



inmobi™

Mobile Messaging Apps Study : Indonesia

September 2014

Contents



1. Research Objectives & Methodology
2. Key Findings
3. Mobile Consumption Behavior
4. Message Apps Usage & Behaviors
 - Download Intent
 - App Awareness & Discovery
 - Messaging App Preferences
 - In-App Purchases
5. Recommendations



OBJECTIVES & METHODOLOGY

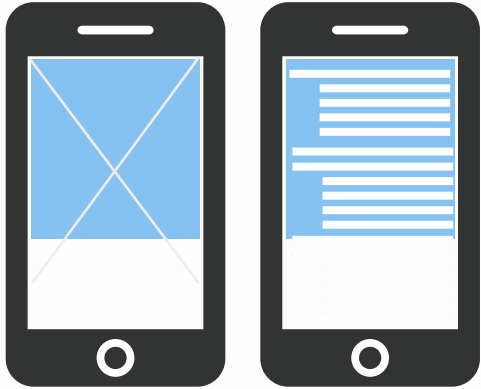


Objective

InMobi conducted this study to identify the demographic profile of messaging apps users in Indonesia, frequency of use, preferences, factors that influence download, in-app purchases and optimal price points.



Research Methodology



On-device survey
conducted over Kinesis
mobile platform



Sample of n= 240 Indonesian
mobile users



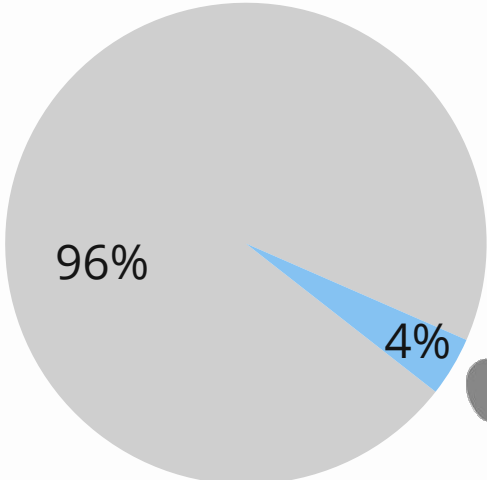
Respondents recruited via
InMobi mobile ad network in
Indonesia between May and
June 2014

Survey Participants Demographics

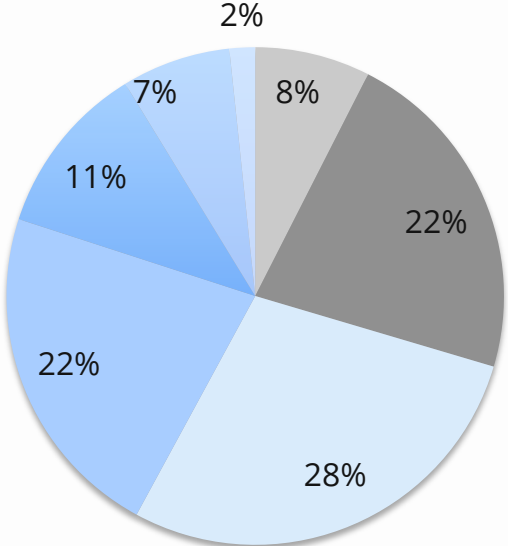


80% | 20%

Gender



OS



Age Group

- 15-17
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+

KEY FINDINGS

Key Findings

97%

of mobile messaging users in Indonesia access their app multiple times daily



Early adopters of messaging apps are **under 35**

App Discovery Channels



46%

Browsing The App Store



42%

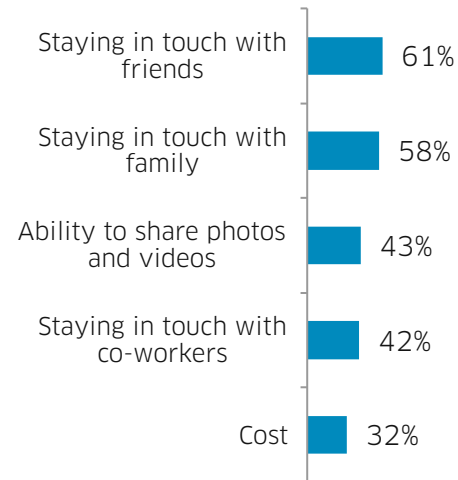
Word Of Mouth



20%

Mobile Ads

Top Reasons Why Users Download Messaging Apps



30%

of mobile users have made an in-app purchase when using a mobile messaging/chat application

14%

of users have never made an in-app purchase but would consider it

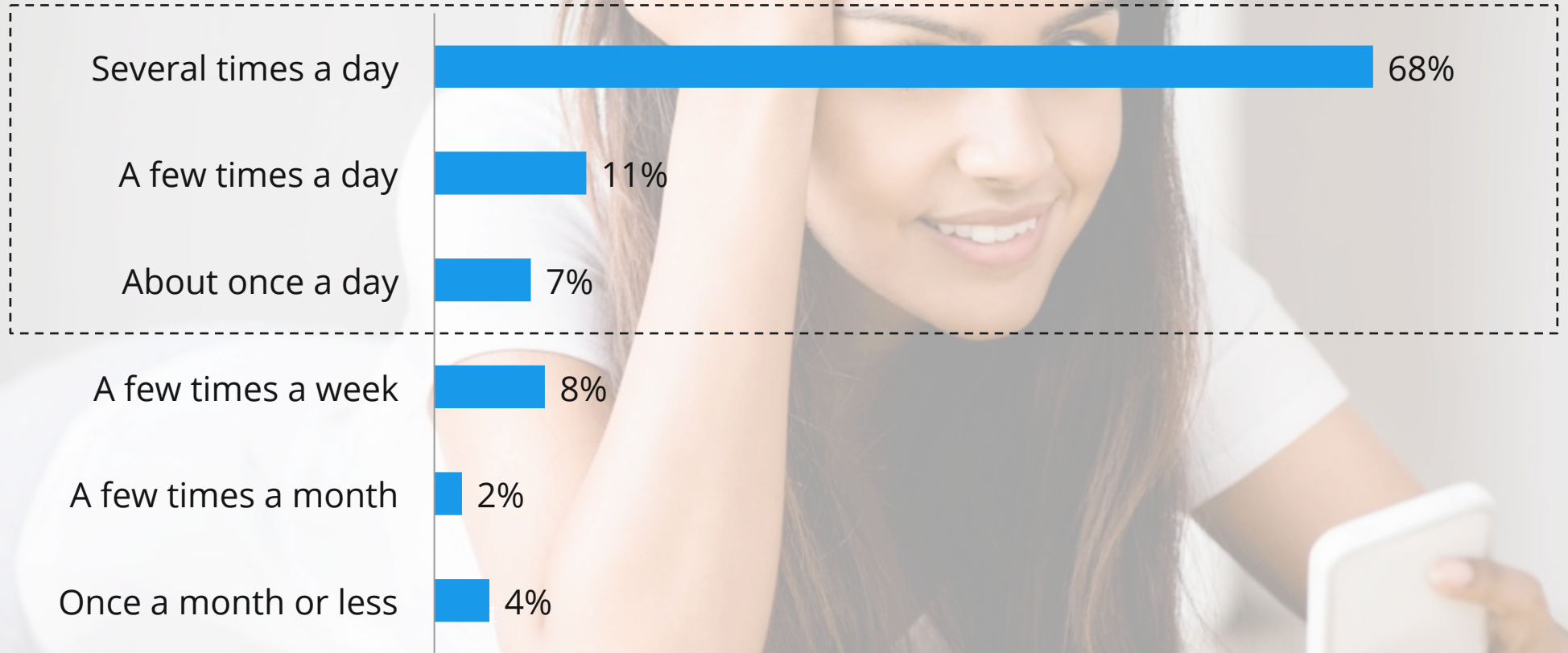


37% of In-App Purchases are for Digital Goods

Reasonable Price Point for In-App Purchase
IDR 18241 (US \$1.6)

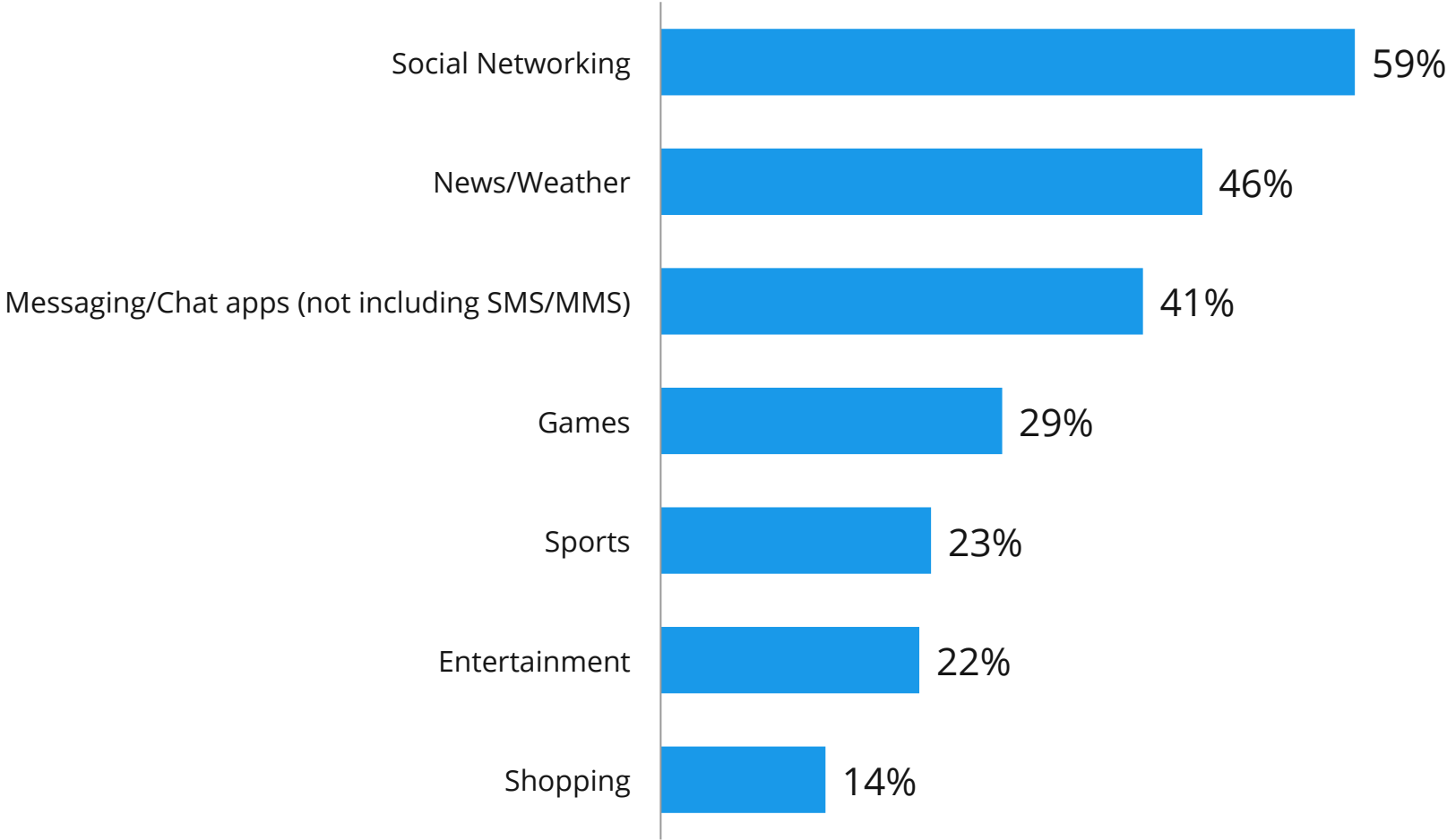
MOBILE CONTENT CONSUMPTION BEHAVIOR

4 in 5 Mobile Internet Users Send Messages Daily



Q) How frequently do you read or send text messages (SMS/MMS) on your cell phone? (n = 240)

Indonesian Mobile Consumers Most Frequent Social Networking And News/ Weather Sites And Messaging Applications

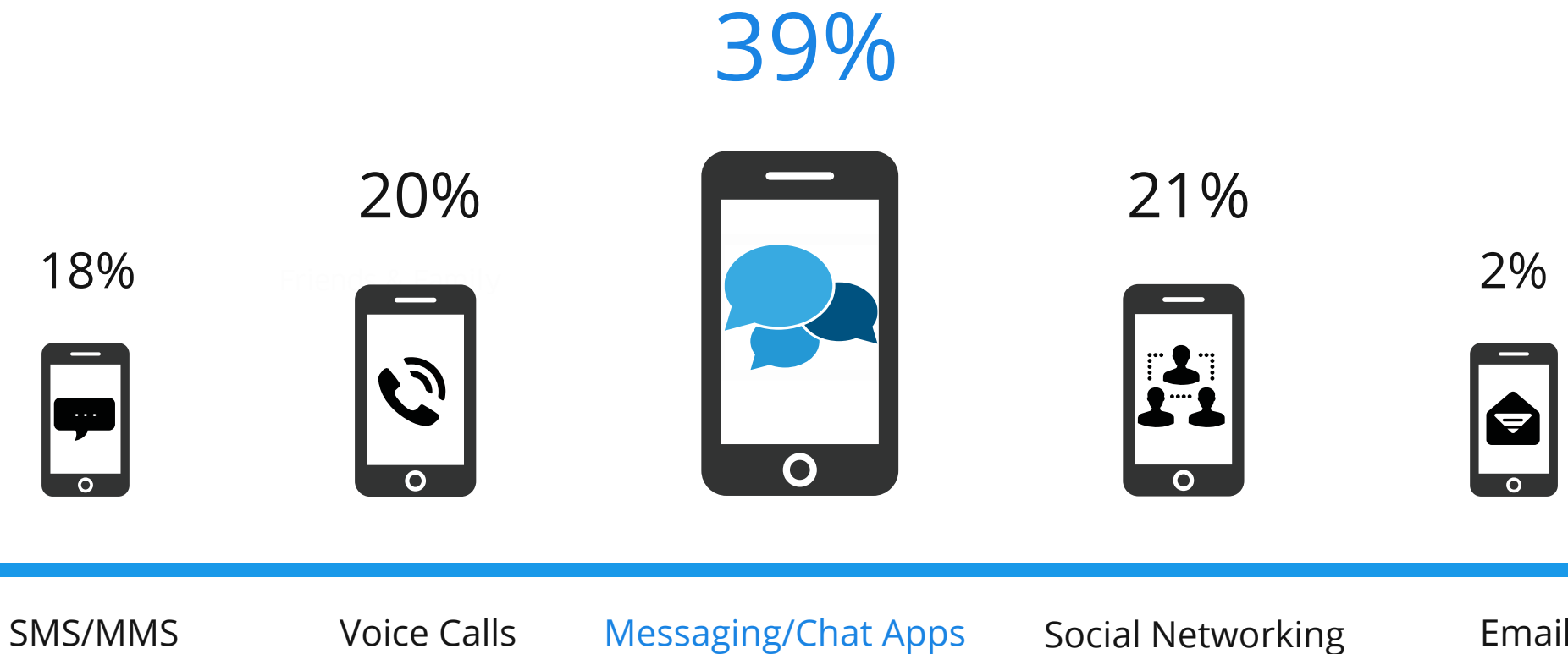


Q) What type of applications or web content do you access regularly on your mobile device? Select all that apply. (n = 240)

MESSAGING APPS USAGE BEHAVIORS & PREFERENCES

Messaging Apps Score Over Social Networks in Terms of Communication

Preferred channel of mobile communication



Q) Of all the ways you can communicate with others through your mobile device, which method do you prefer the most? (n = 240)

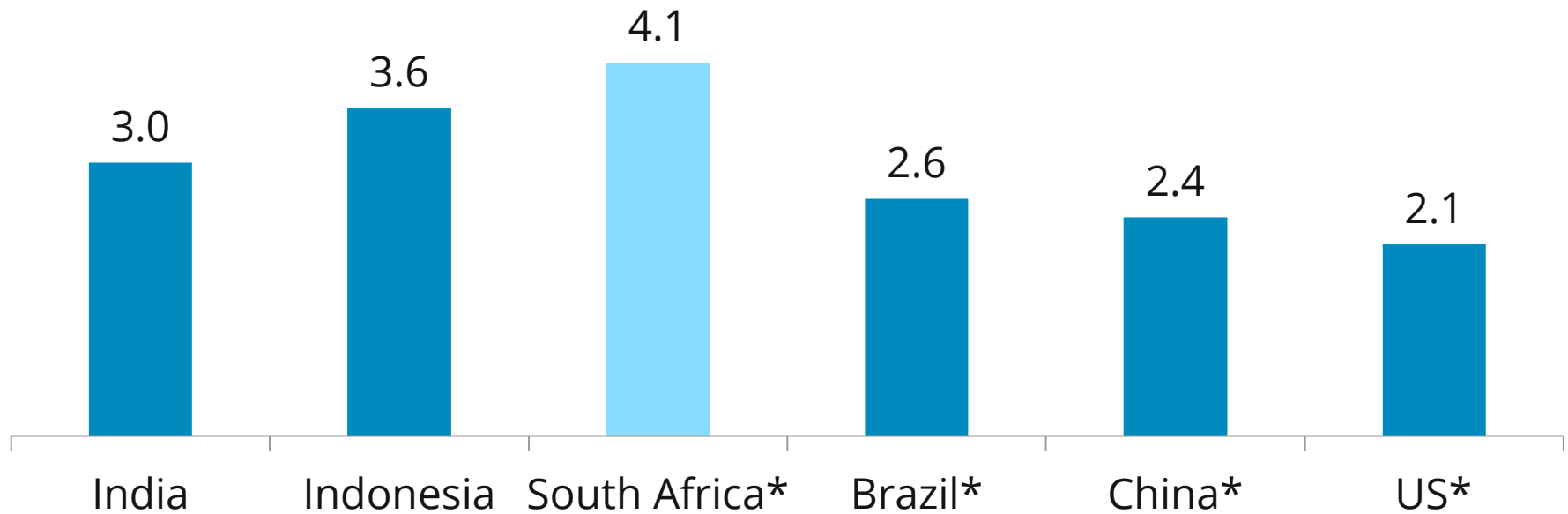
Consumers Prefer Messaging Apps Because ...

Mobile Messaging Apps


- **Are easier to use**
 - And more efficient compared to voice and text
- **Save them money**
 - By avoiding expensive operator data charges
- **Promote creative expression**
 - Videos, photos and custom emoticons
- **Have increased functionality**
 - Group chat, ability to communicate with friends, family & co-worker
- **Are communities in themselves**
 - Chat functionality, social networking, gaming & shopping



Messaging Apps Ownership.....



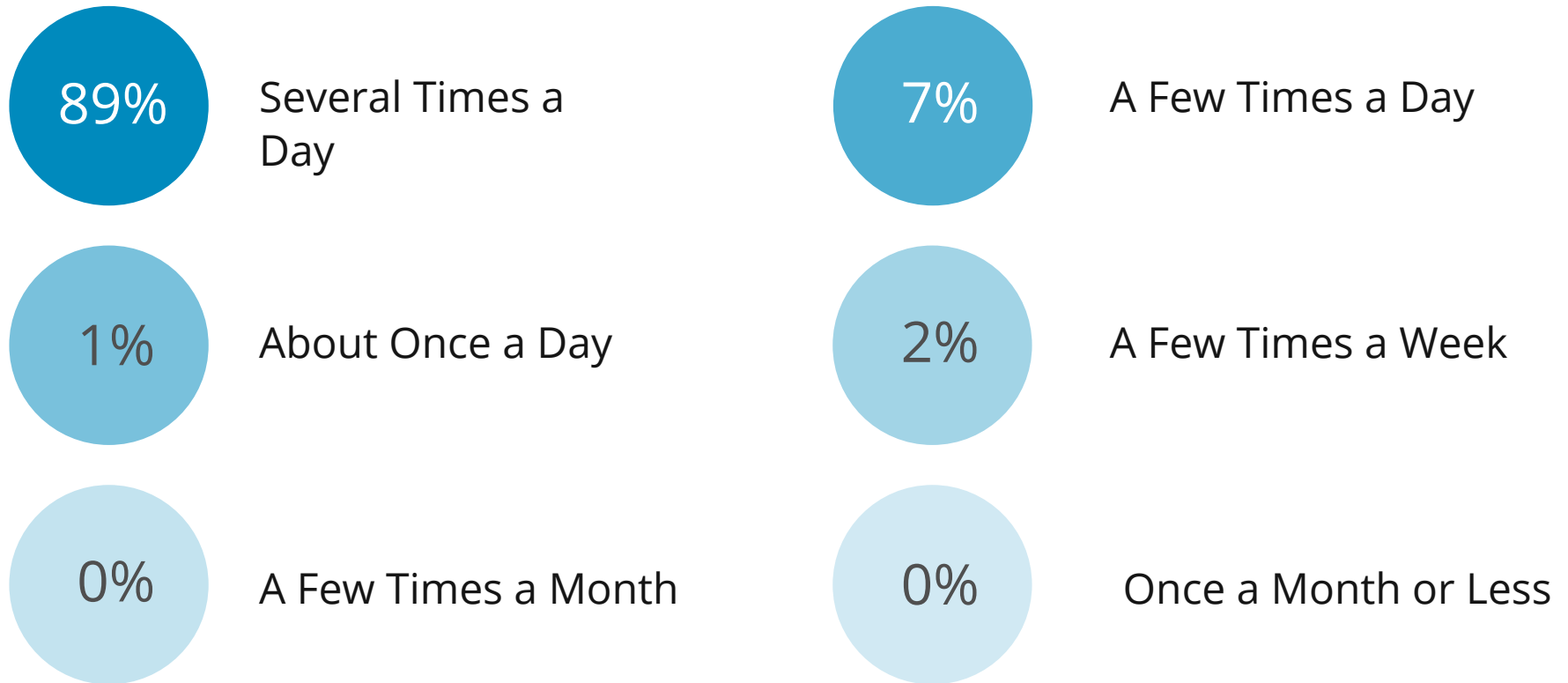
*Note: * Source for these countries are from On Device Research, November 2013
India & Indonesia data is from InMobi Research*

A close-up photograph of a woman lying on her back, wearing a light blue t-shirt. She is holding a black smartphone in her right hand, looking at the screen. Her eyes are closed, and she has a relaxed expression. The background is a plain, light-colored surface.

For marketers, messaging apps provide another opportunity to integrate into consumers' daily mobile activities

97% of Users Access Their Messaging Apps Multiple Times Per Day

Frequency of accessing messaging/chat apps on mobile device



Young Adults Under 35 Lead Adoption Of Messaging Apps, But Older Audience Are Catching Up..

Demographic profile of mobile messaging apps users



Top Reasons For Using Messaging Apps

Ability to communicate with friends **69%**

Ability to communicate with family **52%**

Ability to share photos and videos **50%**

Ability to communicate with co-workers **32%**

Cost **24%**

Group messaging capabilities **23%**

Stickers and emoticons **16%**

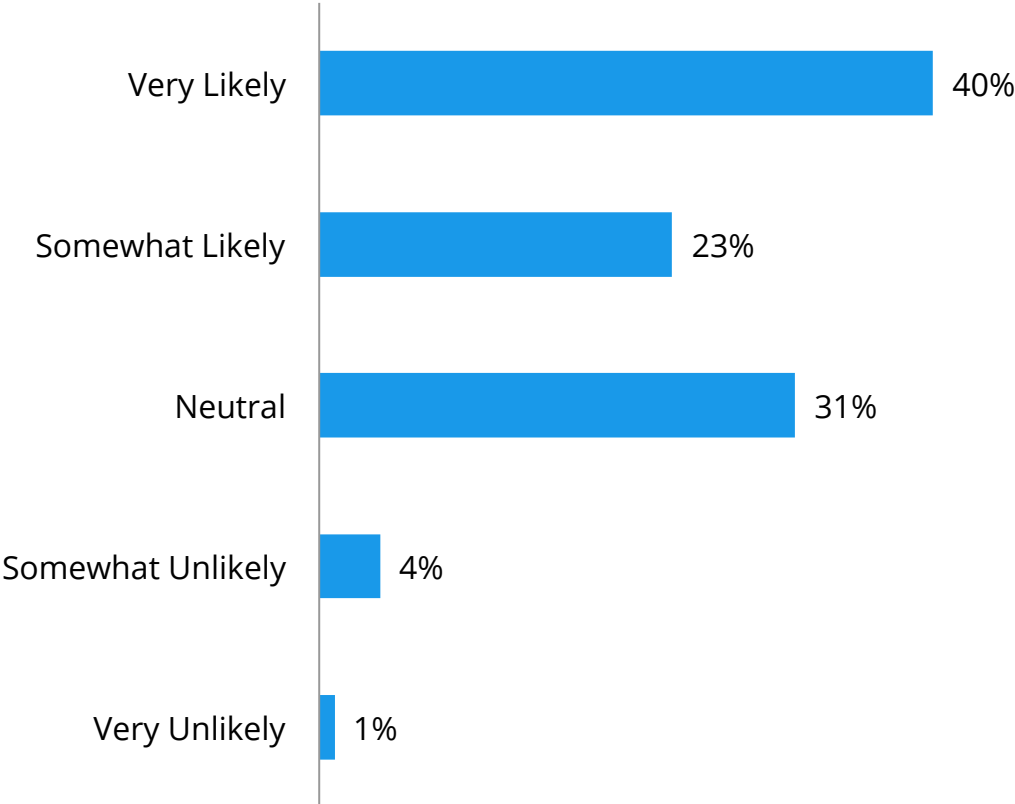
Ability to delete messages after they are sent **6%**



DOWNLOAD INTENT

63% Of Users Expect To Download Messaging App In The Next 30 Days

Likelihood of downloading a mobile messenger/chat app in the next 30 days



Q) Mobile messenger/chat apps allow you to communicate with friends and family through text messages, emoticons, photos, video, and voice for no charge. How likely are you to download a mobile messenger/chat app in the next 30 days? (n=142)



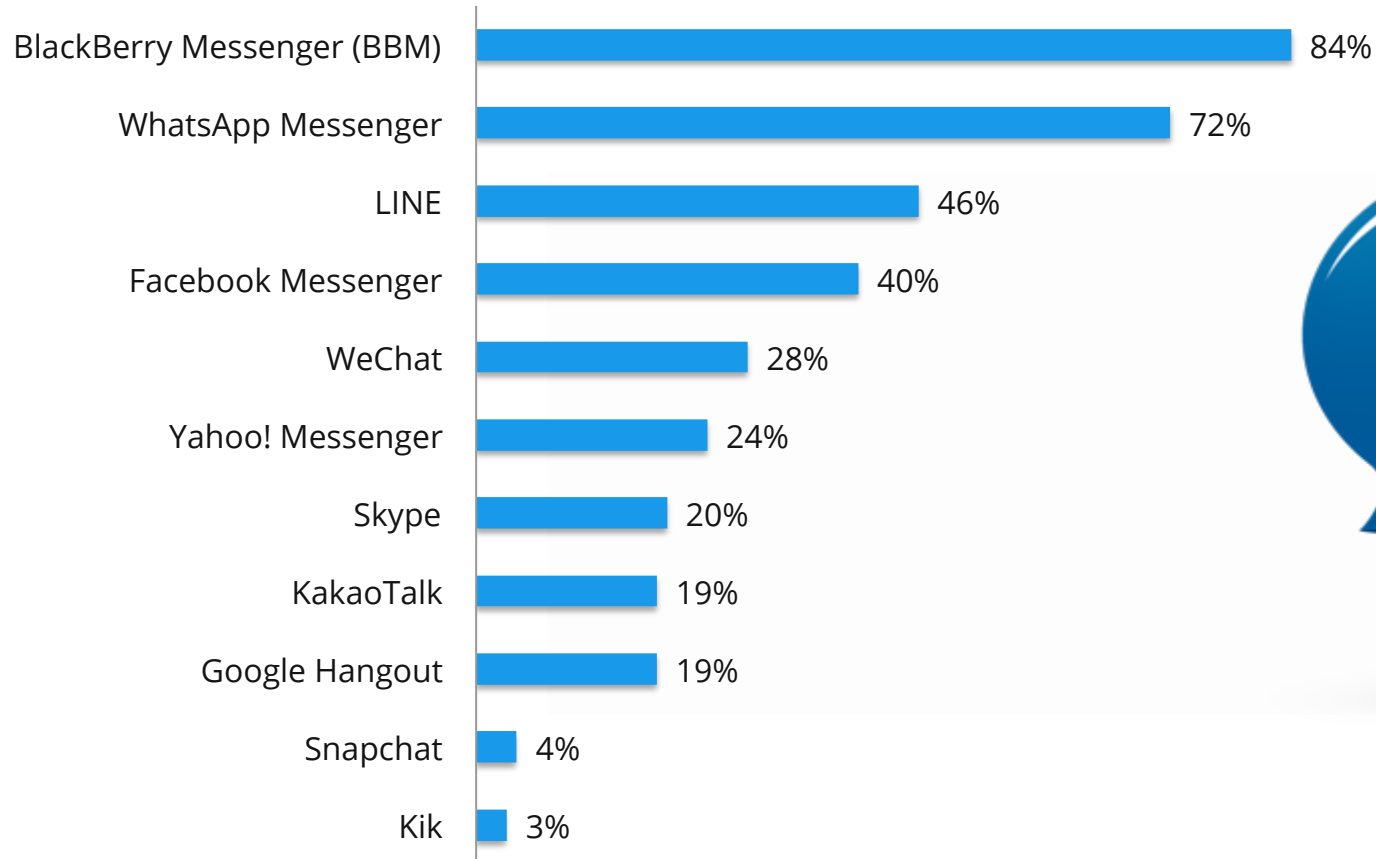
Top Reasons That Influence Messaging Apps Downloads



APP AWARENESS & DISCOVERY

In Terms Of Usage, BBM Is The Most Used Smartphone Messaging Service In Indonesia With 84% Usage Rate, Followed By WhatsApp Messenger

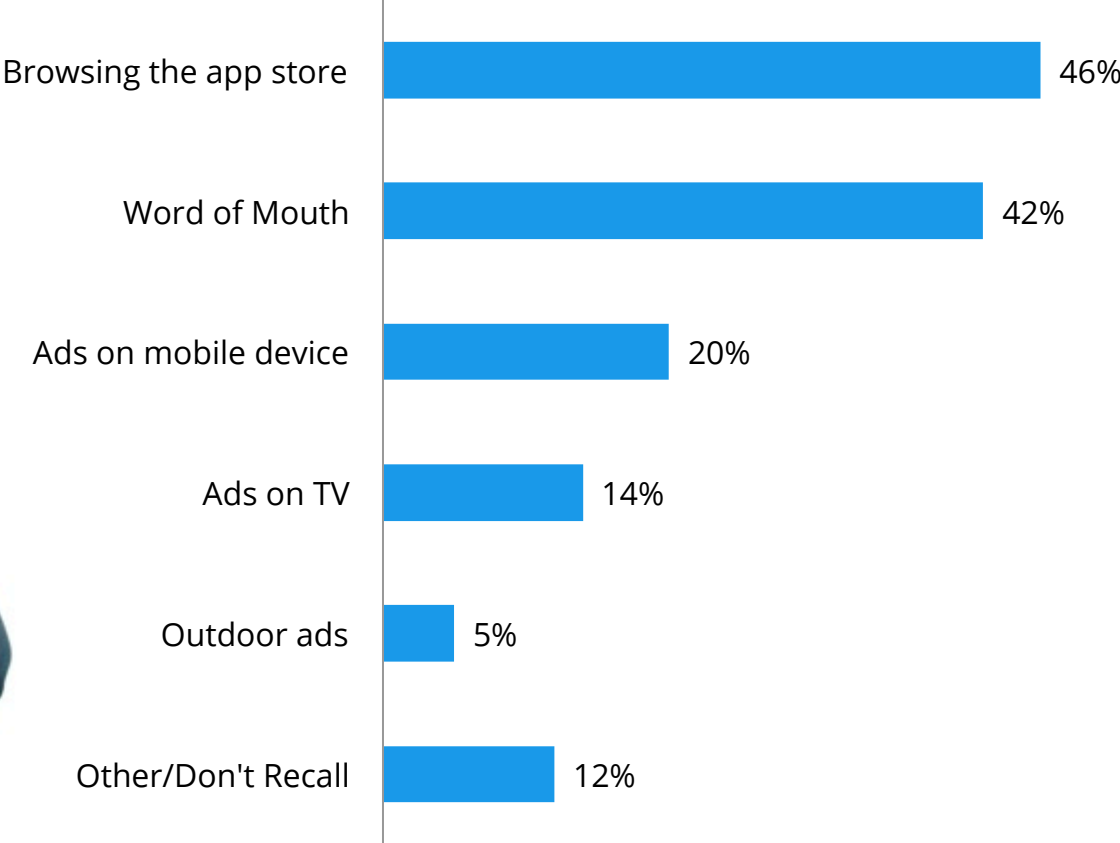
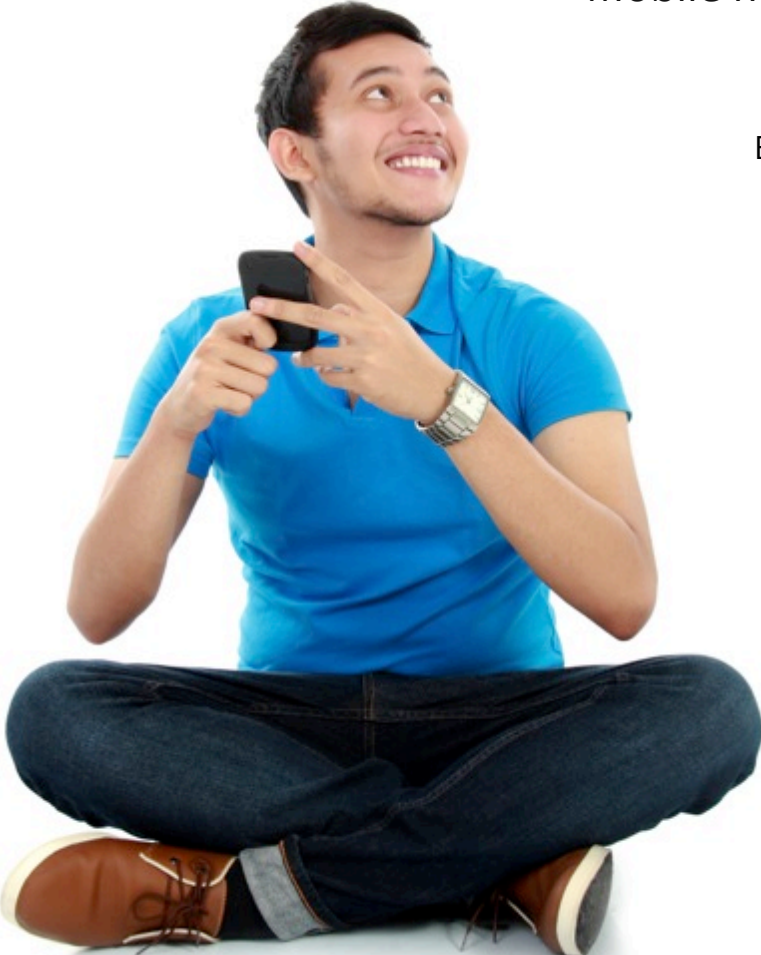
Mobile messaging apps most used



Q) Which mobile messaging/chat apps do you use? Please select all that apply (n=142)

Mobile Users Discover Messaging Apps Through Various Media Channels

Mobile messaging app discovery channels

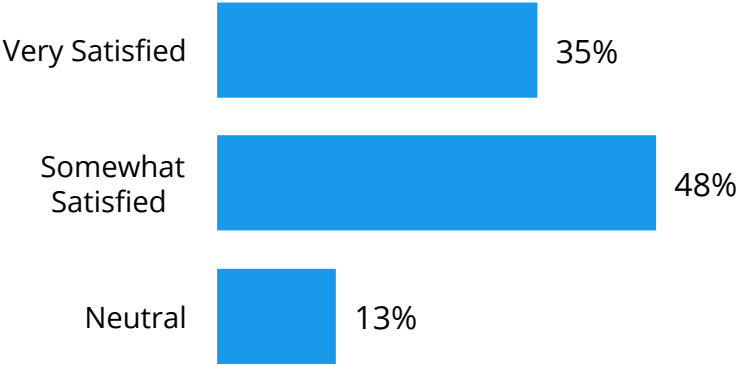


Q) How did you find out about mobile messaging/chat apps to download? (n=98)

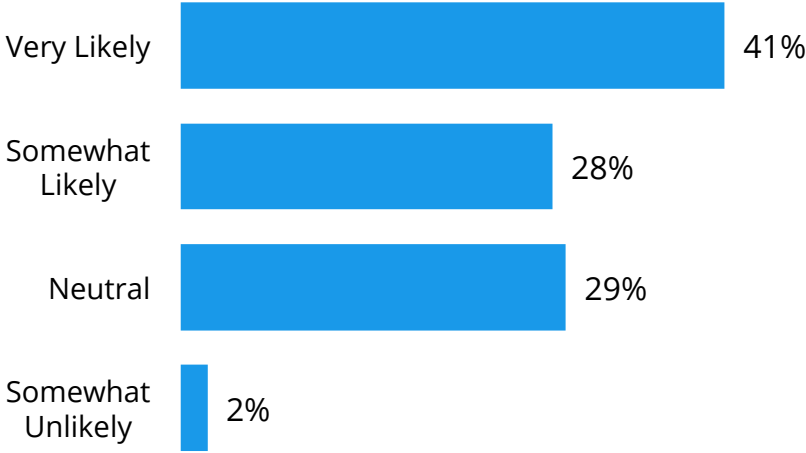
MESSAGING APP PREFERENCES

Satisfied Users Are Very Likely To Spread Positive Word Of Mouth

Satisfaction level with the most used apps











Likelihood of recommending messaging app to others



Q) Now think about the mobile messaging/chat app you use the most. How satisfied are you with this app? (n= 93)
Q) And how likely are you to recommend this app to others? (n=93)

Mobile Users Leverage Messaging Apps For Multiple Purposes

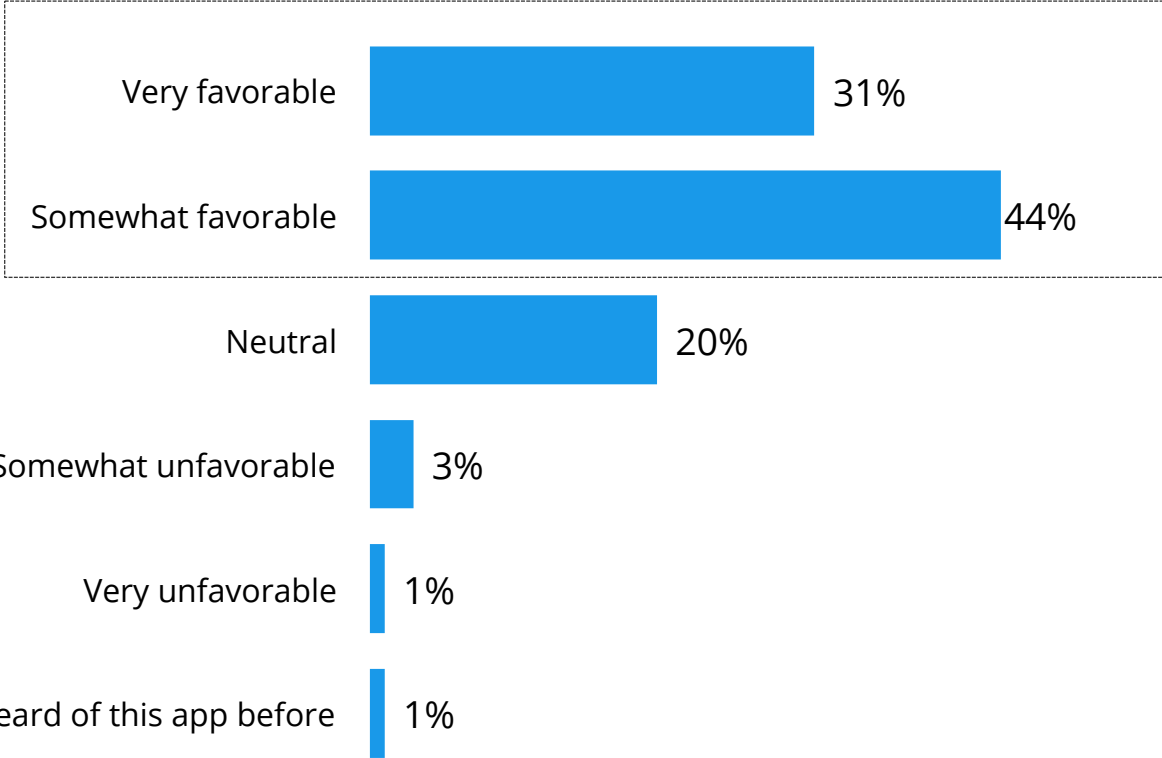
Mobile messaging apps usage by activity

		Message friends		Message family		Message co-workers		Group chat		Stickers and emoticons		Games		Send photos or videos
	Blackberry Messenger	76%	▶	68%	▶	59%	▶	55%	▶	49%	▶	0%	▶	70%
	Whatsapp Messenger	61%	▶	51%	▶	48%	▶	40%	▶	43%	▶	0%	▶	61%
	Facebook Messenger	35%	▶	23%	▶	19%	▶	15%	▶	15%	▶	0%	▶	28%
	LINE	35%	▶	25%	▶	24%	▶	13%	▶	40%	▶	28%	▶	31%
	WeChat	11%	▶	9%	▶	9%	▶	0%	▶	13%	▶	1%	▶	9%
	Google Hangout	6%	▶	5%	▶	6%	▶	4%	▶	1%	▶	0%	▶	4%
	Yahoo! Messenger	10%	▶	53%	▶	11%	▶	3%	▶	4%	▶	0%	▶	5%
	Skype	9%	▶	11%	▶	8%	▶	3%	▶	3%	▶	0%	▶	9%

Q) Now think about the different mobile messaging/chat apps you use. Which activities do you use each app for? (n=80)

Three-quarters of respondents view BlackBerry Messenger (BBM) for Android and iOS favorably

Opinion of BlackBerry Messenger (BBM) for Android and iOS

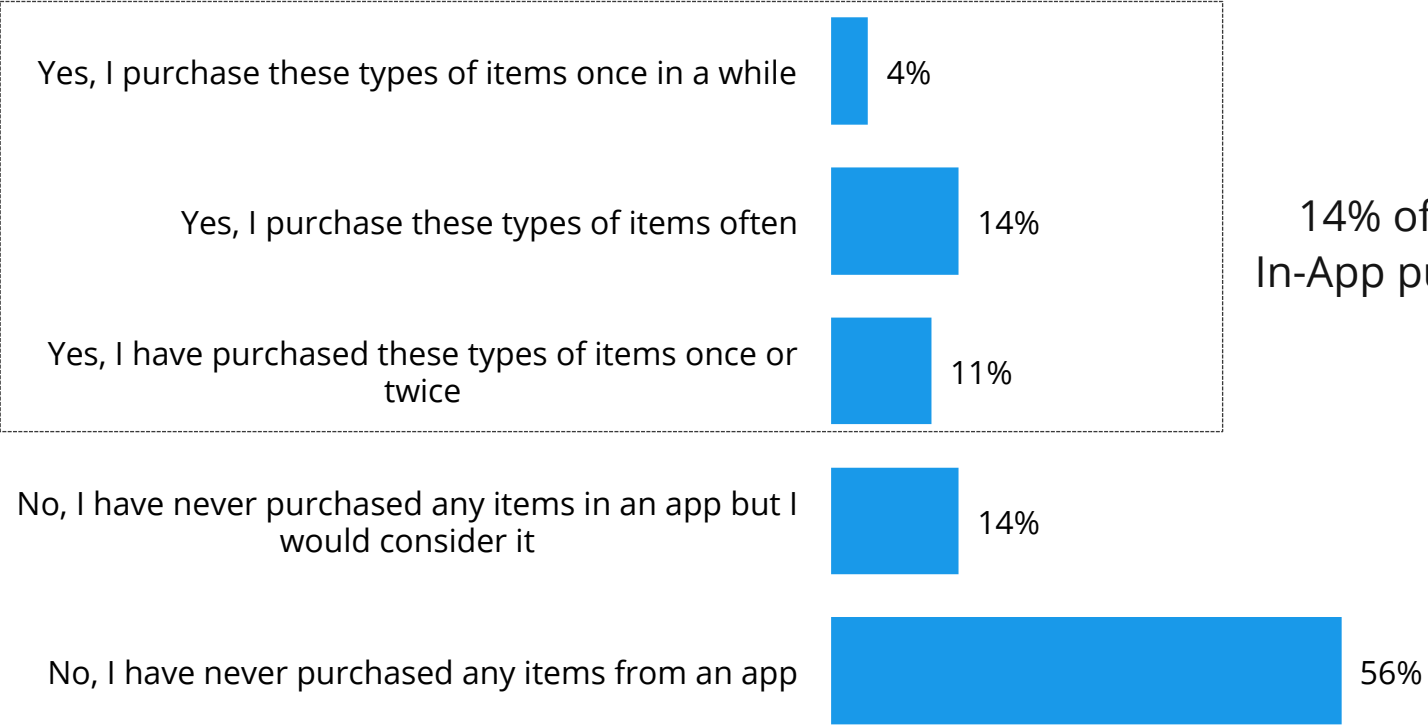


Q) What is your opinion of BlackBerry Messenger (BBM) for Android and iOS? (n=239)

In-App Purchase (IAP)

Nearly 30% Of Mobile Users Have Made An In-App Purchase When Using A Messaging App

In-App purchases made when using a mobile messaging/chat app

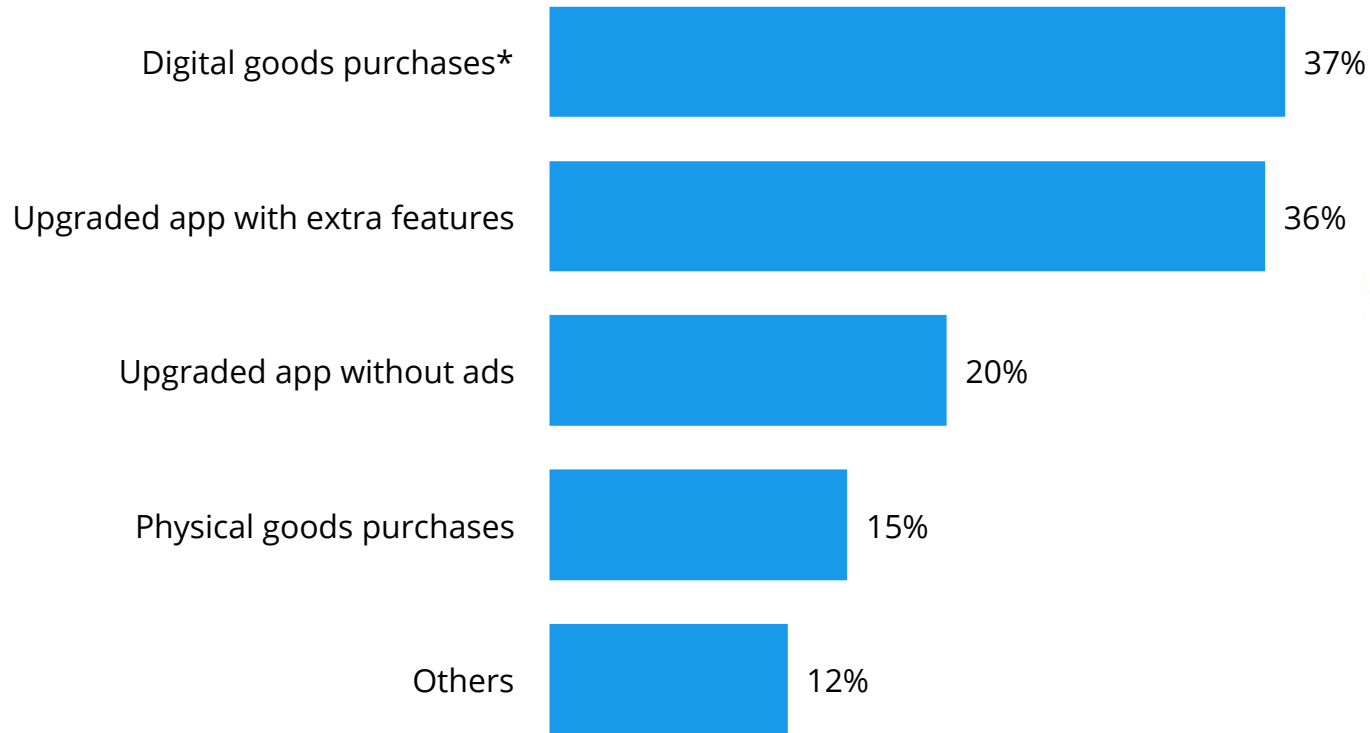


14% of users have never made an In-App purchase but would consider it

Q) When using a mobile messaging/chat app, have you made any in-app purchases? (n=98)

About One Third of App Users Would Make an In-App Purchase to Upgrade the Messaging App with Extra Features

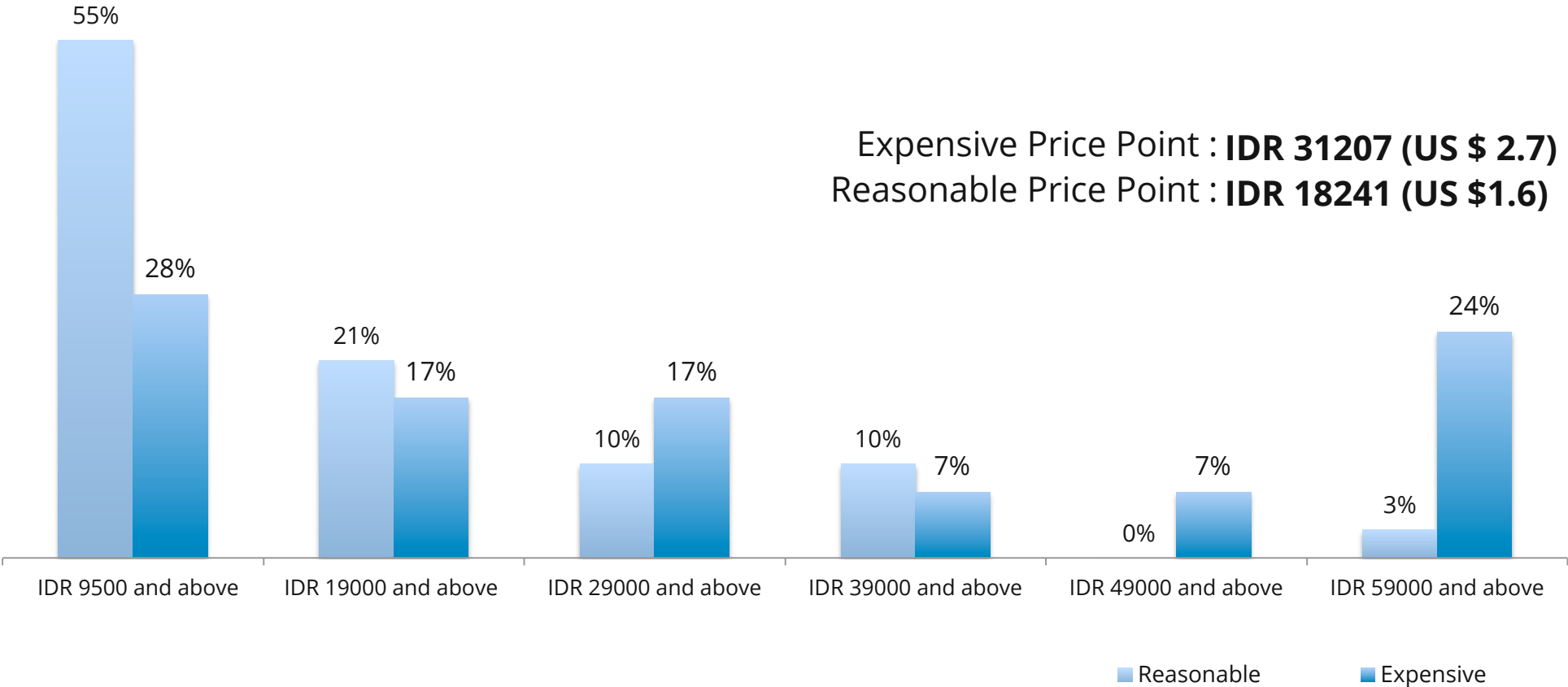
Types of In-App purchases made when using mobile messaging apps



*Digital goods purchases includes Games, stickers & emoticons, virtual currency

Q) What types of in-app purchases have you made or would you consider making? (n=98)

Price Preferences For In-App Purchase



Q) At what price would an in-app purchase be so expensive that you would not consider buying it?
Q) At what price would an in-app purchase be reasonable to purchase? (n=29)



RECOMMENDATIONS





1

86% of respondents send or receive multiple mobile messages per day. [Leverage the mobile messaging/ chat app opportunity to fill this need to communicate with other via mobile messages.](#)

2

[Understand who your target consumers are and what factors consumers find most important in messaging/ chat applications.](#) 97% of respondents already use mobile messaging/ chat apps, and nearly two-thirds of them are planning to download a messaging/ chat app in the next 30 days.

3

Mobile consumers discover messaging/ chat apps through multiple channels. Acquire new users utilizing mobile ads. [Design dynamic and engaging mobile experiences](#) that introduce consumers to messaging/ chat applications, showcase app features, and enable them to seamlessly download the app.

4

Indonesian mobile consumers most frequent social networking and messaging and news/ weather mobile sites/applications. [Generate brand awareness](#) by targeting ads to these mobile properties and other sites they frequent.

5

Nearly one-third of mobile users make in-app purchases. Digital goods purchases and upgrading apps with additional features are the most popular types of in-app purchases. [Understand what types of in-app purchases users are making and offer those that make the most sense for your app.](#)

6

[Identify the optimal price for your in-app purchases.](#) According to mobile users who have made an in-app purchase, the ideal price for an in-app purchase is IDR 18241 and IDR 31207.

7

[Earn additional revenue by hosting ads in your app.](#) Consider utilizing native ads that seamlessly blend into your app content.



Thank You!

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