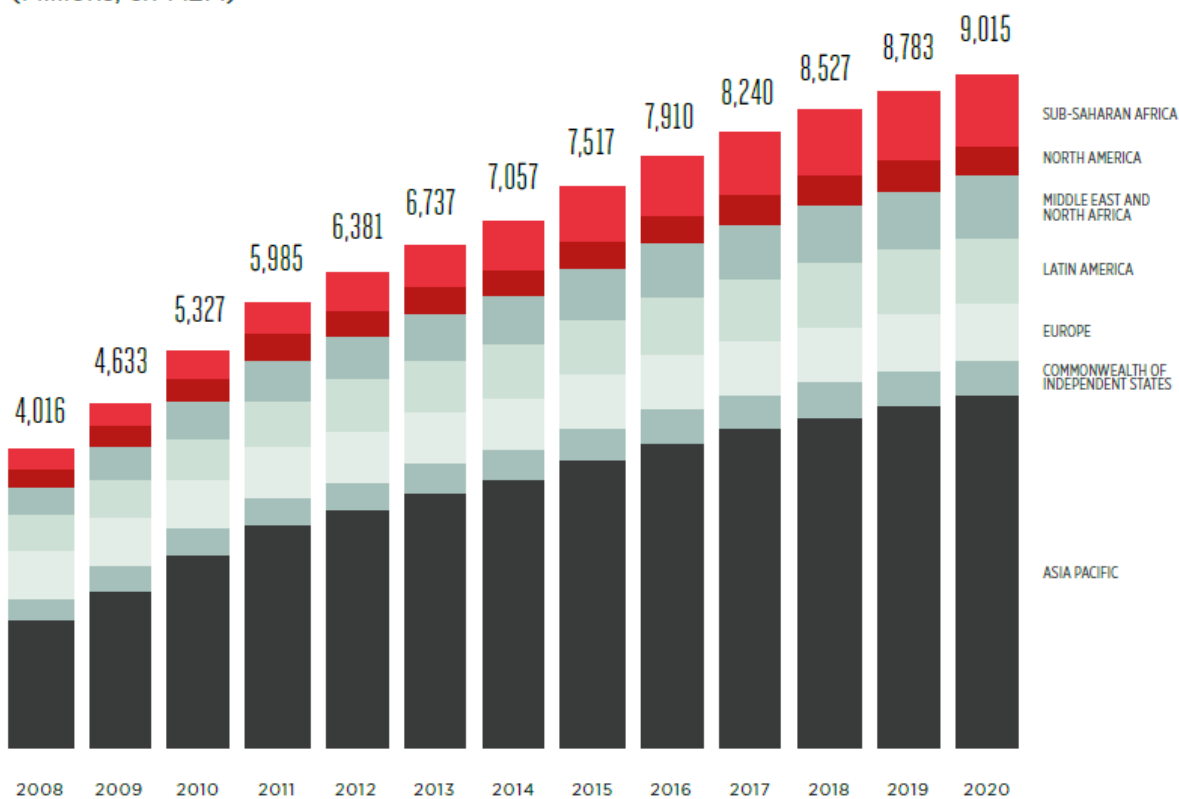
Global connections by technology
(Millions, excluding M2M)

2G   3G   4G

Smartphone connections (millions) and adoption

ADOPTION RATE

SUB-SAHARAN AFRICA
NORTH AMERICA
MIDDLE EAST AND NORTH AFRICA
LATIN AMERICA
EUROPE
COMMONWEALTH OF INDEPENDENT STATES

ASIA PACIFIC

Adoption: 4% 6% 8% 13% 20% 28% 37% 44% 50% 55% 59% 62% 65%

Values: 179 273 446 773 1,246 1,900 2,630 3,324 3,948 4,514 5,019 5,475 5,895

Years: 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020

Video fuelling strong mobile data growth

(PB per month)

2,523 — 2014
4,175 — 2015
6,765 — 2016
10,666 — 2017
16,140 — 2018
24,314 — 2019

Web/data   File sharing   Video   Audio streaming
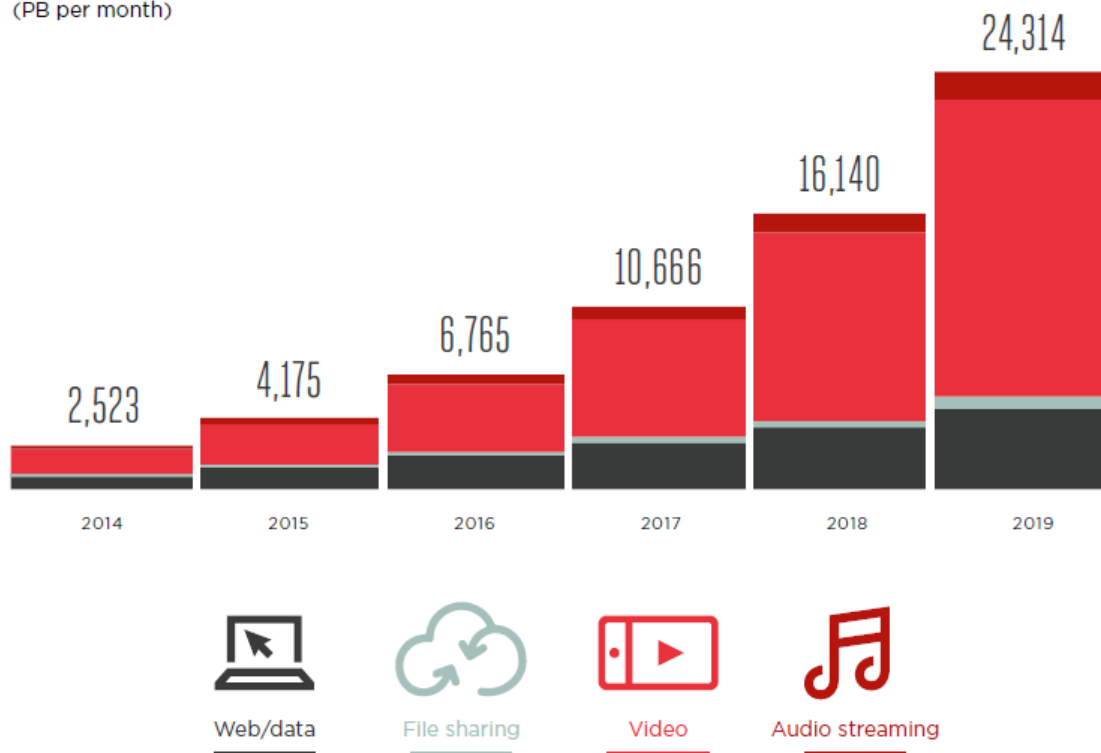
Fig. 11: Mobile payments landscape (source: GSMA)

Number of live mobile money services by region
(2001-2014; year-end)

As of December 2014, there were **255** live mobile money services in **89** markets
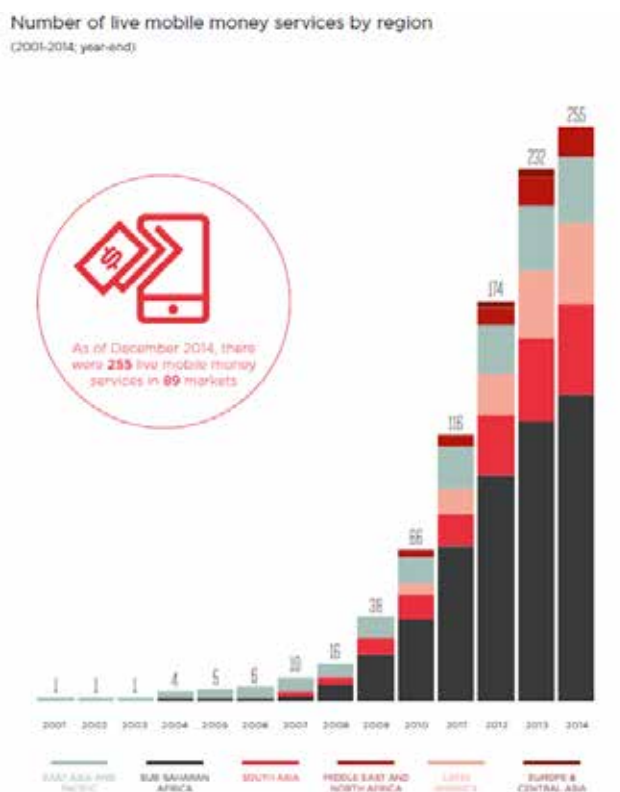
Fig. 11: M2M connections (source: GSMA)

Global growth of cellular M2M
(Connections M)
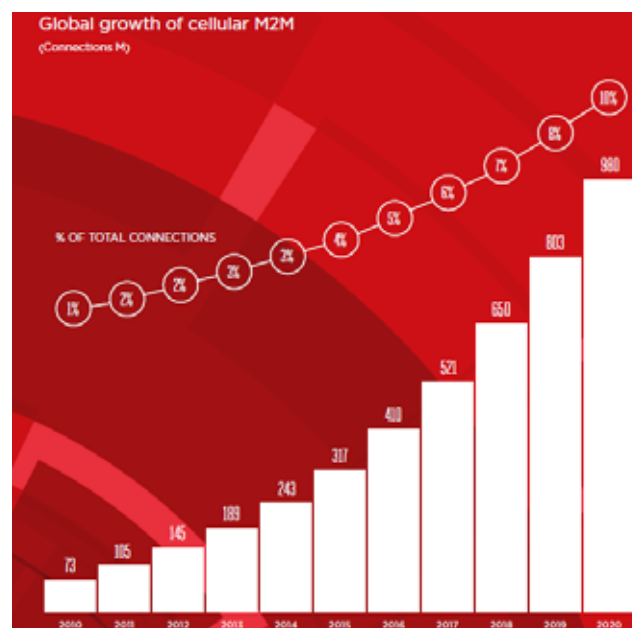
Fig. 12: 15 years of Internet growth (source: ITU)
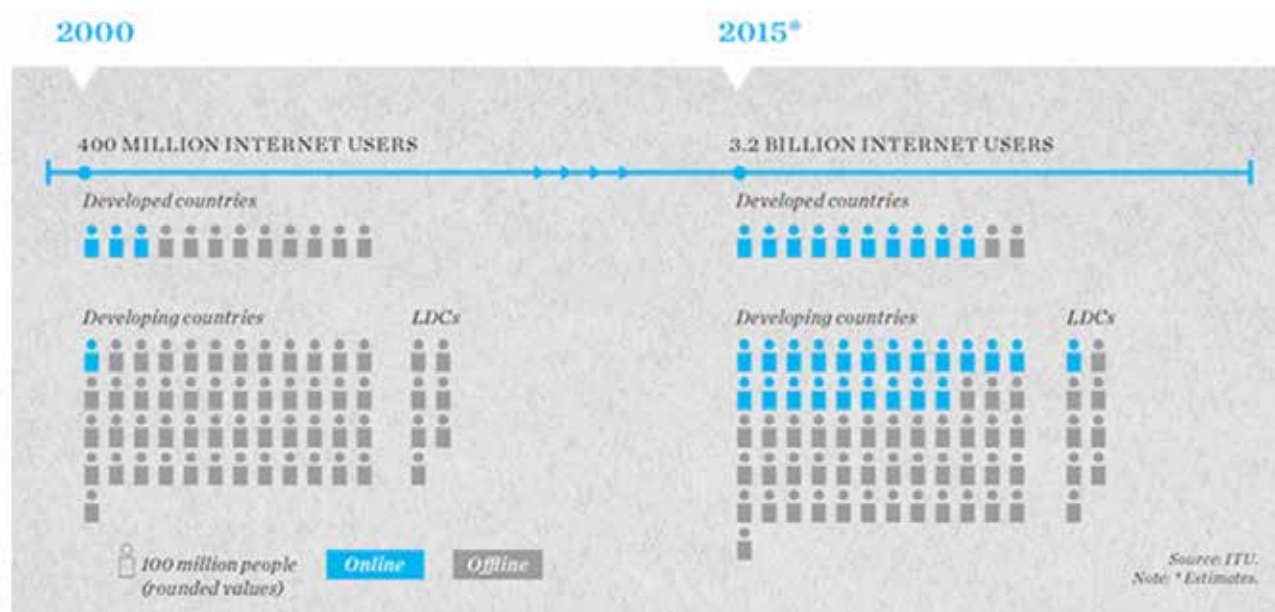
Mobile broadband subscriptions
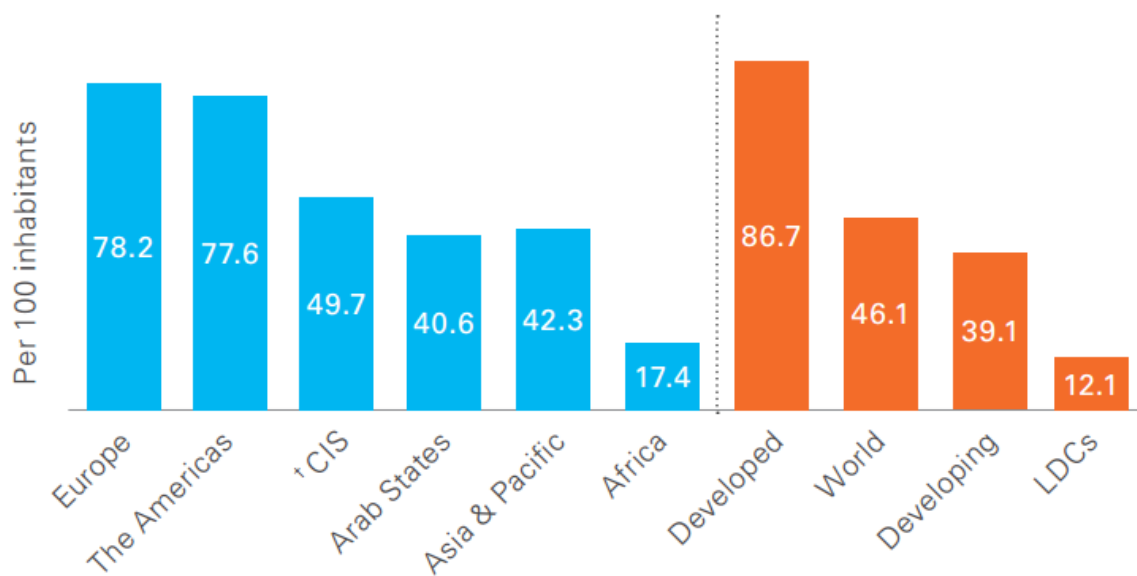
Mobile subscription essentials	2014	2015	2021 forecast	CAGR 2015–2021	Unit
Worldwide mobile subscriptions	7,100	7,400	9,100	5%	million
> Smartphone subscriptions	2,600	3,400	6,400	10%	million
> Mobile PC, tablet and mobile router subscriptions	250	250	350	5%	million
> Mobile broadband subscriptions	2,900	3,600	7,700	15%	million
> Mobile subscriptions, GSM/EDGE-only	4,000	3,600	1,300	-15%	million
> Mobile subscriptions, WCDMA/HSPA	1,900	2,200	3,200	5%	million
> Mobile subscriptions, LTE	500	1,000	4,100	25%	million
> Mobile subscriptions, 5G			150		million

Monthly data traffic per smartphone**	2015	2021	Unit
> Western Europe	2.0	18	GB/month
> Central and Eastern Europe	1.4	6.9	GB/month
> Middle East and Africa	1.1	6.3	GB/month
> Asia Pacific	1.0	6.9	GB/month
> North America	3.8	22	GB/month
> Latin America	1.2	6.0	GB/month

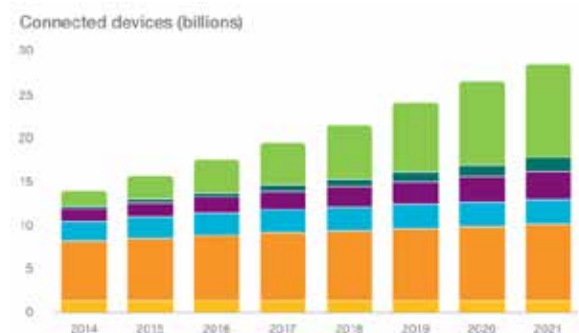*Fig. 14: Smartphone subscriptions by region (source: Ericsson)*
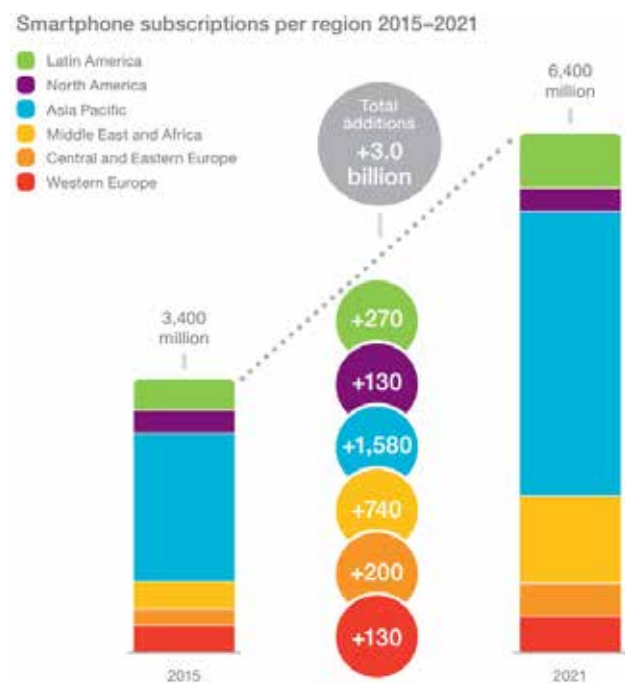
Fig. 15: Digital device distribution by region (source: Ericsson)

Fig. 16: Data traffic by region (source: Ericsson)
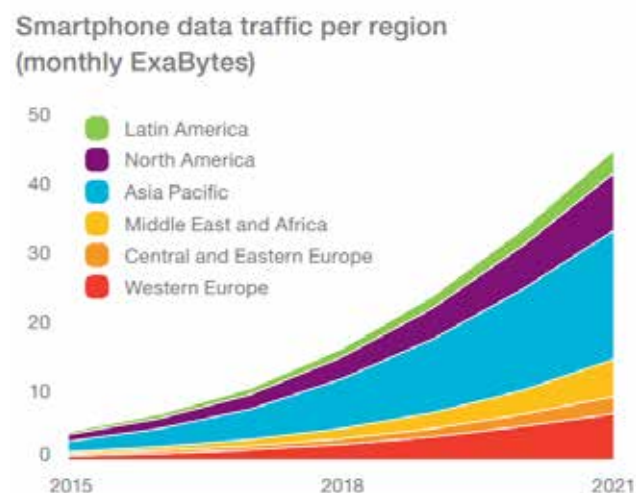
Fig. 17: Evolution of digital services (source: Ericsson)
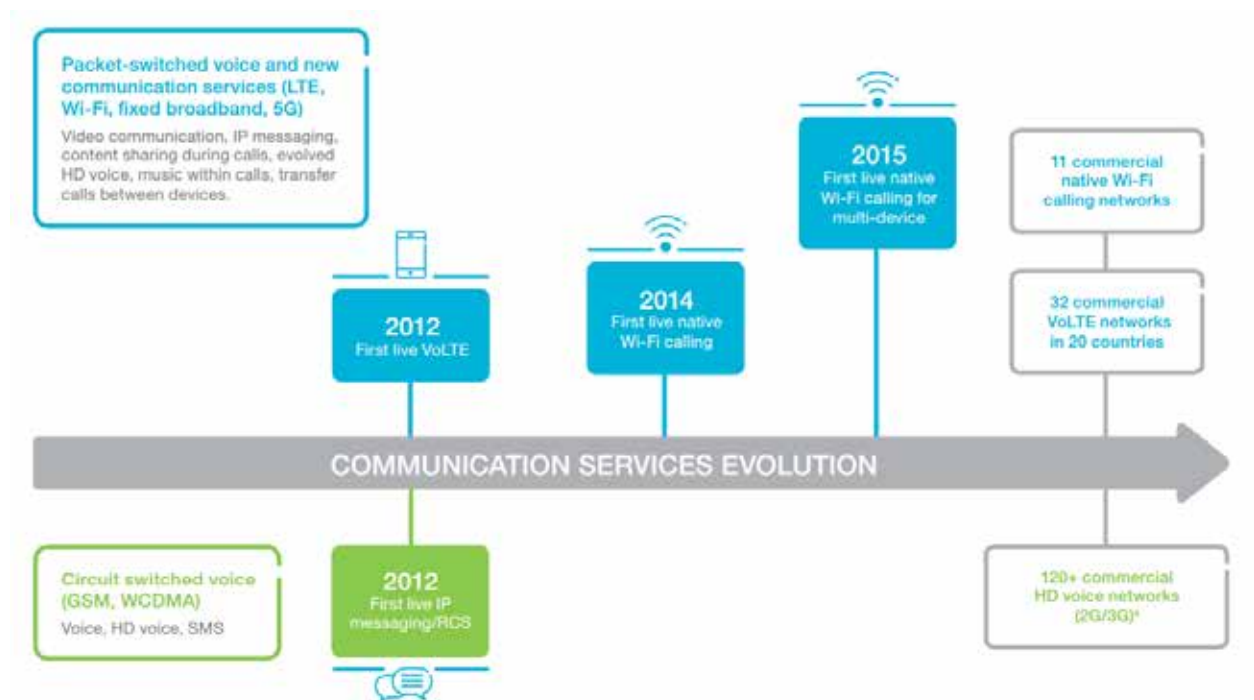
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1,1 Million
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1.796
Digital Poster

CPE up to 25%

" The first **SOLOMO** solutions for shoppers mobile marketing in **Vietnam** "

(*) Example of Mobile Instant App for Shoppers
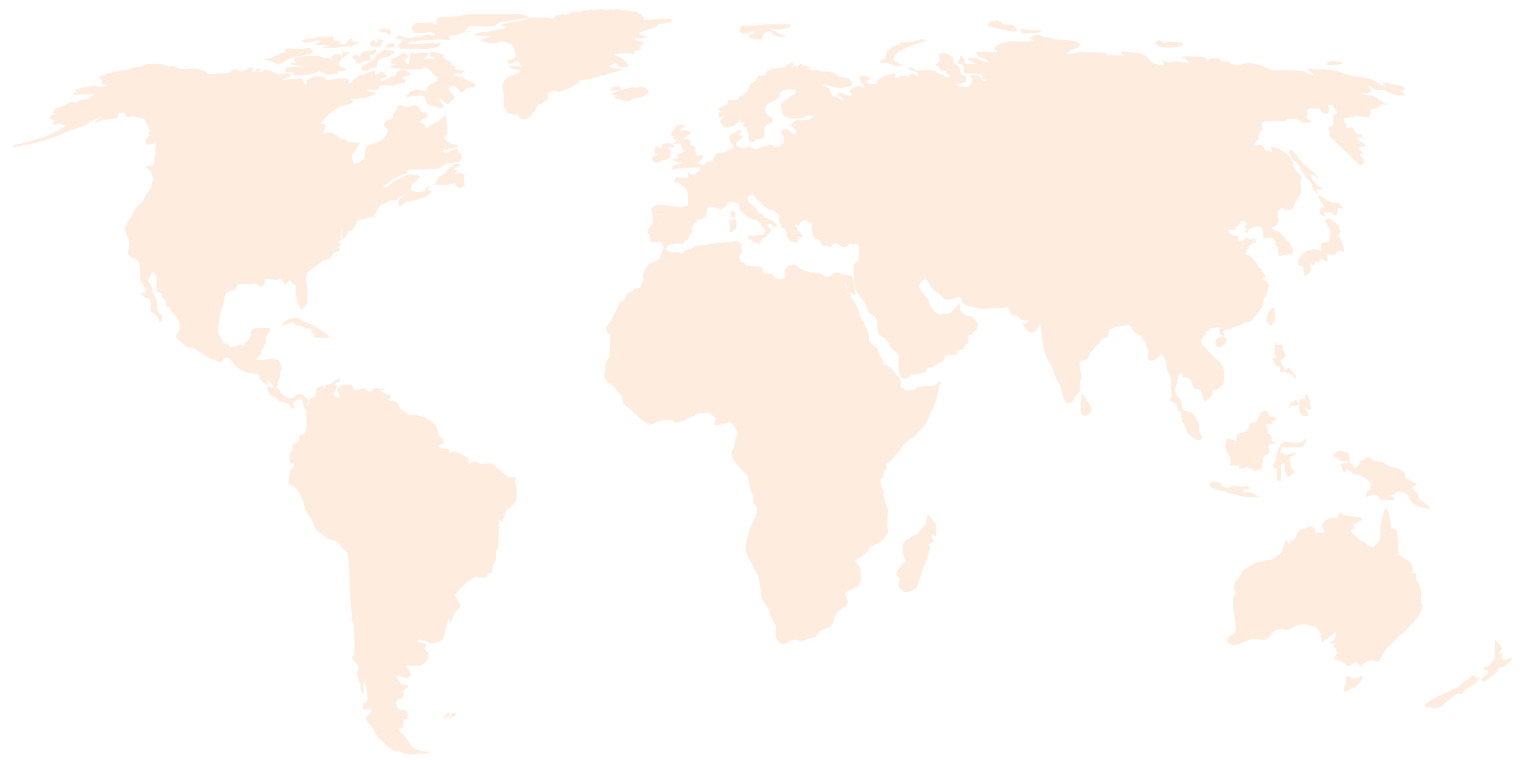
To discuss about membership and how you can play an active role in the MMA locally, contact the appropriate MMA staff in your region.

Asia Pacific (APAC)

Ammita Mistry - Consultant - Strategic Projects
ammita.m@mmaglobal.com

Jasveen Kaur - Senior Regional Membership and Marketing Manager, APAC
jasveen.kaur@mmaglobal.com

India

Preeti Desai, Country Manager, MMA India
preeti.desai@mmaglobal.com

Vietnam

Tam Phan Bich - Country Manager, MMA Vietnam
tam.phanbich@mmaglobal.com

China

Yolanda Shi - Membership Manager, MMA China
yolanda.shi@mmaglobal.com

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