
THE STATE OF THE INDUSTRY: MOBILE MARKETING IN TURKEY



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96 marketing and advertising professionals from Turkey

Key Insights

*At present, mobile is most commonly assigned **10% or less** of marketing budgets in Turkey. This is currently the case for **62%** of respondents. Limited budgets are the main barrier to industry growth in the region for **34%** (8% above the EMEA average).*

*However, almost all respondents believe their budgets will rise in both the short- and mid-term, with **40%** expecting to see growth of up to a quarter over the next year.*

*Some of this growth may be driven by media inflation. **54%** of respondents believe the cost of securing mobile ad space in Turkey has **risen over the last year**.*

*In cross-channel campaigns, social platforms are most frequently used in tandem with mobile marketing activities, particularly **Facebook (96%)**, **Instagram (82%)** and **Twitter (80%)**.*

***TV** is used with mobile in a significant **79%** of Turkish campaigns; **23%** above the EMEA average.*

Key Insights

Multi-screening (76%) is regarded as the most significant consumer trend impacting mobile strategy in the region, followed by **watching video (54%)** and **mobile payments (38%)**.

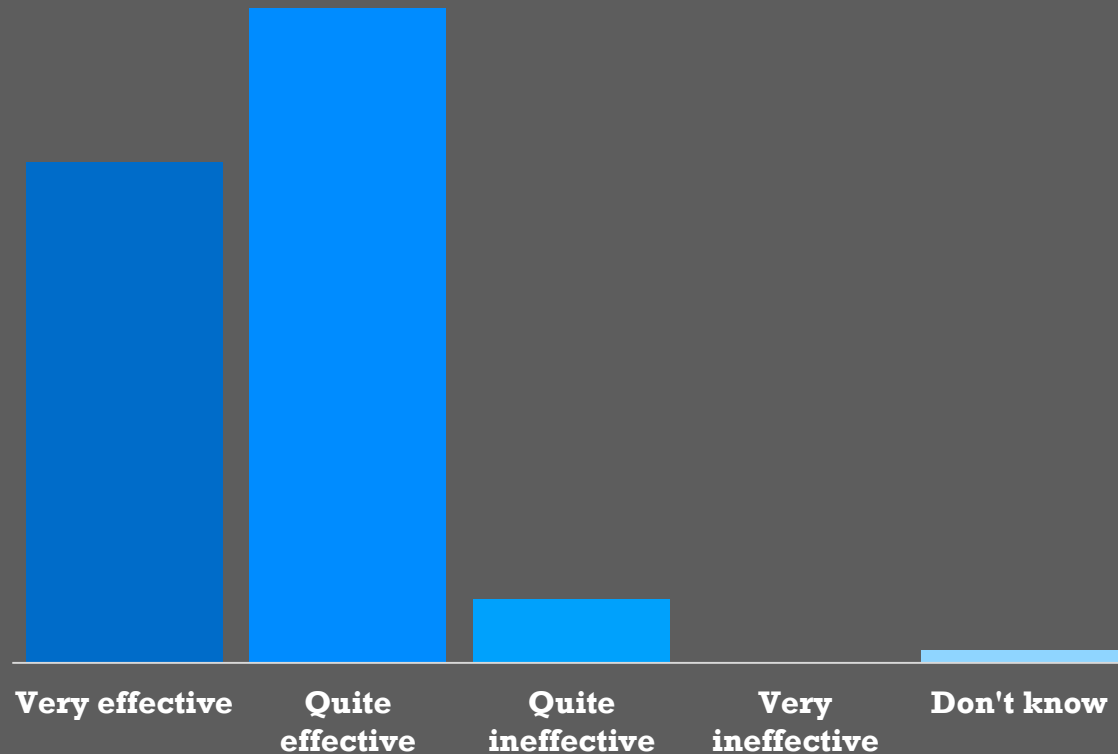
70% of all respondents intend to utilise **mobile video** in their marketing activities this year, while **54%** intend to leverage **location data**.

In five years' time, **virtual reality (50%)** and **mobile wallet (50%)** technologies are expected to have come to the fore, with the latter seeing a **34%** increase in perceived importance.

56% of respondents regularly trade programmatically, and **47%** currently use a **private market place (PMP)**. The most commonly cited reason for doing so is to secure quality ad inventory (**55%**).

Samsung is regarded as the most innovative brand in the mobile space in Turkey, followed by **Turkcell** and **Unilever**.

Q. In your experience, how effective is mobile as a marketing channel?



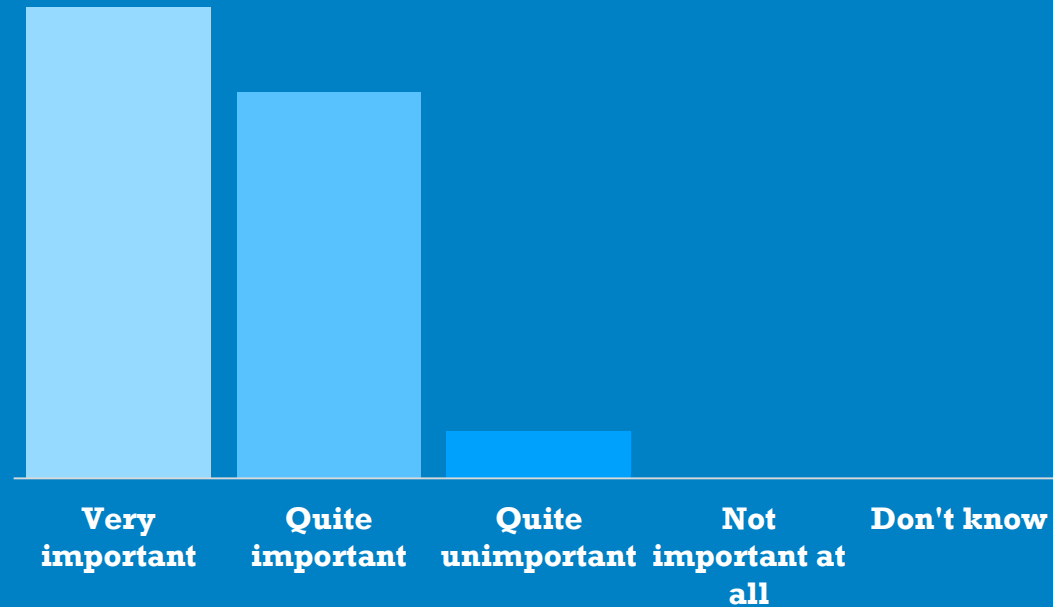
Almost all respondents

believe mobile is an effective advertising channel and agree it holds importance within their marketing strategies.

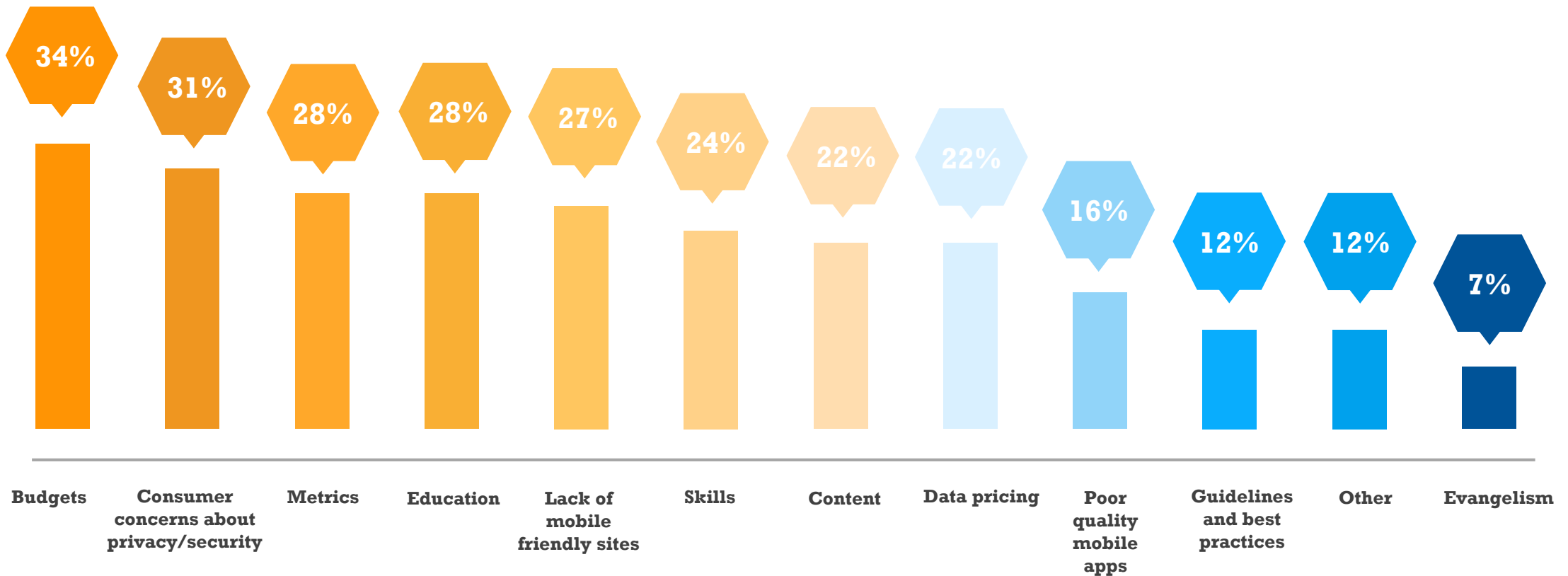
Almost all respondents

say mobile will be an important marketing tool for them or their clients in the next 12 months.

Q. Overall, how important do you think mobile marketing (in all forms) will be for you or your clients this year?



Q. In your opinion, what are the biggest barriers to the growth of mobile marketing and advertising in Turkey? (pick up to three)





BUDGETS

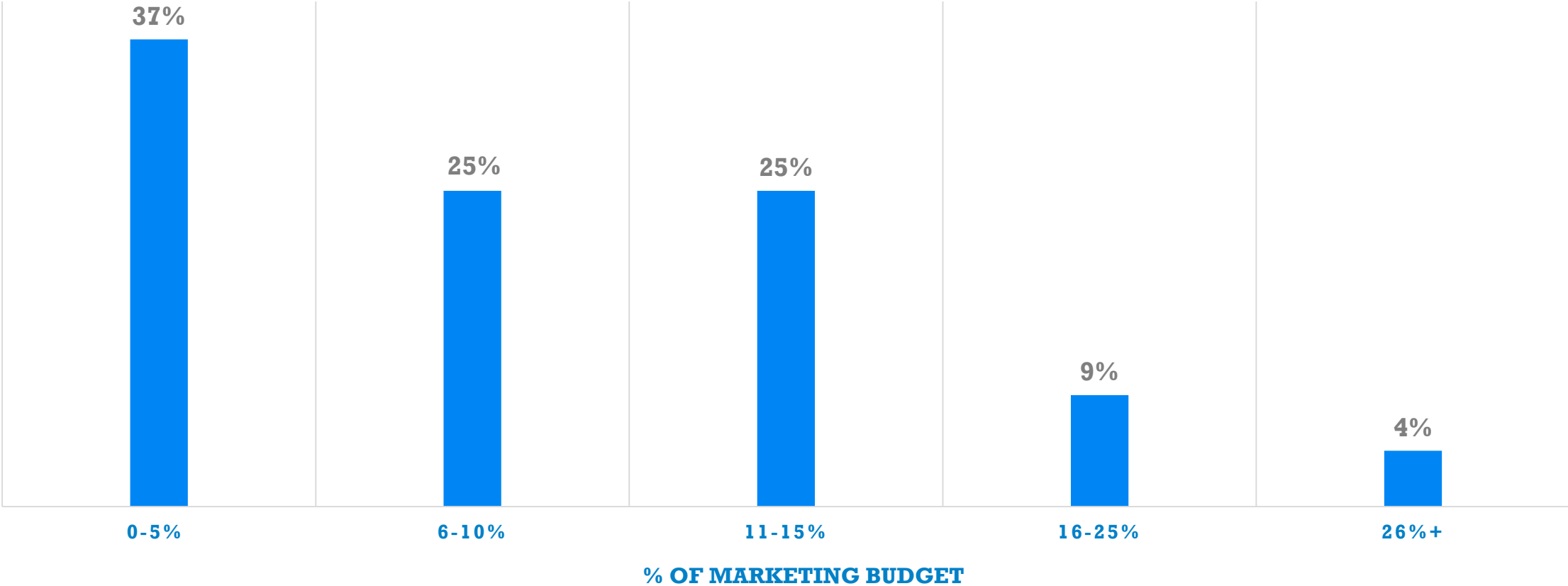
Key Insights

*At present, mobile is most commonly assigned **10% or less** of marketing budgets. This is currently the case for **62%** of respondents.*

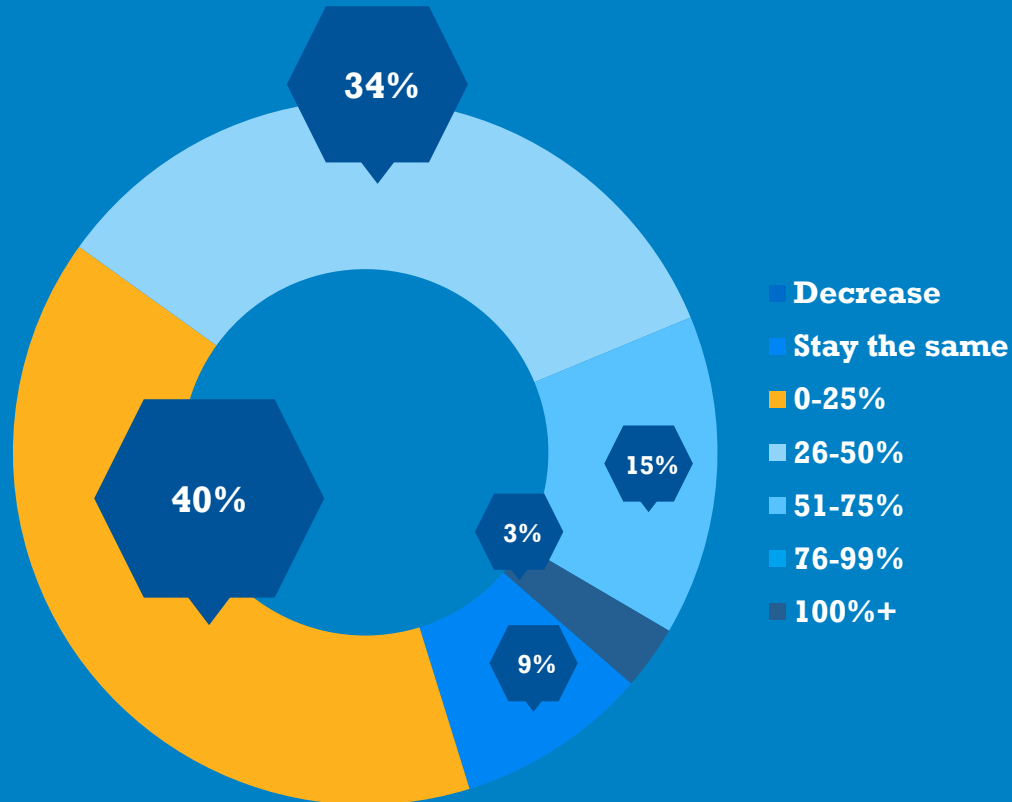
*However, the vast majority of respondents (**91%**) believe their budgets will rise this year, with **40%** expecting to see growth of up to a quarter.*

*Some of this growth may be driven by media inflation. More than half (**54%**) of respondents believe the cost of securing mobile ad space has **risen over the last year.***

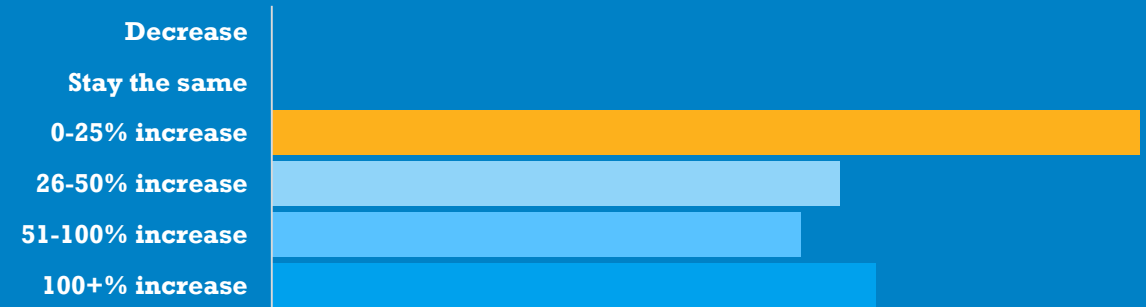
Q. What percentage of your/your clients' marketing budgets is currently being allocated to mobile marketing activities?



Q. How much do you/your clients expect your/their mobile marketing budgets to grow over the next year?



Q. How do you see mobile marketing budgets changing over the next five years?

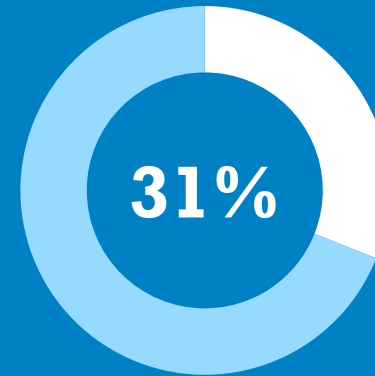


Q. How easy do you find buying mobile advertising?

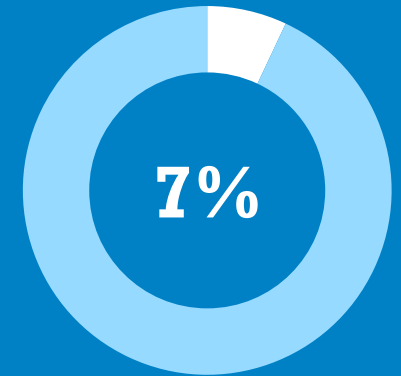


Q. In your experience, compared to last year, has the cost of mobile advertising...

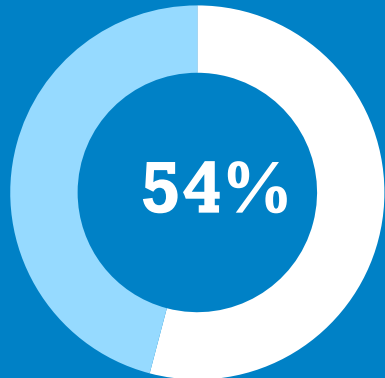
Remained the same



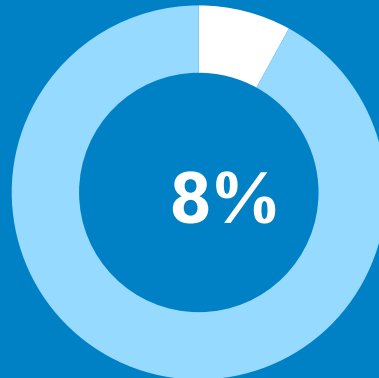
Don't know



Risen



Fallen



More than half of respondents (**54%**) believe the cost of mobile advertising has risen in the past year. While few people believe costs are decreasing, almost a third (**31%**) believe the cost has remained the same.



STRATEGY

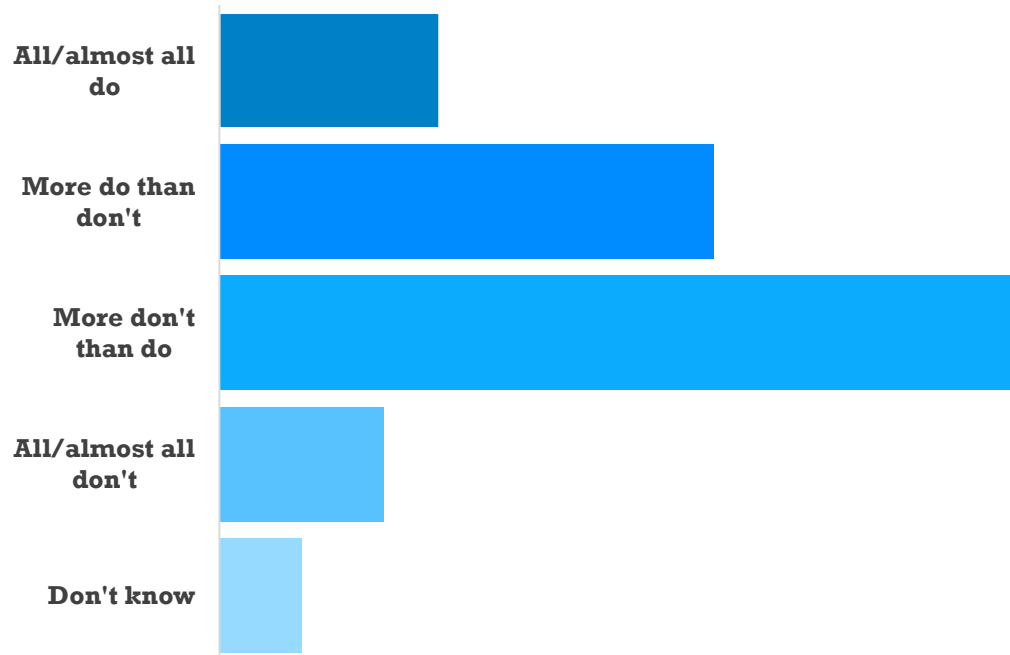
Key Insights

*Most agencies in Turkey believe that the majority of their clients **do not** have a formal mobile strategy in place, **yet 67% do.***

*In cross-channel campaigns, social platforms are most frequently used in tandem with mobile marketing activities, particularly **Facebook (96%), YouTube (77%)** and **Twitter (80%)**. TV is used with mobile in more than half of campaigns.*

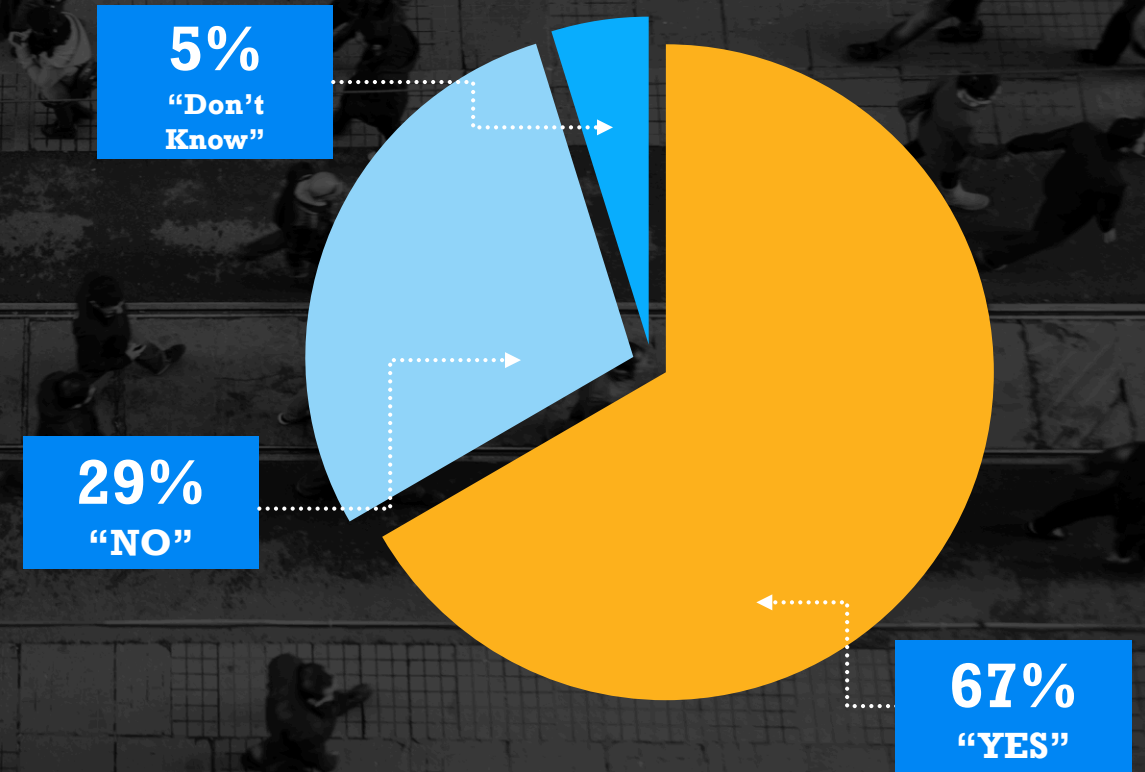
***Multi-screening (78%)** is regarded as the most significant consumer trend impacting mobile strategy, followed by **watching video (54%)** and **mobile payments (38%)**.*

Q. Agencies, do your clients have formal mobile marketing strategies for their brands?



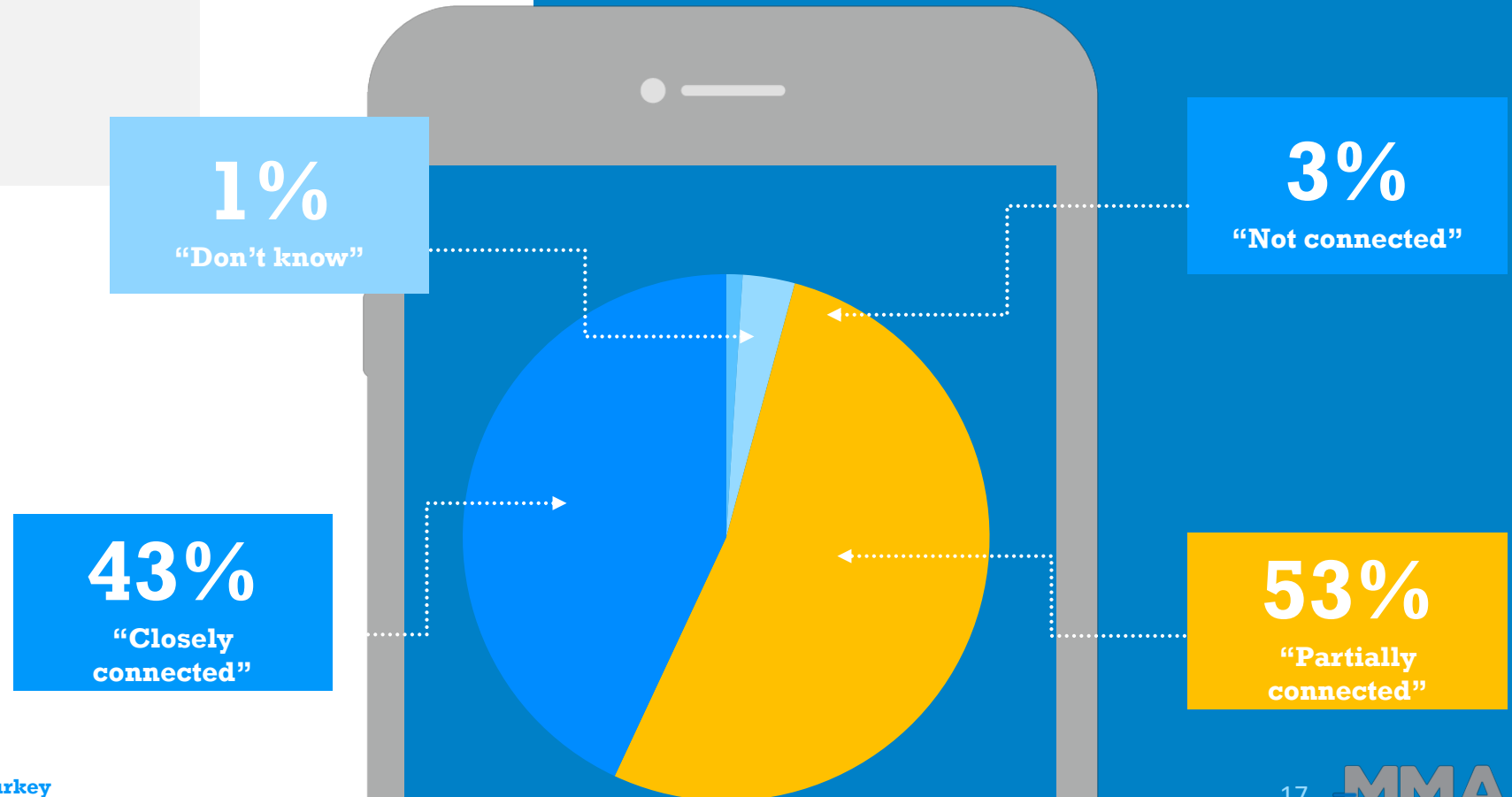
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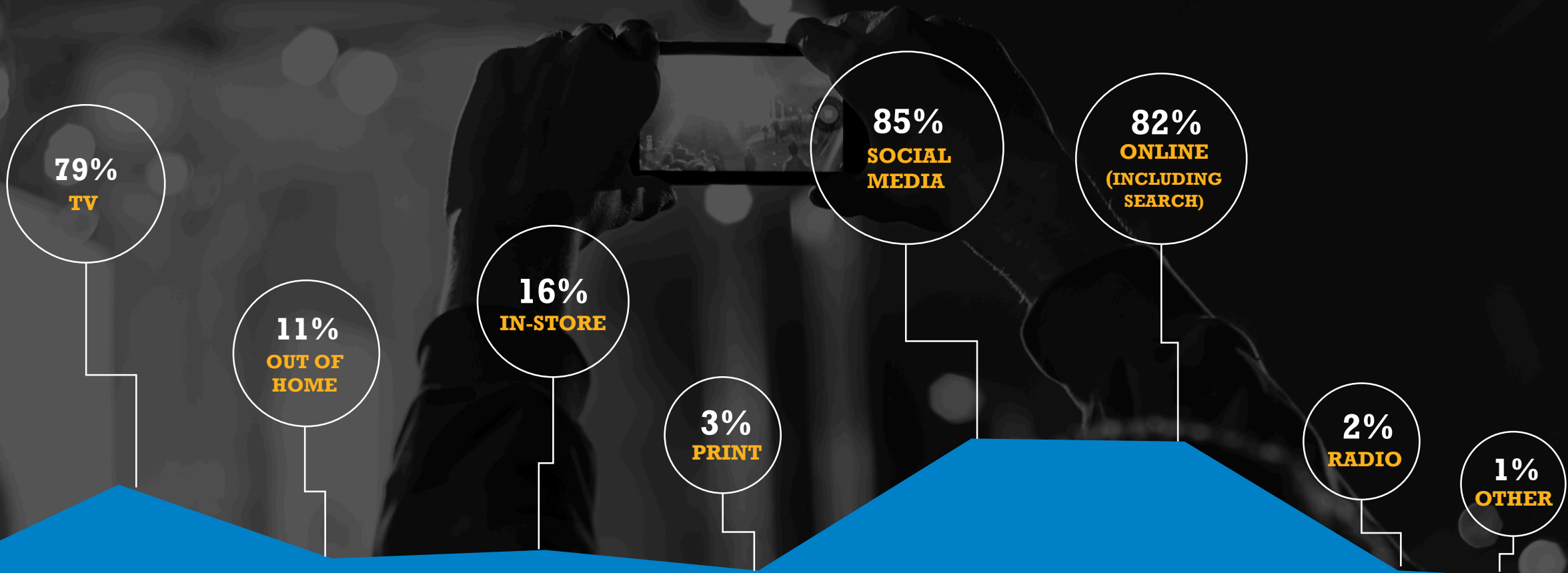
Q. Brand owners, do you have a formal mobile marketing strategy for your brand?



Of those that have a formal mobile strategy, **56%** could be better integrated with other marketing activities.

Q. If you or your clients have a formal mobile strategy, how closely is it integrated with other marketing activities? In your opinion, is it:

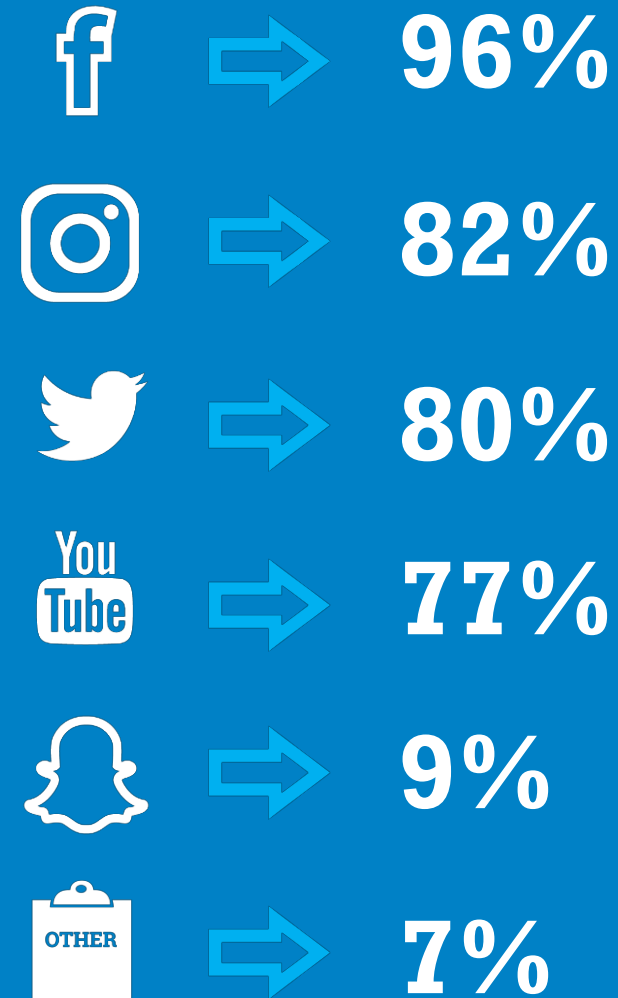




In your experience, which media channels are used most frequently with mobile? (pick up to three)

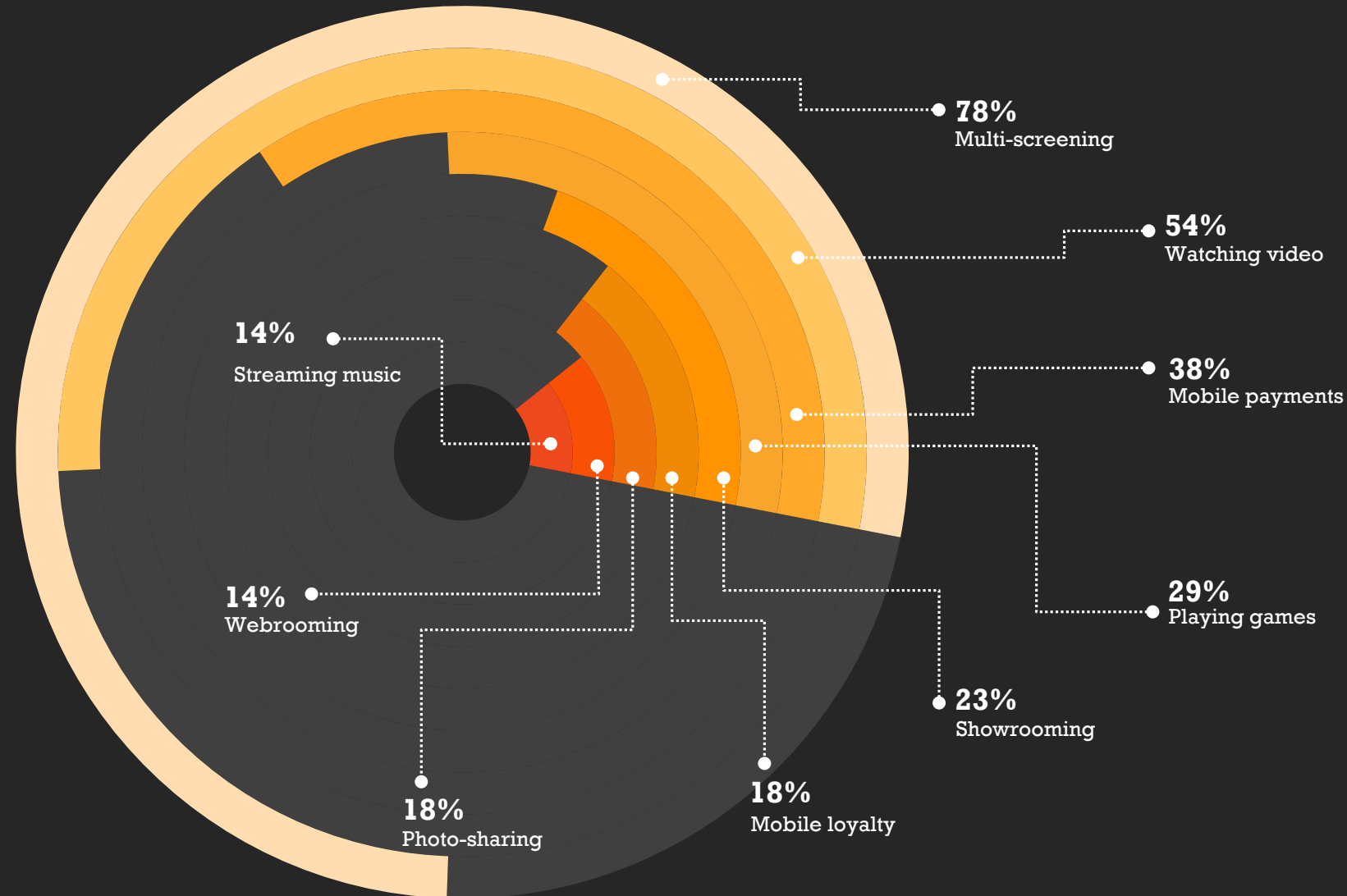
Which social media platforms have you/your clients used for mobile marketing this year?

(select as many as necessary)



Q. Of the following consumer behaviours made possible by mobile, which do you think has the most significance for the marketing industry?

(choose up to three)





INNOVATION

Key Insights

*70% of all respondents intend to utilise **mobile video** in their marketing activities this year, while **54%** intend to leverage **location data**.*

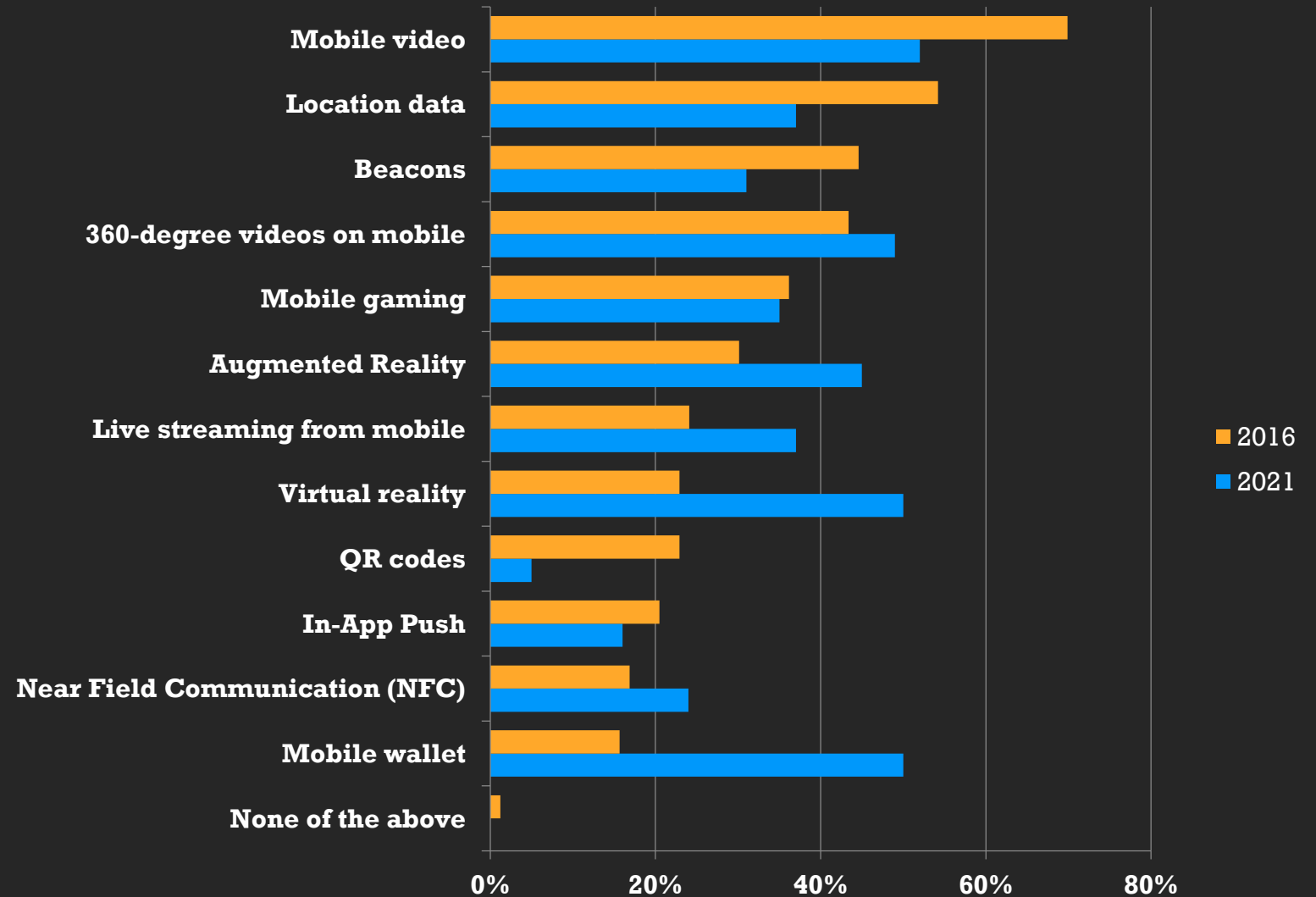
*In five years' time, **mobile video (52%)** will remain important, and **virtual reality (50%)** and **mobile wallet (50%)** technologies will come to the fore.*

*56% of respondents regularly trade programmatically, and **47%** currently use a **private market place (PMP)**. The most commonly cited reason for doing so is to secure quality ad inventory (**55%**).*









Q. Which technologies are you/your clients planning to use this year?









Which do you/your clients expect to be most important in five years' time?

(pick as many as required)



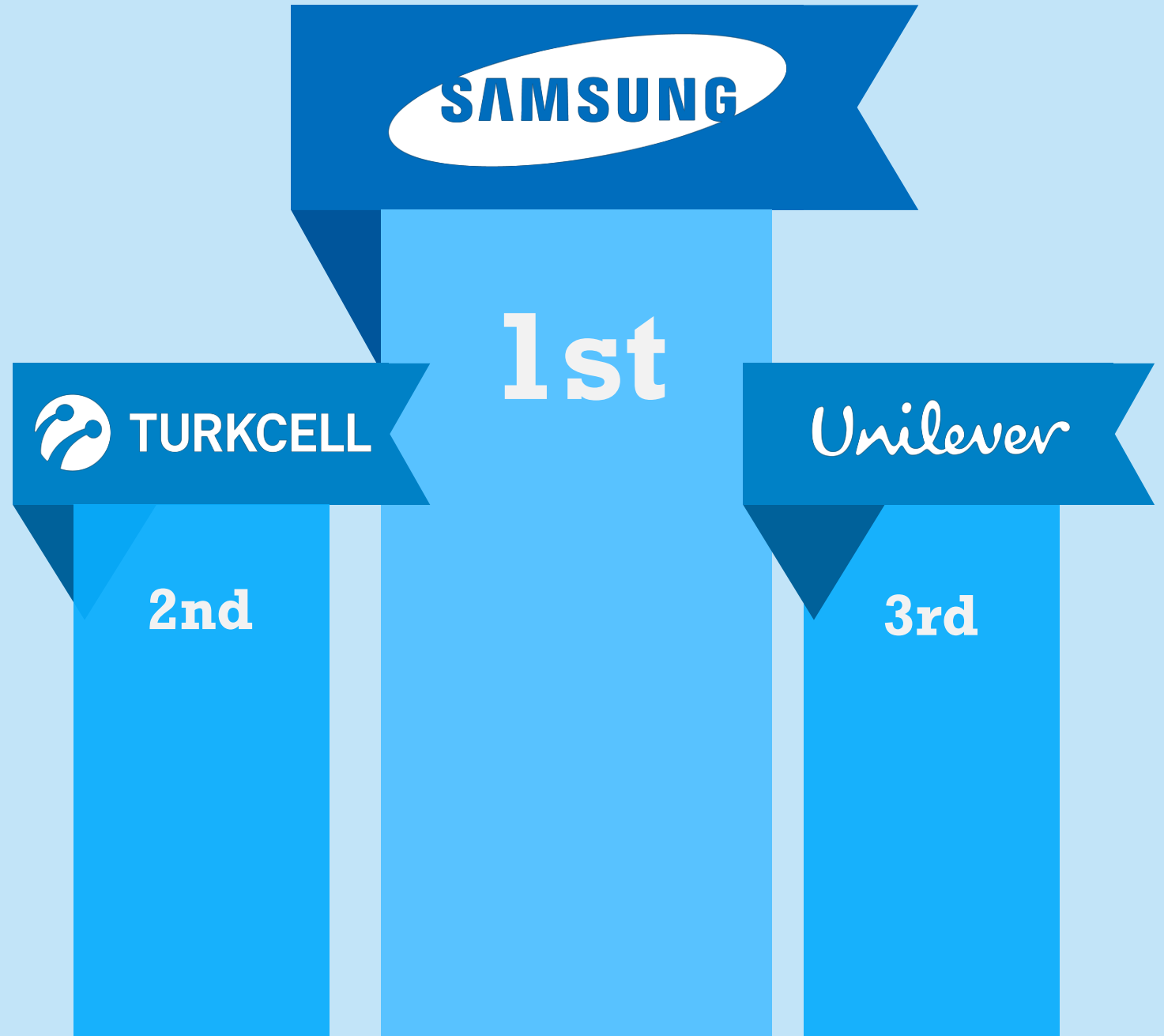
Q. In which categories, in Turkey, are you seeing the most innovation in mobile marketing? (pick up to three)

	Telecoms	47%
	Financial Services	32%
	Drink and beverage	31%
	Retail	28%
	Travel, transport and tourism	21%
	Media and publishing	19%
	Leisure and entertainment	18%
	Motor and auto	16%

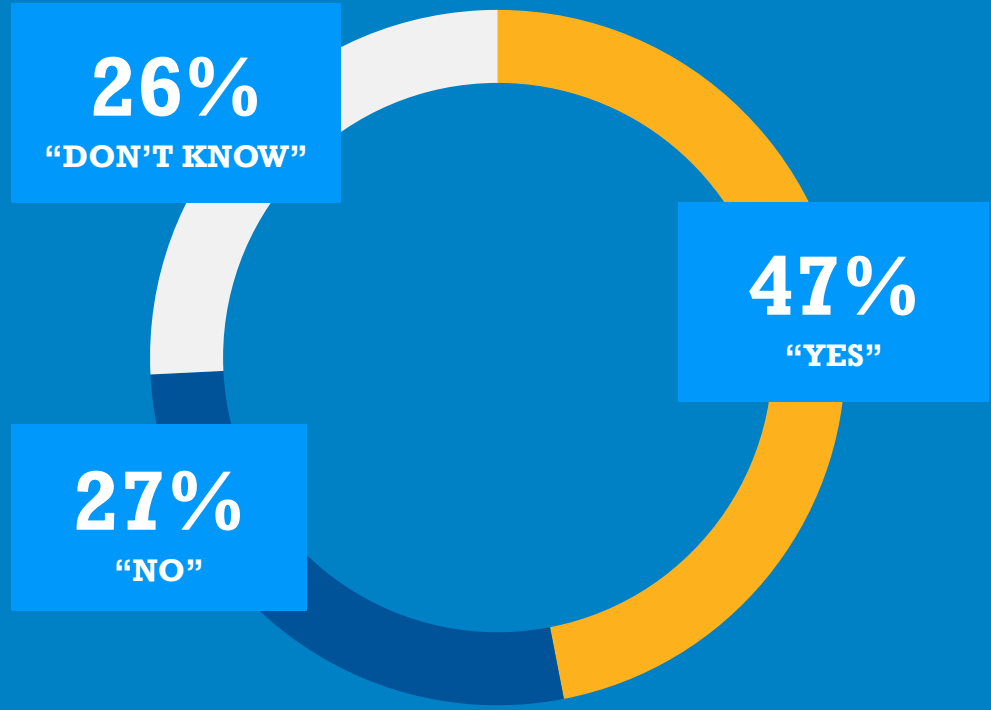
	Food	13%
	Wearing apparel	12%
	Utilities and services	10%
	Toiletries and cosmetics	6%
	Household and domestic	6%
	Government and non-profit	6%
	Business and industrial	4%
	Other	3%

Q. In your experience, which brands do you feel are the most innovative in the mobile space in Turkey?

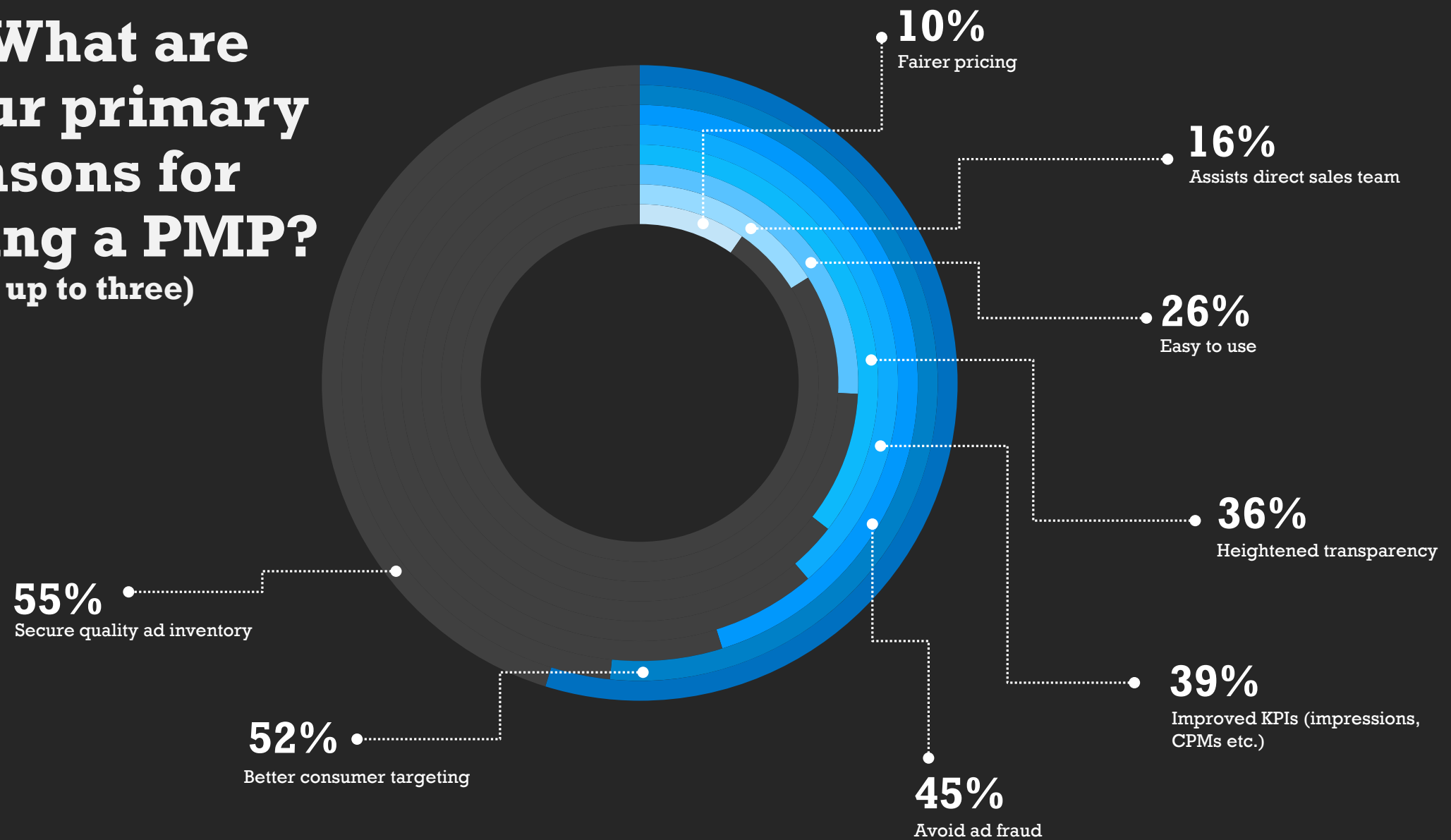
(choose up to three)



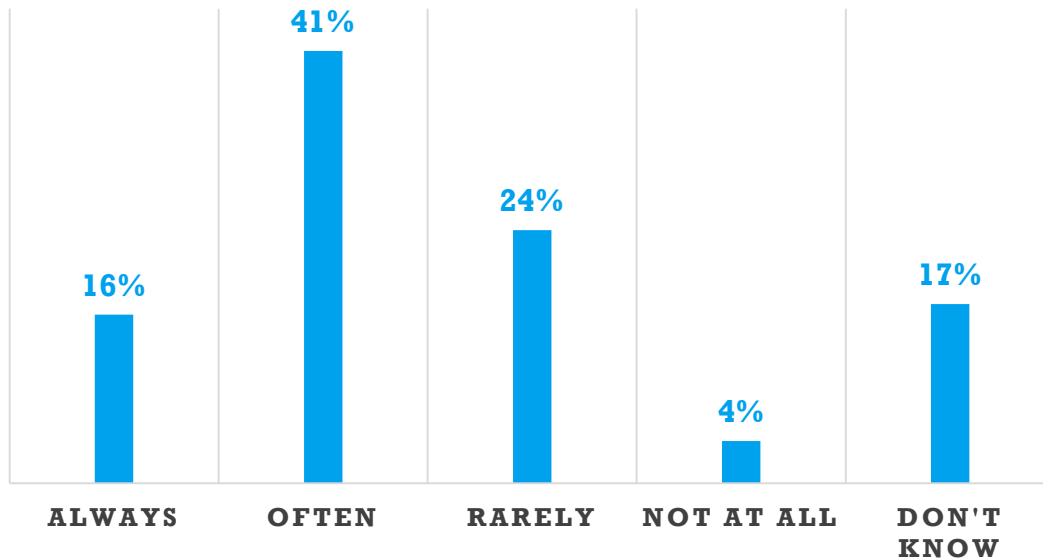
Q. Do you use a private market place (PMP) to buy or sell mobile ad space?



Q. What are your primary reasons for using a PMP? (pick up to three)

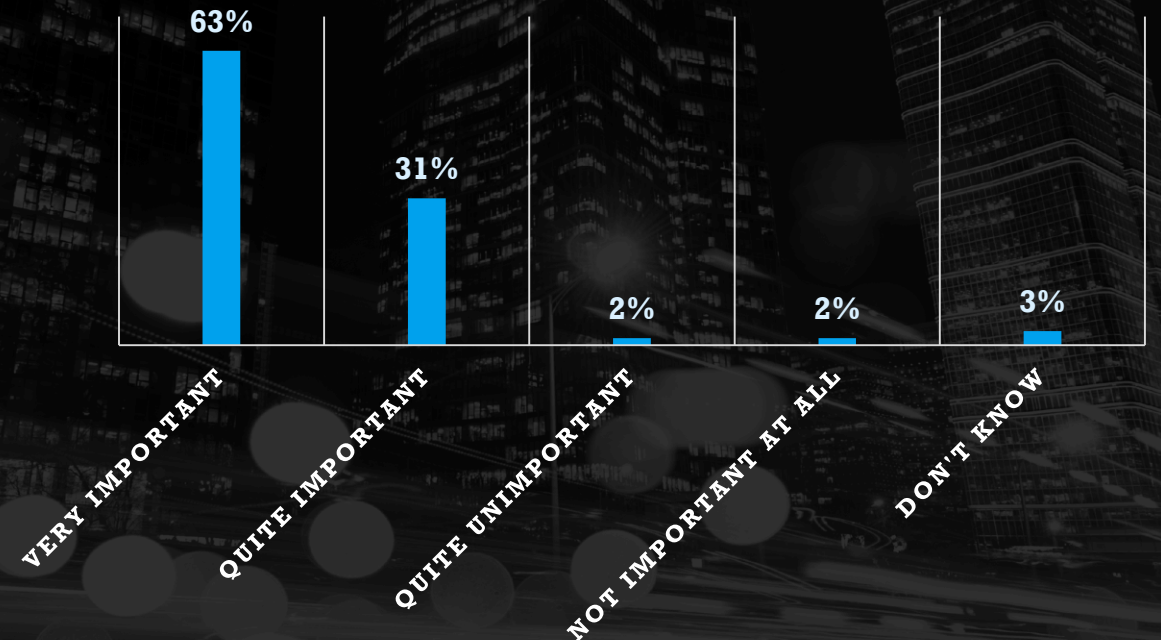


Q. How often do you use programmatic/RTB as a medium for ad buying?



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Q. In your opinion, how important a role do you believe programmatic buying will play in your/your clients' marketing strategies in five years' time?





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