Messaging Apps:
The New Face of Social Media and What It Means For Brands

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Facebook's $19 billion purchase of WhatsApp solidified 2014 as a breakthrough year for messaging apps, but what role can brands and media owners play in the conversation?[1] The answer lies in understanding a fragmented industry landscape dominated by a few key players with strikingly different philosophies, product offerings, and geographic and demographic strongholds. If you think apps are just a cheaper way to text, you're missing their potential: they're content portals enabling 1:1 interaction with friends and fans.

Like many an "overnight" success, the industry's popularity has actually been years in the making—coalescing in a period of high-profile acquisitions and IPOs. In addition to Facebook's WhatsApp purchase, Rakuten just acquired Viber for $900 million (a relative bargain), South Korea's KakaoTalk is getting ready for a $2 billion IPO, and there have been rumors of a 2014 LINE IPO. [2,3]

WhatsApp is grabbing most of the headlines, but contrary to many news and tech media observers, we believe it is far from invincible, despite the new war chest. Its "Say No To Brands" philosophy may limit the app's long-term appeal— our experience has shown that people may not crave advertising, but they do want to connect with their favorite retailers, celebrities, sport teams, and more over messaging apps.

Give fans the right experience, and they will not only like you, but even seek out the platforms you endorse. With this in mind, we see brands and media owners already playing a large role in elevating WhatsApp's biggest competitors like LINE, Kik, and Snapchat.

In this report, we'll explore how the battle for messaging app dominance is likely to unfold, and take a close look at the ecosystem, case studies, and best practices to understand what brands and media owners need to know to succeed in this new frontier of social media.

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Overview of the Messaging Ecosystem

From humble beginnings to explosive growth
A history of messaging [4]

Computer-based messaging as a concept dates back to early computing, when engineers needed to communicate within primitive software. As the Internet, mobile phones, and text messaging spread to the general public, people quickly became accustomed to communicating with peers or groups of people via text from an electronic device.
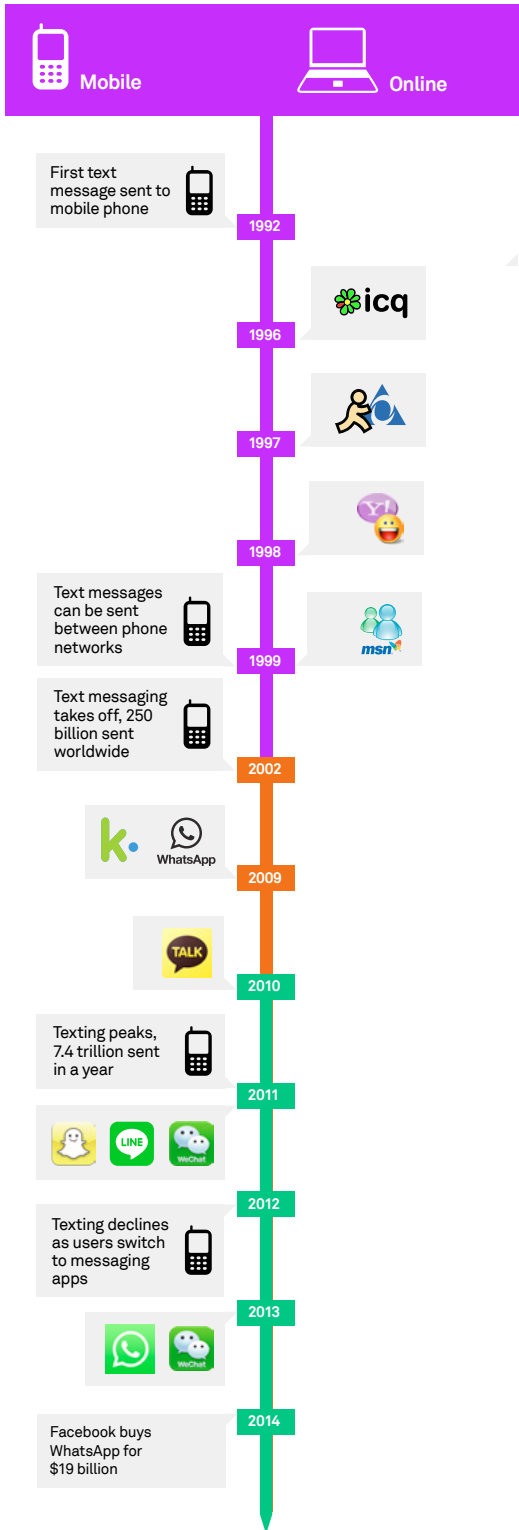
Until the mid 2000's, messaging was bifurcated: you either chatted on your computer or you texted on your phone. The increased popularity of social networks and smartphones changed that, merging online behavior with constant mobile access.

The new crop of mobile chat apps rose to popularity as low- or no-cost alternatives to texting, but over time many evolved into full-blown media portals, recognizing that media and content are fundamental to how we now share and communicate in conversation.

As streaming speed and bandwidth improved on the mobile web, chat apps kept pace.[5] The messaging ecosystem now boasts over twenty apps with different social and sharing features that act as, essentially, "SMS+", with group chats, video conferencing, voice calling, stickers, content sharing, and more.[6]

Interestingly, WhatsApp remains an anomaly in the industry landscape—a platform with a pared-down offering expanding only modestly on basic SMS.

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Messaging History

Mobile	Online

1992 — First text message sent to mobile phone

1996 — icq

1997 — (AOL Instant Messenger)

1998 — (Yahoo! Messenger)

1999 — Text messages can be sent between phone networks / msn

2002 — Text messaging takes off, 250 billion sent worldwide

2009 — kik, WhatsApp

2010 — TALK

2011 — Texting peaks, 7.4 trillion sent in a year

2012 — (Snapchat, LINE, WeChat)

2013 — Texting declines as users switch to messaging apps

2014 — (WhatsApp, WeChat) / Facebook buys WhatsApp for $19 billion

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Messaging apps vs. social networks
What's the difference?

Social networks and messaging apps both provide platforms for people to connect and share content, so what distinguishes the two? Audience size, duration, and intent:

- A messaging app acts primarily as a one-to-one (or -few) communication mechanism, and can be temporary or long-lasting. Content is intended to be private, or at least directed towards a specific group

- A social network consists of "many to many" connections, is durable, and is capable of producing network effects. When used to publish information, it acts primarily as a many-to-many broadcast mechanism. Content is essentially public.

That said, as more platforms strive to attract and hold users, they will add new features and continue to blur the lines between messaging apps and social networks. In December 2013, for instance, Instagram debuted Instagram Direct, which allows users to send images to up to 15 people.[7] Regardless of the platform, timeliness is of the essence, as people enter and leave conversation throughout the day. [8]

Not all apps are created equal

Although all messaging apps enable text chatting, other features vary. Popularity does not necessarily equal permanence or exclusivity: app users feel comfortable shifting between apps both throughout the day and in the long run.

Selected apps and features

App	Global Users	Chat	Video	Calling	Voice Message	Stickers	Media Sharing	Gaming
WhatsApp	450M*	●	●	●	●			
WeChat	355M*	●	●	●	●	●	●	●
LINE	400M	●	●	●	●	●	●	●
Viber	280M	●	●	●	●	●	●	
Tango	200M	●	●	●	●	●	●	●
KakaoTalk	130M	●	●	●	●	●	●	●
Kik	120M	●	●		●	●	●	●
GroupMe	12M	●	●			●	●	
FB Messenger	n/a	●		●		●		

*WhatsApp and WeChat report active monthly users. Numbers for all other apps refer to total registered users only.
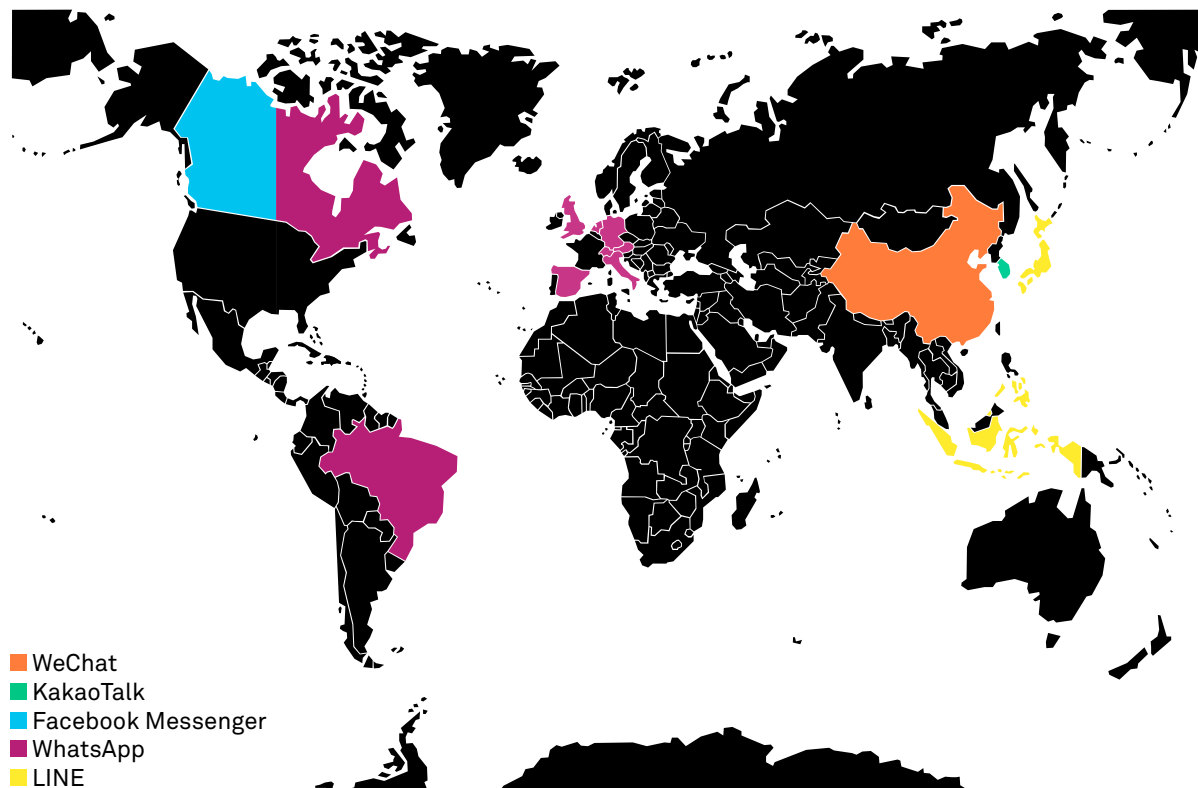
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Global reach, regional preferences
Apps dominate in different markets

The leading messaging apps are engaged in an all-out arms race for user acquisition. Each holds specific regional strongholds, with WhatsApp claiming the most truly global presence, but most are successfully pushing into new markets and growing at incredible speeds. This battle will only intensify with Facebook openly declaring its intention to concentrate on WhatsApp's user acquisition before monetization. It may also explain why Facebook was willing to pay so much for WhatsApp—the company is making an effort to gain audience share abroad.

For brands looking for messaging scale in the US market right now, the best brand-friendly bets are Kik, with over 70 million US users, and Tango, with 66 million US users, as well as Snapchat and Viber. Other platforms like Japan's LINE, China's WeChat, and South Korea's KakaoTalk are likely to build a sizable US audience in the coming years, and actually offer some of the best brand opportunities. LINE is a particularly formidable competitor, as it has over 400 million registered users and earnings that rival Twitter—in Q4 2014 net sales were $120M. [9]

Dominant apps in select countries [10,11]

- WeChat
- KakaoTalk
- Facebook Messenger
- WhatsApp
- LINE

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Young adults lead adoption of messaging apps
Privacy, novelty spur interest

It will come as no surprise that teens and young adults are leading the growth of messaging apps:

- 31% of all mobile users used an instant messenger service in 4Q 2013 [12]
- Users of messaging services spend 7.6 hours per month with them on average.[13]
- 29% of adults 18-24 use a messaging service almost every day [14]

   This is due to several factors:
- Privacy: Younger audiences protect their online privacy by controlling access to their online personas, removing concerns of parents, schools, or employers seeing their activity
- Disposability: Messaging apps make it simple to switch between online personas and groups, and drop them as desired
- Sociability: Informal medium to meet new people and share common interests
- Visual Orientation: Multi-media content is engaging and expressive; rendering regular SMS outdated
- Exclusivity: Unwanted messages and spam are easier to avoid, with a higher signal-to-noise ratio—on Facebook, for instance, the news feed is often cluttered with acquaintances rather than close friends

That said, messaging apps' popularity isn't limited to Generation Y: 70% of Tango's audience is 18-44.[15] This demographic evolution was a hallmark of user adoption on Facebook in its early years, and we expect messaging apps will follow a similar curve.

Brands and Messaging Apps: Case Studies

Brands moving into messaging
Creating a great fan experience

Brands follow audiences, so it's no surprise that messaging apps' explosive growth has attracted brand, media owner, and celebrity attention. This new medium requires a different strategy and willingness to experiment, as many of the platforms have yet to develop turnkey solutions for advertisers. However, that shouldn't stop brands from participating: Instagram initially had a no-advertising approach, but brands still joined the platform, adapting to its format [17]. Let's take a look at how some innovative companies have already joined the conversation.
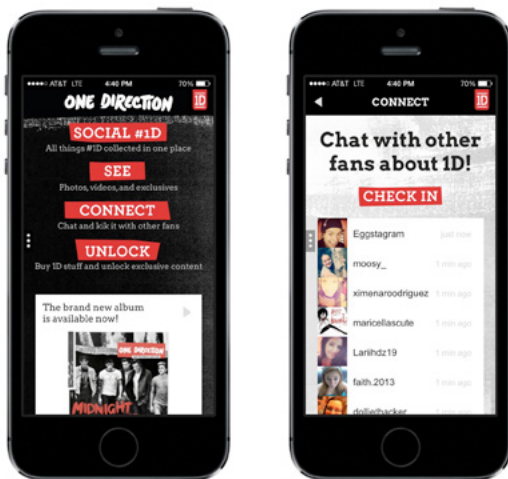
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Kik connects fans
One Direction creates unique experience within app

Kik positions itself as a mobile web browser with a messaging layer, competing with messaging services as well as browsers like Firefox and Chrome. The platform has most of the features of multimedia messengers like LINE, but it also lets you open any website within its URL browser and easily share those pages.

For brands, this means experiences built for the platform will actually be HTML5 web apps, rather than native content. In fact, Kik would assert that your brand is "already on Kik" because unlike other messengers, users can already pull up your content from the web. That said, brands serious about connecting with the Kik community will want to build Kik-optimized web apps around shareable content that leverages the platform's API. It's important to note that Kik is less interested in actively building those experiences, so brands will have to do customized work.

Brand Campaign:
The Lab witnessed the power brands have to elevate messaging apps and brought on Kik as a strategic business partner to launch a One Direction experience we created for Syco/Columbia Records. The band actively encouraged fans on Facebook and Twitter to download Kik to access and share exclusive content. Collaborative purchase behavior is encouraged by rewarding fans with even more exclusives. It is a place where fans can chat and make friends with other fans from around the world and it's clear they're doing that: there have been over 956,800 installs of the 1D experience, over 2.4M visits, and the massive 1D Kik chat room is always crowded with people joining the community.
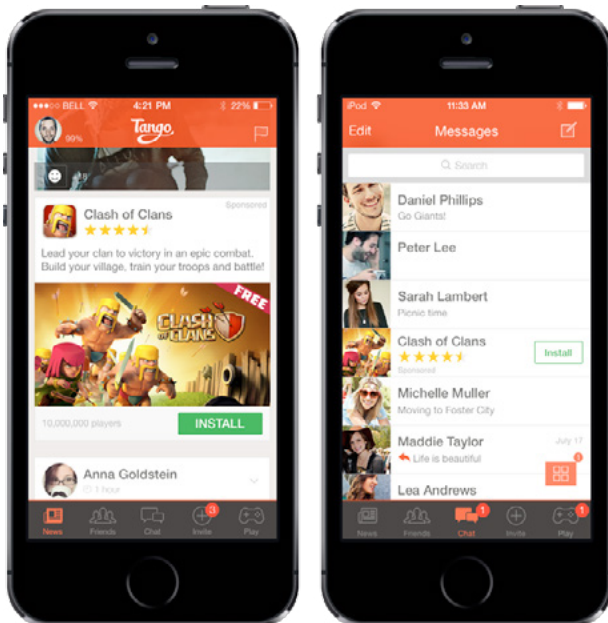
Tango tests native ads
Gaming company prefers sponsored content

Tango is perhaps the "blingiest" of the messaging apps, with a penchant for wildly animated stickers that dance across the screen during video and text chats. It's notably brand-friendly, has partnered with companies like Spotify, and boasts close to 200 million users, with a strong contingent of casual and social gamers. It's also a demographic anomaly in the messaging space, with 70% of its users in the 18-44 age bracket.[18]

In late 2013, Tango launched "native" mobile ads which appear in the news feed and chat tab in the same card format as original content, but with a "sponsored" icon. Ads mostly drive app downloads for mobile games and other entertainment apps. Mobile ad network MoPub manages the ads, but advertisers can buy directly through Tango.[19]

Brand Campaign:
Video game company Supercell bought app install ads for "Clash of Clans" directly from Tango. Tango's model is one of the most traditional in terms of brand campaigns.[20] Given their existing marketplace of games and music, entertainment app install banners are a natural fit: they have scale and match Tango's look and feel. Brands like Dunkin Donuts have run similar campaigns on the platform to drive app installs.

LINE finds success with stickers
Celebrities, brands offer exclusive content

Japan's LINE is the "fun" messaging app, and is known for its "stickers"—icons, images, or GIFs of playful characters that users can include in their messages. For U.S. consumers new to messaging, it may be surprising that users spend money on what are essentially JPEGs, but LINE is making roughly $18 million a quarter on sticker packs, and even more on in-game purchases.[21] The key to understanding this craze is that stickers promote identity —they allow users to express themselves through the images, characters, or brands they love.

As of February 2014, LINE had over 500 sticker characters globally[22] In April 2014, the Creators Market will begin to allow anyone to design, submit, and sell stickers on the LINE store for 50% of the profits—a shrewd move that will help penetrate new markets.

Brand Campaign:
Paul McCartney's LINE account, which has over 10 million followers, released a set of eight exclusive stickers showing Paul's face making various expressions.[23] Stickers were free for the first few weeks and then offered at $1.99.

Snapchat takes fans behind the scenes
Philadelphia Eagles offer exclusive sneak peeks

Like LINE, Snapchat is entirely open to brands creating pages, with no differentiation from regular users. Its unique offering —photos that disappear after a few seconds—makes it ideal for brands that want to give their fans a feeling of exclusivity. The private nature of Snapchat makes it challenging for fans to discover, but increases its "secret" appeal. Tracking is limited, as there are no analytics beyond seeing the number of followers, but this may change as more brands seek to engage with fans.

Brand Campaign:
The Philadelphia Eagles send out behind-the-scenes photos and videos to promote upcoming games or events, as well as tease announcements or break news to drive traffic. With over 7,000 fans within the first week, it's one of the most successful brands on Snapchat.[24]

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WeChat makes messaging pay
McDonald's supports payments via app

WeChat may be the most multi-faceted in the space, supporting all kinds of multimedia sharing, gaming, and commerce. Leveraging their partnership with Chinese mobile payments provider Tenpay, users can make purchases within the WeChat app. Approved official accounts are able to support purchases via Tenpay. WeChat is connecting offline and online commerce, which could proveto be very attractive for brick-and-mortar retail. That said, mobile payments are still an emerging technology, so their effectiveness in the messaging space is largely unproven.

Brand Campaign:
McDonald's was the first account to support payments and offered a discount on tea, provided users purchased the tea upfront via Tenpay in the app. After buying it, users were sent a message with a QR code, which they could scan at a register as proof of purchase.[25]

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Best Practices for Brands

Staying on messaging
What to expect for 2014 and beyond

Messaging apps have only been in the market for a few years, so in many ways, it feels like the early days of social media marketing. At their core, though, messaging apps are simply about facilitating and enhancing private conversations. How will usage evolve as more people join these platforms, and what do brands need to do to stay relevant?

" I think the biggest challenge is the heavy competition in the space... With 10-15 chat apps globally, it stands to reason we will see a lot more acquisitions like Facebook/WhatsApp in the coming year."

Mike Cohen
VP and GM, InMobi

Creating content and context
Understanding brands' roles in the ecosystem

The ascent of messaging apps represents a desire for one-to-one and one-to-few communication instead of one-to-many. These apps are a haven where users talk to the people they care about most, and where there's less pressure to have the community at large like or retweet everything.

This is an inherently tricky proposition for brands used to a broadcast approach, and most messenger services are keenly aware that traditional advertising— banners, video ads, and mass messaging—could erode user experience. On the whole, they are more inclined to experiment with "native" experiences.

For brands and apps alike, creativity will be required to do "native" right. One simple branded activity or game that encourages daily use is more effective than a mirror image of Twitter or Facebook content.

Here are three basic rules to consider when designing campaigns for messaging services:

1. **Enhance the conversation**
   Provide truly shareable, fun content that lets people connect. With branded stickers, the challenge is to create images that let users express themselves in likely conversational scenarios. This works especially well for popular entertainment properties, but with the right creativity, it can work just as well for CPG, Auto, Retail, and a host of other verticals.

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2. **Create opportunities for fans to interact**
    The most popular game on Kik is called Costume Party, and it attracted over 1 million players in its first 24 hours.[27] Built by a company called Koala, it asked users to draw costumes on top of photos of friends and to share them rapidly in one-to-one conversations. Brands could build this type of game to engage existing fans while reaching new audiences.

3. **If you have to hard sell, give them something they really want**
    There have been successful coupon distribution and ecommerce campaigns on messaging apps, but they rely on giving users a notably exciting offer. Go beyond broadcasting typical messages about discounts or regular sales.

> " We keep on treating social media like it can be a broadcast mechanism. It won't be."
>
> **danah boyd**
> Author of "It's Complicated: The Social Lives of Networked Teens,"
> speaking at SXSW 2014

Selecting a platform
What to consider when comparing apps

The messaging space is fragmented, but ultimately, different apps can serve different purposes. If you're thinking about testing the waters, consider:

- Audience: Understand who the brand wants to target, and what behaviors they are already exhibiting, either on messaging or social platforms. For now Snapchat, Kik, and LINE are especially well suited for younger audiences, while Tango offers an older demographic.
- Location: If audience size is crucial, go with the app that is most popular in the market, which is strongly dependent on the country. If the brand has a niche audience, then their preference or the desired action should take precedence.
- Action: Decide what you want the user to do, and find the app that best allows them to accomplish that task. LINE's stickers might be great for promoting celebrities and upcoming movies, but WeChat may be better to drive ecommerce, and Kik might be best if you have a great existing HTML5-based game in need of exposure.

Most importantly, brands should remember that users are fickle, and transfer costs are low: when WhatsApp announced its acquisition by Facebook, many users fled to other services like Telegram, which has been downloaded over 8 million times since February 19th.[28] Hedge your bets, and be willing to try a variety of platforms to learn about the experience that your fans prefer.

> " Geographic nuances change quite significantly at the hyper-local level. In order to connect with your audience, you must understand what distinguishes that particular community from others at a regional, country, or city level."
>
> **Staci Youn**
> PR Manager, LINE

Building a community
How messaging makes community a better experience

Messaging apps have the potential to be a more powerful tool than traditional social networks to build true fan communities. Whereas Facebook and Twitter primarily let brands broadcast messages on a one-to-many level and let fans comment or respond, messaging services can allow fans to truly bond with each other over the shared love of a brand.

A successful online community is comprised of several components:
- Profile: the user's online identity, which can vary depending on the audience, is not necessarily permanent
- Images: photos, videos, stickers, and other content that helps people share their lives and construct an online identity
- 1-to-1 messaging: medium for personal, private contact with others in the community
- Mass distribution: the "network effect"— the more people available on the network, the more useful it becomes

Brands can contribute to the user's experience in two areas: visuals (or media), by providing people with shareable content; and messaging, both to and between users. In our work with Kik, we found that messaging was particularly successful in helping fans of One Direction connect and develop online friendships. When planning your brand's messaging strategy, don't forget to spark conversations between your loyal fans, rather than acting just as a one-way broadcast platform.

> " The best experiences developed by brands for Kik's users are 'shareable-by-design.' The content needs to feel authentic, and it can't feel like advertising."
>
> **Heather Galt**
> Vice President of Marketing, Kik

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Implementing a strategy
Companies helping brands access messaging apps

The scale and reach of messaging platforms is already massive, but the industry has significant work to do if it wants to compete with Facebook and Twitter in terms of offering turnkey opportunities and reporting to brands.

It's also important to note that while companies like Facebook and Google revel in collecting personal and demographic information to enhance targeting capabilities, many messaging apps pride themselves on collecting very little information—indeed, it's part of their appeal for users. Marketers may need to accept the targeting limitations of apps, or focus more on community building than traditional targeted ads.

As more companies enter the space, it will become even easier for major brands to efficiently develop and implement campaigns into and across messaging apps. That said, great third-party companies are already working hard to make messaging apps advertiser-ready, such as:

Adaptly

Adaptly is working with Kik to help brands buy Facebook and Twitter mobile ads that efficiently drive users to brand experiences on Kik. This slightly roundabout approach is actually one of the best ways to give brands the hyper-targeting they're used to— especially since it's possible to target users already on Kik. We expect Adaptly to expand its efforts to other messaging apps in the near future.

InMOBI

As one of the largest mobile ad networks, InMobi not only sells Tango ad inventory, but also runs paid media campaigns for some of the biggest messaging services in order to drive app downloads. With those relationships in place, InMobi is especially well positioned to offer new ad inventory on major messaging apps as it becomes available.

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mopub

The MoPub Marketplace is a programmatic platform that connects direct advertisers with over 95 demand partners. It works with messaging app Tango, as seen in its work with Supercell.

> " As the landscape for 'social' experiences continues to fragment, brands need to understand and develop more scalable ways to leverage the myriad of opportunities they'll be presented with. Common technology layers for media buying and planning will become more agnostic, and the ability to adapt quickly will be key."
>
> **Nikhil Sethi**
> CEO, Adaptly

A new mindset for a new ecosystem

In today's on-demand environment, brands must shift their mindset: instead of dictating how and when consumers engage with brands, now consumers can control their interaction. Brands must seek inclusion in order to influence how consumers talk about the brand with their peers. Ready to get started? These four tips will help guide the way:

1. **Messaging apps are "SMS+"**
   Messaging as a behavior isn't new; it's simply the continuation of texting and instant messaging that was established over 20 years ago. Smartphones are simply making it easier for people to chat whenever and wherever the mood strikes them.

2. **People love messaging apps because they can better control and dispose of online identities**
   Unlike profiles on other forms of social media, which are meant to be consistent and long-lasting, messaging apps let users assume and drop personalities, protecting their identity while allowing them to connect. This is especially important to young adults, as we discussed in our Outlook 2014 report.

3. **Content and context are the key to connecting**
   Before jumping into the messaging ecosystem, determine where and how your brand can add to the dialogue. Consumers are looking for content that improves their experience, not spam on a new medium.

4. **Third parties can help enhance brand executions, simplifying implementation**
   InMobi, Adaptly, MoPub, and other companies are quickly ramping up to help brands participate in messaging apps, so there's no excuse for not entering the space.

Thanks!
If you have any questions, please feel free to contact us.

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