DEEP DIVE

GROUP 6

SOCIAL & MOBILE MARKETING TRENDS IN ASIA

AND HOW TO ADAPT THEM FOR BRANDS IN AUSTRIA



ANNA DI DONATO
KRISTIAN PAULI BENJAMIN NIKULA
ALISSIA HAGEN
STELLA NÖLKENHÖNER
LUKÁŠ HOLUB
KATHARINA JANSEN
ISABEL ORTNER
GIULIA MARANGONI
ADRIAN ANDREAS THEUERKAUF

DEEP DIVE

GROUP 6

AGENDA

1 - INTRO

→ Facts and figures about the status quo

2 - THE WHAT

→ These are the social and mobile marketing trends in Advanced Asian Economies right now

3 - THE WHY

→ In which macro-environment are they flourishing
→ PESTEL analysis

4 - THE HOW

→ How to utilize these insights to level up social and mobile marketing in Austria
→ Recommendations for our clients Manner and Swarovski

INTRO

FACTS & FIGURES

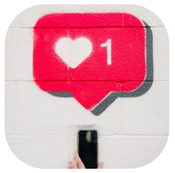
GLOBAL SOCIAL & MOBILE MARKETING MARKET



6.04 BN
internet users



5.78 BN
mobile phone subscribers



5.66 BN
social media user identities



3.41 BN
purchase online

54% **of online consumer goods are purchased through mobile phone:**

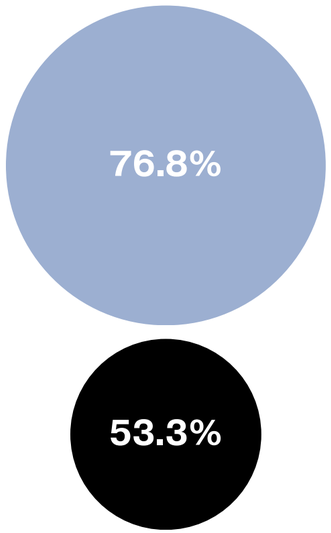
- Mobile commerce is one of the fastest-growing segments of global e-commerce
  → Expanding by over 5% annually
- Key drivers: high smartphone penetration and social media integration
- It's transforming how consumers discover, evaluate, and purchase products worldwide

17% **share of social commerce on total e-commerce**

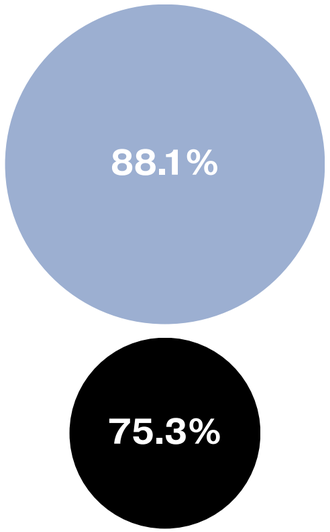
E-COMMERCE IS TRANSFORMING. GUESS, WHERE THE EPICENTER IS?

INFRASTRUCTURE & BEHAVIOR

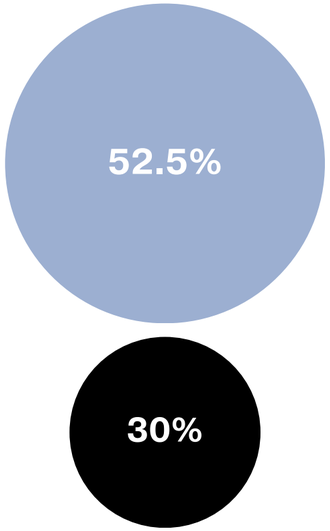
Share of mobile internet traffic (Asia vs Europe)



Social media penetration (East Asia vs Europe)



Share of 5G connections (East Asia vs Europe)



Asia dominates the online world:

- Asia accounts for 45.7% of global internet users
- High 5G adaptation supports not only mobile connectivity, but also efforts to develop modern, inclusive, and sustainable digital nations by enabling enterprises and public services to adopt more advanced technologies

Asia Pacific social commerce:

- Largest revenue share (71,6%) of the Global social commerce market in 2024
- The social media landscape in the region is among the most dynamic in the world, and being online is deeply embedded in daily life

MOBILE FIRST

Asia’s mobile dominance was no incremental evolution:

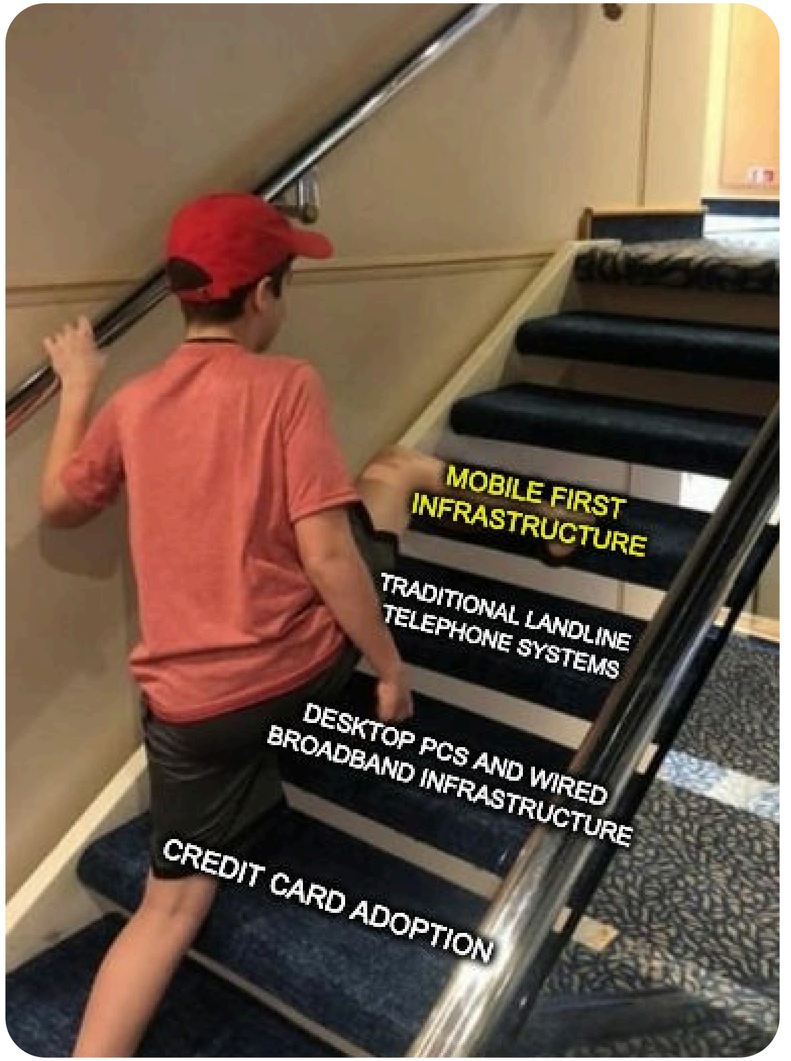
- Many countries bypassed traditional desktop infrastructure entirely
- Massive jumps in mobile internet penetration in the past 10 years
- 88,9% of internet users are accessing through their phones (2023, SEA)

→ ***“stage-skipping” technological adoption***

Social and commerce platforms …

- are now developed natively for mobile from the outset
- create seamless integration and innovative business models like super-apps and social commerce
- now influence global standards

→ ***What succeeds in Advanced Asian Economies often sets the trend for other markets.***



WHAT

ARE CURRENT SOCIAL AND MOBILE MARKETING TRENDS IN THE MOST ADVANCED ASIAN ECONOMIES?

WHAT

TREND 1 OF 4

MOBILE OPTIMIZATION

What is it?

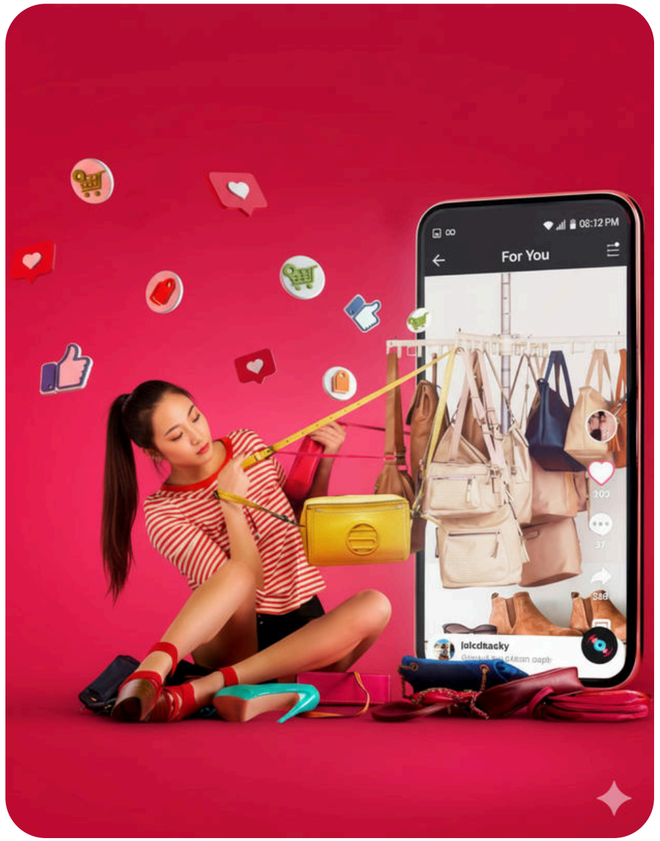
- This isn't just about being mobile-friendly, it's about being mobile-native
- APAC achieved *Mobile Infrastructure Excellence*: High smartphone penetration, extensive 5G rollout, and affordable data plans created a perfect environment for mobile selling

Why is it important?

- Mobile-native ads (Stories, Reels, in-app banners) outperform desktop formats
- In-app payment ecosystems like Alipay, Line Pay, or ShopeePay streamline checkout
- Instead of merely driving traffic to a store or website, campaigns are living inside the social-mobile moment
- Mobile apps convert 157% more than a mobile web session

How are companies succeeding in social and mobile commerce?

- Companies are turning mobile and social platforms into direct sales engines using in-app shopping, influencer partnerships, and seamless mobile checkouts to drive higher conversion rates by **reducing friction between discovery and purchase**



WHAT | TREND 2 OF 4 | DEMONSTRATION LINK

LIVE STREAM SELLING

What is it?

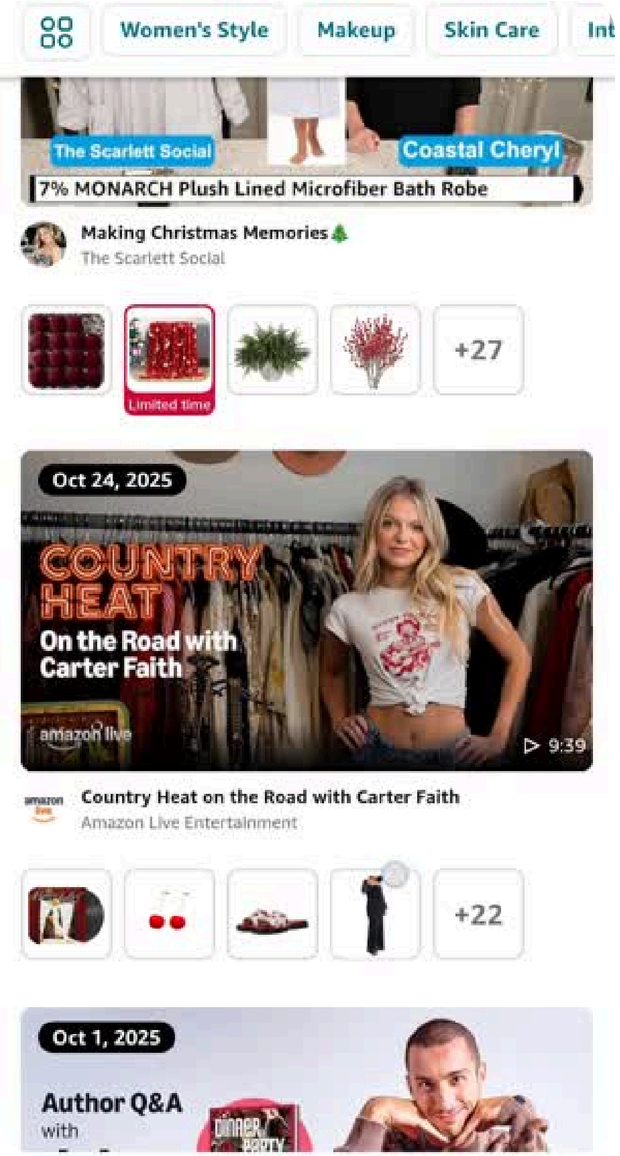
- Functions as a conversion machine where a creator hosts a live session, entertaining viewers who interact in chat while watching real-time product demonstrations with visible listings
- Encourages impulse buying, effectively merging content, review, community, engagement, Q&A, and checkout into one immediate, seamless experience

Why is it important?

- The power of social selling lies in its much higher conversion rate
- McKinsey estimates live-commerce conversions can “approach 30%,” up to 10× higher than conventional e-commerce
- That is due to it being an all-in-one conversion channel

Economics of live stream selling?

- Money is generated through platform commissions, brand sales revenue, influencer commissions, and performance-based bonuses, as hosts drive impulse purchases while platforms and payment providers take transaction and referral fees



IF VIDEO DOESN’T PLAY, CLICK “DEMONSTRATION LINK”

WHAT

TREND 3 OF 4

AI-DRIVEN PERSONALIZATION & HYPER-LOCALIZED CONTENT

What is it?

Asian brands, especially in China, Japan, and South Korea, are using AI to automatically tailor marketing content to specific target groups, locations, or even individuals.

- AI decides which photo or video consumers see
- AI adjusts the language, music, and emojis used
- AI optimizes the timing and context of ads
- AI personalizes recommendations and prices



Why is it important?

- Asian markets are extremely diverse & data-driven

→ one-size-fits-all ads don’t work

- AI enables faster, more culturally relevant communication
- In Asia, this level of personalization is already standard practice

How to succeed?

→ Everyone receives the version of the content that best matches their culture, style, and behavior

WHAT

TREND 4 OF 4

SUPER-APPS

What is it?

- It's a single **mobile application** combining multiple digital services within one ecosystem
- Users can chat, buy, pay, and earn rewards without leaving the app

Why is it important?

- Removes barriers between communication and commerce
- Enables use of first-party data for personalization
- Builds loyalty and convenience through one ecosystem
- In Asia, most people mainly use their smartphones for almost all digital activities (for example, mobile usage is higher than laptop usage)

How does a super app function?

- Messaging & social media – e.g., WeChat, LINE, KakaoTalk
- Shopping & e-commerce – browsing and buying directly in-app
- Payments & finance – digital wallets like WeChat Pay or LINE Pay
- Mini-programs / mini-apps – booking taxis, food delivery, brand stores
- Customer service & loyalty – chatting, earning points, getting offers



WHY

ARE THESE TRENDS HAPPENING?
ARE THEY TRANSFERABLE TO AUSTRIA?

PESTEL ANALYSIS AAE

POLITICAL	*ECONOMIC*	*SOCIAL*
• Government policies shape the digital landscape across markets • China: autocracy, Western apps blocked, strongly monitoring inter-net access, promoting local firms • Japan: democracy, open internet, government acts supportive • Korea: democracy, strong support for tech, careful monitoring • Singapore: one-party-government, “Smart Nation” initiative, close monitoring of online activities	• Major economies • Large consumer bases and high purchasing power • China: huge middle class, strong e-commerce led by Alibaba & WeChat • Digital ad spend on the rise, traditional media spend declines • Digital marketing is highly scalable and profitable	• Still youth-heavy, but rapid population aging • High social media penetration • High trust in influencer commerce, but increasing scepticism and demand for authenticity • Digital, urbanized, mobile-first: social media is an integral part of everyday life and culture • Specific platform preferences by country • Tech-driven societies

PESTEL ANALYSIS AAE

TECHNOLOGICAL	*ENVIRONMENTAL*	*LEGAL*
• Mobile-first markets with near-universal smartphone access • China/Korea/Japan are technological leaders in 5G, AI, and algorithm-driven platforms • World-class digital infrastructure • Local apps dominate, each country has its own digital ecosystem • Innovation pushed by governments	• Rising eco-consciousness among consumers, awareness of high energy usage in data centres • Strengthened ESG disclosure requirements, and environmental claims must be verifiable • Rising regulatory pressure on sustainability • Governments support efforts to reduce the carbon footprint of companies	• Increasingly strict data protection and privacy laws, varying by country • Cross-border data transfer restrictions • Regulatory constraints on influencers and advertising claims • Strict rules on undisclosed paid promotions and deceptive ads • Sometimes licenses and approvals for AI content are needed, but no overarching law yet

AUSTRIA = ASIA?

- Smaller population, more privacy-sensitive and multi-device oriented audience, stricter legal context (EU)
- Macro-environment is not the same, **trends are not 100% transferable - they need to be adapted**



HOW

CAN MANNER AND SWAROVSKI UTILIZE THE INSIGHTS FROM ASIA TO LEVEL UP THEIR MARKETING IN AUSTRIA?

AI PERSONALIZED ADS

Manner should use AI to automatically adapt social media ads to the different Austrian regions and their respective dialects.

How it works:

- People in Vienna will see Manner ads in the Viennese dialect, people from Carinthia will see them in the Carinthian dialect
- It will make the brand seem closer and more authentic, adding a humorous touch to the ads
- This will make viewers remember them longer



LIVE SHOPPING

Before special occasions/holidays or before the launch of new products, Manner should organize Live Shopping Events on Instagram or YouTube.

How it works:

- Offered products vary depending on the holiday (e.g., gingerbread cookies during Christmas season and chocolate bunnies before Easter)
- Easy and convenient for customers who need last-minute presents and do not have time to do a lot of research and shopping
- Before product launches → customers can get a first glance at the new product and instantly order it
- Members of Manner Club get special discounts during livestream and have access to exclusive merch related to holiday/new product
- Hosting collaboration with influencers (preferably micro influencers from previous campaigns) or sponsored ski jumpers
- Optional add-on: partnership with Foodora → viewers will be able to order products and receive them within 30 minutes



CHRISTMAS WISHLIST

The “Swarovski Wishlist DM” is a mobile-native Instagram feature that allows users to create, view, and shop their personal Swarovski wishlist directly within Instagram DMs — simply by replying “Wishlist” to Stories or Reels.

How it works:

- Users reply “Wishlist” to a Swarovski Story or Reel featuring Christmas-inspired products.
- This triggers an automated Swarovski message on Instagram, guiding users through a quick, personal experience.
- Swarovski then creates a custom digital wishlist — “Your Sparkle List” — with all the products they interacted with.
- Users receive a direct message from Swarovski with their wishlist and a link to shop all items instantly.
- Opening the link takes them to the Swarovski website, where all items are pre-loaded in a cart — ready for instant checkout or easy sharing with friends and family.



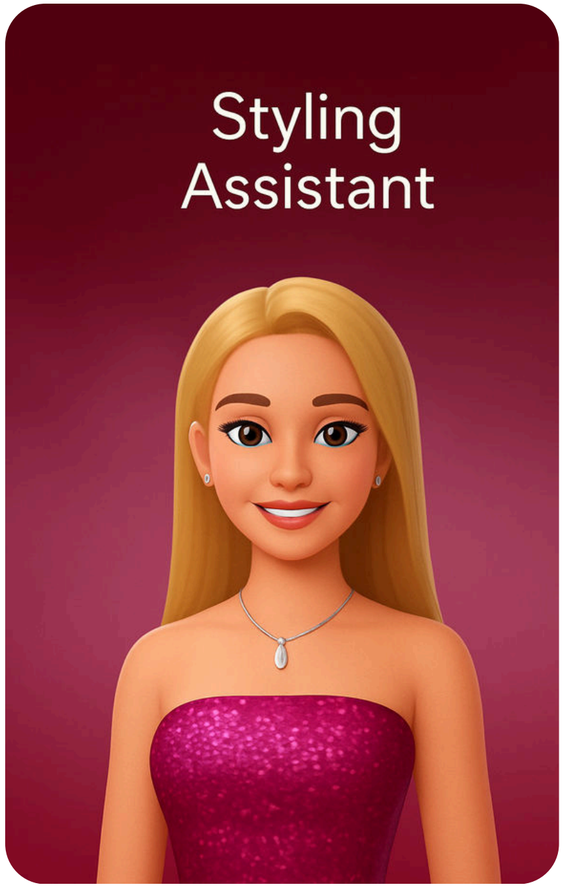
APP

Adapting the Asian super-app model to the Austrian market: The Swarovski “Super-App” combines shopping, personalization, and community in one platform, offering AR try-ons, live events, and AI styling to create a luxury, mobile-first experience that increases convenience and strengthens brand loyalty

Key features:

- Augmented Reality (AR) Try-On
- AI Personal Stylist (inspired by Victoria Swarovski)
- Swarovski Community Space
- Omnichannel Integration





LET’S DISCUSS!

APPENDIX | TREND 3 OF 4 | EXAMPLE

CASE STUDY: 12GO (THA)

12GO is an online travel agency operating across Southeast Asia that …

- partnered with Google APAC to test **AI-powered digital ad campaigns**
- **s**witched from manual targeting to automated AI campaigns, **personalizing ads in real time**

How? The AI analyzed signals like …

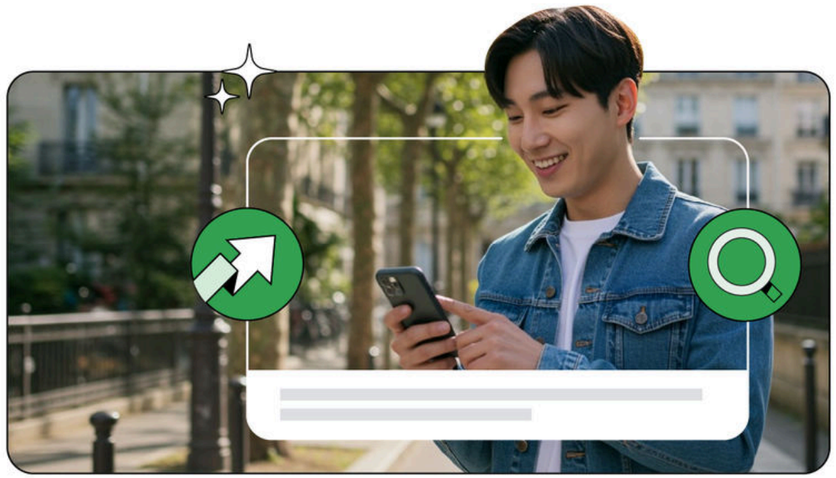
- location, device type, and search history
- travel intent and previous booking data

… and automatically decided:

- which ad text or image to show
- how much to bid
- which channel to use (Search, Display, YouTube)

Results (6-week A/B test):

- +160% conversions (2.6× more bookings)
- +230% conversion value (3.3× higher total revenue)
- Higher efficiency / ROAS – more budget invested in high-value users





APPENDIX | TREND 4 OF 4 | EXAMPLE

CASE STUDY: STARBUCKS X WECHAT

To meet Chinese consumers' expectations for seamless digital experiences, Starbucks partnered with Tencent (WeChat) to launch the **"Starbucks Now" Mini-Program** – a full ordering, payment, and loyalty experience inside WeChat.

What users can do:

- Order and pay via WeChat Pay
- Send digital gift cards in chat
- Earn & redeem Star Rewards
- Get personalized offers
- Locate stores – all without leaving WeChat

Results & impact:

- Digital orders: ≈ 26 % of all transactions (within 1 year)
- Membership growth: +45 % YoY
- Gift transactions: +100 % YoY
- Customer retention: +40 % higher than non-WeChat users



MANNER SWOT ANALYSIS

	POSITIVE	NEGATIVE
INTERNAL	***STRENGHTS:*** • strong brand identity (tradition heritage brand for over 130 years) • high brand awareness & loyalty in Austria • certified sustainable fairtrade chocolate • local production in Austria • big product portfolio	***WEAKNESSES:*** • improvable online presence • traditional marketing • dependent on Austrian & German market
EXTERNAL	***OPPORTUNITIES:*** • growing popularity of social & mobile marketing • live shopping • grow Manner accounts on various platforms & reach younger target group • use AI to precisely target different target groups	***THREATS:*** • increased awareness about health and sugar • competition from other brands (Heindl, Milka, Lindt) • lag behind compared to other brands regarding online presence if no action is taken

SOURCES

https://www.meltwater.com/en/global-digital-trends
https://www.meltwater.com/en/blog/social-media-trends-habits-southeast-asia
https://www.gsma.com/solutions-and-impact/connectivity-for-good/mobile-economy/wp-content/uploads/2025/08/The-Mobile-Economy-Asia-Pacific-2025.pdf https://www.statista.com/statistics/1449284/retail-mobile-commerce-revenue-worldwide/
https://www.statista.com/statistics/1251145/social-commerce-share-worldwide/
https://documents1.worldbank.org/curated/en/328941558708267736/pdf/The-Digital-Economy-in- Southeast-Asia-Strengthening-the-Foundations-for-Future-Growth.pdf
https://www.go-globe.com/digital-landscape-in-asia-statistics-and-trends/
https://www.pulse-advertising.com/resources/social-media-news/southeast-asias-dominance-in-social-commerce-trends-how-europe-and-usa-can-prepare/
https://techforgoodinstitute.org/blog/perspectives/leapfrogging-in-southeast-asia-a-path-to-digital-and-economic-transformation/
https://www.statista.com/statistics/306528/share-of-mobile-internet-traffic-in-global-regions/
https://www.statista.com/statistics/269615/social-network-penetration-by-region/
https://capitaloneshopping.com/research/digital-wallet-statistics/
https://www.grandviewresearch.com/industry-analysis/social-commerce-market
https://www.oecd.org/corporate/esg-disclosure-asia-2024.html
https://regco.sgx.com/
https://nielseniq.com/global/en/insights/report/2023/sustainability-report-asia/
https://www.tandfonline.com/doi/full/10.1080/23311975.2025.2525499#d1e202
https://www.iea.org/reports/data-centres-and-data-transmission-networks
https://kpmg.com/sg/en/campaigns/kpmg-singapore-budget-2025/proposal-ready.html
https://economictimes.indiatimes.com/news/international/global-trends/us-news-no-degree-no-discussion-china-tightens-the-grip-on-influencers-and-its-new-law-has-sparked-massive-debate-online-check-details/articleshow/124929667.cms?from=mdr
https://www.pdpc.gov.sg/overview-of-pdpa/the-legislation/personal-data-protection-act
https://www.netinfluencer.com/china-now-requires-degrees-for-influencers-discussing-professional-topics/
https://rewe-group.at/en/newsroom/2025/03/live-live-shopping-bipa-sets-new-standards-in-e-commerce-with-innovative-interactive-shopping-format-in-real-time
https://iclg.com/practice-areas/consumer-protection-laws-and-regulations/japan
https://iapp.org/news/a/preparing-for-compliance-key-differences-between-eu-chinese-ai-regulations
https://www.oecd.org/en/publications/pensions-at-a-glance-asia-pacific-2024_d4146d12-en/full-report/demographic-old-age-to-working-age-ratio_2f411197.html, https://link.springer.com/article/10.1007/s42379-025-00198-3
https://www.statista.com/topics/6606/social-media-in-asia-pacific/?srsltid=AfmBOoqIR3pD3xIhaLah2RS2roiEW8Kz1GlmweO1zgNb4-Q5OpvyQW7C
https://www.statista.com/topics/6606/social-media-in-asia-pacific/?srsltid=AfmBOoqtw8ha_FWmhlicZyGaMrMPjzEaoKVgMN6S_x68P9SkW74j9C0G#topicOverview
https://www.statista.com/statistics/250546/leading-social-network-sites-in-china/

SOURCES

https://longadvisory.eu/en/social-media-and-platforms-banned-in-china/#:~:text=While%20social%20media%20platforms%20like,brands%20absolutely%20need%20to%20know
https://www.comms8.com/blog/2024/chinas-digital-dominance-social-media-amp-e-commerce-power-growth-in-2024#:~:text=,monthly%20active%20users%20in%202023
https://freedomhouse.org/country/japan/freedom-net/2024#:~:text=Does%20the%20state%20block%20or,00%206
https://www.humblebunny.com/japan-top-social-media-networks/#:~:text=Social%20Media
https://www.digitalmarketingforasia.com/most-popular-social-media-in-apac/#:~:text=93.4%20,compared%20to%20other%20Asian%20nations
https://freedomhouse.org/country/south-korea/freedom-net/2024#:~:text=In%20addition%20to%20blocking%2C%20some,request%20the%20removal%20of%20content
https://asianbusinessreview.com/economy/news/singapore-nears-full-digital-saturation-96-internet-penetration#:~:text=Singapore%20remains%20one%20of%20the,Meltwater%20and%20We%20Are%20Social
https://www.amnesty.org/en/latest/news/2020/02/singapore-social-media-abusive-fake-news-law/#:~:text=forward%20to%20this%20year
https://www.imf.org/en/Publications/fandd/issues/2018/09/asia-digital-revolution-sedik#:~:text=E,commerce%20market%20in%20Southeast%20Asia
https://www.emarketer.com/content/asia-pacific-ad-spending-2025#:~:text=1,search%20and%20digital%20drive%20growth
https://datareportal.com/reports/digital-2024-japan#:~:text=,9%C2%A0percent
https://www.imarcgroup.com/singapore-ecommerce-market#:~:text=%3E%20The%20Singapore%20e,growing%20preference%20for%20online%20shopping
https://www.dcconnectglobal.com/from-kimchi-to-cloud-south-koreas-digital-transformation-journey/#:~:text=,percent%20of%20the%20total%20population
https://www.statista.com/chart/22001/projected-5g-market-penetration-selected-countries/?srsltid=AfmBOooLHq9cuJ2Yguhtbx_bvxMIFowx_Z7QDt0f-DgLN8pViNl6BkTQ#:~:text=5G%3A%20South%20Korea%20Stays%20in,55%20percent%20in%20the%20US
https://news.cgtn.com/news/2022-08-31/China-hits-1-05-billion-internet-users-74-4-penetration-1cWikCwAMWk/index.html#:~:text=users%20news,of%20them%20being%20cellphone%20users
https://soax.com/research/mobile-website-traffic
https://www.demandsage.com/smartphone-usage-statistics/#:~:text=Latest%20Smartphone%20Usage%20Statistics%20,each
https://awisee.com/blog/live-shopping-in-europe/#:~:text=In%202025%2C%20live%20shopping%20in,commerce%20strategy.%20Consider%20these%20stats
https://www.manner.com/de-at/ueber-manner/
https://josef.manner.com/de/investor-relations/finanz-und-zwischenberichte
https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/ready-for-prime-time-the-state-of-live-commerce
https://firework.com/blog/top-livestream-shopping-statistics-that-you-cant-ignore-for-your-e-commerce-business
https://sprii.io/inside-live-shopping?submissionGuid=37175891-cf91-4ccc-8608-00465c73edf6
https://www.statista.com/chart/34033/estimated-live-streaming-e-commerce-revenue-by-continent/?
https://ecdb.com/blog/livestream-commerce-in-china-taobao-leads-but-its-dominance-fades/4598
https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/ready-for-prime-time-the-state-of-live-commerce
https://buildfire.com/mobile-commerce-trends
https://www.cnbc.com/video/2023/02/14/us-livestream-shopping-takes-off-on-tiktok-amazon-live-and-youtube.html
https://www.thinkwithgoogle.com/intl/en-apac/marketing-strategies/automation/international-expansion-ai-powered-ads/?utm_source=chatgpt.com

AI DISCLOSURE

ChatGPT was used

- for image generation (slides 18, 19, 20)
- to provide linguistic support (slides 19, 20)
- to help with research (slides 8, 9, 10, 11, 13, 14)
- to summarize sources (slides 4, 5, 6)

Perplexity was used

- for text generation (slides 4, 5, 6)
- to help with research (slides 4, 5, 6)

Gemini was used

- for image generation (slide 8)