INMOBI

2021
Southeast Asia
Mobile Marketing
Handbook

Marketing in the Era of Mobile

Content

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Foreword

Building Resilient Brands: Thriving in the Era of Mobile

Undeniably 2020 has been a cataclysmic year for individuals, organizations and humanity as a whole across the globe. Several of these changes were simmering undercurrents over the last few years but have finally catapulted on to the main stage due to the pandemic. As marketers across Southeast Asia go back to the drawing board, one truth has emerged: mobile is the anchor for both consumers and brands in this sea of unknown. Several brands have pivoted admirably to meet their consumers where they are – be it embracing m-commerce, building click to mortar capabilities, or creating custom mobile experiences, brands have prioritized the needs of their consumers above all.

In this year's Mobile Marketing Handbook, we examine the year that was and discuss key trends that will influence marketing strategies for years to come. We are truly living in a mobile-first world order with SEA now accounting for 639 million global internet users. Consumer behavior has remarkably and distinctly evolved as they spent more time indoors. Regardless of age and gender, Southeast Asians have taken to gaming with great gusto. Short form video continues to rage on in popularity, recording nearly an hour spent per user on average while e-commerce has become an essential service with a 20% increase in number of first-time shoppers. As a mobile first market, many of the most exciting movers and shakers in the super-app race originate from this side of the world

This rapid shift in consumer behavior has not gone unnoticed by marketers across the region, with several brands now focusing on their Mobile Marketing Maturity (3M). Marketers are setting higher bars for themselves by closely measuring the impact of each marketing activity, as they move from being aspirational to actionable mobile with their marketing strategies.

While this may be a tough time for marketers not only in the region but across the globe, true innovation is born from adversity. We have observed this from close quarters as resilient brands have pioneered innovations that enable them to pivot, strategize and execute in the new normal.

We discuss all this and more, in detail in this year's edition of the Mobile Marketing Handbook. As always, we hope you find the data and insights useful as we together march into the next decade of advertising and marketing innovation.

Vasuta Agarwal
Managing Director, Asia Pacific, InMobi

01

Chapter
A New World Order, Indeed!

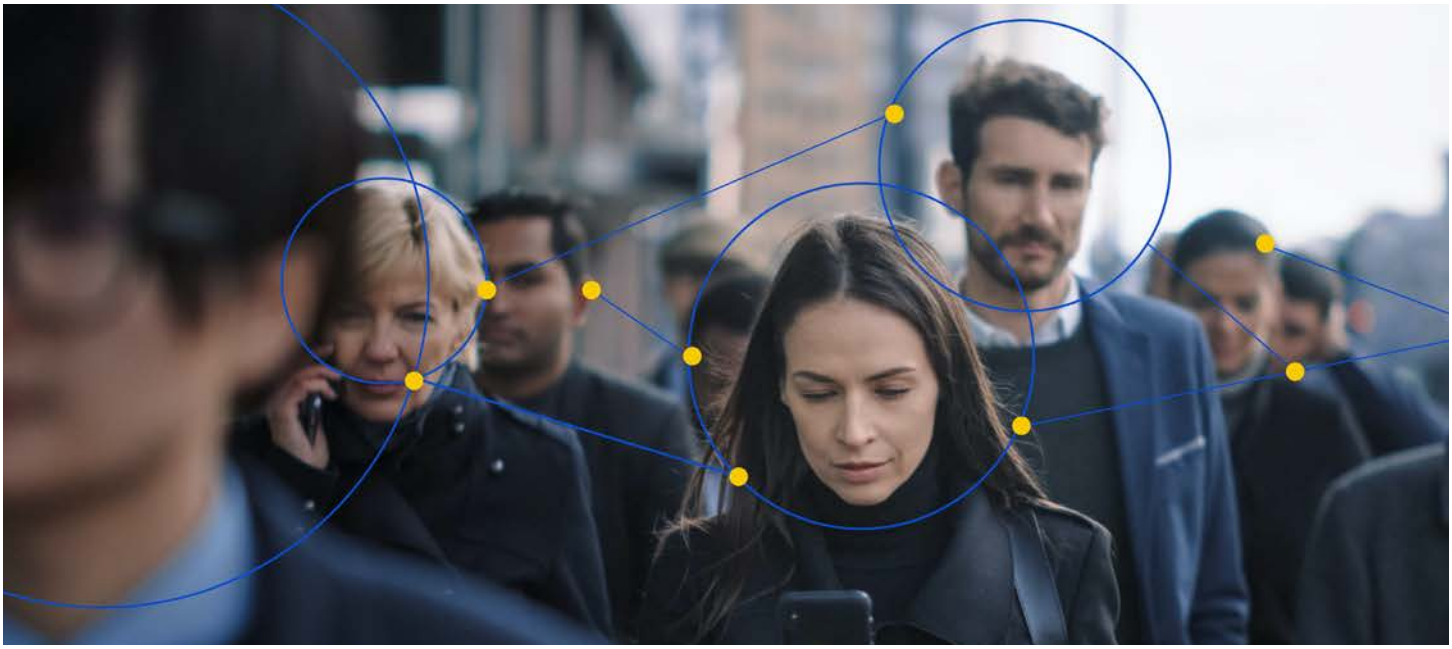
What can you expect in this chapter?

We share the top mobile statistics and consumption patterns that have shaped 2020. We deep dive into rising consumer trends including gaming, short form video, and Southeast Asia's burgeoning super-app ecosystem.

1.1 Chapter

A Digital, Hyperconnected Global Village

The following article details the far-reaching and lasting implications of the pandemic on the mobile economy in Southeast Asia and the developments that will dominate consumer experiences in the new normal.



Over the past decade, increasing globalization, better connectivity, and technological advancements have brought the world closer to a digital, hyperconnected global village. And even during the epoch-shifting pandemic, this hyperconnected global village was in it, together! COVID-19 dramatically reshaped life as we know it and permanently shifted the consumer landscape to a mobile-first world. Sheltering at a place, always on the hunt for new information (and distractions), and longing to stay connected with near and dear ones, consumers relied on their one constant companion – mobile.

Welcoming the Mobile-First World Order

All around the globe, there has been a significant increase in app downloads, time spent on mobile, and consumer spending on mobile.[1] COVID-19 catalyzed several trends but most importantly the transition to a mobile-first world at a pace that was unmatched to the last few years combined.

New internet users worldwide

321 Mn

New internet users worldwide[13]

+25%

Worldwide **Downloads** Growth in Peak Month H1 2020 vs H2 2019

$143 Bn

Worldwide App Store **Consumer Spend** in 2020

4.2 Hrs

Per day spent in mobile by the average user in 2020

1.6 Tn Hrs

Spent on Mobile Worldwide in H1 2020

$240B

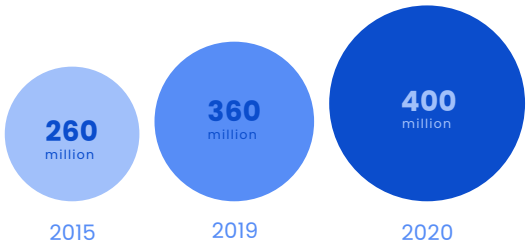
Mobile Ad Spend in 2020

Southeast Asia Leads as a Mobile-first Economy

Internet Users

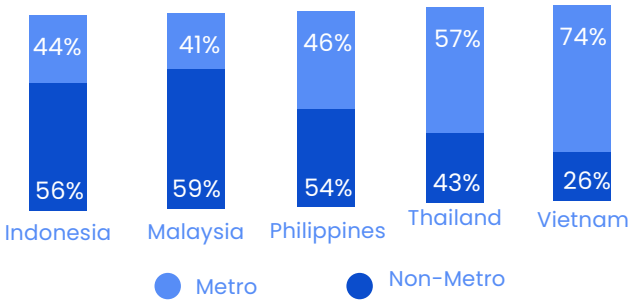
Between 2015 and 2019, 100 million new users joined the internet. In 2020 alone, 40 million users have come online. 70% of the region's population is now online.

On average across SEA, 1 in 3 of all digital service consumers are new to the service due to COVID-19.



Internet User Origin

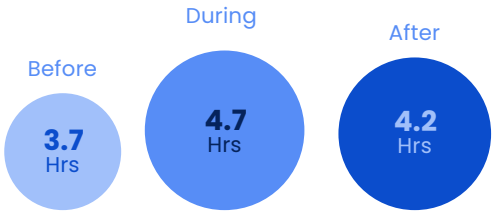
A majority of new users are from non-metro areas except for Vietnam and Thailand.



Time spent online

Consumers have spent more time online for personal use since the lockdown.[5]

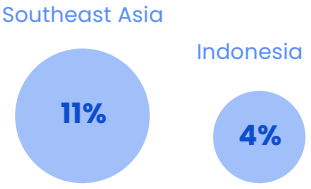
During the lockdown, time spent online increased by almost 30% when compared to the pre-lockdown period. After the lockdown ended in some regions, consumers continued to spend time online. This is a 13% increase before the lockdown.



App Downloads

Southeast Asia accounted for 11% of global app downloads in Q3 2020.

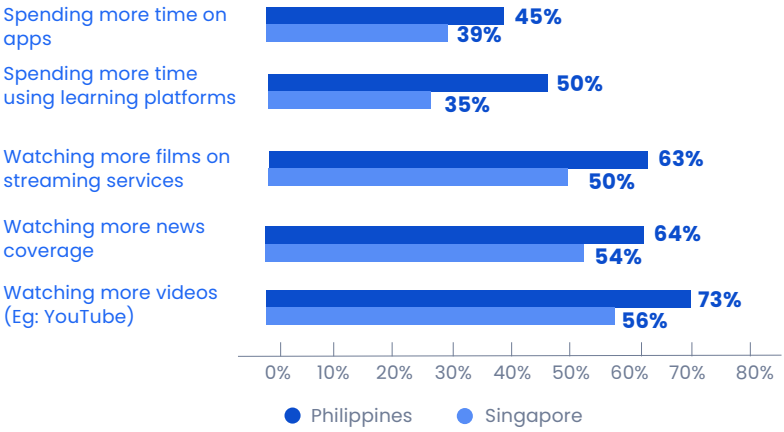
While Indonesia was the leading Southeast Asian country driving app downloads in Q3 2020 with a global share of 4%, it was Malaysia that drove growth in downloads during the pandemic charting an increase of 34%, the highest across all Southeast Asian countries.



Usage Patterns

94% of new digital consumers intend to continue using digital services post-pandemic.

- 1.4% increase in DAUs in SEA between Q2 and Q1 2020 due to the pandemic
- 4.46% increase in Entertainment and Video Streaming DAU in SEA (Q2 vs Q1 2020); 1.5% increase in Gaming DAU and 24% increase in Fitness app DAUs. Time spent in fitness apps increased by 7.5% in the same duration. [8]



Data Consumption

Due to the ban on holiday exodus during Ramadan this year, consumers connected with family and friends online, causing a surge in data traffic across Indonesia's telecommunication companies.

While two of them reported over 25% increase compared to the period before the pandemic, the state-owned telecom provider witnessed a steep hike of 75%. [7]

surge in in data consumption recorded by state-owned telecom operator in Indonesia

Categories that Peaked During the Pandemic

Not only are consumers spending more online, but they are also buying more categories. In 2020, consumers are going online to buy an average of 5.1 categories — an increase of 40% in just one year.3

E-Commerce

Mobile Shopping during COVID-19 surpassed holiday shopping levels. E-commerce boomed in H1 2020, achieving growth that normally would have taken between 4 to 6 years — and mobile was central to this growth.[1]

In Indonesia, for instance, the average weekly sessions in Q2 2020 were 30% higher than Q1 2020. This growth was more than that witnessed in the US for the same time. [1]

30% of Southeast Asian consumers have increased their online spending due to the pandemic and 47% have decreased their offline purchases.[3]

Grocery

People are also now more receptive to grocery shopping online: 43% of respondents said they now shop online for packaged groceries.[3]

Food Delivery

Consumers are also open to using food delivery apps especially as stay-at-home orders surged. Indonesia tracked the highest growth of 60% in average weekly sessions in Food & Drink Apps.[1]

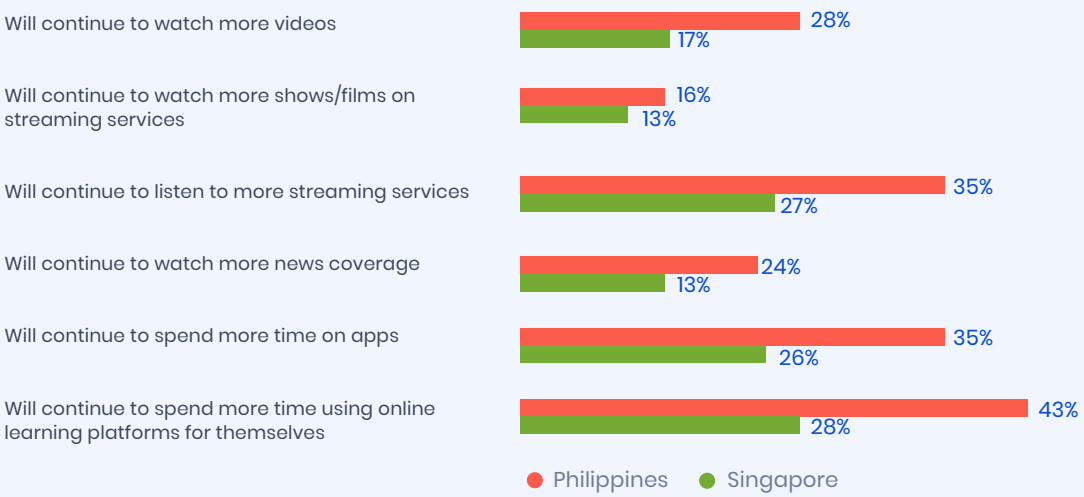
Education

Indonesia clocked an 80% growth in time spent on Education apps in just 2 quarters.[1]
Almost 50% of digital consumers on education, groceries, and lending were first time users as an aftermath of the pandemic.

The Southeast Asian Consumer Mindset: Stay Online, Stay Connected

Consumers are increasingly moving to mobile, more so after the onset of the pandemic. They have not only found connections and comfort by going online but also availed various digital services that have made their lives easier and better. According to the Bain & Facebook study, the region's digital consumers expect to spend more time at home after restrictions are lifted, and they have discovered new apps that they intend to continue using. They are buying more essentials online and are favoring value for money and trusted established brands.[3] While consumers expect to carry on with their newly adopted habits post the pandemic, mobile continues to play a pivotal role in the lives of the consumers and drive robust growth for the digital economy.

Permanent changes expected in consumer behaviour[2]



The Expert Take on Southeast Asia's Digitally Hyperconnected Village

"

Humans today face a new reality. The pandemic has not brought life to a standstill but has forced consumers to find new ways to fulfill the needs of their daily lives, physically, mentally and spiritually. The acceleration of digital or mobile-based services is due to a fundamental change in consumer behavior. This is especially evident in Southeast Asia, where over 33% of today's digital consumers started using online services for shopping needs due to COVID-19. In fact, 5 in 10 consumers who shop for groceries online today, do so because of the pandemic. As digital became the go-to-medium for shopping, entertainment, learning, work, and everything in-between, time spent online also increased by 27% during the pandemic in the region.

This change in consumer dynamics presents a unique opportunity for marketers. Marketers are already finding ways to bring offline experiences to the digital world. A prime example of this has been the popular events going online this year with the help of existing platforms or even newly created solutions. With live streaming of products and marketing support for businesses, consumers and vendors were able to connect and shop, the consumers are also accelerating the adoption of content and experiences through online connections. With 70% of the region's population now online, consumers are sharing their experiences and learning from one another via the digital medium. In such a scenario, the ability to convert a purchasing customer into an advocate is manifold and primal.

The increased digital activity offers marketers the opportunity to better understand the consumer through different sets of data, which now possibly captures better suggestions on preferences and behaviors in and outside of their owned properties. With access to these unique insights into the mind of the customer, marketers can create innovative experiences to delight the digitally hyperconnected global villager across the world.

Eka Sugiarto
Head of Media, Unilever
Indonesia & SEAA

1.2 Chapter

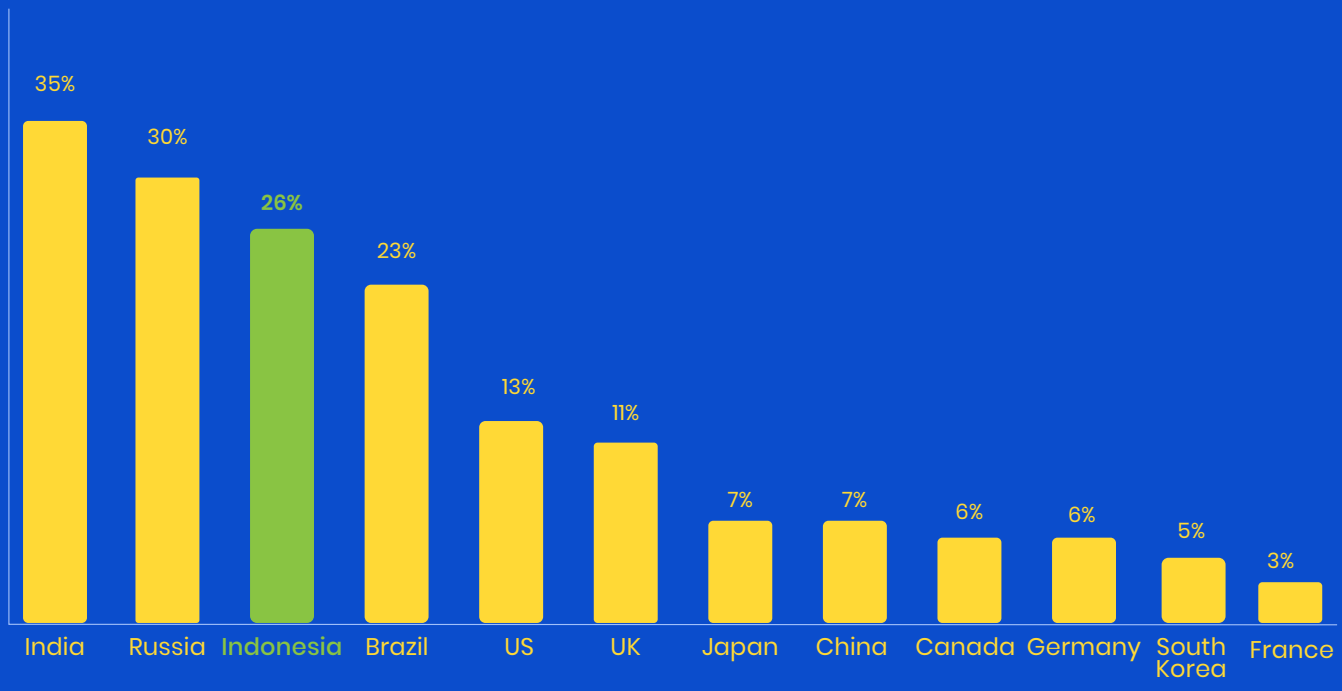
The Curious Case of Mobile Gaming

> As online games emerge as the new entertainment among Southeast Asians, we take a deeper look into the curious case of mobile gaming with insights from the InMobi Audience Intelligence platform.

In 2020, the gaming industry is at the forefront of entertainment, growing rapidly with 2.7 billion gamers across the world[9]. Gaming has witnessed a great revolution with the advent of smartphones, as mobile gaming accounts for over 48% of overall revenues, quashing both console and PC gaming[10]. In the first week of Q2 2020, weekly mobile game downloads broke records at over 1.2 billion, and weekly download levels remained at 1 billion on average throughout the quarter, up by 20% Y-o-Y[11].

Increase in number of games played each month by the average user

During COVID-19 Pandemic - Peak Month in 2020 Vs Monthly 2019 Avg



Southeast Asia has become one of the most viable gaming markets around the globe. With the dominance of premium publishers, such as the SEA group (formerly known as Garena), mobile is poised to account for 69.4% of all gaming revenue in the region[12]. Indonesia has emerged a bright spot in the region, with even the government hosting e-sport competitions. A minimum of 75% growth in mobile gamers was seen across Indonesia during April and May 2020[9]. We deep dive into the trends we've see in Indonesia to give you a glimpse of how the modern Southeast Asian Gamer has evolved.

What's your In-game name? South East Asia Sees a Diverse Mix Embracing Gaming

Age or Gender; No Longer a Barrier for Gaming

What was once a male-dominated hobby in the past, today's Indonesian gamers are predominantly female. In fact, the 3 largest gaming audiences are women-led, across different age groups. Southeast Asians enjoy a wide variety of games including casual and simulation games.

Gaming is not only popular among Gen Z but is equally popular among consumers between 45 to 54 years of age. The gaming audience in Southeast Asia comprises 14% female Gen Z gamers, 12% male Gen Z gamers, and 25% women, and 14% men between 45 to 54 years of age[9].

The Many Lives of the Indonesian Gamer

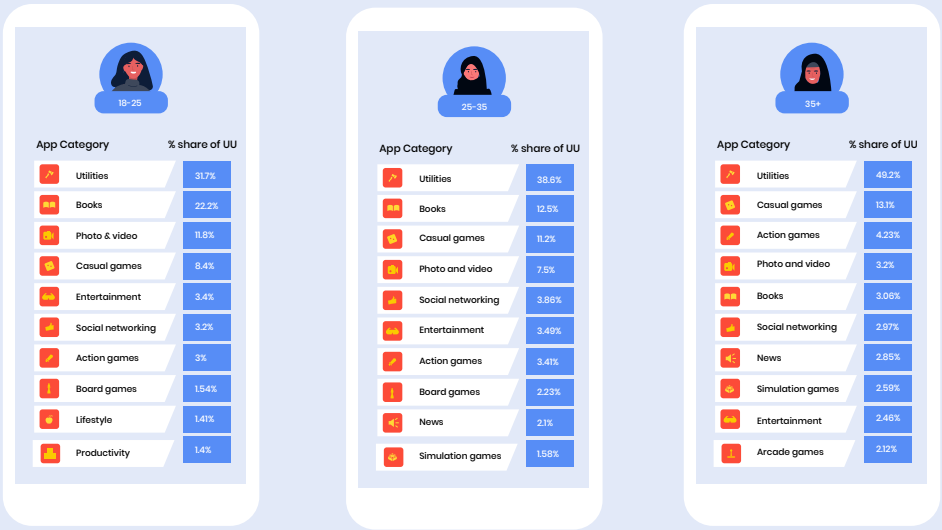
The Indonesian app gamer spends a significant amount of time in Utility, Entertainment, and Photo and Video apps accounting for 80% of their time spent outside of Gaming[9]. Additionally, these gamers manifest as Indonesians who are frequent visitors to retail stores and restaurants and showcase a preference for Bahasa as the language setting on their phones.

The Apps that a Woman Mobile Gamer Resides In

The Indonesian Gaming audience is led by women accounting for 59% of mobile gamers. Overall, Casual, Action, and Arcade remain the top gaming categories in Indonesia with 61%, 29%, and 70% time spent on each category respectively[9].

The Indonesian Woman Mobile Gamer

The Apps that Women Gamers Use



Gaming is a burgeoning category that is democratized and propelled by mobile. And the typical profile of the Southeast Asian gamer has shifted over the years to represent people with diverse backgrounds and a variety of interests. If things continue to play out the way they are, gaming will soon be as mainstream as social media apps.

The Expert Take on Gaming

Marketers must shed all cliched notions they might hold in their minds regarding gamers. A recent Think with Google article highlighted that today's gamers are not just young men with niche interests, hunched over a multi-player role-playing gaming console in a dark room. Instead, gamers today make up a community of a wide and vibrant array of individuals. This is especially seen in Southeast Asia, where women make up 40% of the region's gaming community. In fact, in countries such as Thailand (50%) and Singapore (46%) women stand on equal footing. These are the casual gamers.

What is shattering these traditional notions? Smartphones are the clear drivers of this change, with 50% of females and 75% of males in Thailand preferring to play on their mobile devices. Mobile has further broken down barriers associated with different geographical classes. Gaming is now democratised across Tier 1 and Tier 2 cities, where the level of gaming engagement is not correlated to your location. Developers have leaned into this opportunity by developing games that reflect the culture of these areas and are working to make sure that their games can run smoothly on smartphone devices.

With the democratization of casual gaming on apps, one truth remains: gaming communities. Be it viral mass movements, fan clubs, or streaming communities, gaming is able to cut across numerous boundaries to bring together a large number of individuals together under the influence of one shared passion. With this truth in mind, it is time for marketers to wake up to the sleeping giant napping right in front of them this year!

Elvin Rahardja
Head of Google Marketing Platform
Google

1.3 Chapter

The Next Social takeover: Short-form Video

> With short-from video taking over the globe as the next social sharing phenomenon, we discuss the unique nuances this category showcases as it enjoys rising popularity in Southeast Asia

Southeast Asia occupies a unique seat on the world stage as a meeting point for both Eastern and Western tech media giants. Be it Snap, TikTok, or Reels, they have all enjoyed immense popularity with these apps having been downloaded more than 200 million times in the region alone. Additionally, homegrown players such as Singapore-based Likee are making significant inroads, the app was the 7th most downloaded non-gaming app in 2019, reaching over 200,000 active users in Southeast Asia alone[13].

Short-form Content, Long-term Consumption

Despite the short nature of these videos, they drive deep engagement with users. The average time spent on short-form apps per user is close to an hour, standing at 52 minutes. In fact, 20% of respondents in an IPAC survey shared that they spent more than 3 hours per day on short-form video apps: that's the length of 2 feature films[14].

Thus, assumptions of an attention deficit consumer economy do not necessarily paint a complete picture. Marketers must consider this consumption pattern not as a challenge of declining attention spans, but as an opportunity to dazzle consumers who now have more control over how they consume media.

Democratizing Content Creation

Traditionally media consumption has been a unidirectional experience. Both access and opportunity were awarded only to a select few and conversations were limited to feedback from select focus groups. With technology disrupting every aspect of our lives as we know and understand it, content is no different. The ability to pick up your phone and start recording has led to countless creators gathering millions of followers across the globe. Yesterday's content consumers are today's content creators.

The New Social Order

A critical component of the short-form video apps is its ability to bring together a strong sense of community, be it through popular content genres or challenges. The platforms are built on easy to share snackable content, comfortably lending itself to virality and cross-pollination among other platforms as well. Recognizing this change in tide, traditional media houses are also rethinking their content strategy to better suit this new world order, validating the power of these platforms.

Advertisers must carefully consider the opportunity that comes with short-form video. When done right, it is a meaningful channel that can drive deep engagement. Simultaneously marketers must keep in mind the perils of the medium which remains consistent across user-generated content platforms including brand safety, content control, and reaching the right type of audience for your brand.

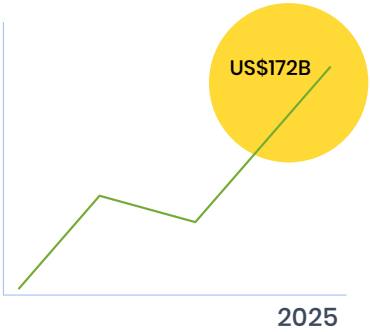
1.4 Chapter

M-Commerce: Mobile to Learn, Mobile to Explore and Mobile to Buy

> This article showcases the evolution of shopping preferences of consumers across online and offline channels, especially in the new normal.

Despite the pandemic, the South East Asian internet economy is expected to exceed $100B GMV this year[5]. SEA's e-commerce economy has majorly accelerated due to newly formed online habits and raised it to the US $62B in 2020[1] . By 2025, this sector is expected to boom further and rise to US$172B which is a 23% increase[5]. 47% of shoppers on average cited 'save time and energy' as the top reason to shop online and 49% of new users cited 'decreased exposure to COVID-19' as the reason to shop online[5].
According to Google, over a third of 2020s online commerce was generated by new shoppers, of which 8 in 10 intend to continue buying online going forward.

The SEA e-commerce economy

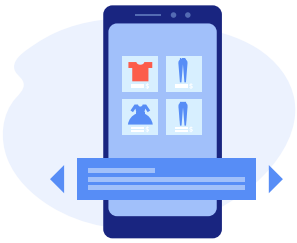


Consumers who have now tried online grocery shopping have doubled, with over 75% indicating they'll continue post-COVID-19[5]. E-commerce has emerged as a key growth driver in 2020 across Southeast Asia as more shoppers moved online, and this seems to be a permanent shift in the habit. But how has shopping behavior evolved in this new world order?

Connected, Mobile-first and Nonlinear Shopping Journeys

The connected consumer is constantly discovering new brands, browsing online for product information, exploring the product in-store for look and feel, searching for better deals on mobile while at the store, and completing the purchase online, in-store or via any other medium. Regardless of the varying touch points, they expect a seamless experience. The connected consumer journey is divided into three stages: Learn, Explore and Buy.

Learning stage

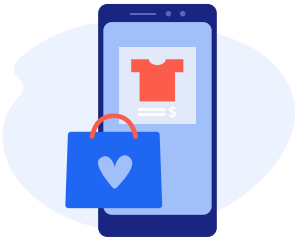


The 'Learning' stage is the first touchpoint with a brand that introduces or piques the interest of consumers in its products, services and offerings. The 'Learning' stage becomes critical for (re)discovery of brands reflecting in increased brand awareness and recall. The consumer, subsequently, starts interacting, engaging and investing time in the brand and its offerings.

Exploring stage

The 'Exploring' stage involves extensive research on the products and its features, price comparisons, and user reviews. Relevant and in-depth content plays a key role in shaping the perception and favorability of the consumer during this phase.

Buying stage



The 'Buying' stage is the ultimate touchpoint when a consumer is at the brink of becoming a customer. However, a consumer can seamlessly float between the Learn, Explore and Buy stages multiple times, before making the final purchase.

The connected Southeast Asian lives in a world of divided attention across these multiple devices and is constantly multi-screening. The steps between awareness and purchase for the connected Southeast Asian consumer are many and varied, and often nonlinear. 27% of consumers learn about products through offline media, 95% explore and research on desktop & mobile, and 26% buy the product in a physical store[16]. Consumers refer to at least three to four information sources pre-and post-purchase. The customer journey isn't what it used to be: one no longer sees a TV ad, walks into the store, and buys a product.

However, there is one constant in their shopping journey: mobile to learn, explore, and to buy. According to a survey conducted using InMobi Pulse, 2 in 3 respondents across Southeast Asia claim to use their mobile to learn about and discover new products, 82% to research and explore, and over 60% to make purchases[16]. The survey also reveals that while consumers are not completely averse to in-store visits in the new normal, they seek a seamless experience that involves mobile discovery/ booking and subsequent pick-ups in store. Whether online or in-store, mobile is the preferred companion; the beginning and the end of it all.

An Omnichannel, Mobile-enabled Shopping Experience

In today's world, brands must create a unified and seamless consumer experience across both online and offline channels to connect with their consumers and create a sustainable relationship. According to our recent study on Marketing in the New Normal, delivering an omnichannel experience is the biggest priority for marketers across Southeast Asia. This omnichannel mindset provides customers with the much-needed choice and freedom to interact with the brand at the touchpoints they prefer.

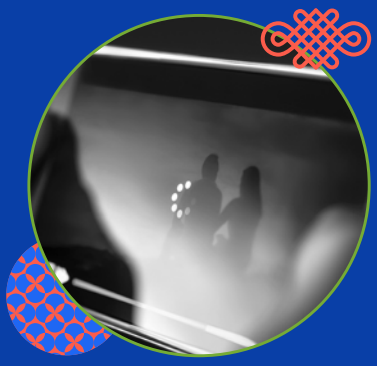
However, with the multitude of choices that consumers of today are presented with, it is becoming increasingly tough to drive loyalty for one single brand. The mobile-first connectivity has paved a unique opportunity for brands to create their own closed and robust app ecosystem to capture these mobile-native users. The Super App ecosystem-led omnichannel experience will drive brand loyalty through mobile supremacy.

The Southeast Asia Super App Ecosystem

Shopping	Entertaiment	Hyper Local Delivery	Payments	Subscription Program	Brand Name
Grab Food, Grab Mart, Grab Groceries, Grab Health	Grab Tickets, Grab Gift Cards, Grab Attractions	Grab, Grab Express	Grabpay, OVO	Grab Tickets	Grab
GoFood, GoShop, GoMart, GoMed	Gotix, GoPlay, GoNews	Gojek, GoSend	Gopay	GoPlay	gojek
Shopee			Shopee Pay		Shopee
Lazada	LazLife	RedMart	Lazada Credit		Lazada
Facebook Shop, Instagram Store, WhatsApp For Business, Messenger	Instagram, Facebook, Messenger		WhatsApp Pay		facebook, Instagram, WhatsApp, Messenger
Line Shop	Line News		LinePay		LINE SHOP
JD.ID		JX Express	JD Payment		JD.ID

02

Chapter
The Era of Mobile Marketing Maturity



What can you expect in this chapter?

In this chapter we discuss how 2020 has radically changed the ways marketers have had to think about their strategy. From overarching themes of digital maturity and omnipresent rise of video, to the nitty-gritties of tech that matters be it supply path optimization or consumer intelligence solutions.

2.1 Chapter

Achieving DMM – The Struggle is Real

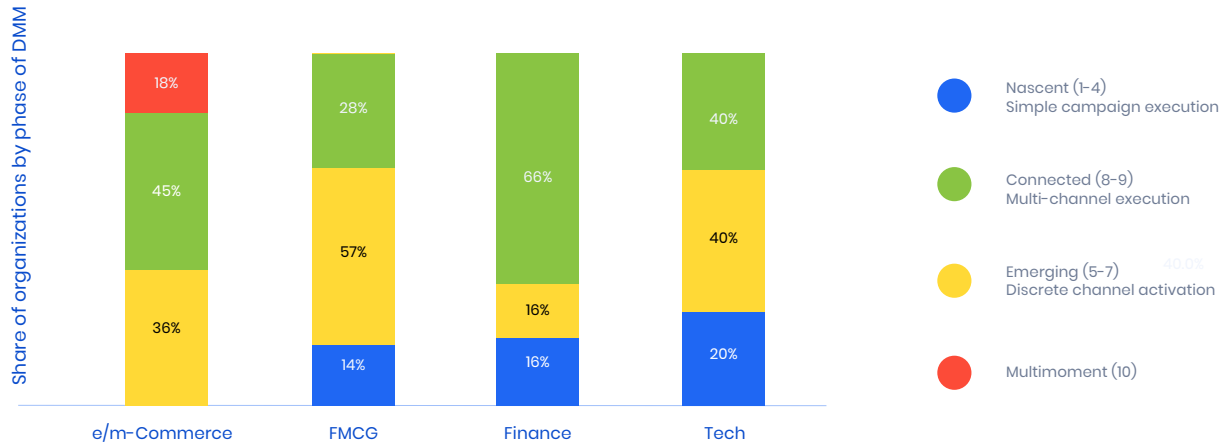
> The following article showcases the top trends based on a survey of senior marketing and media leaders across India and Southeast Asia conducted during the months of June and July 2020

COVID-19 has caused a major shift in the way consumers think, feel, and act. With market disruption dramatically shifting long-conditioned behavior in just a matter of weeks, digital has become the first prerogative in the way consumers choose to interact with the world. As a result, marketers today are re-evaluating their priorities and strategies to not only survive but thrive in a post-COVID world. What changes does it bring to the new normal in marketing? How are marketers staying on top of their game due to these transitions?

DMM is Critical, But Are Brands Ready?

BCG states that Digital Marketing Maturity (DMM) is the organizations' capacity in delivering seamless brand experiences and is characterized by four maturity levels: Nascent, Emerging, Connected, and Multi-moment. According to our survey, expectedly, e-commerce and BFSI segments lead the way when it comes to Digital Marketing Maturity, emerging as the more connected and multi-moment focused categories. Yet over close to half of the marketers characterize themselves in the Nascent or Emerging Stage, leaving a large room for organizational growth.

State of digital marketing maturity by industries



DMM is Critical, But Are Brands Ready?

Given the state of digital marketing maturity, what are new goals in the new normal? Here's the list of goals placed in the order of significance:

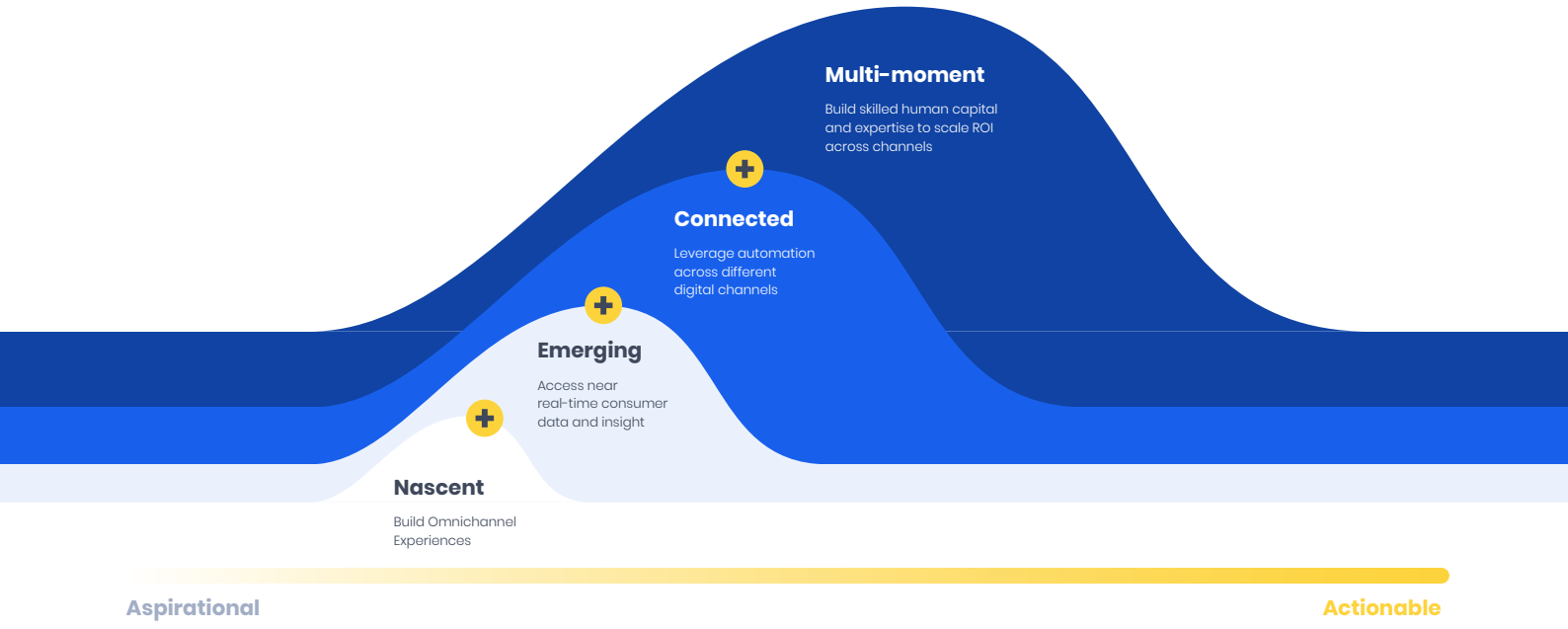
- Acquiring new customers
- Strengthening brand reputation and trust
- Increasing brand awareness
- Engaging the existing community of consumers

As the DMM of brands evolves, their strategies on digital channels shift from the aspirational to the actionable. Marketers are moving towards the 'actionable' end as they become better equipped to scale

Evolving Strategies with Evolving Digital Marketing Maturity

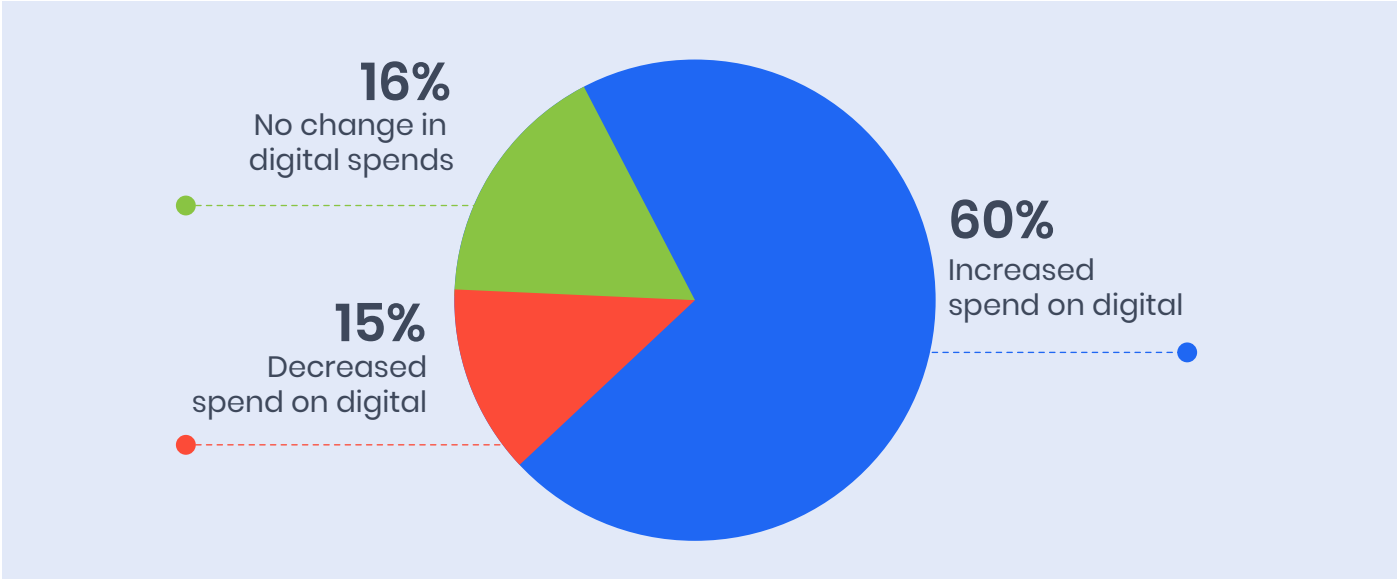
Acquiring new customers while engaging the existing customer base has become a challenge in Southeast Asia. Marketers look to drive measurable outcomes going forward by investing in the following strategies:

Key Strategies for Brands in the New Normal

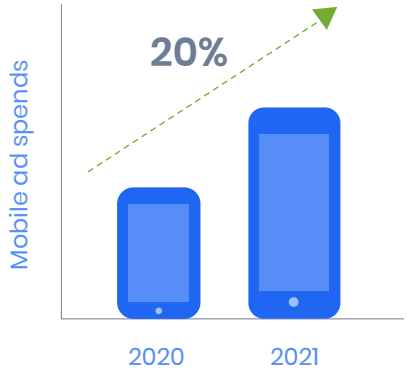


Digital Advertising will Drive Growth in a Post-COVID world

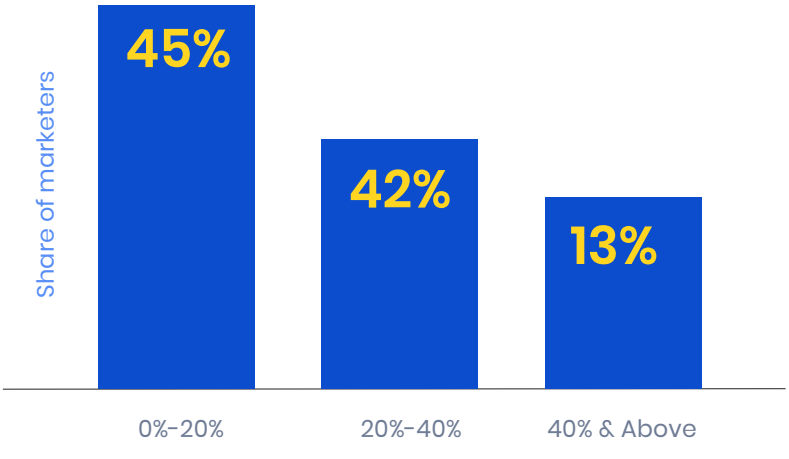
In a pre-COVID world, while digital was a part of most marketing strategies, 58% of marketers spent less than 40% of their budgets on digital. With a wide variety of platforms to explore like the TV, OOH, print, and radio, the budgets were well-spread across multiple digital and non-digital channels. The pandemic has resulted in marketers having to pivot their plans to be more digitally focused.



According to eMarketer, SEA sees a tremendous rise in mobile ad spends have also seen an upward trajectory in growth by 20% from 2020 to 2021. Overall, in the post-COVID world, there is a significant 69% increase in digital ad spends.



In-app Advertising Budgets Will Grow



Expected increase in in-app advertising budgets

87% of marketers will increase their investments in in-App advertising by up to 40%. Programmatic buying remains the most efficient channel for marketers to reach and engage audiences in a brand-safe environment with 100% compliance with industry guidelines.

The Expert Take on Marketing Maturity

Across the region, the scale and speed of mobilization have been extraordinary. What took 15 years to achieve in many Western markets was done in five years in China and, arguably, just 24 hours in the Philippines this year. The mobilisation of e-commerce across the region has been massively accelerated by the pandemic and shows every sign of being here to stay. Agility will be a key feature of successful brands.

We shall need data-driven marketing that is always-on and to use thoughtfully the creative canvas of mobile, which is so very different to traditional media. For brands to achieve Mobile Maturity they will need to be mobile-first in everything they do - not only in advertising.

An emerging challenge is how to unlock simultaneously the power of brand purpose, brand building, data acquisition and performance media while also creating strong consumer experiences.

Mobile gaming and eSports are coming of age commercially, vying for attention from brands budgets and the public attention against social commerce, live streaming and eCommerce content.

An older challenge which will continue in the new year is the fight for a healthier, safer digital ecosystem for commercial users and for the general public. We must improve viewability, verification and brand safety, working together through the Global Alliance for Responsible Media and other bodies.

Diversity and inclusiveness will also play a part in our messages, how we make them and who creates the briefs in the first place. Brands and their messages will begin to look much more like the people who buy them.

This will take place against the backdrop of the pandemic, a probable global recession, and the prospect of a cookieless world.

So hold on to your hats, 2021 will be quite a year!

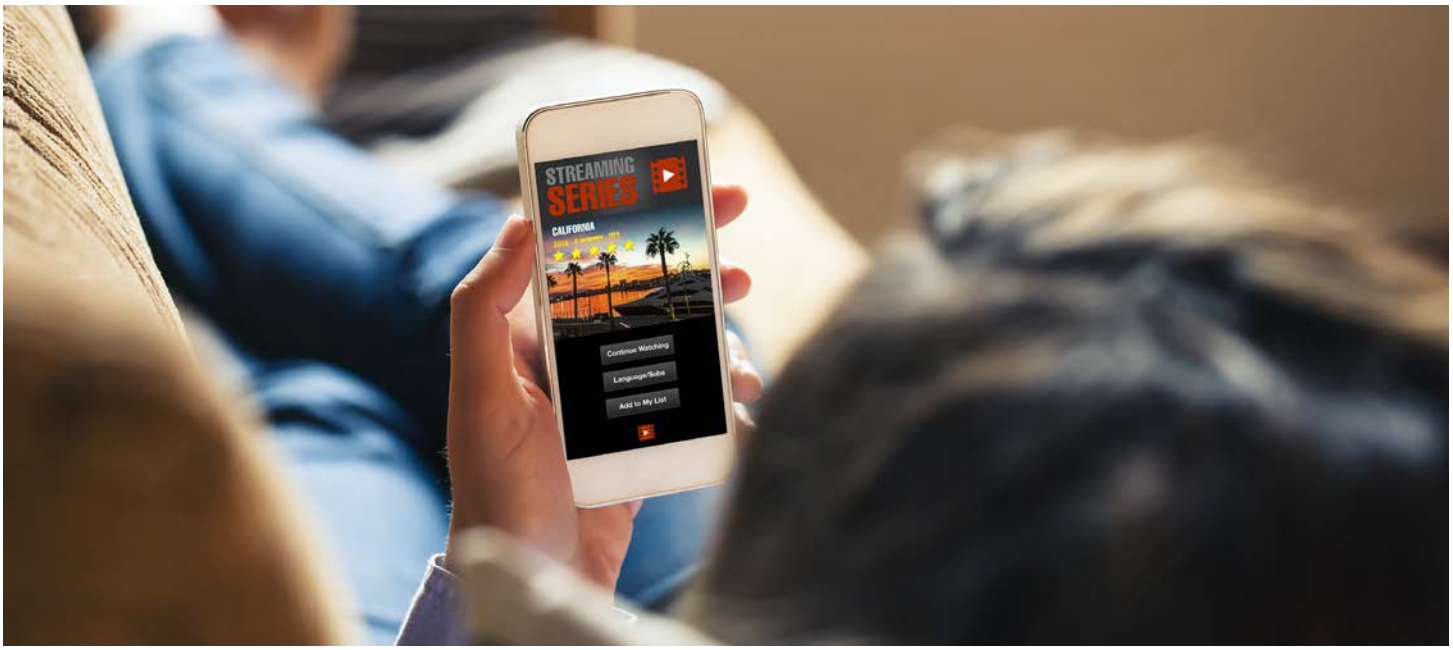
David Porter
VP, Global Media, APAC & Africa
Unilever

2.2 Chapter

The Next Frontier for Programmatic Advertising – OTT

Guest Contribution by

This article is an excerpt of a conversation between Rishi Bedi, VP - SEA, Japan, and Korea at InMobi, David Sky, Director of Advertising Operations at True Digital Group, and Laura Quigley, SVP, APAC at IAS



Over the past few years, Southeast Asia has emerged as one of the most exciting OTT markets across the globe - a rare focal point where eastern, western, and local players meet. The lockdown has only further compounded the exponential rise of the OTT platforms in the region. With the lack of opportunities to step out to places of entertainment such as theatres and concerts, consumers are increasingly turning to access video content on OTT channels. Leaders from the ecosystem believe that OTT has become the medium of choice for entertainment among consumers in the new normal.

Access to the best of both worlds: Convenience & Unlimited Access

OTT platforms cut through the limitations of linear TV to bring immediately accessible content for audiences in a manner most convenient to them. Anytime, anywhere!
Sharing his thoughts on how consumer behavior has shifted, Sky said, "There's been a steady increase in the consumption of OTT content across Southeast Asia, driven by access to high-speed internet and broadband services. Local content and event-based reality TV, especially, have enjoyed immense popularity during the lockdown." Additionally, Sky shared that the average time spent peaking only during weekends is a model of the past, with consumers now spending considerable time on these platforms during the weekdays too.

Mobile vs CTV: Determining the Device of Choice

As a mobile-first market, smartphones continue to dominate the streaming wars in Southeast Asia. Quigley shared that over 76% of users are watching content on smartphones in Indonesia alone. Reflective of this trend, Bedi opined, "We have seen a 286% growth in usage on OTT apps on mobile, from the start of the year to April, which was when most countries in the region went into lockdown. This is an opportunity that advertisers across the board are excited about." Yet, CTV proves to be an exciting opportunity in uniquely advanced markets such as Singapore and is gaining fast popularity in markets such as Thailand as pointed out by Sky.

The Advertising Opportunity with OTT

While SVOD continues to be a promising avenue, consumers in local markets are typically hesitant to pay for content. This has led to the emergence of various monetization models including 'Freemium', 'Mobile-only', and pure-play Advertising Video-on-demand (AVOD) models.

"In the past year alone, we have seen a 10X increase in advertising spends, signifying the importance of the OTT opportunity to advertisers. After all, the engagement, placement, measurement, and interaction offered by the medium is not easily replicated. OTT players can set themselves apart in the eyes of advertisers by layering deep audience insights with their media proposition," shared Bedi.

Commenting on the challenges faced by advertisers, Quigley added, "While marketers have a consensus on using GRP as the currency for traditional television, there is still some debate as to how marketers should define success for their OTT campaigns. Another concern is devising a holistic solution for cross-device measurement in the age of the hyper-connected consumer."

The Brand Safety/Suitability Promise

Sharing her thoughts on how advertisers can ensure brand safety and suitability Quigley said, "Marketers must remember that the same rules of digital advertising apply to OTT. One must check for compatibility across channels, content, device suitability, and more."

Additionally, Bedi articulated how technology can help solve these challenges – be it through pre-bid filters or by embracing industry standards such as ads.txt. Quigley and Bedi also emphasized the importance of upskilling marketers as different forms of fraud emerge. From innovative interactive experiences to the explosion of short-form content, the industry is optimistic about the future of OTT as truly the next frontier for Programmatic Advertising in Southeast Asia.

The Expert Take on the Future of Programmatic

Southeast Asia has emerged as an incredibly exciting market for programmatic advertising over the last few years. As we look forward to the start of a new decade and with it a new era in marketing, here are some of the key trends that will shape the ecosystem as we know and understand it.

Addressability and Identity

Addressable media is a top priority among marketers across the globe and for many years we have been able to achieve this through cookies. As the industry continues to rapidly evolve, concerns over regulations and privacy has emerged, leading to the depreciation of third-party cookies. The industry has responded to this challenge by going back to the drawing board and devising solutions with consumer privacy at its very core. ID5's Universal ID, LiveRamp's ID Graph, IAB Tech Lab's Project Rearc, the TradeDesk's Unified ID 2.0, and Lotame's Panorama ID are only some of the examples of ID solutions that the industry has been working on. As multiple solutions emerge interoperability will be critical to ensure ease of operations, failing which we may see cases of consolidation or worse still - the emergence of mini walled-gardens.

Driving Efficiencies through Collaboration and Curation

As the programmatic ecosystem continues to mature, over time we are seeing the rise of closer collaboration between publishers and Supply Side Platforms (SSPs). Premium publishers who typically have stayed from the Open Exchange, are now making inroads in Private Marketplaces (PMPs) or are making themselves available via Programmatic Guaranteed deals (PG). In addition to this, the relationship between publishers and advertisers have also matured, with publishers now becoming smarter about their first party data. As a part of advance level partnerships with few key advertisers, certain publishers are now passing pivotal data signals as part of their bidstream while respecting the privacy of their users. It is critical to note that we must not limit ourselves while driving efficiencies by only considering how we buy, while disregarding what we're buying. While artificial intelligence and machine learning play a crucial role in driving optimizations, marketers must also take a closer look at what they're deploying these algorithms on.

Supply curation is a key pillar in setting up marketing campaigns for true success. Through curations, marketers can access supply that is suited to their specific needs be it brand suitability, viewability, reach, engagement or any other KPI that has been defined by their brand.

The Emergence of OTT

While marketers have traditionally considered television to be the most effective medium for brand awareness, shifting consumer behavior may suggest otherwise. A recent Kantar report showcased that over a 180 million Southeast Asians spent over 8 billion hours each month on OTT content. This has only been further accelerated by the pandemic, with 60% of viewers having increased their time spent on OTT since the lockdowns were instated across the regions. With demand having skyrocketed over the last few months, it is natural for advertising on OTT platforms to now share the investment broadcast television has enjoyed for a long period of time.

Reimagining Commerce Readiness

As consumers across the region came to terms with their new reality, CMOs had to go back to the drawing board and reconsider their marketing strategies. With consumers moving away from traditional retail to digital commerce, typical assumptions on consumer touch points need to be reevaluated. Brands have had to truly evaluate their digital maturity, be it their readiness when it came to integrating more closely with online marketplaces to understand the effectiveness of their campaigns or building their own online storefronts for the very first time. Marketers have had to accordingly relook at their AdTech, MarTech, and commerce plays to navigate this new digitally pronounced reality.

Sunil Naryani
VP Commercials & Partnerships
Dentsu APAC

2.3 Chapter

SPO: The Next Stage of Programmatic Evolution

Guest Contribution by

theTradeDesk

The following article has been written by Mr. Bihao Pan, Lead Senior Director, Inventory Partnerships. South East Asia, India, Australia & New Zealand at The Trade Desk. He highlights the key advantages of SPO for advertisers and why it is an important aspect that could potentially define the future of programmatic advertising.

Supply Path Optimisation is a natural step forward in the evolution of automated digital buying. With advertisers getting increasingly sophisticated in the execution of digital advertising coupled with programmatic market rapidly maturing, certain practices that could thrive in the past wouldn't survive today for good reasons. But before we get down in the weeds, it is important to understand this - Supply Path Optimisation (SPO) cuts across a broad spectrum of topic. SPO means different things depending on the audiences. Although it became synonymous with improving path to purchase after header bidding was widely adopted, the SPO concept itself is not entirely new. Advanced buy-side technologies and sophisticated Advertisers have navigated this path effectively for the longest time.

The Need for SPO

Before the industry rolled out measures to stamp out unsavoury practices, Advertisers and Publishers had their work cut out. Advertiser's confidence was negatively impacted, and Publishers are not fully rewarded with the revenue they deserved because of fraud. Both Advertisers and Publishers have a harder time discerning valuable intermediary from the less valuable ones. To top it off, the opacity of the supply chain means sometimes, it is difficult to take action in spite of knowing there are underlying issues. Not surprisingly, our industry responded swiftly with implementing Ads.txt and Sellers.json aimed at eradicating these problems.

While there are varying definitions on Supply Path Optimisation, there should be no ambiguity that the core tenet of Supply Path Optimisation is transparency. Ads.txt published by Publishers tells Advertisers who are authorised to sell their inventory. Sellers.json published by the SSP provides information about the seller of an impression. Together with Supply Chain Object, these measures shine a welcomed light into the supply chain and helps form a shorter and more transparent supply path. The added benefits of a shorter and more transparent supply path are that it's also mutually reinforcing. It allows closer scrutiny into the supply chain significantly deterring fraud.

The Path to Efficiency

One of the less desirable outcomes from the adoption of header bidding is auction duplication. What used to be a single bid request suddenly becomes twenty requests of the same ad opportunity, obscuring the true view of what is available - why would anyone want to evaluate the same bid request twenty times? The solution to that is much simpler this time - removing auction duplication. There are tremendous benefits to be reaped from removing auction duplication. Single supply path to publisher's inventory clears the fog of receiving the same bid request multiple times, allowing Advertisers to zoom into unique inventories adding on to that much needed unique reach figure. Similarly, it also creates a ton of value on the supply side by offering Publishers a much clearer view. Advertiser's increased awareness of SPO helps drives a closer relationship with SSPs who are providing an optimised supply path. With redundant bid requests getting skipped over, Advertisers avoids unnecessary cost, and more money will be able to reach the Publishers. This newly found transparency spurs efficiency helping the industry makes better decisions and propel us towards a more virtuous cycle.

What this Means for Advertisers

Back to my earlier point about SPO being different things depending on the audiences, there a lot more tools available today for Advertisers to achieve their SPO's objective be it more direct supply path or lower supply fees in general. The current state of SPO have improved by leaps and bounds. Most Advertisers are able to achieve a transparent and highly efficient way of buying digital media through combining sound supply policies with optimisation tools. In the market, there are optimisation rails for granular inventory, placement type targeting and blocking mechanism for unknown inventory safeguarding Advertiser's interest. But you need to know SPO is not a one size fits all solution. Of course, there are overlapping areas that rolls into the SPO's umbrella. However, the true value of SPO comes from knowing what you intend to achieve rather than simply using any turnkey solution. It became increasingly important to clearly define the SPO's goals and evaluate its impact in the context of each Advertiser as more and more embarks on their SPO project - objective evaluation of SPO's strategies is vital.

The Expert Take on Supply Path Optimization

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We are seeing more and more digital budgets move into programmatic buying and execution. However, the Incorporated Society of British Advertisers (ISBA) in May uncovered that up to 15 percent of UK advertising spend cannot be accounted for and a lack of standardization around data capture and storage. This window into programmatic operations brought up questions for the entire industry about how revenue is earned.

GroupM, inspired by the progress in Australia and China on supply management, is taking rigorous and focused approach to supply curation and applying it across all APAC markets.

We have developed a set of guiding principles for all markets to improve transparency. These guiding principles ensure that a select number of preferred SSPs, who agree to a code of conduct, have direct integrations with publishers and never send inventory as unknown or obfuscated domains. The SSPs thereby have to provide the log-level data for campaigns so that it can be matched against DSP data. We also aim to become 100 percent ads/apps.txt compliant and support Open Measurement SDK as well as VAST 4.1 and higher.

We are already seeing some great results from our efforts in SPO in terms of performance and quality metrics such asviewability and completion for video

John Miskelly,
APAC Investment Director,
GroupM

2.4 Chapter

Playing to the Gallery with Mobile Video

The world is in the midst of a technological upheaval with an exponential rise in video viewing on connected devices including smartphones, tablets, and Smart TVs. Despite the consumption explosion, advertisers are yet to master playing to the gallery with mobile video.

The reason for this is simple. The underlying approach and technology powering video ad experiences on modern devices widely stem from the TV or desktop era. The ability of the connected devices to deliver a highly personalized, contextual, and interactive ad experience is truly incredible but requires that videos be created and distributed with mobile-first technology. Unfortunately, most mobile video ad experiences today continue to be built from TV or desktop-based, browser-first technologies resulting in very poor consumer experiences and decreased media effectiveness for advertisers. For instance, the average video viewability on mobile for a TV or desktop-based asset remains below 55%, while that for a mobile-first video via the InMobi Exchange comfortably lies above 80%.

Perhaps the most fundamental issue remains the lack of focus on mobile-first principles: truly understanding mobile environments in order to get the end-user experience right.

>55%

Viewability on mobile for a TV or desktop-based asset

>80%

Viewability with Mobile-first video on InMobi Exchange

Press Play without Latency

On average, mobile video ads take over five seconds to load, and with user attention steeply declining after the two-second mark, this is simply unacceptable. This latency in ad loading time, frequently caused by being unable to pre-cache a video on a particular device, severely damages the consumer experience and is the major contributor to the user drop-off that ultimately results in low completion rates averaging less than 50% and subsequent poor viewability metrics across connected devices.

The Future is Video, the Future is Now

Unlike desktop, users spend 90% of their mobile device time in-app. Frequently used video technology is only optimized to deliver ads on desktop browsers, depending on methods like Javascript tags and cookies, that doesn't work inside mobile app environments. These video standards were created years ago and never meant for use in the mobile app environment, so it comes as no surprise that video ads built for other mediums perform poorly on mobile. This also further impacts load times and severely limits media effectiveness across connected devices.

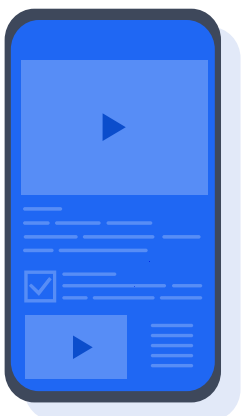
Different digital environments, therefore, require different video player standards for effective advertising. While the old standards were designed for an interactive pre-roll desktop video environment, the new IAB standard is the more appropriate choice for a mobile-first video experience as they ensure compliance with every player. By adhering to these standards across connected devices' native players, publishers can pre-cache video advertising, and deliver a buffer-free ad experience for a higher media performance for buyers.

Mobile First, Not an Afterthought

The inherent nature of mobile devices makes them perfect for delivering immersive video messaging with relevant brand actions to a consumer's current location and mobile context. By leveraging the combined power of sight, sound, touch, mobile devices can now deliver personalized ad experiences that allow brands to truly differentiate themselves in a cluttered space. By continuing to run ad campaigns that are not interactive or optimized for mobile-native environments, advertisers are losing out on the opportunity to truly engage their users and meet their campaign ROI as well as maximize ROAS. Collectively, these issues complicate matters for the mobile video ad ecosystem, hindering the growth of the industry as a whole. There is the need to look beyond short-term gains within video planning, forcing mobile to be a small part of a cross-device video strategy.

The Advertiser's Checklist for Doing Mobile Video Right

By focusing on the technology that is native to connected devices, brands can ensure that consumers are able to receive a seamless video ad experience and translate it into better media effectiveness. Advertisers must:



- Include in-app mobile video as part of your digital media video buys, not just mobile web and desktop
- Adopt the latest standards for mobile in-app video
- Leverage MRC-accredited viewability partners that understand in-app video measurement
- Go programmatic for increased efficiency and transparency

2.5 Chapter

The Rise and Rise of the Growth Marketer

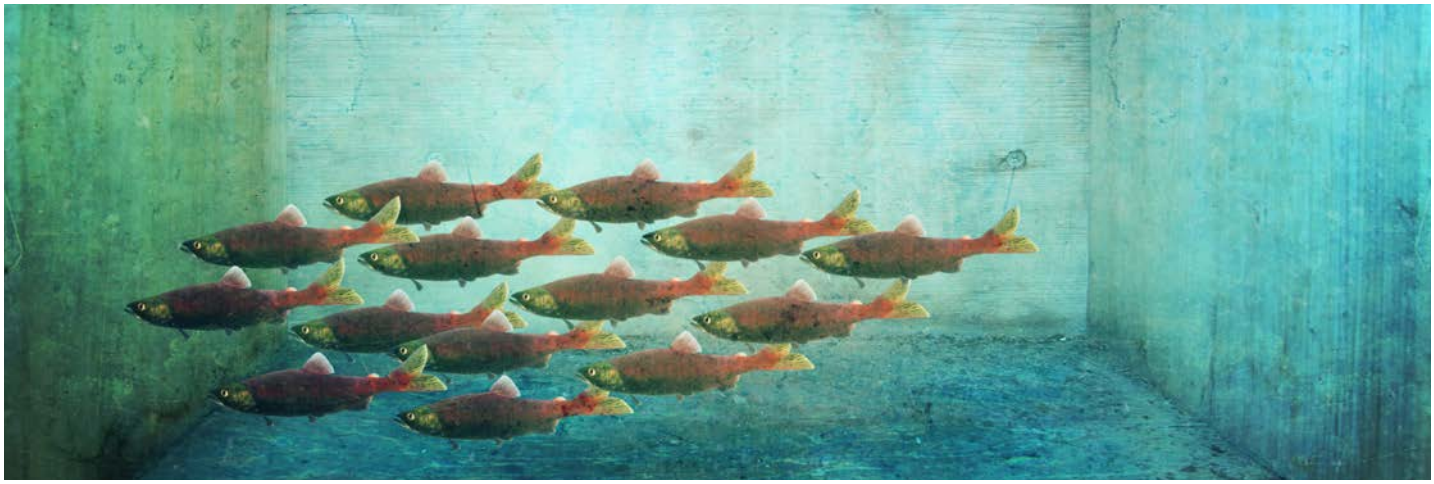
Guest Contribution by

AppsFlyer

The following article has been written by Nicola Fraccaroli , Marketing Manager, SEA at AppsFlyer. and elaborates on the current state, top trends, and the future of growth marketing.

The pandemic has changed life as we know it and fast-forwarded digital transformation by at least 5-6 years, especially in a mobile-first region such as SEA. According to Google's latest regional report, 40M new users adopted digital and mobile services in 2020 alone.

The Growth Marketer's Arsenal: Data and Customers



To succeed in this new age of the digital consumer and crowded app ecosystem, performance marketers have two primary weapons in their arsenal: data and their existing customer base. With the massive amount of available data, the performance marketer will have to build their quantitative aptitude and couple this with an understanding of user behavior to retain and grow their user base.

Additionally, the existing user base also provides an excellent avenue for optimizing an app's marketing strategy. Current customers can be a strong referral base by leveraging owned media, which serves a two-fold purpose - customer retention and driving down customer acquisition costs (CAC).
In these difficult times, managing costs and growing your user base is imperative for all performance marketers. Utilizing data insights available at their disposal and ensuring that customer LTV is more than CAC will be critical in 2021.
While quality customer acquisition and retention will be the main challenges for performance marketers, they will not be the only roadblocks for app growth. As performance marketers increase their ad spend to capture more eyeballs, it will attract a higher level of fraud as well. According to AppsFlyer data, **$945M** was exposed to app install fraud in APAC in H1 2020 alone. Hence, performance marketers should look to leverage robust fraud protection tools with strong validation rules that allow for real-time fraud detection and blocking.

With the fragmented app ecosystem, it does become a challenge for performance marketers to attribute each user to their correct source. Attribution modeling is a crucial component for being competitive in a crowded marketplace. Every performance marketer should find what works best for them based on user behavior and monetization strategy. To find out which attribution model works best, experiments and then optimizing for the best results would be essential. Though marketers should also be mindful that the more sophisticated a model is, the more resources they'll need to implement it.

The pandemic hit everyone hard, and a WARC report states that media owners saw revenues fall by a combined **$63B** in 2020. While some of the losses will be recouped, not all of it will happen in 2021. It is not all a bleak picture, though. Mobile-based services have also shown signs of growth, and with mobile ad spending projected to increase in coming years throughout the region. This indicates a sense of optimism amongst app marketers and an increased desire from consumers to leverage the app ecosystem to its full potential.

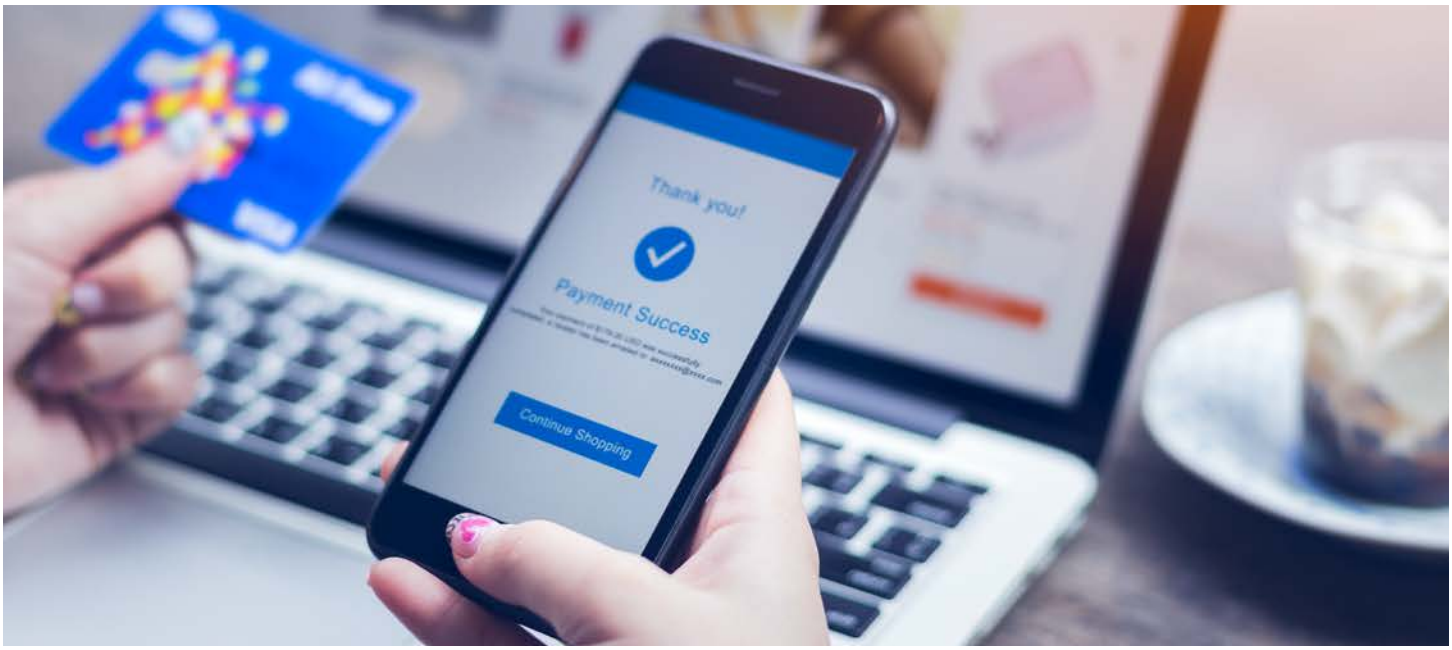
The 2021 Growth Mantra: Automation, Personalization and Measurement

2021 would be the perfect moment for performance marketers to ride the post-lockdown wave of app growth. Performance marketers need to find the right balance between user acquisition and retention. Each aspect of marketing campaigns should be automated, personalized, and measured. The growing trend of automation is highlighted in the WARC report, which mentions that the majority of ad money will be transacted by machines in 2021.
Markets are now well equipped to handle extensive data for optimization, and programmatic media buying will be the way ahead. Many companies are leveraging machine learning to improve media buying and create the look-alikes of super users. Personalization, contextual advertising, and specific targeting will yield better results through programmatic media buying.
Peter Drucker is often quoted as saying that "you can't manage what you can't measure." and performance marketers should follow this adage, as well. They should invest in the right tools for their marketing tech stack to collect, attribute, and analyze all user activity data across paid and owned channels. This will become even more critical in 2021 as performance marketers battle it out to capture the new digital natives' mindshare and achieve marketing efficiency.

2.6 Chapter

The Quest for Mobile-first Consumer Intelligence

> The following article is a summary from a webinar conducted by InMobi and presided by Abhinav Mohan, VP and GM, InMobi Pulse, and guest speaker Cinny Little, Principal Analyst, Forrester following InMobi's recognition in the ***Forrester New Tech AI-enabled Consumer Intelligence Report 2020.***



In a world that is rapidly evolving, brands are finding it increasingly difficult to keep up with the constantly changing preferences of their consumers. Even as consumers have struck a balance between the physical and digital world, it is not so with brands.

Online or Offline: Data-to-insights Remains a Challenge for Brands

One of the biggest challenges that retail brands face is their inability to blend the physical and digital worlds as the current consumer journey is no longer linear. Consumers often shop in-store while searching online and can potentially complete the purchase on either medium. This poses a lot of last-mile challenges due to the lack of in-the-moment consumer feedback which is further exacerbated by inefficient methods of collecting it. Most

consumer feedback relies heavily on face-to-face data collection which can lead to both higher costs and lead times. This method is now disrupted due to the pandemic with low footfall in-stores.

Similarly, staying relevant and driving personalization remains an uphill task for brands that have no online or retail storefronts., like in the case of fast-moving consumer goods, who are reliant on channel partners to shape consumer experiences. On the other hand, online/ mobile-first companies are also oblivious to the consumer's behavior and preferences outside the confines of their app and website, despite the abundance of data. In such cases, a combination of first, second, and third-party data can act as a goldmine for brands to understand the consumer's habits, behavior, attitude, and preferences. Additionally, to match up to the fast-paced consumers of today, brands cannot afford to merely gather data, they must extract actionable insights that drive real value for consumers and their business.

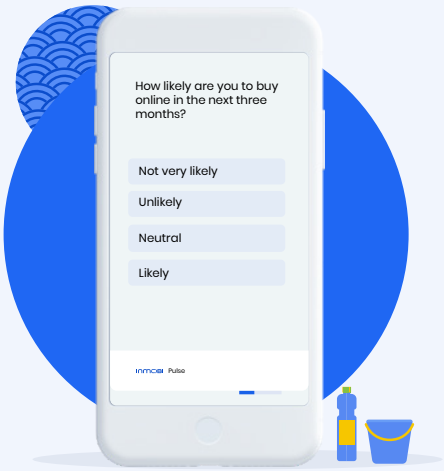
Leveraging the Power of Mobile-first Consumer Intelligence

The only solution to bridge the widening gap between brands and their consumers is meaningful data across all touchpoints that lead to actionable insights. Brands need to invest in mobile-first AI-powered solutions that access real-time data signals from users - demographic, technographic, and location – and combine them to provide out-of-the-box analytics. This has a huge impact on not just how marketers reach consumers, but also on how they interact with them. Here is how the global CPG and digital transformation leader – Unilever, partnered with InMobi in its quest to gather and leverage mobile-first, consumer intelligence.

Unilever: Mastering the Art of Personalization at Scale

In the Philippines, Unilever provides consumers with laundry products under the brand name 'Breeze'. The detergent market, however, is dominated by powders and bars, with more than 95% of consumers preferring these formats over liquids. Breeze aimed to grow the liquids penetration in the market by familiarizing consumers that are traditionally used to the powder detergents with the new format. To this extent, Unilever needed to understand, identify, engage and acquire customers in a manner that drives a paradigm shift in their washing behavior. With a legacy of increasing convenience and brightening the lives of millions of households around the world, Unilever had to help consumers in the Philippines leap forward for effective washing through liquid detergents.

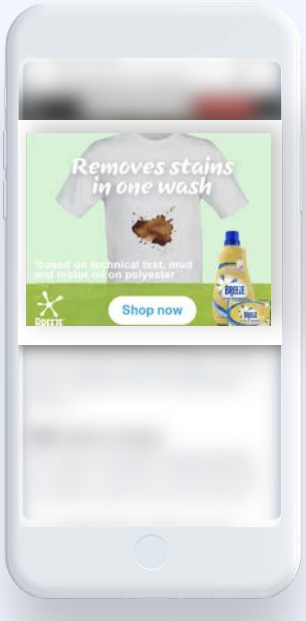
Unilever, through traditional research methods, had gathered seven key barriers for consumers to switch from powder to liquid detergents. However, this information fell short in providing the lower funnel triggers that are required to create sharp brand messaging. The qualitative insights were not sufficient to precisely understand such a broad category of consumers and to action a plan that drives a shift in their washing behavior.



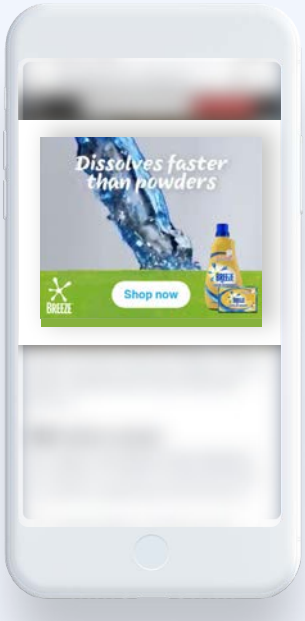
Unilever leveraged InMobi Pulse, the leading mobile consumer intelligence platform, which accesses over 1.6 billion monthly active smartphone users (MAUs) across the globe. Through the platform, Unilever programmatically surveyed more than 11,500 consumers to understand their category preferences, usage and key barriers to adopting liquid detergents.

Along with an understanding of the washing methods, the mobile research disclosed drivers of preference for detergent choice (category adoption), how Breeze can unlock an improved laundry experience and an adequate mapping of audiences based on interests (for creating effective communication). Unilever clustered its prospective customers in to three segments of non-liquid detergent buyers and designed personalized communication accordingly. The personalization at scale saw a marked effect on customer purchase patterns. With 1 in 3 consumers who saw the ad stating their intent to purchase Breeze, the brand witnessed a YoY turnover uplift of 30.3% in September 2019 and 24.8% in October 2019. As a mobile-only campaign, it drove a significant uplift.

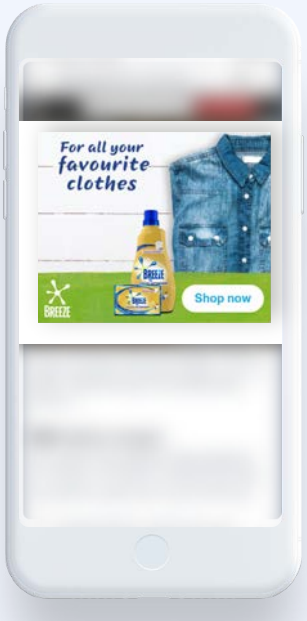
Bargain Hunters



Skeptics



Laggards



A problem well understood is a problem half-solved. To gather actionable consumer insights from time to time, brands must invest in a sustainable approach. Using a mobile-first platform, brands can stay in touch with the evolving consumer needs by capturing the real voice of the customer. The mobile is the ultimate means to understand and identifying prospective customers while shaping how to engage and acquire them.

Conclusion

Being Future Ready through Mobile Marketing Maturity

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2020 has undoubtedly been a tremendous inflection point for the global community. While some may look forward to returning to business as usual, marketers must reconcile with the endlessly paraded phrase of New Normal and that a few key emerging trends are here to stay.

Mobile has truly emerged as the de-facto platform enhancing the lives of both consumers and marketers alike, especially in moments that matter the most. While certain brands have been on the path of building resilience long before the pandemic struck, other are still finding their footing as they closely consider how to build on their Mobile Marketing Maturity.

It is critical for marketers to take comfort in the fact that true innovation and excellence often comes in the face of adversity. A challenge well understood, is a challenge half solved. Advertisers must be cognizant of the fact that mobile is the one true channel that can drive full-funnel efficiencies from awareness to conversions and beyond.

Be it gauging consumer sentiments, identifying the right cohorts, creating delightful custom experiences, or nudging consumers down the funnel with remarketing, brands can do it all on mobile platforms. While this may seem daunting to the uninitiated, marketers must maximize the potential that mobile has to offer by working with experts.

Brands across industries such as retail, finance, education, and FMCG are making the first move by investing heavily in these channels. Be it going direct to consumer, embracing online to offline experiences, leveraging first party data at scale, or creating custom cross device strategies, there is a unique solution that exists for each brand as we move into the next era of marketing and advertising.

By partnering with experts, brands can build meaningful relationships with consumers that will last a lifetime and ensure that they are future ready

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