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MOBILE MARKETING ASSOCIATION  
**FORUM SINGAPORE**  
**2017**

MOBILE REDEFINED - TRANSFORM,  
INNOVATE AND DISRUPT

## Mobile's Hierarchy of Needs

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# Mobile's Hierarchy of Needs

How mobile evolved as the primary tool for the digital omnivore



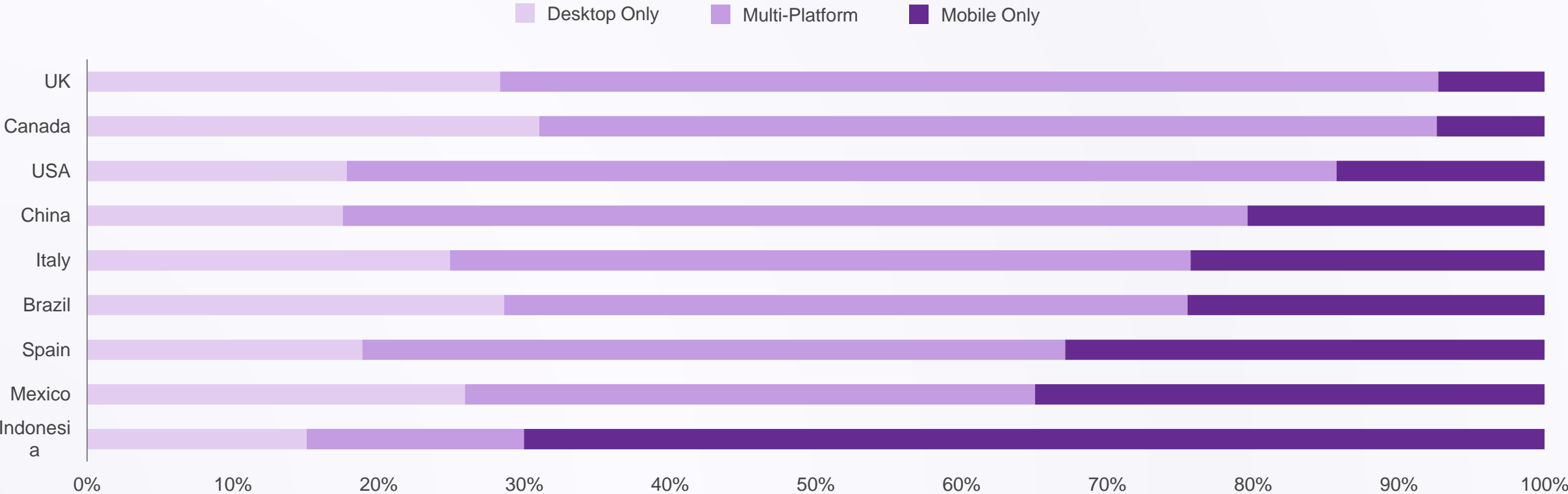
# Mobile Evolution

In 2017, mobile devices have an unquestionable role as consumers' primary digital tool

# Audience composition

The audience landscape varies dramatically between regions, with some markets such as Indonesia having almost skipped the desktop phase followed by others, resulting in huge mobile only populations

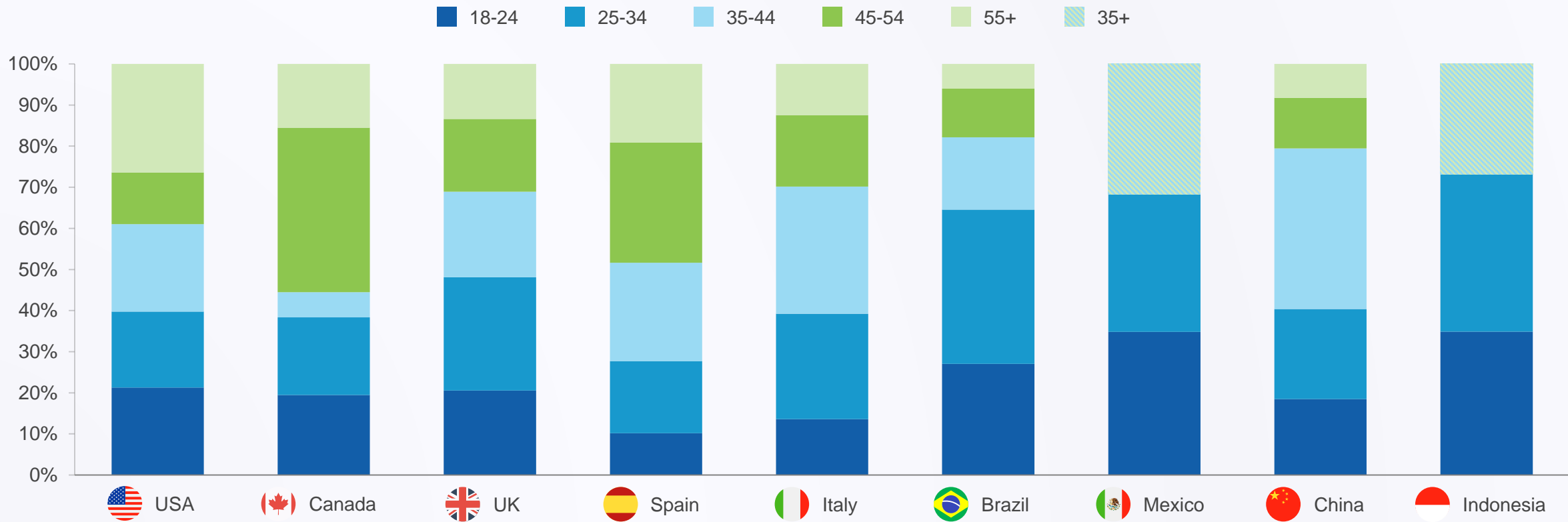
% of unique users by platform



# Who are the mobile only audience?

Mobile only audiences (those who no longer use desktop in a month) skew younger in Latin America and Asia, while in North America and Europe they are comparatively evenly comprised of users from across age demographics

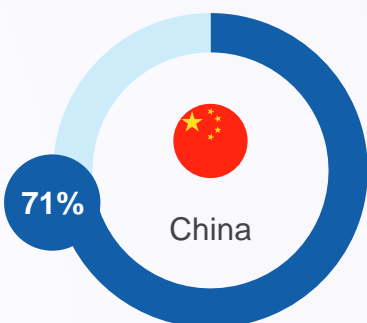
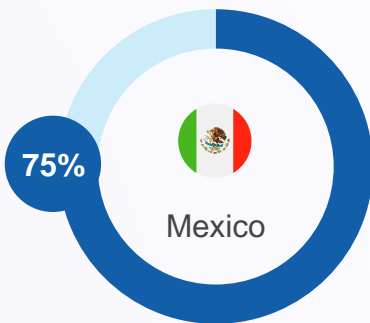
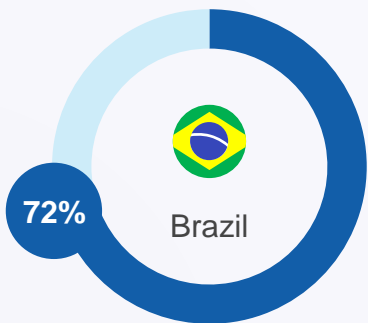
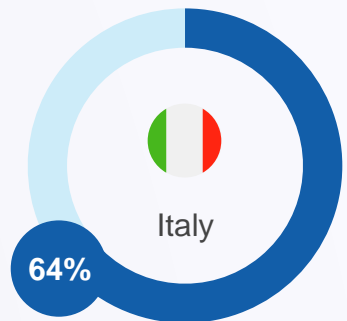
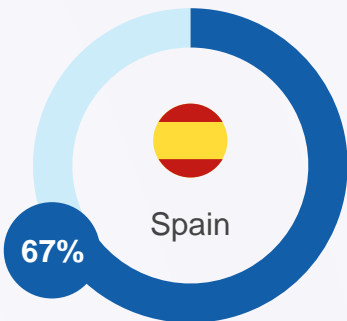
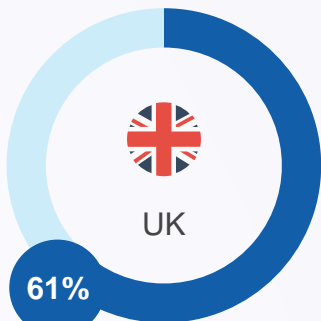
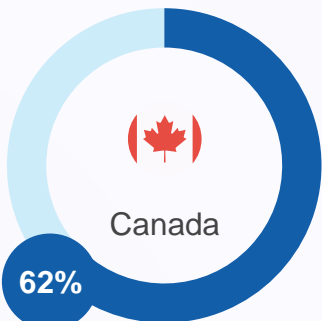
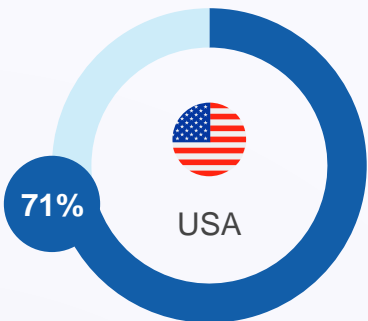
% of unique users on mobile by age demographic



# Our primary tool

Across the globe, mobile devices dominate total minutes spent online, passing 90% in Indonesia

% mobile share of total digital minutes

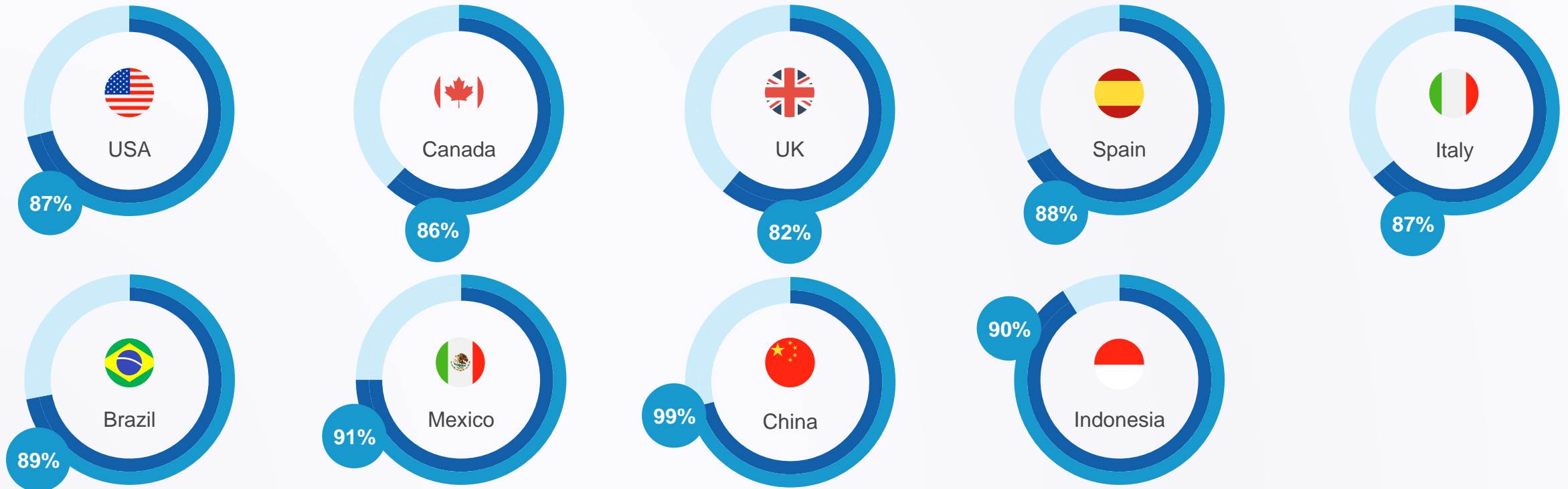


# We are now firmly in the 'app age'

As consumers have come to rely on mobile devices in more aspects of daily life, the customisable and refined experience of apps have led to their dominance within mobile consumption

% mobile share of total digital minutes

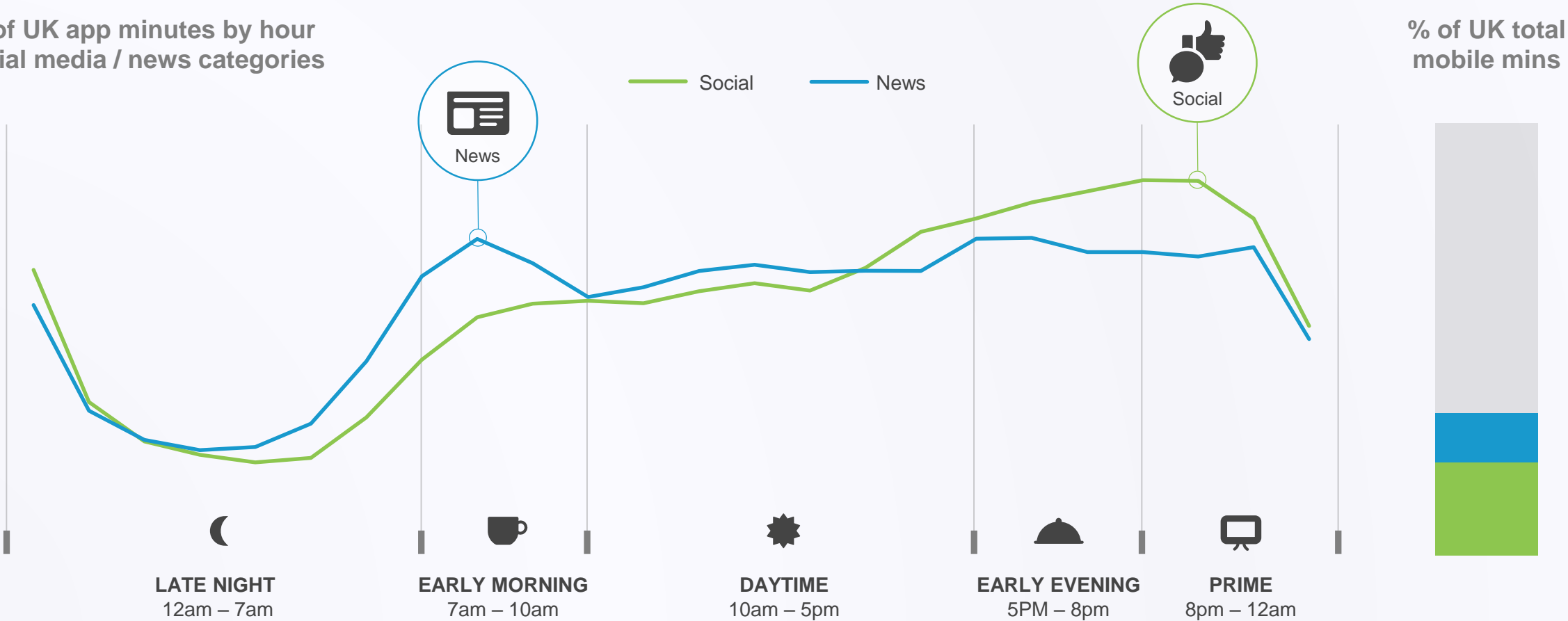
% app share of total mobile minutes



# Apps readily fit into consumers' daily lives

The constant availability of mobile devices, coupled with ease of app usage are a perfect fit for consumers' lives. Taking two major UK categories, we can see clear peaks in usage based on the need for these types of activity

Share of UK app minutes by hour for social media / news categories





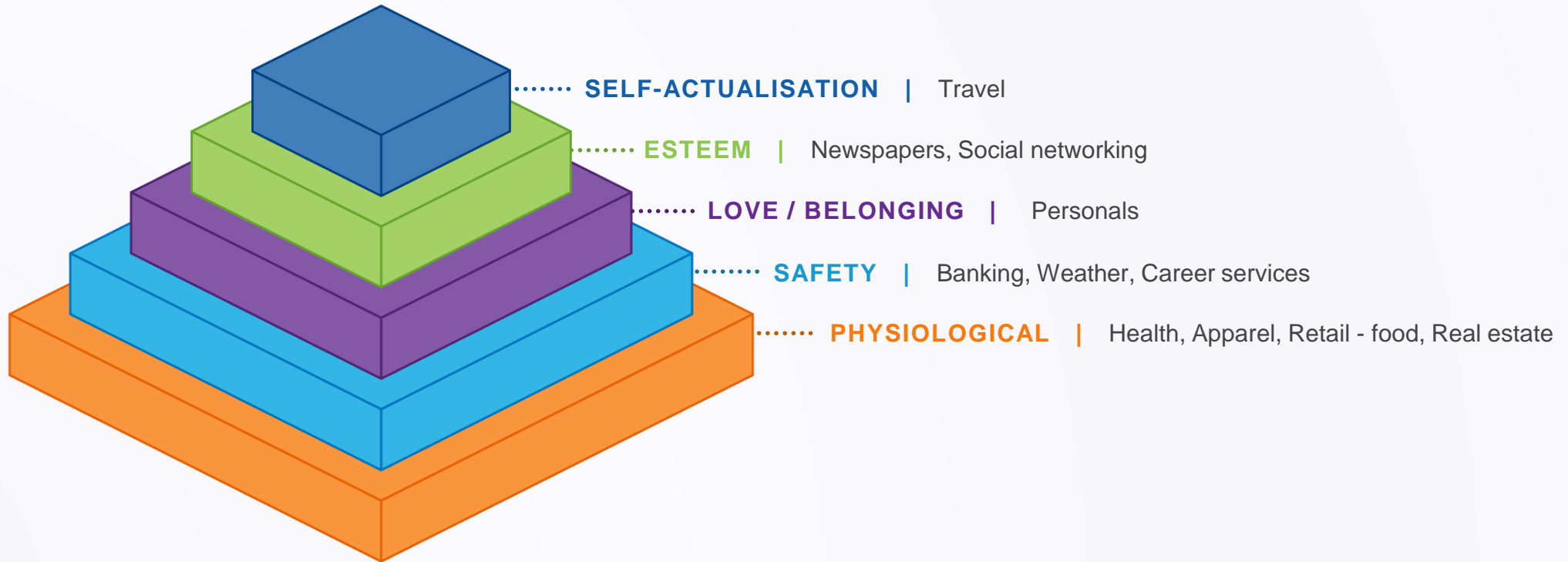
# Mobile meets primary needs

The degree to which categories are 'mobile first' can be aligned with human need states from Maslow's Hierarchy of Needs

# Maslow's hierarchy of needs (and how mobile meets it)

This familiar theory from Abraham Maslow's 1943 paper "A Theory of Human Motivation" is still considered an important framework in understanding behaviour. Many highly mobile-skewed digital behaviours fit these needs.

Many key uses of mobile devices can be aligned with this set of needs



# Physiological

Physical requirements for human survival and health, which should be met first.

These needs include air, water and food, as well as clothing and shelter for protection from the elements.



# Mobile has become a primal need

A recent Boston Consulting Group survey demonstrates that consumers would be increasingly unwilling to surrender their mobile devices, even at the expense of some traditional needs

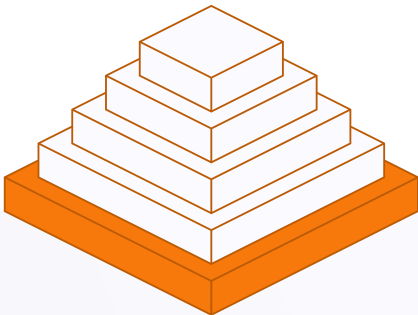


More than **55%** would  
rather **forgo dining out**  
for 12 months

# Time spent on food retail grows faster than mobile overall

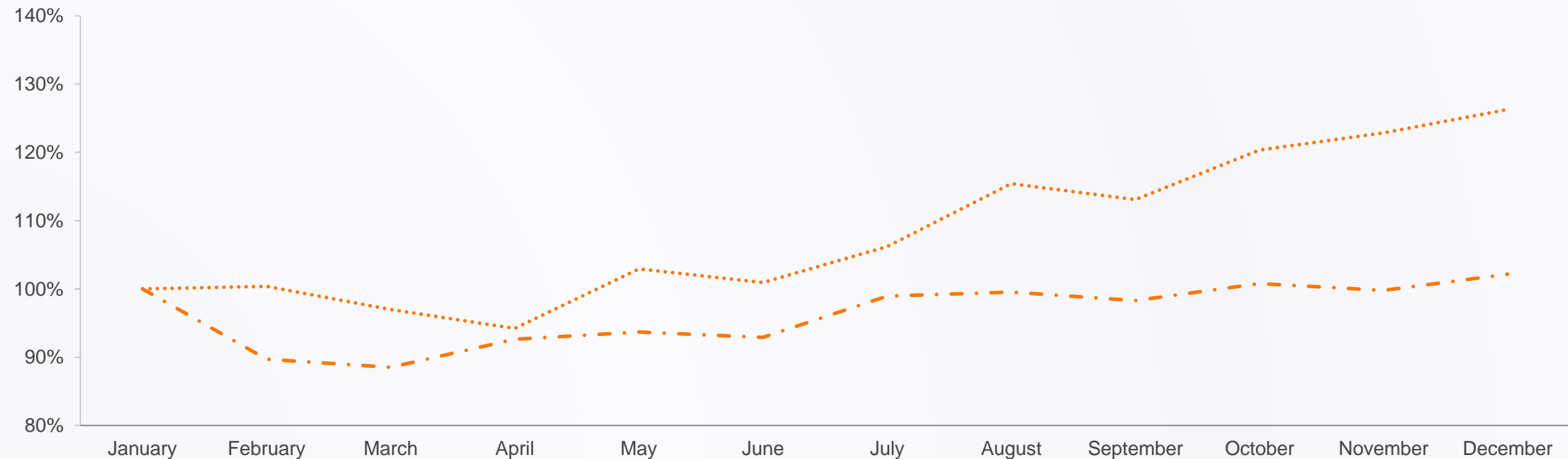
Data from the UK shows how food purchasing (notably delivery services) has outpaced the growth of general mobile usage, as consumers still reach for their phones to order takeaways

PHYSIOLOGICAL



2016 total mobile minutes (as a percentage of January 2015 total)

—•— Total Internet : Total Audience      ..... Retail - Food



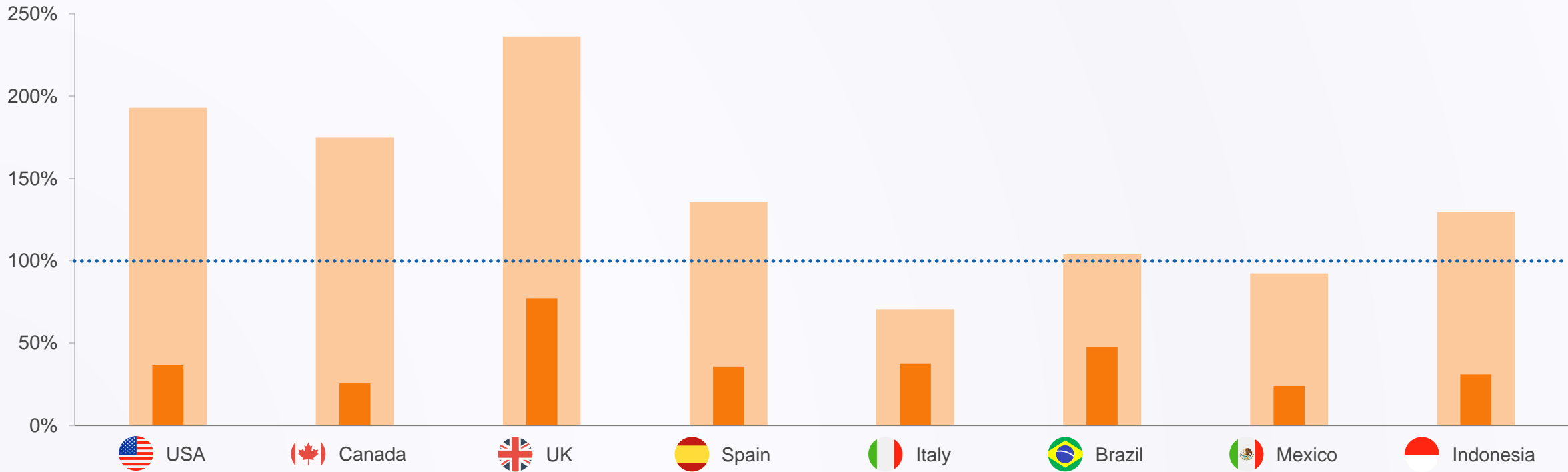
# Mobile provides largest top-of-funnel access to real estate

In the majority of markets, real estate audiences are now larger on mobile than on desktop, but time still lags behind, suggesting mobile usage still largely occurs at the research stage of the purchase funnel



Real estate category reach / mins (as a % of desktop reach / mins)

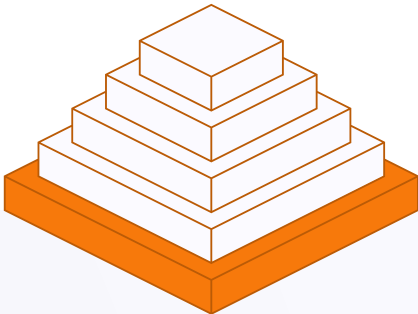
Mobile reach as % of desktop    Mobiles mins as % of desktop    Total desktop reach / mins



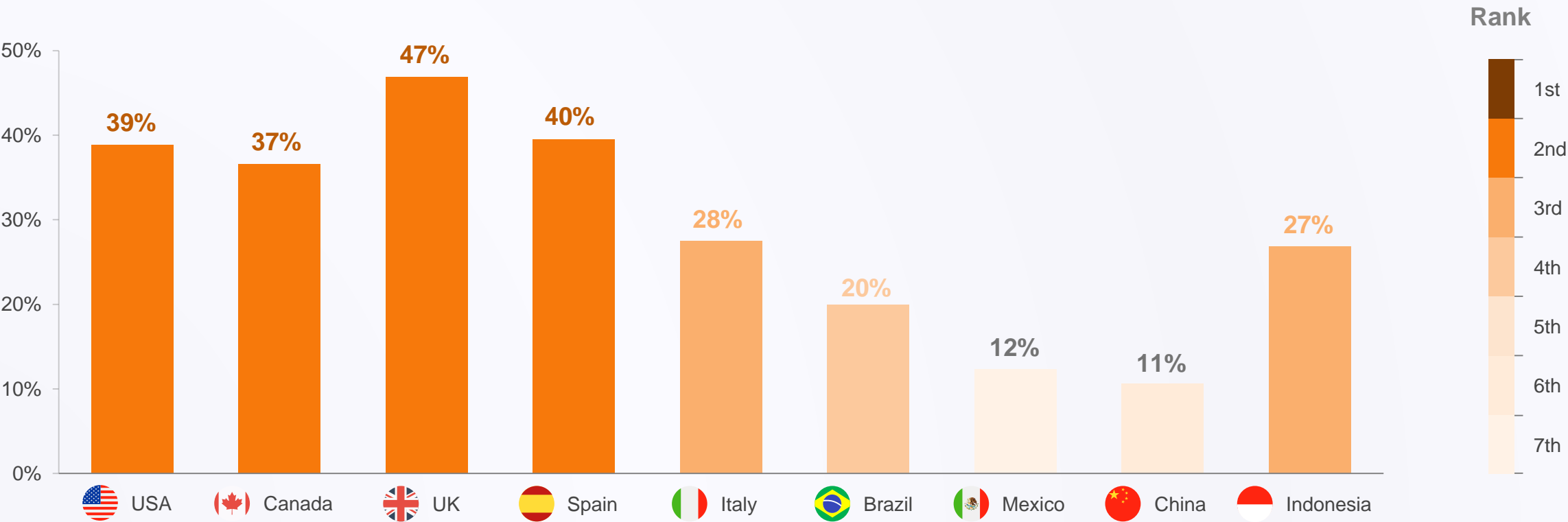
# Apparel shopping is a key driver of mobile retail

Especially in North American and European markets, clothing is one of the top retail uses of mobile devices. Other top 5 top categories vary dramatically from market to market

PHYSIOLOGICAL



Reach / rank of apparel category among retail users



# Safety

Mobile helps meet modern human needs for safety and security.

This may mean physical security, such as safety from weather conditions, or financial and career security.





# Mobile has become a primal need

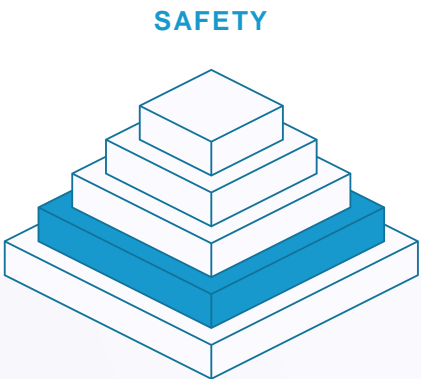
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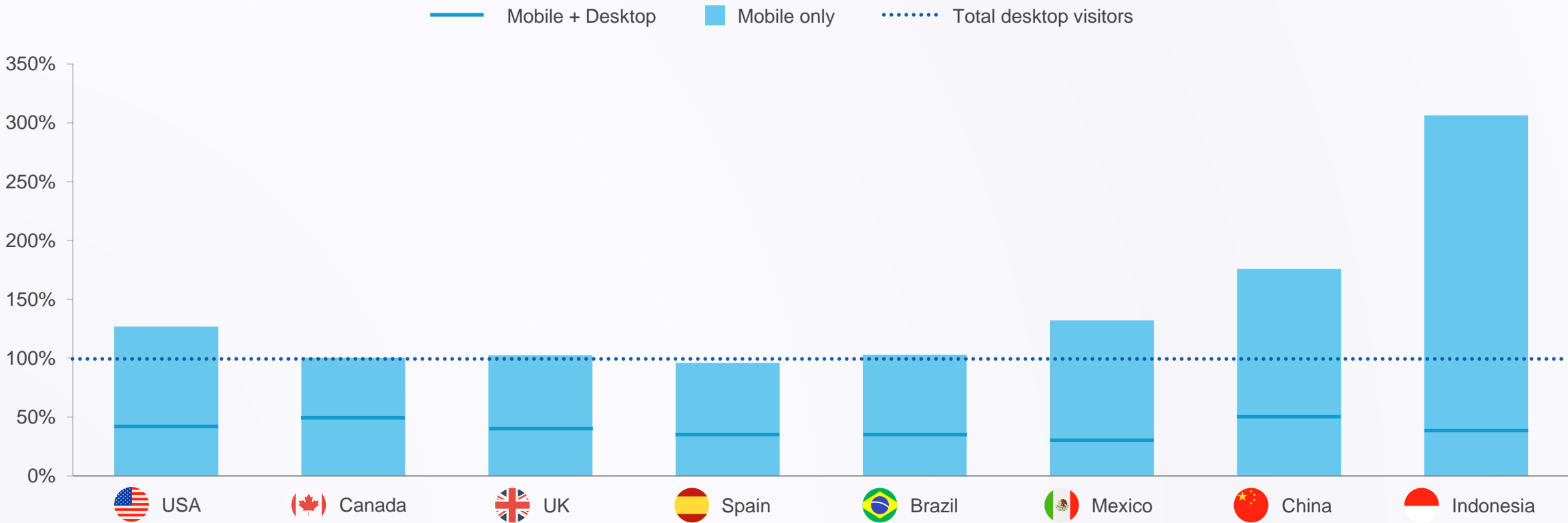
**46%** would be willing  
to **give up a day off**  
**per week**

# Banking audiences trust mobile and depart desktop

Despite historic consumer concerns around security on mobile, banking audiences now largely exceed desktop. More than 50% of these users have abandoned desktop entirely for their banking needs.

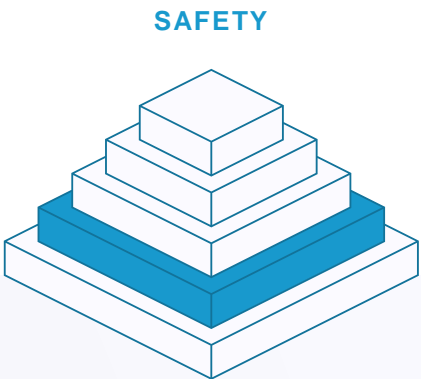


Mobile banking category visitors (as a % of desktop)

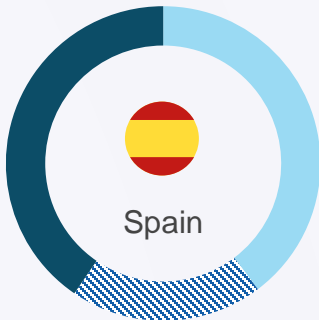
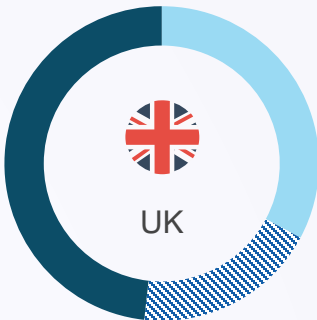
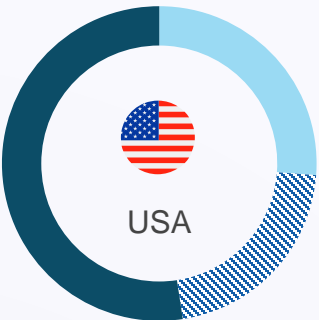


# Career advancement in the palm of users' hands

The majority of jobs / career development users are on mobile platforms, with large numbers abandoning desktop altogether, possibly enjoying the relative privacy afforded, even in working hours



% of total career services users by platform

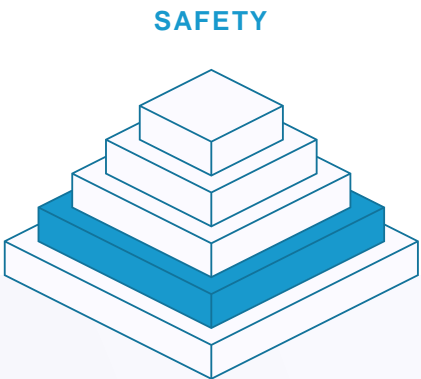


- Desktop only
- Multi-platform
- Mobile only



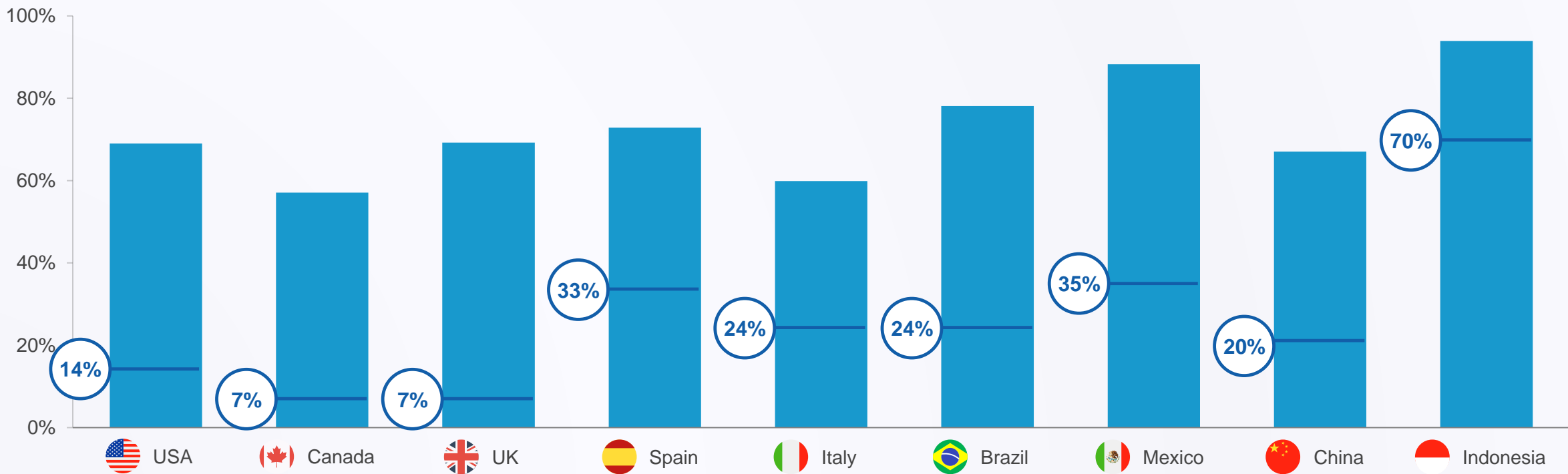
# Mobile is the primary tool for weather-watchers

When location is a consideration, mobile unsurprisingly grows share of time / audiences. Coupled with time of day needs, weather is one of the most mobile-skewed categories in all markets observed



% of weather category / all users who are mobile only

■ Mobile only %      ○ Mobile only % of Total Digital Population



# Love / Belonging

From romance to family connections, mobile communication has created more avenues to create, maintain and develop human relationships.



# Mobile has become a primal need

A recent Boston Consulting Group survey demonstrates that consumers would be increasingly unwilling to surrender their mobile devices, even at the expense of some traditional needs

BCG

THE BOSTON CONSULTING GROUP

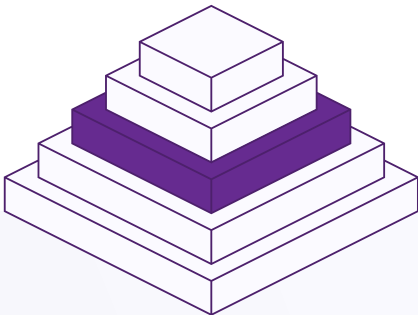


Almost **a third**  
of Americans would rather **give**  
**up sex** for a year

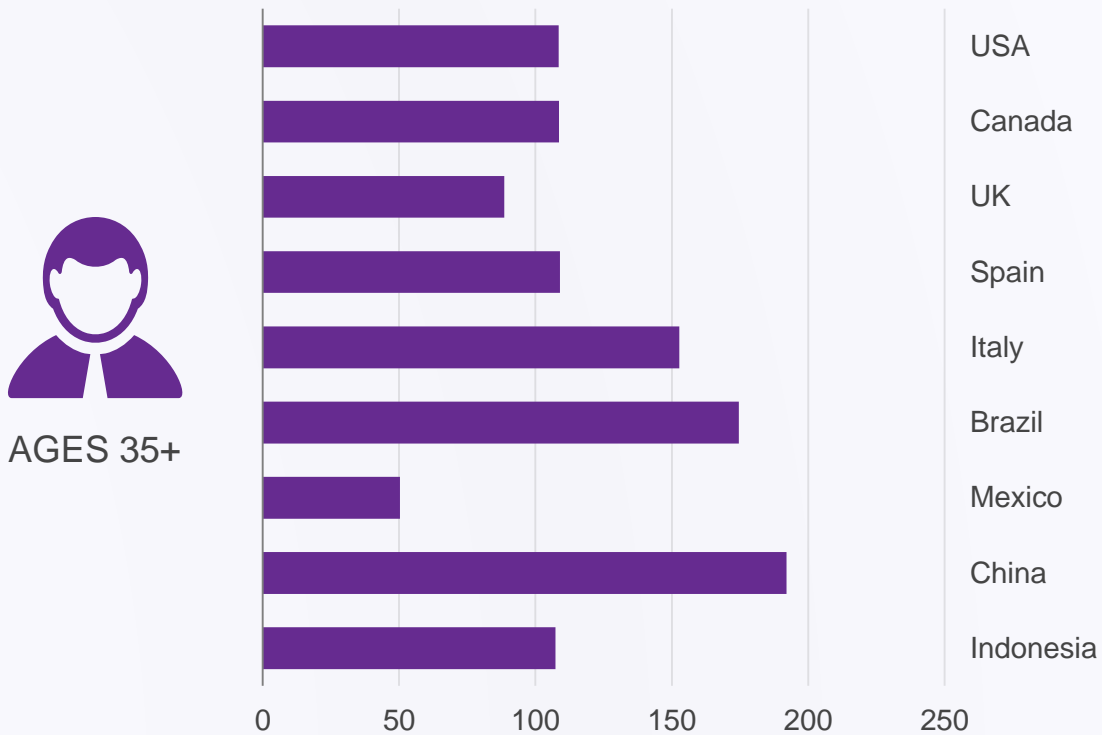
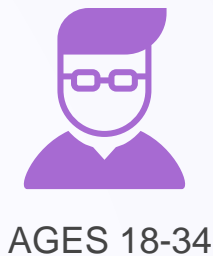
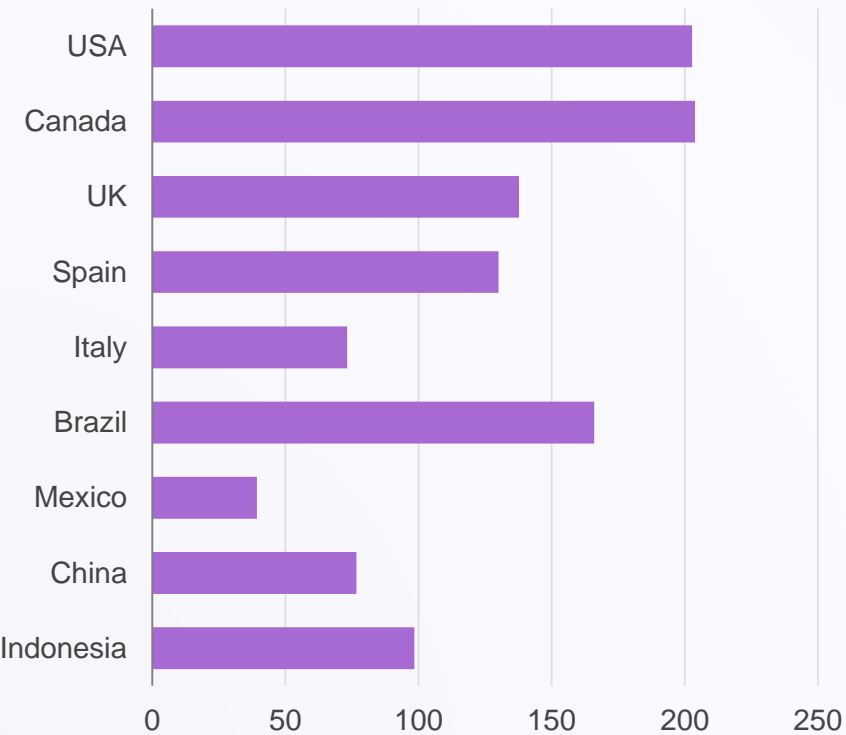
# Mobile dating has come of age

Mobile consumption typically skews towards under 35s, but the personals category is more even, with per-user minutes among over 35s equaling or eclipsing younger users in many regions

LOVE / BELONGING



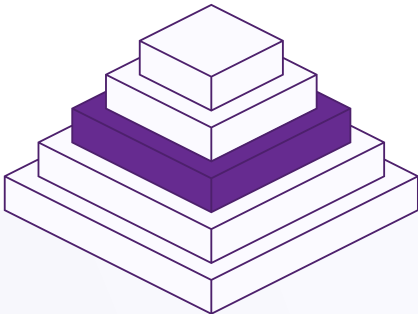
Mobile minutes per user for the personals category



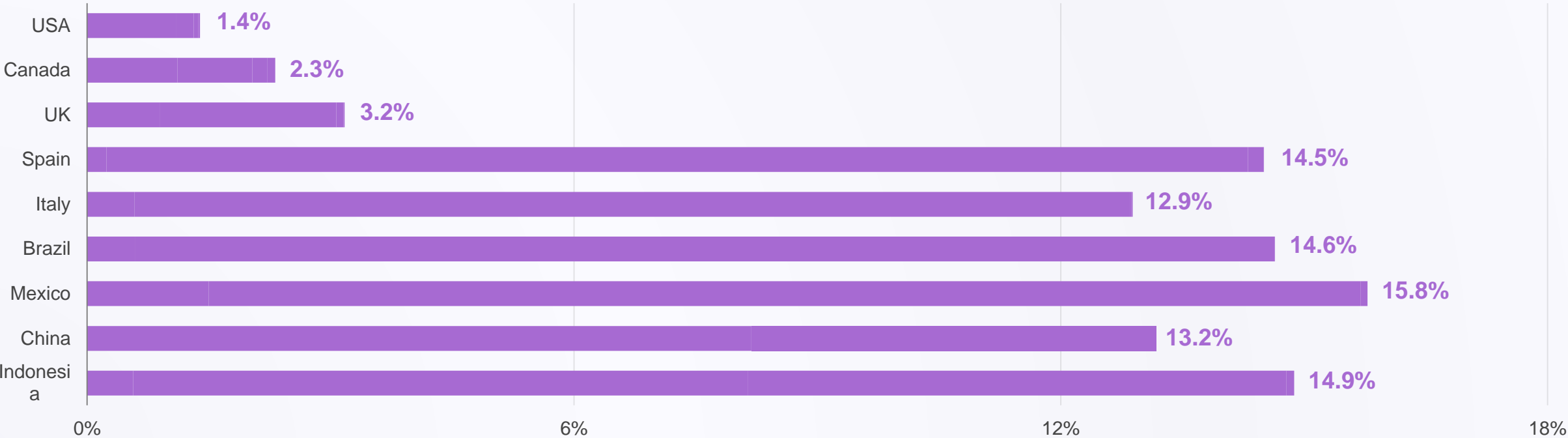
# Messaging apps have exploded outside USA / Canada / UK

The share of total mobile minutes among 5 key messaging apps (Facebook Messenger, WhatsApp, Line, WeChat, QQ messenger) has exploded, particularly in continental Europe, Latin America and Asia

LOVE / BELONGING



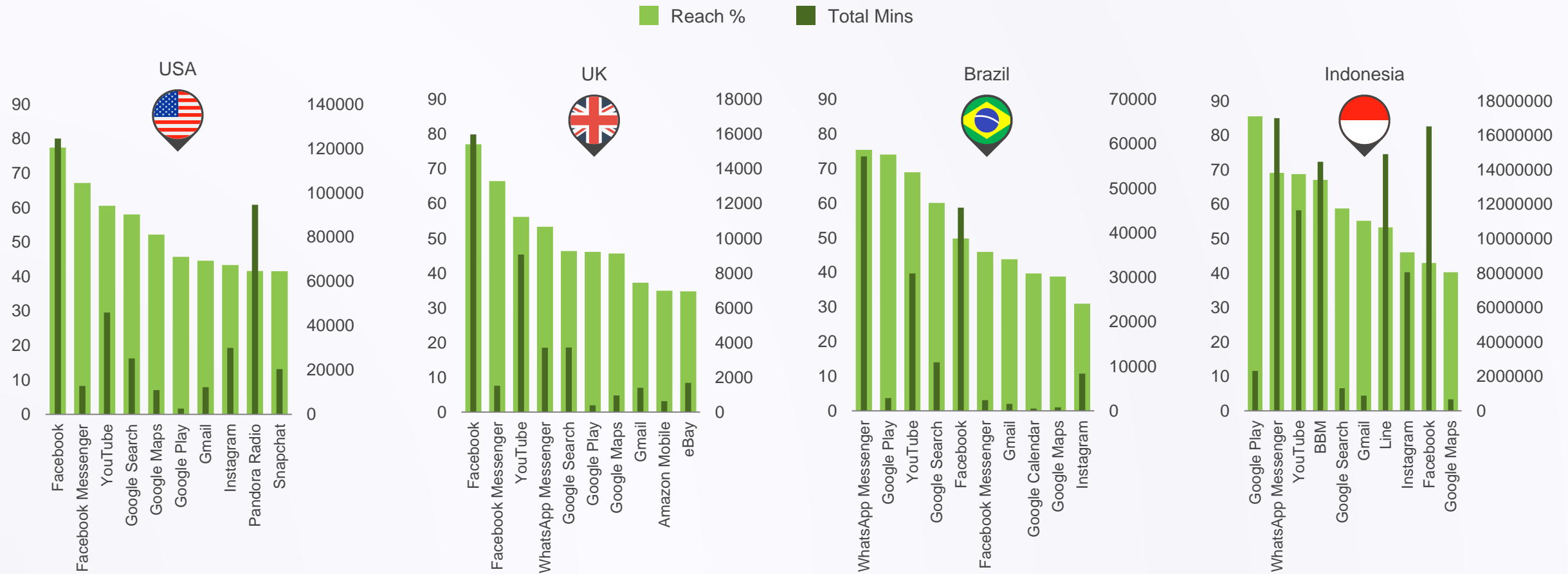
% of mobile minutes for 5 major messaging apps





# Engagement does not always correlate with reach among top apps

Messaging apps are in much greater evidence outside the US, and Indonesia features BBM at #4, despite its absence elsewhere. Overall minutes vary heavily from reach even among these most popular apps



# Esteem

Esteem represents the human desire to be accepted and valued by others, which can manifest in social behaviour as well as hobbies and interests.



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BCG

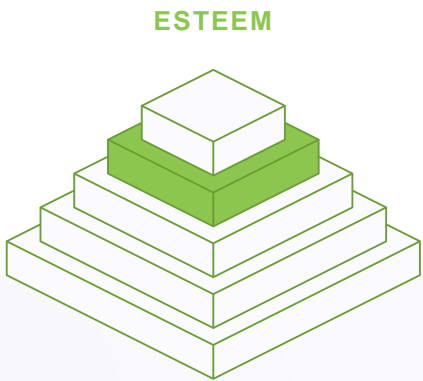
THE BOSTON CONSULTING GROUP



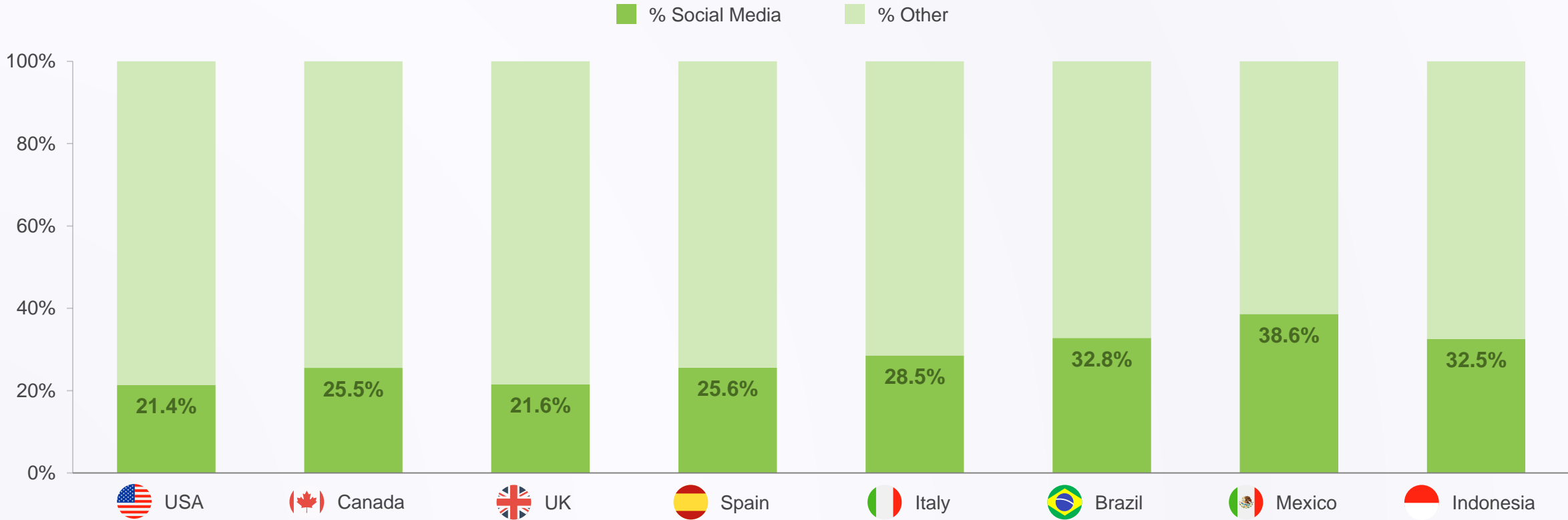
More than **three in 10**  
would **stop seeing their**  
**friends in person**

# Social media accounts for around a third of mobile minutes

Social media has always been seen as a major mobile category, and global figures confirm this, with this category accounting from between 20-40% of all minutes spent on mobile devices

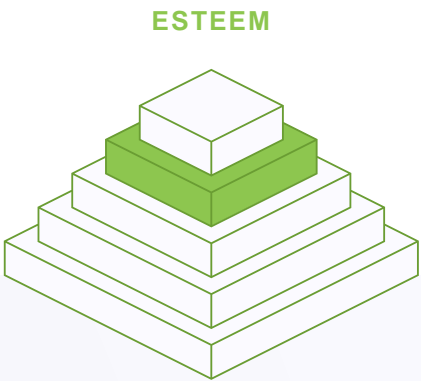


Social media category % of total mobile minutes

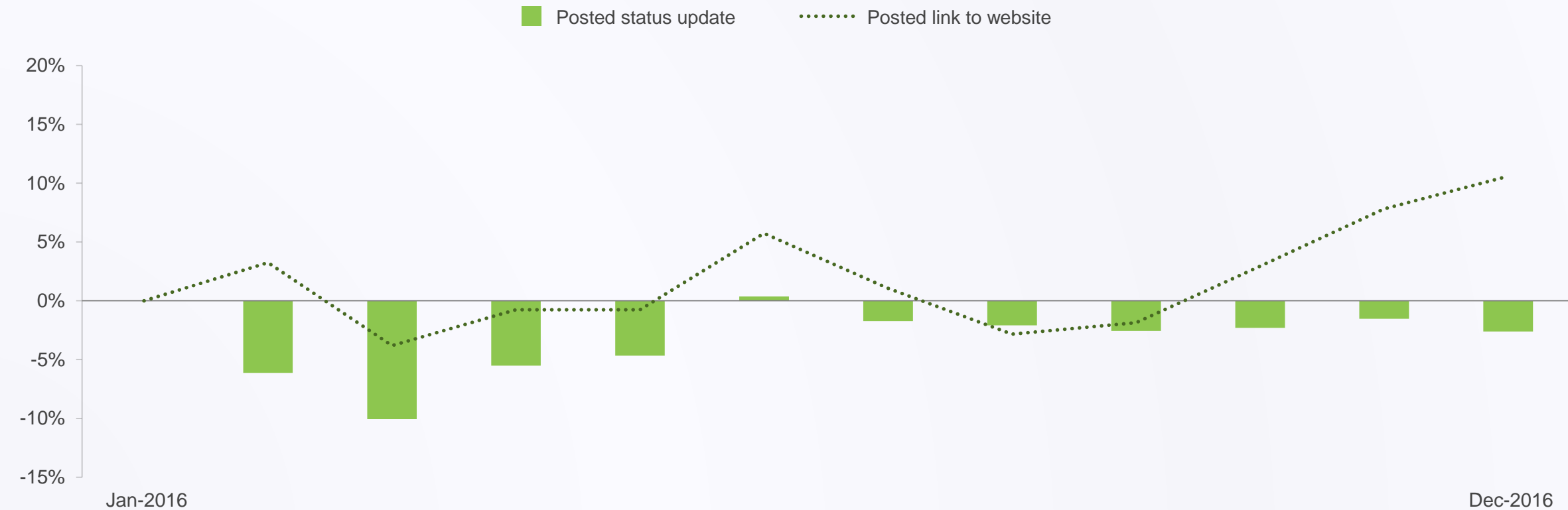


# Content sharing on social media grows faster than personal updates

Data from Spain shows that users are posting fewer personal statuses, and increasingly using social platforms to instead share content that reflects their views



% of users sharing on social media (versus January 2016)



# Self-actualisation

The realisation of a person's potential. This can involve artistic pursuits, or achievement of aspirational desires such as travel.



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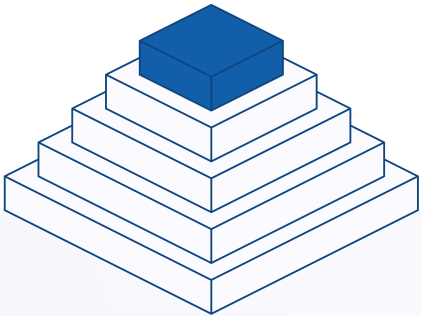


**45%** said they  
would **put off going**  
**on vacation**

# Apps & comfort with mobile transactions boost Travel

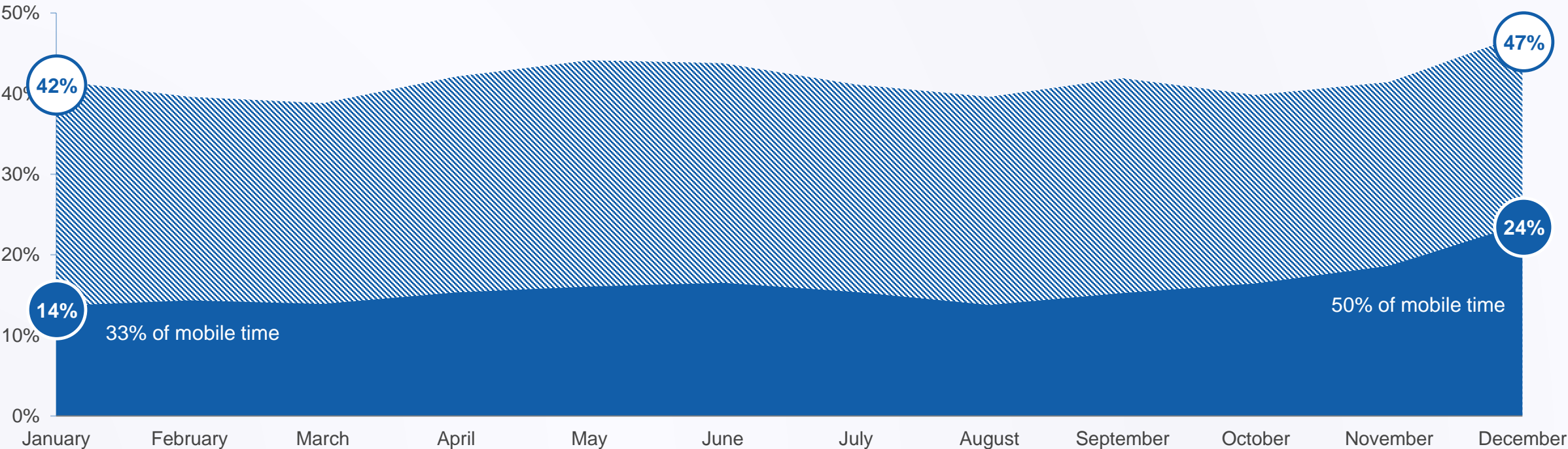
Despite being high-value purchases, travel minutes are shifting in the direction of mobile. The refined user experience of apps is growing their share at an even faster rate, shown here in UK data

SELF-ACTUALISATION



% of all digital travel category minutes (2016)

% Mobile      % App

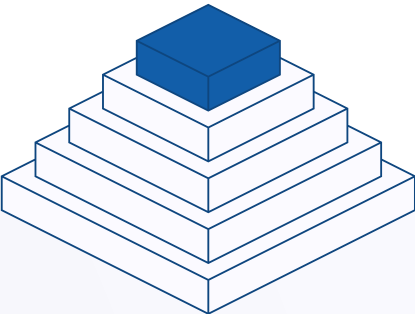




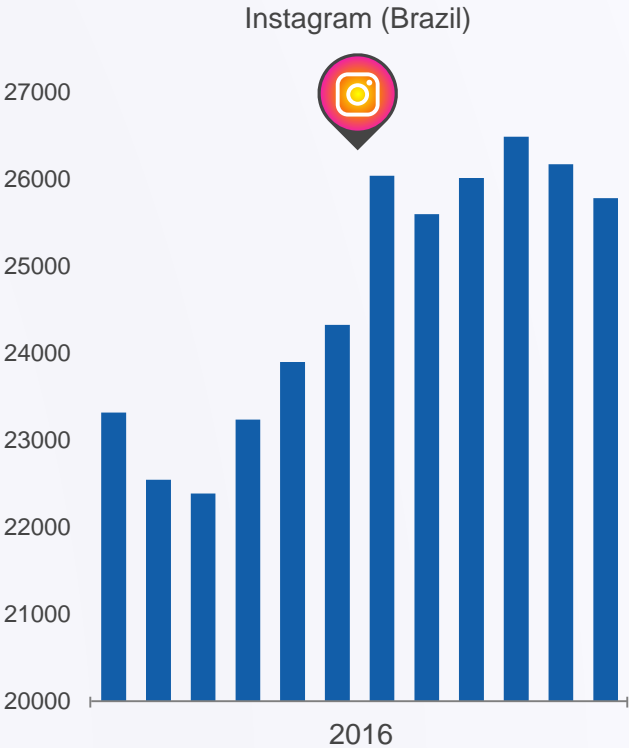
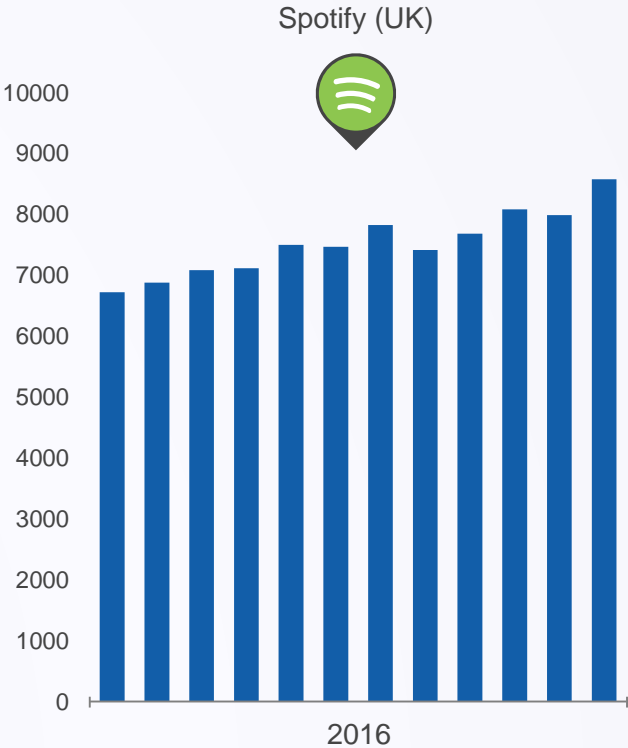
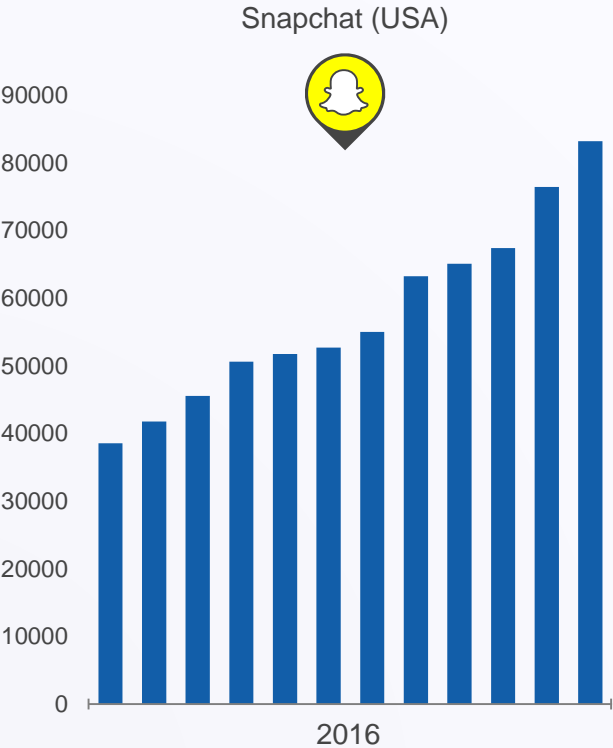
# Creative apps are flourishing on mobile around the world

The combination of always-present, increasingly sophisticated cameras and streaming music services have made mobile devices a hotspot for consumers' creative pursuits

SELF-ACTUALISATION



Total unique visitors for selected apps in selected countries

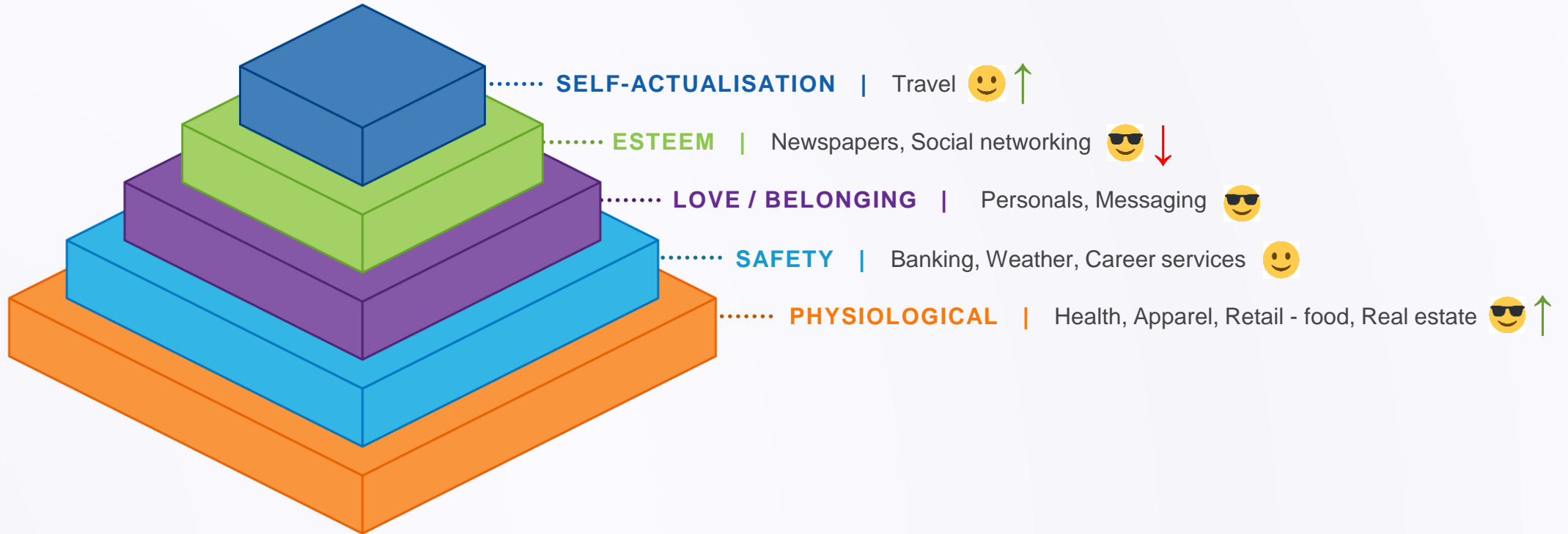


# Summary

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