MMA

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MOBILE MARKETING ECOSYSTEM REPORT 2018, INDIA

Foreword

Since the last time we saw you there have been dramatic shifts in multiple areas. Demonetization in India saw massive uptake on digitization of payments, and Trump took over the presidency in the US. In the same period, Reliance Jio changed the Telecom ecosystem in India by adding **200+ million new mobile subscribers**, shaping it's vision of "Internet for Every Indian".

We also saw 4G in India becoming mainstream, on both network and smartphone tech adoption, it completely dominated the market. **4G featurephone** is an innovation that will take the India market by storm and will stay for long.

Lower data cost caused **massive growth in data consumption via mobile devices. Gaming, OTT Video and Digital Audio platforms** became the flag bearers of increasing data traffic. India saw the launch of seven big OTT platforms in the last 2 years (namely Netflix, Amazon Prime, Hotstar, Voot, Zee5, Sony Liv and Wynk). With the growing OTT consumption and the need of vernacular content, we think in the next 5 years' vernacular content users will grow 12X compared to 2X growth for English content consumers.

Gaming is another category showing growth in India, as it caters to not only to seasoned gamers, but also casual gamers like kids on their parents phones. Also, by introducing relevant native ad formats like reward videos, gaming has become a top contender for marketers to spend on.

In 2017, 70% of India's digital advertising budget was spent on mobile, wherein traditional FMCG and BFSI brands also saw uptake in something as advanced as programmatic spend. In this report we give all marketers a quick peak on a basic guide on how programmatic works and its pros and cons, and its future evolution. With the second edition of the report, we bring you up-to date on the latest trends in data growth, content play, programmatic, device status; how India is moving towards a new era of mobile marketing, seeing rampant growth in both usage and spends. We hope you like our? efforts and do share your feedback on what you want in the next report.

Happy Reading!

Table of Content

Key Trends and Insights

The Jio Brigade!

Since its launch in August 2016, Jio added 200+ million users, representing 18% of the mobile subscribers market in India. Jio helped establish 4G in India making it affordable for people of all financial backgrounds. Competitive telecom brands had to decrease their data costs by 40% so that their current customers don't opt for/get a MNP (Mobile Number Portability) to Jio. Being the first 4G network in India, Jio now holds 40% of the broadband traffic in India and it will keep on growing exponentially.

4G now holds approximately 82% of the data payload in the country!

As 2G users decrease with every passing month, 3G and 4G will lead the mobile internet path till 2019 before we see the launch of 5G. Since the launch of 4G in late 2015, the total data payload grew 7.5x and 2.4x in 2016 and 2017 respectively.

The 4G monthly data consumption is 3.8x greater than 3G data usage. 4G will lead the growth curve, although 3G will also continue to grow in the years to come.

Compared to Urban India, Rural India is bringing three times more people online!

India added 67 million mobile internet users in 2017,out of which 44 million were from Rural India. Rural India's mobile internet users saw a 19% YoY growth, almost triple the 6% YOY growth Urban India. India will cross 500 million mobile internet users by the end of 2018, we foresee that this growth will be led by the rural populace.

OTT platforms majorly engulf data traffic!

OTT audio and video combined reach more than 200 million users in India. Video takes the largest share of the pie of content consumed on mobile internet, projecting a growth from 49% in 2016 to 75% in 2021. OTT players are creating original content and also including international content, which is helping them gain newer audiences and increase view time. Additionally, Indian YouTubers are creating great content that has also increased video viewing in India. Growing time spent on these platforms has also led to more advertising inventory. This also makes ads on video platforms more
receptive due to its good content value. The OTT market will keep on growing as good content and good vernacular content is created for audiences from all regions.

Mobile Gaming - the next big thing for Indian marketers!

Why gaming you ask? Because 84% of mobile subscribers have games on their devices. Mobile gaming in India is high due to freemium games and free access and the segment will continue growing at the rate of CAGR 87% till 2020. Interestingly, this boom occurred with the help of female gamers who spent 70 mins a day playing games on their mobile devices. 34% of Indian mobile gamers make in-app purchases, mostly paved by card and strategy games. For marketers gaming is a platform which helps in reaching a varied audience, that aren't accessible anywhere else.

In the next 5 years Chat Application, Government Sites and Digital Payments will lead to more vernacular content consumers online!

The Indian language internet users have grown from 42 million in 2011 to 234 million in 2016, a 4x growth, almost double from the 2x growth seen in the English language internet users. This has happened due to major online platforms like e-commerce and social media platforms launching their content in vernacular languages, reaching out to a much bigger and diverse Indian audience. It is anticipated that vernacular language users will increase 12 folds by 2021 and this will only be possible if OEMs create keyboards that are available in all languages, as currently 70% of vernacular content consumers find it tough to work with an English keyboard on their mobile device.

The average monthly mobile spends reduce!

The 4G data surge led people to use more data than voice. Furthermore, lower data package costs helped reduce mobile spends. This led to a 21% drop in ARPU (Average Revenue per User). We think in the coming years as more and more people use data to make calls, voice spends will decrease as will the average mobile spends.

Featurephones are here to stay!

Contradicting all predictions, featurephone* shipments remained higher than smart-phone shipments and they are equally an urban phenomenon as they are a rural one. With featurephones equipped with better quality cameras, more RAM and storage space at half the price of the smartphone, people prefer investing in them instead of a smartphone. Soon Jio and Micromax will be launching a 4G featurephone that will cost less than 2k. With these updates, featurephones are here to stay for the long term.
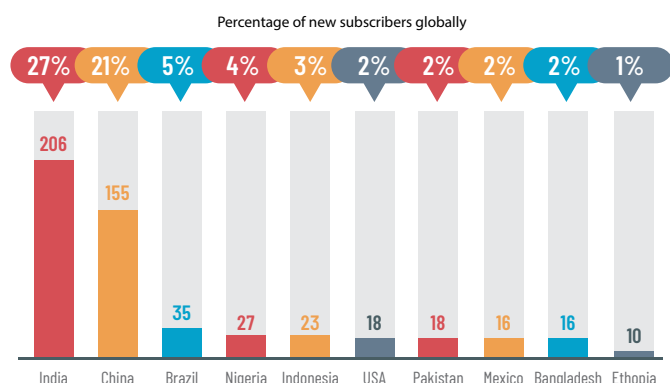
*The definition of featurephone is given in detail in the appendix
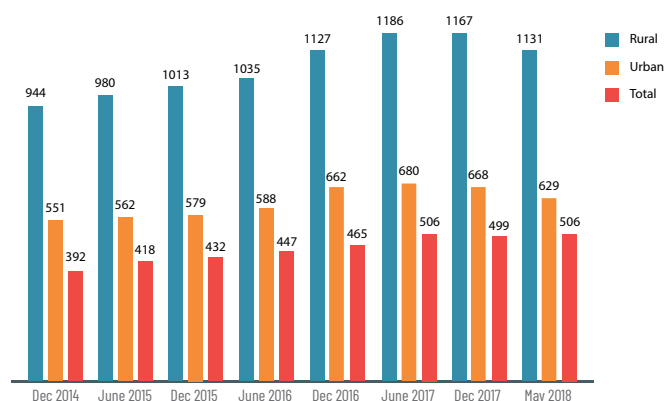
Part I: Reach of Mobile among consumers in India

India ahead of China and expected to add over 200 Mn new subscribers by 2020

20%[1] of the total mobile subscribers globally now reside in India. By 2020, 27% of new subscribers added globally will be from India - making India the largest contributor globally to the mobile economy, placing India significantly ahead of other emerging economies such as Indonesia and Brazil, who contribute to less than 5% of new subscriber growth.

Global markets by additional subcribers, 2016 -2020
(Million)

Percentage of new subscribers globally

India	China	Brazil	Nigeria	Indonesia	USA	Pakistan	Mexico	Bangladesh	Ethopia
27%	21%	5%	4%	3%	2%	2%	2%	2%	1%
206	155	35	27	23	18	18	16	16	10

Mobile Subscribers in India (in Millions)

Rural
Urban
Total

	Dec 2014	June 2015	Dec 2015	June 2016	Dec 2016	June 2017	Dec 2017	May 2018
Rural	944	980	1013	1035	1127	1186	1167	1131
Urban	551	562	579	588	662	680	668	629
Total	392	418	432	447	465	506	499	506

Since the advent of Reliance Jio, India had added over 3 times[2] more subscribers compared to its subscriber growth since 2014. Subscriber growth came from both urban and rural markets - with 53 million rural and 79 million urban new mobile subscribers added during the period.

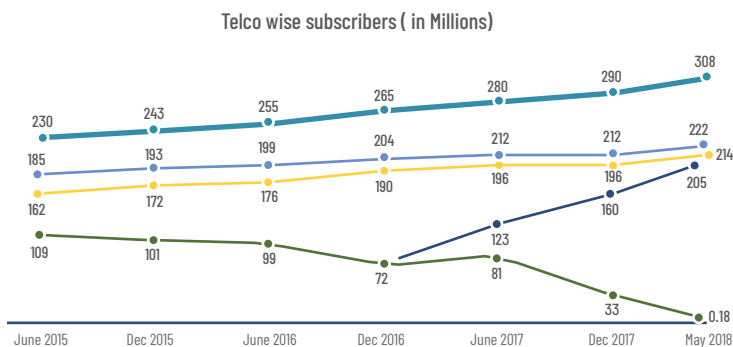Access service provider-wise market shares in term of wireless subscribers

TATA
2.4%

BSNL
10.0%

Reliance Jio
18.2%

Bharti Airtel
30.5%

Idea
18.9%

Vodafone
19.7%
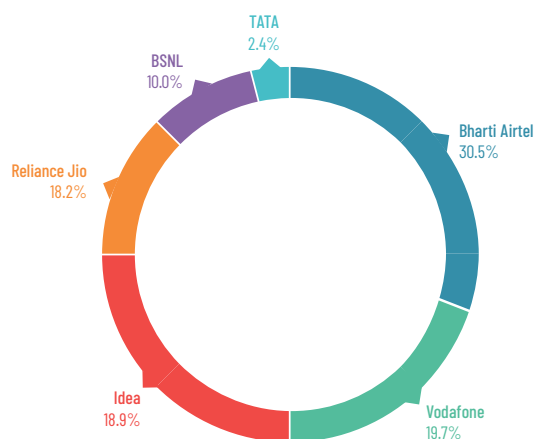
Reliance Jio gained a whopping 18% market share within 6 months of launch; the Top 3 telcos continued to grow too

In the last 2 years there is minimal decrease in the top three Telecom players in India. With the incoming of Jio, the top three Telecom players rarely saw major impact (downturn) on their numbers. Jio took it's share from the parent company Reliance and also onboarded new mobile subscribers and turned many existing subscribers into dual SIM users.

[1]GSMA report 2017 I [2]TRAI June 2018

Telco wise subscribers (in Millions)

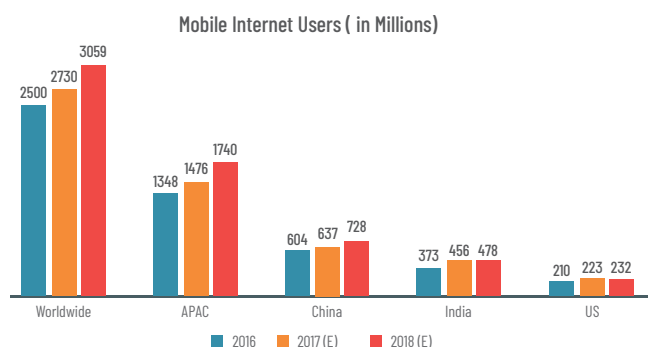|	June 2015	Dec 2015	June 2016	Dec 2016	June 2017	Dec 2017	May 2018
	230	243	255	265	280	290	308
	185	193	199	204	212	212	222
	162	172	176	190	196	196	214
	109	101	99	72	81	33	0.18
					123	160	205

As anticipated, the Jio launch significantly changed the dynamics of the mobile consumer in India and made data ubiquitous, specifically proliferating the rapid adoption of 4G data subscriptions.
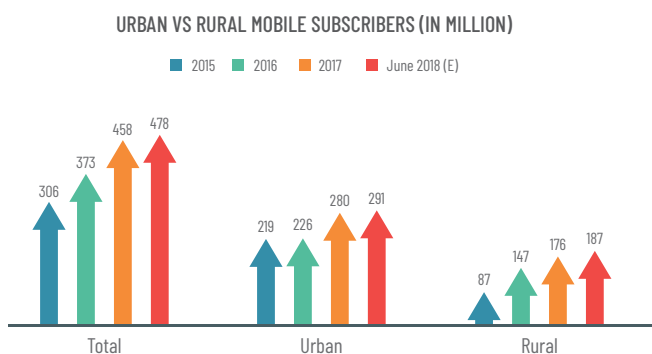
Since its inception in August 2016 Jio has added almost 200 million[3] mobile subscribers and all subscribers are data users, using an average of 1GB[2] data every month. Jio users have been said to consume 100 Crore GB[4] of data per month which is 50% more than China and almost equal to the mobile data consumed by the entire US.

India continues to be the fastest growing mobile internet economy in the world

Worldwide mobile internet users grew by 9.2%[5] in 2017, while India grew at over double the rate at 22%. The pace of growth in mobile internet users puts India ahead of the other two major economies, China and the US, which saw a growth rate of 5.4% and 6.2% respectively. India's growing millennial

Mobile Internet Users (in Millions)

	Worldwide	APAC	China	India	US
2016	2500	1348	604	373	210
2017 (E)	2730	1476	637	456	223
2018 (E)	3059	1740	728	478	232

population and it being a developing country are the main reasons behind the mobile growth. This also creates many opportunities for Indian marketers to explore mobile as a digital medium more extensively.

URBAN VS RURAL MOBILE SUBSCRIBERS (IN MILLION)

	Total	Urban	Rural
2015	306	219	87
2016	373	226	147
2017	458	280	176
June 2018 (E)	478	291	187

There has been a rapid growth in the number of mobile internet users, in the past 2 years. We have added almost 150[6] million new mobile internet users (2015-2017) and expect it to increase significantly in 2018. By the mid of 2018 it is estimated that India will reach nearly half a billion mobile internet users.

[3]TRAI Jan 2016/Jan 2017 | [4]http://telecom.economictimes.india-times.com/news/thanks-to-reliance-jio-india-becomes-top-mobile-data-user/57269548 | [5]eMarketer Estimates/IAMAI & Kantar IMRB Mobile Internet Report 2016 |[6]IAMAI & Kantar IMRB Mobile Internet Report 2016

61%[6] of mobile internet users in India are still from urban India, compared to 39% of users from rural India. However, of the new users being added there has been a significant growth from rural users, adding 100 million mobile internet users since 2015, a CAGR (Compound Annual Growth Rate) of 29% .

Growth in mobile internet subscribers, specifically urban India, brings data usage growth to newer areas beyond communication and social networking

Purpose of Internet Access Urban vs Rural (2016 vs 2017)

Communication   Social Networking   Entertainment
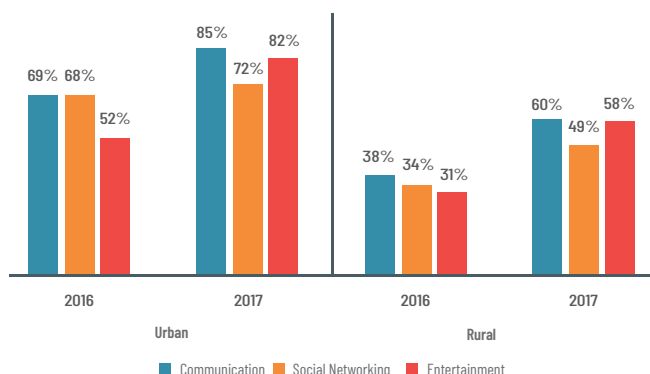
The rise of several international and local OTT players in the video and music category (e.g. Netflix, Gaana, Wynk, Hotstar, Voot, Amazon Prime etc.) in 2016 gave an impetus for driving data consumption in the category, along with rapid drop in data tariffs for consumers. Urban India data spent on entertainment grew 58%[7] YoY.
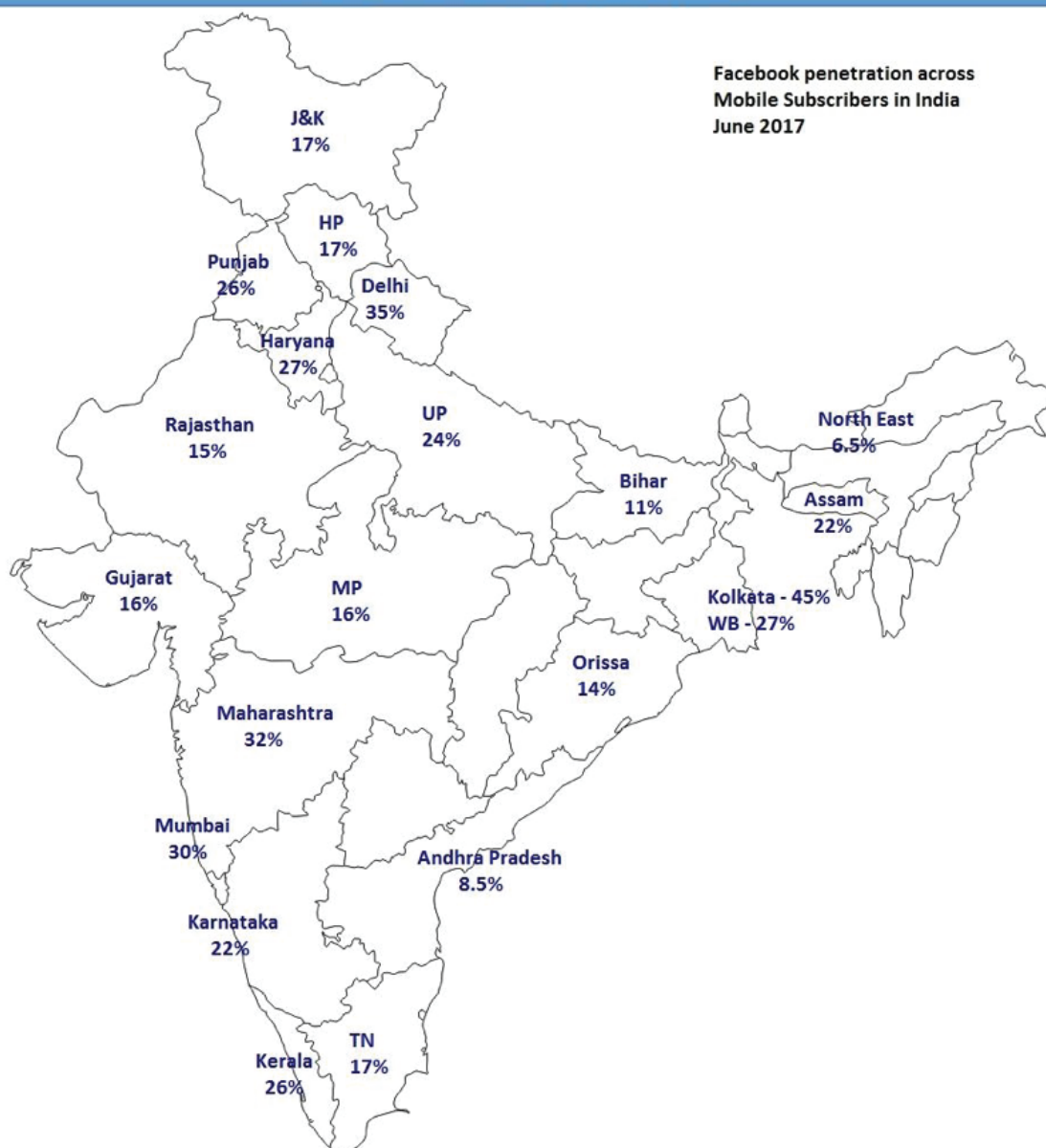
Networking and Communication continue to be a key category among mobile internet users; Facebook user base increased by 22% YoY. Facebook in Q4 2016 saw double the growth compared to the same period in 2015. David Wehner, CFO, Facebook in an interview said the reason for this change was India giving free internet to their users (by the new entrant Jio).

[7]IAMAI and Kantar IMRB Mobile Internet Report 2017 | [8]Facebook Ad Manager | [9]http://telecom.economictimes. indiatimes.com/news/reliance-jios-free-data-makes-big-contribution-to-facebook-revenue-growth-in-q4/56931784 | [10]MMA and GroupM Mobile Ecosystem Report India 2016 / Facebook Ad Manager

Comparing 2016 to 2017, 5 Telco circles showed almost double growth in Facebook user penetration10: Delhi (2016 – 19% vs 2017 – 35%), Bihar (2016 – 5% to 2017 – 11%), Kolkata (2016 – 25% vs 2017 – 45%), Maharashtra (2016 – 16% vs 2017 – 32%) and Assam (2016 – 13% vs 2017 – 22%).

Facebook penetration across Mobile Subscribers in India June 2017

J&K
17%

HP
17%

Punjab
26%

Delhi
35%

Haryana
27%

Rajasthan
15%

UP
24%

North East
6.5%

Bihar
11%

Assam
22%

Gujarat
16%

MP
16%

Kolkata - 45%
WB - 27%

Orissa
14%

Maharashtra
32%

Mumbai
30%

Andhra Pradesh
8.5%

Karnataka
22%

TN
17%

Kerala
26%

Source: Facebook Ad Manager (data as per June 2017)

4G data usage grew 144% in 2017!

Pan-India mobile data usage - in petabytes PB per month, December'

Payload 2G   Payload 4G
Payload 3G   Total Payload

2.4x

Y-o-Y Growth*

2,360   144%

966   135%

7.5x   1,930

823

398   286%

2400
1900
900
300
200
100
0

128
85   82
48
28
44   47
21

103
40

32   -20%

Dec-13   Dec-14   Dec-15   Dec-16   Dec-17
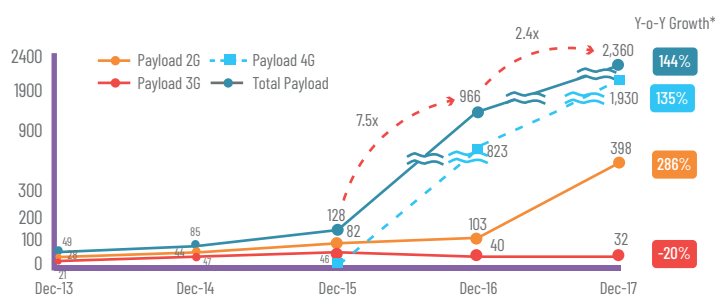
The Indian telecom market witnessed a paradigm shift in data consumption, with 4G traffic capturing 82% share of total data traffic in December 2017. 3G+4G contributed to 98%[11] of the total data payload in 2017[6] with a 150% YOY increase. Since, the 4G launch in end of 2015, the 4G payload has grown 7.5x and 2.4x in 2016 and 2017 respectively.

Increase in 4G device penetration, aggressive 4G network rollout, lower data prices, and development of video and locally relevant content creators have all contributed to the rise of 4G traffic

Data subscribers by technology in december 2017
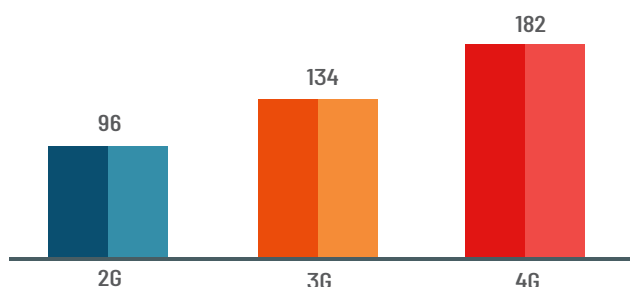
Falling data prices, bundled data plans, better coverage footprint, off-load of 4G on to 3G, and better device availability have contributed to growth of 3G payload.
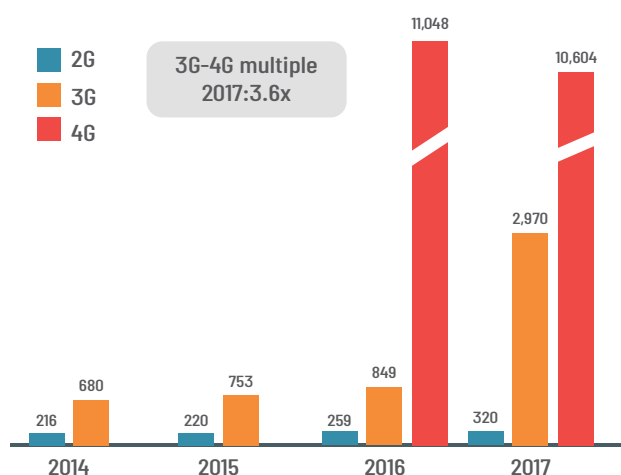
44% of the mobile internet users in India are 4G data users, out of which 80% are Jio users.

Exponential increase in data traffic is accompanied by a significant increase in data consumption, with 4G usage reaching approx. 11GB/month

Between 2016 and 2022, total mobile data traffic is expected to grow CAGR 40%[12]. By 2022, 97%[12] of mobile data will be consumed by smartphones. Industry analysts predicted that 4G consumption will reach 11GB/month in 2022, however, this statistic was reached in 2017.
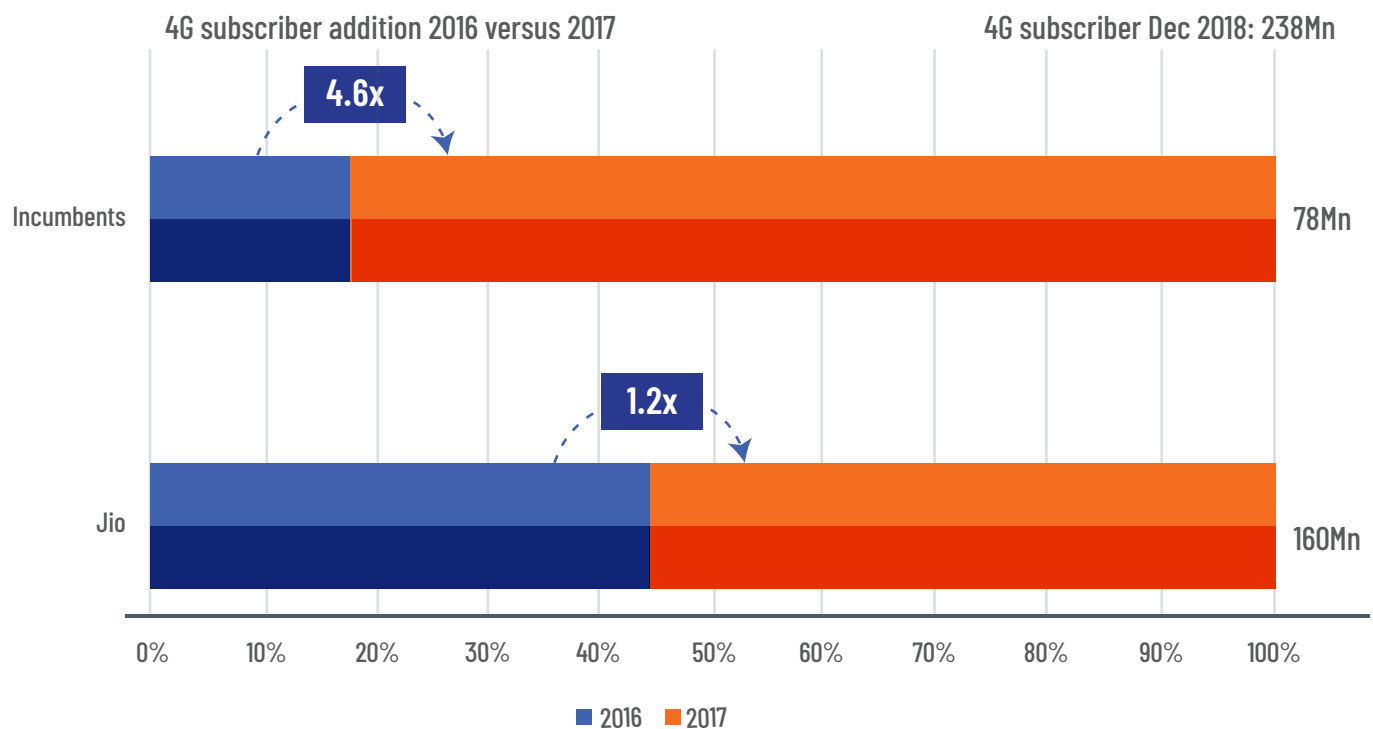
[11]Nokia MBIT Report 2016 | [12] Ericsson Mobility Report – India, June 2017

Average data usage/month (MB)

4G growth was led by Jio, but other Telcos benefitted as well!

35% of the total 4G subscribers (approximately 1 out of 3 4G subscribers) came from rural territory.

Jio is credited with bringing 4G to India but Jio also should be credited for the ramping up of the 4G network for incumbents like Airtel, Vodafone, and Idea. Consequently, while Jio, being the 4G lead operator with 160 million subscribers (by end 2017), increased 122% (88 million) subscribers in the year 2017; incumbent mobile operators grew 457% (64 million).

4G subscriber addition 2016 versus 2017

4G subscriber Dec 2018: 238Mn

Incumbents — 78Mn (4.6x)

Jio — 160Mn (1.2x)

Legend: ■ 2016 ■ 2017

Further analysis points that Jio added 26% rural subscribers using 4G, incumbents added 53% of their 4G subscribers to the rural market. By the end of 2018, its estimated that India will have 300 million 4G subscribers, of which 58 million will be using a 4G featurephone and the remaining 81% of subscribers will be using 4G over a Smartphone.

Urban versus Rural 4G subscriber addition 2017

Incumbents

Jio — 26% Rural, 74% Urban

Legend: ■ Rural ■ Urban
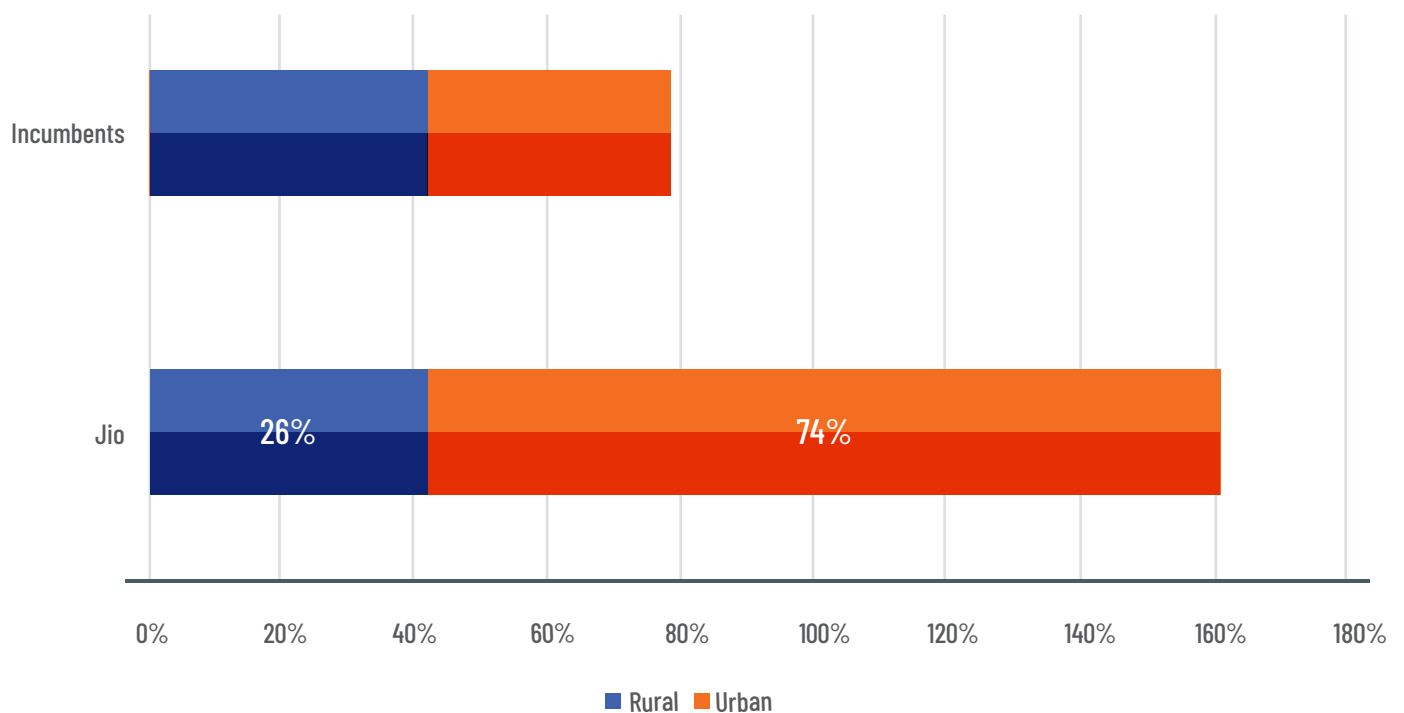
## Older generation in India gets hooked to data usage, as voice ARPU decreases as low as Rs.45 monthly!

It is quite evident that average mobile expenditure has been decreasing continuously from 2014. Previously in the report we have learnt that this decrease is due to increased affordability of mobile data, which decreased from 2014 to 2016, with a marginal rise in 2017 owing to higher usage of mobile data. Expenditure on Voice has been steadily

Average Mobile bill per month (in INR)

decreasing (at a CAGR of -32%) since 2013; and with the popularity of VOIP and video chatting, the expenditure on voice services has decreased dramatically in recent times.
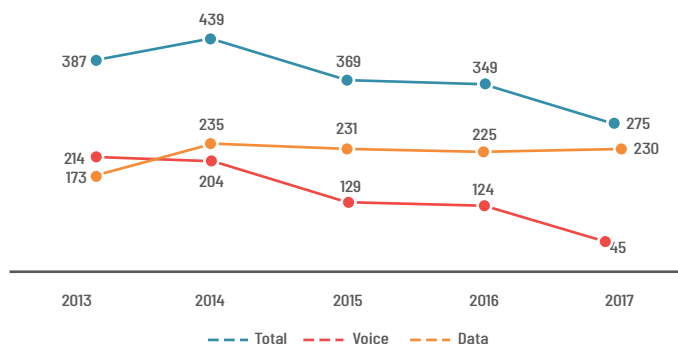
Mobile Bill: Agewise
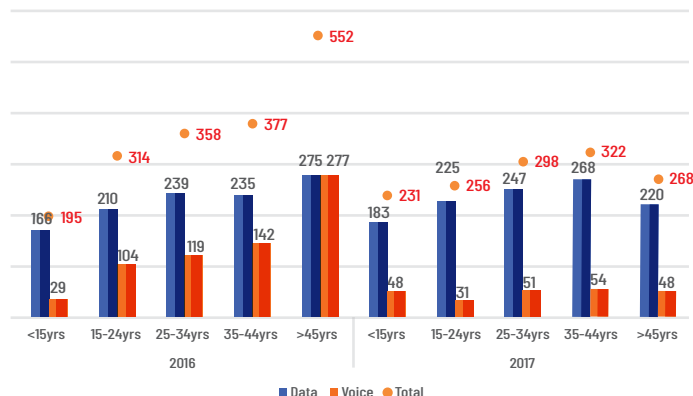
Since, last year we have seen a drastic drop in ARPU across all age groups, other than the <15 year group. The >45 year group , which was one of the most prolific user of voice services last year witnessed a significant drop. Much of this drop can be attributed to changes in mobile plans offered by service providers, which are more data centric with very low costs for voice packages. Data spend by the >45 year group has decreased given lower price of data packs and overall usage saturation of the age group.

[11]Nokia MBIT Report 2016 |[13] IAMAI and Kantar IMRB Mobile Internet Report 2016

Part II: Mobile Handset Ecosystem in India

India sees the emergence of new category of handsets - 4G Feature phones!

The concept of the 4G feature phone is relatively new for the Indian market. It is expected to add more users to internet services, digital content consumption and digital transactions from their mobile phones. Data prices are at an all-time low and operators are working on strengthening their 4G connectivity in India.

Reliance Jio is expected to introduce attractive bundling offers to proliferate rural and lower tier customers. With the experience of minimal data on the 4G feature phones, these users are expected to migrate to smartphones in next few years becoming the major smartphone growth drivers in the Indian market.

Feature phones get an extended life; another year before smartphones overtake feature phones in India

Shipments growth status 2014 - 2020 (F)
(Numbers in millions)

Source: IDC June 2017
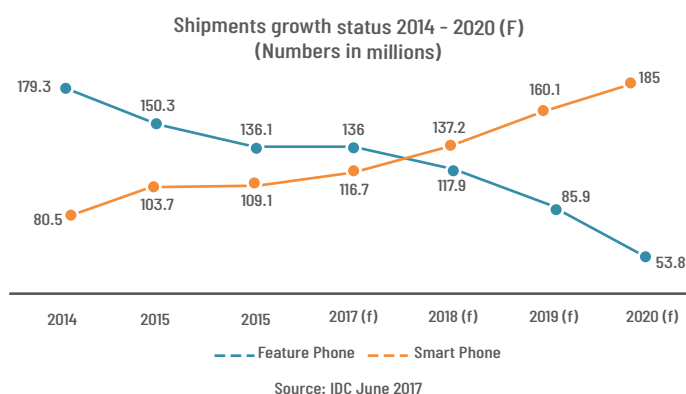
India offers a huge untapped opportunity to the smartphone vendors, which is evident from the entry of several new smartphone vendors in the Indian market in last 2 years, a key driver to the smartphone growth. All this while, feature phones remain the dominant category in the overall mobile phone market accounting for 52%[13] of the total mobile phone shipments in India in Q1 2017 and constituting more than 50%[14] of the overall mobile market in 2016. 2016 saw the feature phone de-growth slowing down and it is likely to contribute the majority of the mobile phone shipments in 2017 as well, as the migration to smartphones is expected to further slow down due to the introduction of low-cost 4G feature phones and its continued relevance to its sizeable target consumer.

*https://telecom.economictimes.indiatimes.com/news/one-out-of-two-feature-phone-users-wish-to-buy-4g-feature-phone-in-next-6-months-idc/62755518

According to a study by the MMA and Kantar IMRB, contrary to popular belief, featurephone users spend more money on their mobile plans. The ARPU for the survey respondents was almost 20% higher compared to the national average.   The survey also revealed that feature phones are entertainment hubs - with respondents listening to music, watching videos and playing games being key activities. Additionally, only 15%

of featurephone users said they intended to switch to a smartphone on their next purchase.

Cashing in on this continued interest for feature phones, Reliance Jio in June 2017 declared[16] to launch their 4G feature phones for as low as USD28 (INR 1800). Micromax and Lava are also in this race and will be launching their 4G featurephones in the same price bracket.

Smartphone market has swiftly shifted to 4G

At a time when other major smartphone markets like China, USA are seeing single digit growth, the Indian smartphone market is expected to grow in double digits during next five years. Thus, India provides a huge opportunity for smartphone vendors to set up and expand their base.

The entry of Reliance Jio in the telecom services market has disrupted the incumbents dramatically. However, it proved immensely beneficial for consumers. The smartphone market has swiftly shifted to 4G, voice and data have become more affordable and new use cases have been developed to drive migration to smartphones. This graph shows,

Generation wise smartphone shipments (In millions)

Source: IDC May 2017
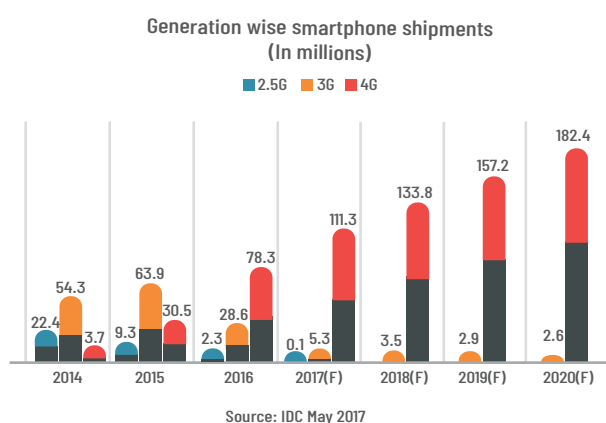
smartphone shipments have steadily risen by 35% in the last 3 years and forecasted to grow by another 49% by 2020 reaching 185 million by 2020. Also, expected that by the end of 2017, 95% of the smartphone shipments are 4G smartphones, drastically reducing the 3G smartphone share.

42%[17] of the smartphone market lies below US$100. The premium segment market is also bigger than some of the more mature markets like Hong Kong, Taiwan and Singapore. This provides a wide spectrum of opportunities for vendors to pick and choose the consumer segments and price categories to focus upon.

As per the analysis by eMarketer (August 2018), India now has 337 million smartphones, making it the second largest user base in the world, ahead of the USA and only behind China.

[13]IDC June 2017 | [14]IDC June 2017 |[15]MMA and Kantar IMRB Feature phone report India (Q4 2016) (among a sample size of ~1000 consumers (feature phone users) in Metro and Non metro cities)| [16]http://indianexpress.com/article/technology/mobile-tabs/reliance-jios-4g-volte-enabled-feature-phones-to-launch-soon-report/

Xiaomi is changing the fabrication of the Indians smartphone industry

China based vendors like Xiaomi, Vivo, Oppo, Transsion now account for almost a 50%[18] share of the smartphone market in India. They have been able to achieve this on the back of their hi decibel ATL and clever BTL marketing spends, perceived better specifications – price value, wide & deep retail level distribution and online exclusive models. India based vendors were slow to react to the market shift to 4G Smartphones and combined with intense competition from China based vendors, Indian brands faced challenges in 2016-17 in the smartphone market.

Handset brand manufacture's market share in India (Q1 2018)

Legend: Xiaomi, Samsung, Oppo, Vivo, Trannsion, Others
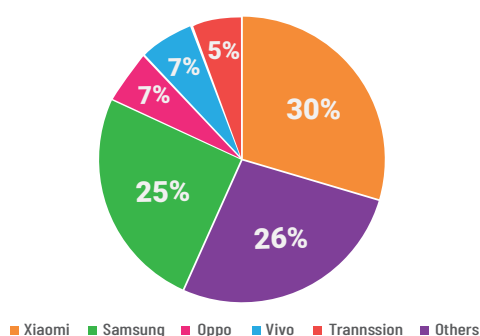
Q4 2017 saw many changes in-terms of Handset shipments; it saw the maximum growth compared to the same time in the last 3 years. Additionally, Xiaomi threw Samsung from the reigning smartphone in India and became the leader in shipments in Q4 2017. The sales that were led by Xiaomi were primarily replacements and upgrades where users shunned their existing Smartphones.

In Q1 2018[18], Transsion made its debut in the top 5 handset manufacturers in India with more than a three fold annual growth. The China based group has 4 brands under its umbrella (namely - Itel, Tecno, Infinix and Spice). With its primary focus on offline channels, Itel and Tecno branded phones are doing well in the highly price sensitive India market.

[18]IDC May 2017 / IDC Q1 2018

According to Krishna Mukherjee, Telecom Analyst with CMR, "In the smartphone arena, the Chinese brands have already kicked out domestic players from the top five list and in the near future, we will see Chinese players wiping out the Indian brands from the top five chart of overall mobile handset segment too. We can't deny the fact that in the next quarter we may see that happening. For the first time in 33 quarters that might happen. Since 2009, brands like Micromax and Intex have shown their presence in the top five list."

China based smartphones are growing as Indian manufacturers struggle to become 4G first!

China based mobile phone vendors have successfully made inroads in the market via both online and offline channels. LOVE (Lenovo. Oppo, Vivo, Xiaomi) v/s MILK (Micromax,

Leading smartphone OEMs by price brand

Below 4K
Intex Technologies

8K- 10K
Vivo Mobile India

15K- 20K
Samsung India Electronics

01 02 03 04 05 06

4K - 8K
Samsung India Electronics

10K- 15K
Rising Star Mobile India

Above 20K
Hong Fu Jin Precision Electronics
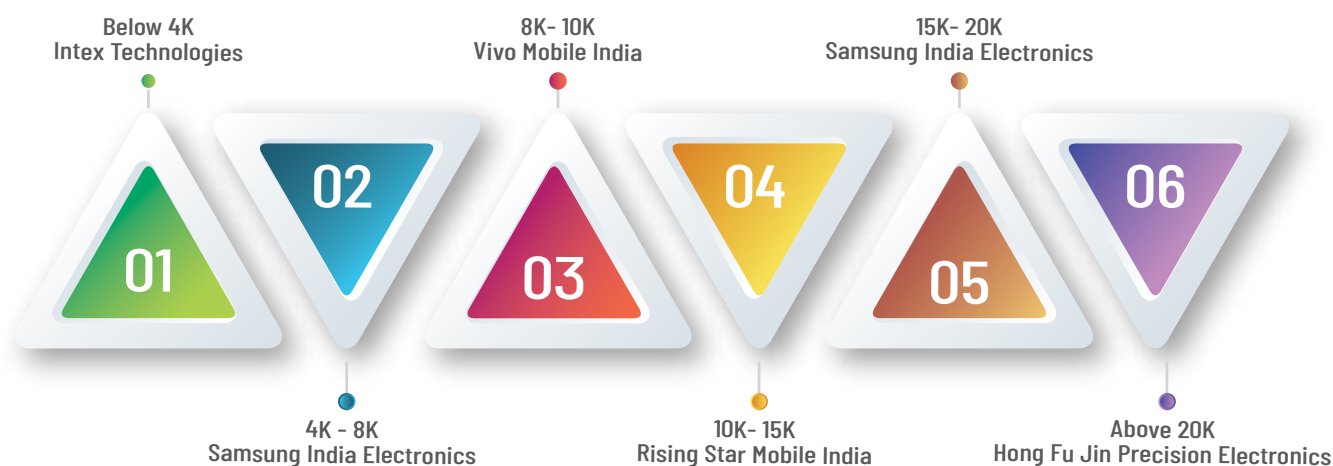
Intex, Lava, Karbonn)[19] as popularly referenced for Chinese Vs Indian brands. Overall LOVE brands have been mono-channel brands, offering great value for money with aggressive marketing. The success in the transition to Omni-channel would be a key factor for them to maintain their standing in the market with internal competition intensifying. At the same time, what Oppo did a couple of years ago , has been recently replicated by Vivo considerably and such marketing strategies have had a direct bearing on the market standings. The biggest challenge for LOVE brands would be to sustain such a campaign through all the quarters and at the same time, not enter each other's ' territories resulting in internal competition. Initially affecting the Indian brands' market share, they now begin to enter into each other's market share.
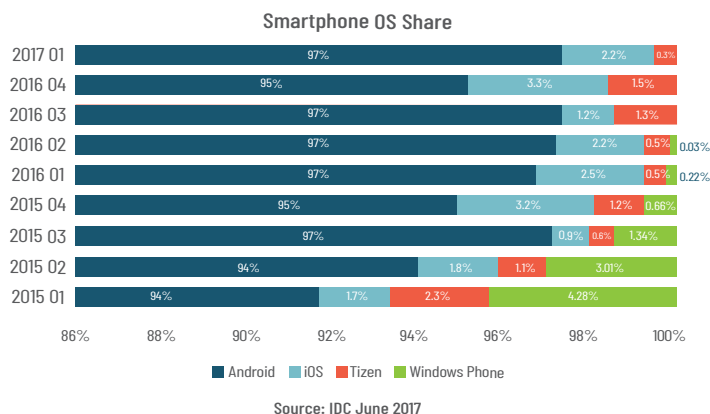
Quarter on quarter we are witnessing the MILK (Micromax-Intex-Lava-Karbonn) brands not being able to leverage any of the anchors they enjoyed over the years. Be it establishing themselves across the country or becoming the first choice for first time mobile (Feature as well as Smart) users, the brands have not been able to support a consumer's journey. While they could not have matching marketing campaigns as their Chinese counterparts and preferred to 'wait' till they (India) burnt their money, their grip on the market became weak impacting their market standings. The success of itel and Xiaomi brands, which are not aggressively marketing by spending crores, are case studies for MILK brands to take cues from on how to manage visibility. It is high time for MILK brands to strengthen their digital presence, not only from the selling perspective but also from the angle of influencing youth, which directly or indirectly, are responsible for two out of three Smartphone sales in India.

'Make in India' has provided the right impetus to the mobile manufacturing in the country. Approximately, 65%[19] of phones sold in India are assembled in India, in 2017, the share would touch 90%. India is fast emerging as the new manufacturing hub for the Mobile Phones and components with 40 brands already manufacturing in India, made possible

by relatively lower labor costs, government push and incentives for local manufacturing coupled with high differential duties on import . In the next few years, Indian vendors are expected to start exporting devices to South-East Asia and African countries from their manufacturing operations.

Android continues to be the most preferred OS choice of India

Android in the last 2 years has been able to maintain its kingship in the OS market in India, with average of 96%[21] market share. What is interesting is that iOS sees a jump in Q4 every year and has managed to slightly increase its market share in the past year.

Smartphone OS Share

	Android	iOS	Tizen	Windows Phone
2017 01	97%	2.2%	0.3%	
2016 04	95%	3.3%	1.5%	
2016 03	97%	1.2%	1.3%	
2016 02	97%	2.2%	0.5%	0.03%
2016 01	97%	2.5%	0.5%	0.22%
2015 04	95%	3.2%	1.2%	0.66%
2015 03	97%	0.9%	0.6%	1.34%
2015 02	94%	1.8%	1.1%	3.01%
2015 01	94%	1.7%	2.3%	4.28%

Source: IDC June 2017

Apple, though slowly, is growing in India!

iPhone may be less than 3%[21] of the smartphone market in India, but it is expected to reach a 10mn active user base in India in 2018 (it stands at 8.9 mn active users as of December 2017). Though, there are already many OEM brands that have surpassed this milestone like Samsung who has 120 mn and Xiaomi who has 28 mn active users as of end 2017; Apple has done exceptionally well in a price sensitive market like India where 56% of the Smartphones sold are still sub Rs. 10,000.

[19]CMR Research Q1 2017/IDC June 2017 [21]IDC June 2017 |[21]http://www.cxotoday.com/story/smar-phone-sales-hit-due-to-demonetization-idc/ / CMR Research

Part III: Programmatic Ecosystem in India

The advertising industry is on a march toward automation. Plenty of advertisers today are buying digital ads without speaking to a single human at a media company, and print and TV ads might not be far behind. Automated, or programmatic, buying is growing not only because it makes ad transactions more efficient but because it can make them more effective, as long as the right data is applied.

Programmatic is no longer a buzzword, many agencies, and evolved advertisers (including e-commerce, auto and FMCG) have dabbled (read budget) on DSP platforms and retargeting platforms. A pure programmatic buy would help a marketer to cap the frequency of exposure of their campaign across publishers and let them transparently manage the media buys across a list of publishers. Layer this with data and they have created an audience buying campaign which, can also be used for retargeting to an audience set.

India is still in nascent stages of programmatic adoption relative to more digitally mature Asia-Pacific markets like Australia and Japan. According to a Forrester Study, programmatic buying adoption for India is at 38% compared to the overall APAC adoption rate of 41% . That said, adoption is poised to pick up in the next 24 months as 52% of marketers in India are either planning to adopt or currently evaluating whether to adopt programmatic buying. Also, in India maximum programmatic spends (92%) on mobile are done on mobile app inventory.

Mobile Programmatic Ad Benchmarks in Select Countries: In-App vs. Mobile Web Spending Share, Q2 2017
% of total on Smaato's platform

	In-app	Mobile web
Argentina	97%	3%
Australia	93%	7%
Brazil	99%	1%
Canada	97%	3%
China	98%	2%
Denmark	97%	3%
France	98%	2%
Germany	98%	2%
India	92%	8%
Italy	95%	5%
Japan	71%	29%
Mexico	91%	9%
Netherlands	95%	5%
Norway	96%	4%
Russia	96%	4%
South Korea	69%	31%
Spain	91%	9%
Sweden	90%	10%
UK	94%	6%
US	97%	3%

Note: represents activity on Smaato's platform, broader industry metrics may vary
Source: Smaato, "Global Trends in Mobile Advertising: Q2 2017," Sep 18, 2017

231089   www.eMarketer.com

Even though programmatic is still growing in India, big and traditional business players like Pepsi, Ford and L'Oréal have shifted over 50% of their digital budgets to programmatic advertising.

In this section we talk about the basics of ad serving, at what level programmatic comes into the picture, effectiveness of programmatic for stakeholders, the current state of programmatic in India as well as case studies of brands on the frontline of programmatic.

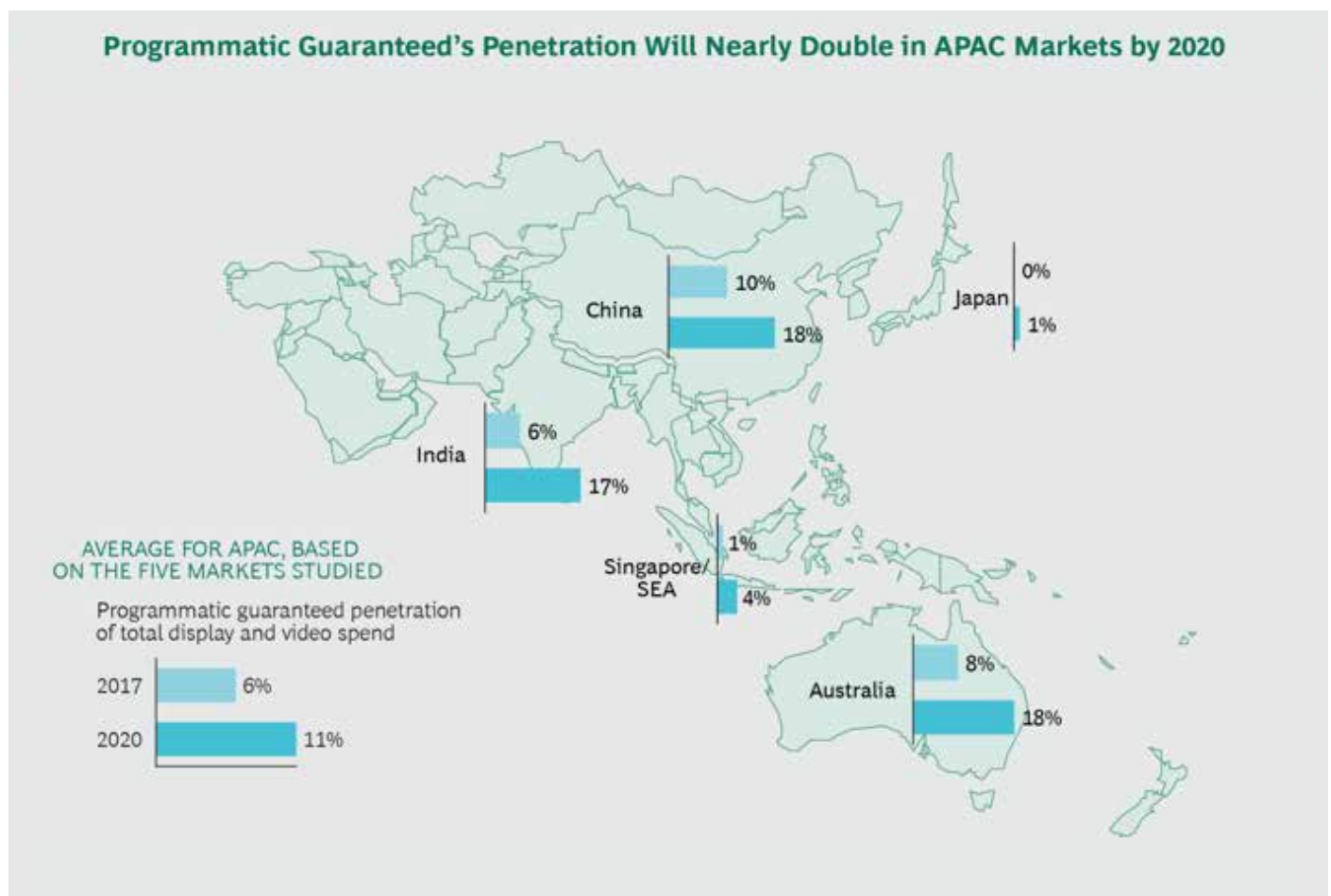**India is in the state of Programmatic evolution, saw 81% growth in 2017**

While India is still in the early stage of adoption compared to digitally mature Asia-Pacific markets like Australia and Japan, it has quickly ramped up the programmatic space. According to a recent study, India ranks near the top globally in terms of growth for programmatic ad spending*.

	2016	2017	% change	2018	% change
Switzerland	$46.00	$100.80	119.00%	$227.70	126.00%
India	$116.20	$210.60	81.30%	$371.70	76.40%
Finland	$43.60	$95.20	118.30%	$149.80	57.40%
Australia	$508.70	$776.40	52.60%	$1,213.40	56.30%
Italy	$297.70	$412.00	38.40%	$587.50	42.60%
China	$3,854.30	$6,038.20	56.70%	$8,526.70	41.20%
Sweden	$168.80	$338.60	100.50%	$456.20	34.70%
Spain	$197.10	$263.90	33.90%	$348.00	31.90%
Germany	$631.90	$853.30	35.00%	$1.082.8	26.90%
Japan	$1,981.70	$2,703.90	36.40%	$3,390.40	25.40%
Russia	$119.20	$159.10	33.50%	$197.90	24.40%
France	$649.80	$821.30	26.40%	$1,011.60	23.20%
US	$24,224.00	$30,928.30	27.70%	$38.035.6	23.00%
Denmark	$218.80	$294.80	34.80%	$360.20	22.20%
Canada	$878.70	$1,094.40	24.50%	$1,324.00	21.00%
UK	$3,697.80	$4,436.90	20.00%	$5,259.80	18.50%
Netherlands	$425.80	$643.30	51.10%	$717.80	11.60%
New Zealand	$26.30	$30.40	15.40%	$33.60	10.70%
Worldwide	$40,915.30	$54,470.80	33.10%	$69,513.50	27.60%

*Source: Onaudience.com, "Global Data Market Size 2016-2018," Feb 19, 2018

India at power with China in terms of Programmatic Guarantee buys

An interesting point specifically for programmatic in India is its propensity towards guaranteed buys. It is poised to be one of the top markets for programmatic guaranteed - with penetration projected to reach 17% in 2020 based on a Boston Consulting Group study, on par with that of Australia or China. This may be due to prominent publishers who are driving uptake of programmatic buys and a concern with ad fraud, which drives spend from direct traditional buys to programmatic guaranteed. This is a promising trend, given how India has had most of ad spends in direct budgets.

Source: Boston Consulting Group, 2018
https://www.bcg.com/publications/2018/rise-programmatic-guaranteed-advertising-asia-pacific.aspx

Currently, marketers in India tend to approach programmatic as a direct response driver, accessing mostly remnant long-tail inventory. As marketers grow more savvy, they will understand its value for brand campaigns with the ability to purchase premium audiences and inventory. Likewise for publishers, while there has been encouraging movement by publishers to offer access to more of their inventory via programmatic (e.g. TrueCaller with roadblock inventory and Saavn with audio inventory), there are still legacy publishers who view programmatic primarily as a means to move cheap or unsold inventory. The trend towards transacting more premium inventory via programmatic is expected to accelerate programmatic adoption within the market, with prominent advertisers such as Ford India transiting majority of direct deals to transact programmatically[*] .

Why programmatic for publishers?

Programmatic allows publishers to maximize their earnings from their inventory by:

- Identifying and selling each impression uniquely as compared to a block of impressions. This allows each impression to be sold at the maximum value, in turn maximizing the yield of overall inventory
- increasing the value of the remnant inventory, as each impression is sold for the value of the visitor as against the time slot / placement. Suddenly the impressions which were difficult to sell start looking premium to advertisers as they are targeting visitors
- helping publishers to control the pricing for their inventory using business rules, allowing them to offer differential and / or premium pricing based on the requirements and niche audience
- also helping publishers to gauge what is selling on a real time basis, which segment of users is getting higher value and what content are these users consuming on their sites. Thus allowing them to improvise and tweak their publishing strategies based on demand
- creating private marketplaces which can help a publisher create an exclusive club of bidding advertisers and to be a part of this club, advertisers can be pushed to spend either a minimum threshold or an over premium floor price

* https://www.thinkwithgoogle.com/intl/en-apac/tools-research/programmatic/about-time-consoli date-ad-buys-get-more-from-teams-media/

* http://www.forbesindia.com/article/special/saavn-launches-programmatic -audio-advertising-in-india/45717/1

* https://www.thinkwithgoogle.com/intl/en-apac/tools-research/ programmatic/about-time-consolidate-ad-buys-get-more-from-teams-media/

" Why Programmatic?
The L'Oréal Perspective "

Shashibhushan Udyavar,
Head Digital Marketing, L'Oréal India

What do you think are the tangible benefits of programmatic marketing?
Programmatic today offers multiple significant advantages over traditional buying and placement. For us the key benefit of programmatic buying is being able to reach a very precise audience at the right moment through her purchase journey. The richness of ad placements due to a single consumer view is a big advantage over traditional methods of buying. The other benefit we are deriving is sharper profiling of our consumers, this enables to generate more knowledge about our consumers and the key triggers to conversion.

How do you evaluate programmatic vs fixed vs manual buys?
At the first level, we do look at pure media efficiency. However, that is a short-term and one time evaluation. Over the long term we are looking at lower consumer acquisition costs, higher audience retention measured by return visits and purchases and unduplicated reach.

How much of your mobile marketing budgets you have shifted to programmatic in 2017 compared to 2016?
More than 70% of our mobile buying is now programmatic.

What would be your recommendations/ do's and don'ts on programmatic marketing to your fellow marketers?
✓ Have a strong business rationale to move to programmatic i.e. ensure you have enough scale in digital media and are sure that audience buying and moment marketing are a significant driver for your consumer outreach plans.
✓ Second, programmatic yields best results when it's not fragmented so you may want to commit 100% to programmatic to get the most out of it.
✓ Last, most business leaders are still not very familiar with programmatic buying principles. It'll be prudent to induct them into the advantages, risks and needs of programmatic buying before you commit organizational resources to programmatic buying.

Why programmatic for advertisers?

Programmatic buying is nothing but an efficient method of buying from an advertiser's perspective.

- It reduces the need for manual operations across the board and hence helps in reducing the related cost

- Allows the advertiser to buy only the relevant inventory, by giving them an opportunity to evaluate each impression before making a buying decision (read audience buying) across publishers. It also helps them to cap the number of

exposures of a campaign to each user across publishers, further increasing the reach of a campaign within the same budget

- It also allows a unique window for a advertiser/publisher to look into the audience and content profile to which their campaign is getting exposed, enabling them to understand the segments and content which are converting, even better
- With programmatic method, it is easier to optimise a campaign based on conversion and viewable impression data. However, the auto optimizations are done through platforms with integrated machine learning algorithms and is not available across the DSPs
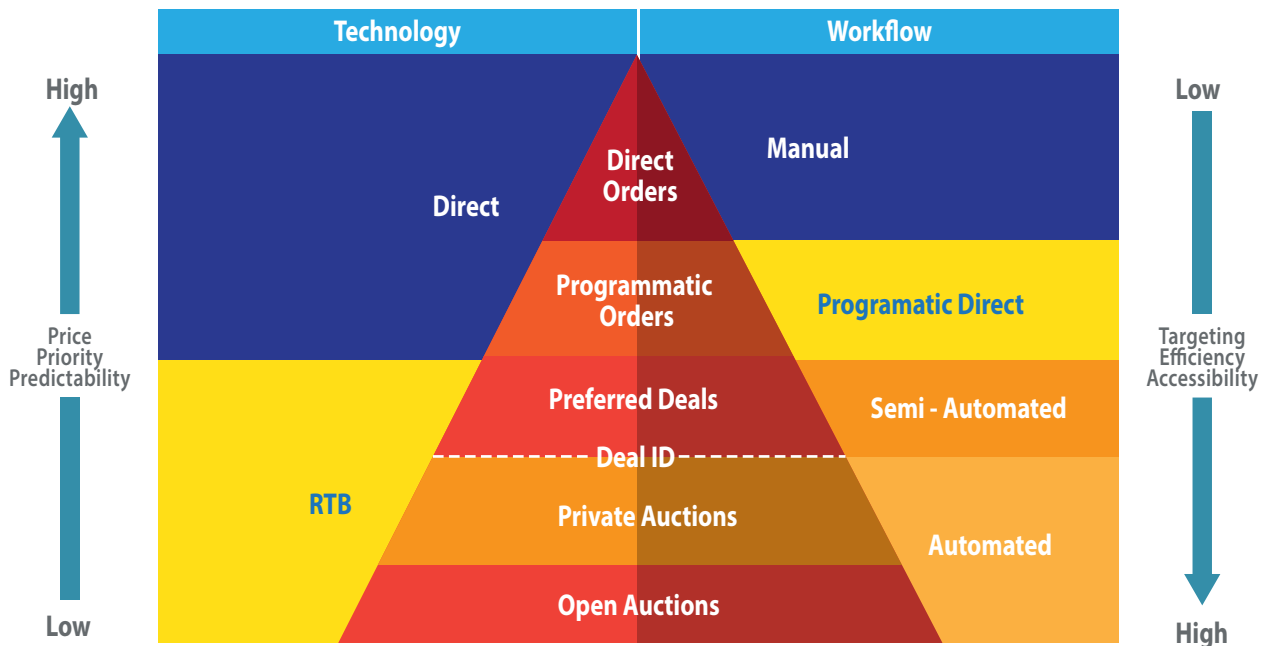
Why programmatic for agencies?

Agencies have been asked this question several times and it is hard for the agency to differentiate its value in an open exchange buying method. However, the might of an agency is highlighted in the programmatic direct and programmatic guaranteed models.

- With programmatic guaranteed and programmatic direct, agencies can influence the buying price towards the lower end of the spectrum (read floor price) which is beneficial for the advertisers and at the same time can allocate a larger chunk of spends towards deserving publishers
- Agencies are also benefited by the transparency layer available within the programmatic buying platforms and the granular level data, helping them to analyze and optimise their buys
- Programmatic / automation reduces the operational flak from the system e.g. it's faster to take the campaign live, real time reports etc

Types of Bidding – Waterfall model

Whenever a publisher's ad server would receive an ad request, it would start calling a predefined list of ad networks, SSPs for filling in the inventory. The list is prioritized by the publisher, either manually or dynamically, based on the yield (return) being generated by each respective network for relevant campaigns. The first network/SSP in the hierarchy to respond with a bid (highest within that SSPs environment) which is higher than the floor price is accepted as the winning bid. This is called as waterfall model.

The waterfall model for programmatic buy

Typical Publisher

Premium Direct	▸ Sponsorship ▸ Custom Executions	▸ High CPM Yield ▸ Direct Demand ▸ Non Standard
Standard Direct	▸ Context Targeting ▸ Audience Targeting ▸ ROS & RON	▸ High Volume ▸ Guaranteed Delivery
Premium Programmatic	▸ PMP	▸ Prioritized Remnant ▸ Repackaged Media
Open Programmatic	▸ SSP ▸ Ad Nets	▸ Undifferentiated Media ▸ Demand-Supply imbalance

Technology — Workflow

High — Low

Price Priority Predictability

Targeting Efficiency Accessibility

- Direct — Manual
- Direct Orders
- Programmatic Orders — Programatic Direct
- Preferred Deals — Semi - Automated
- Deal ID
- Private Auctions
- Open Auctions — Automated
- RTB

Low — High

Types of Bidding – Header bidding (the publisher side optimization)

The limitation of the waterfall model is that there is a missed opportunity in accepting the first acceptable bid. The networks lower in the funnel of the waterfall model end up evaluating only impressions which have not already been bought and cannot see impressions for which they were willing to pay higher money but being lower in the funnel could not evaluate. Hence loss of an earning potential for the publishers.

To overcome this problem of the waterfall model, the header bidding was introduced. The header bidding script, once integrated in the publisher inventory, contains all the relevant information of each ad unit on the page. As soon as the page starts loading on the user's

browser, the header bidding scripts present in the header of the page starts an auction and fires request to all the exchanges simultaneously. This allows a publisher to add more bidders to the auction of the inventory, increasing the chances of getting higher fill rates and better pricing. This is also important for advertisers, as it allows networks and exchanges to have 'first lookup' of each impressions allowing the opportunity to be able to bid for the relevant impressions.

Waterfall Auction vs. **Header Auction**
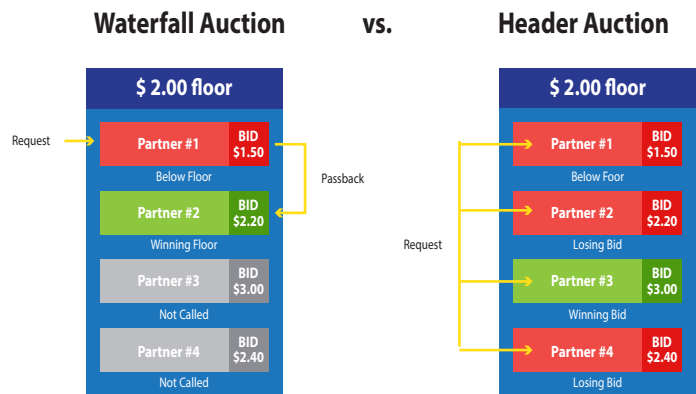
Future trends and challenges for programmatic in India

There is general optimism around programmatic adoption and maturation in India, affirmed by encouraging results from both the demand and supply side as publishers offer more sophisticated and premium ad buys while advertisers move more spend towards programmatic.

However, there are still obstructions to overcome for mainstream programmatic adoption such as the prevalence of direct deals in the market and the perception of programmatic inventory as the channel reserved for transacting low-value inventory. There is also demand to harness richer data/audience segments by publishers to bring more value for advertisers, something which is not yet the norm in the India market.[*]

[*]https://assets.kpmg.com/content/dam/kpmg/in/pdf/2017/01/Digital-the-new-normal-marketing.pdf |

[*]https://www.thedrum.com/news/2017/07/25/programmatic-moving-beyond-the-buzzword-india-buy-and-sell-side-adoption-matures |
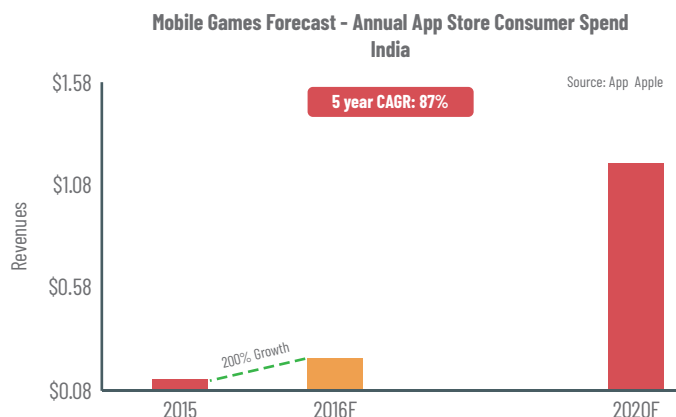
[*]http://www.forbesindia.com/article/special/saavn-launches-programmatic-audio-advertising-in-india/45717/1 |

[*]https://www.thehindubusinessline.com/info-tech/programmatic-tech-set-to-steer-digital-advertising/article10027030.ece

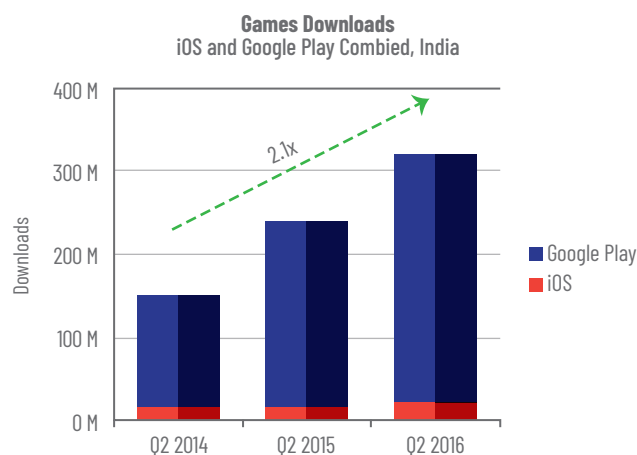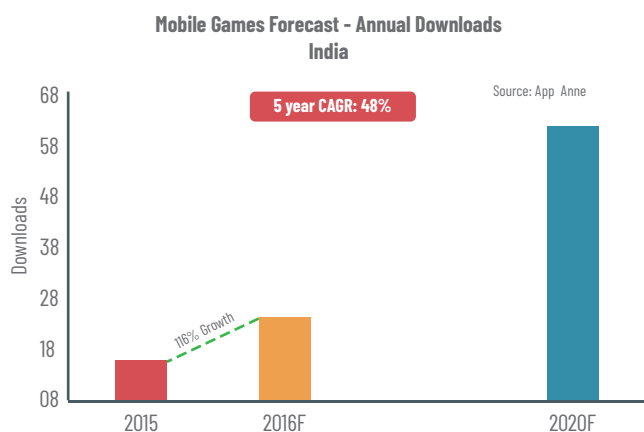# Part IV: Key Verticals driving the Mobile Advertising

(A) Mobile Gaming

By 2020, mobile gaming app consumer spend to reach 1 billion USD

Mobile Games Forecast - Annual App Store Consumer Spend India

Source: App Apple

5 year CAGR: 87%

200% Growth

| | 2015 | 2016F | 2020F |

Revenues: $1.58, $1.08, $0.58, $0.08

Mobile Gaming in India is dominated by freemium games. 2016 saw a 200%[23] increase in gaming app revenue, which will grow at a CAGR of 87% till 2020, crossing the USD 1 billion mark. The Indian gaming market is booming, with maximum growth (in both downloads and revenues) driven by Google Play, as proliferation of low-cost Android devices across lower-tier Indian cities continues to soar. In the last 2 years , game downloads in India has doubled, with Google Play generating 13 times[23] more downloads compared to App Store.

In the last 2 years there has been an increase of 80%[23] in app store revenue from games. Whilst iOS constituted to less than a tenth of game downloads, iOS gamers contributed around 70%[23] of the revenue, as iOS was the more premium segment of the market. On the contrary in 2016, Google Play revenue grew to match iOS as the majority Android users started spending on games. This trend is expected to grow as more and more premium users delve in high-end Android phones. Similarly, a CAGR of 48%[23] growth in mobile app download will be seen by 2020.

Mobile Games Forecast - Annual Downloads India

Source: App Anne

5 year CAGR: 48%

116% Growth

Downloads: 68, 58, 48, 38, 28, 18, 08

| | 2015 | 2016F | 2020F |

Games Downloads iOS and Google Play Combied, India

2.1x

Downloads: 400 M, 300 M, 200 M, 100 M, 0 M

| | Q2 2014 | Q2 2015 | Q2 2016 |

■ Google Play
■ iOS

[23]Nasscom and App Annie 2016

Strategy and Social Card Games Drive Monetization!

Download growth can be observed across nearly all gaming categories on Google Play in India, as its emerging user base continues experimenting with different types of games. However, Q2 2016 highlighted a shift in India's gaming behavior, with a significant increase in time spent on immersive strategy games versus casual games compared to the same quarter in the previous year. While convincing users to spend money on games remains a challenge in India, two categories stand out for solid improvements in monetization: strategy and social card games. The latter has been able to ride on the success of mobile adaptations of traditional Teen Patti card games.

Top 5 Games Categories by Time Spent
India, Android Phone
■ Q2 2015 ■ Q2 2016

Strategy — 1.7x
Casual — 0.8x
Action — 2.9x
Sports — 1.3x
Social Card — 1.2x

Source: App Anne

0   50   100   150   200
Indexed Revenue

Top 5 Games Categories by Revenue
India, Google Play
■ Q2 2015 ■ Q2 2016

Strategy — 1.8x
Social Card — 1.9x
Sports — 1.4x
Casual — 1.1x
Action — 1.3x

Source: App Anne

0   50   100   150   200
Indexed Revenue
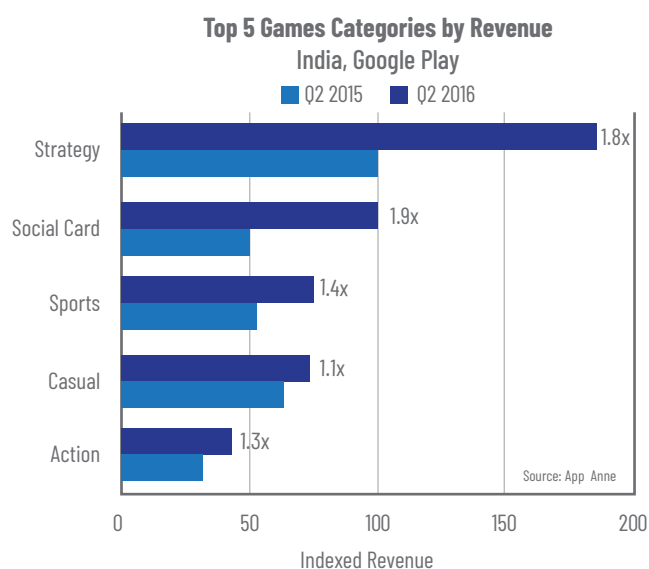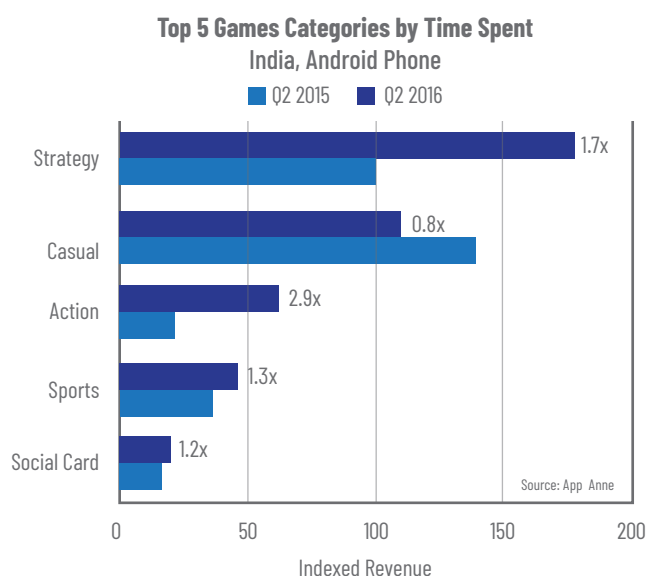
For consumers the madness in gaming is just getting better - more engaged users on mobile gaming apps

Gaming has grown to be more popular than entertainment, news, social media and other general apps. 9 out of 10 users[24] have games on their phones regardless of their gender or the price of the phone. **59%[24] mobile gamers in India are Millennials.**

> **There are a few facts that we can start off with,
> which are a clear indication of the madness that is gaming![24]**
>
> **84%** of mobile subscribers have games on their devices
>
> **37%** have more than 3 games on their phone.
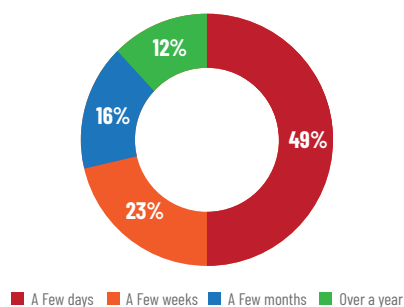> **Almost 9 in 10 indian smartphone** owners play games weekly
>
> A whopping **57%** prefer single player games
> **1 in 10 people** play the same game regularly for over a year

[24] Tune India Gaming 2016

Indian gamers tend seen to be more engaged than their global counterparts

How long do you play the games you typically like?

- 49% A Few days
- 23% A Few weeks
- 16% A Few months
- 12% Over a year

Source: India and Mobile Gaming Report 2016

India is in the top 25%[25] of countries globally for mobile user retention. After 14 days of installing a gaming app, around 24% of the users retain the game globally, whereas in India, it is 30.1%[25]. Also, 12% mobile gamers in India play a game for a year.
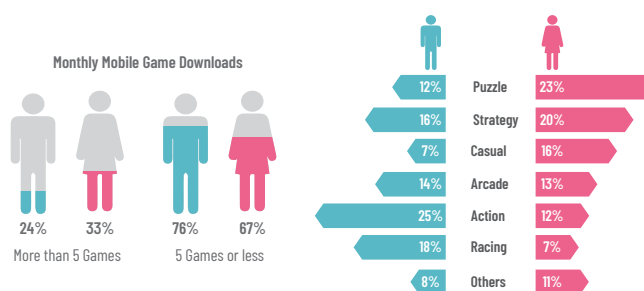
Women make up just 22%[26] of all mobile gamers in India, however, when it comes to the frequency of playing mobile games, 79% of females reported that they played daily, compared to 71% of males.

Additionally, female gamers spent nearly 70 minutes[26] a day playing mobile

Women download more games compared to men;
Puzzle, strategy and casual games most popular

Monthly Mobile Game Downloads

	Male	Female
More than 5 Games	24%	33%
5 Games or less	76%	67%

|	Male		Female
Puzzle	12%		23%
Strategy	16%		20%
Casual	7%		16%
Arcade	14%		13%
Action	25%		12%
Racing	18%		7%
Others	8%		11%

games, in comparison to 55 minutes per day for males. 33%[4] women gamers have downloaded more than 5 games on their smartphones, 37% more than men. Strategy seem to be the common genre of games that both men and women like to play.

[25]Tune India Gaming 2016 | [26]Gamesbond 2016

India Mobile Gaming: Single player, two player or team?

- 54% / 63% Single Player
- 21% / 18% Player vs Player
- 14% / 11% Team Games
- 11% / 9% Team vs Team
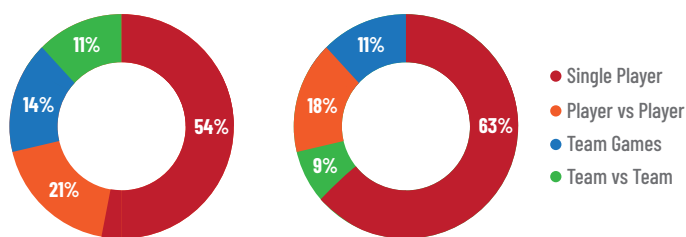
Another trend in the Indian mobile gaming market is the rise of single-player games. These have become increasingly popular and managed to top the charts of the gaming apps with highest download rates.

63%[27] women play single player games versus 54% men. The reason these games are preferred, stems from the Indian population's need to commute locally , making single player games the way to pass this time. Also, for single-player games there is usually no requirement for internet connection or hefty data streams.

[27]Tune 2016

Case studies for Mobile Gaming

Campaign Name: Bingo Mad Angles Contest

Objective: Bingo had an ongoing mad angles contest via sharing a WhatsApp image of the triangle shape of mad angles in the daily life of a consumer. The objective of the campaign was to create awareness about this contest.

Action: Targeting audience between the age of 18 to 30 (for markets — UP, Rajasthan, Chennai, Punjab, Haryana, Chandigarh, Delhi NCR, Orissa, West Bengal, Assam, Hyderabad, Bangalore, Mumbai), Bingo targeted both premium and non-premium games on Pokkt platform with an end card video. A video is played for the gamer to get a reward (can be points or an extra life), once the video is played in the last screen of the video the Bingo contest creative is shared attached to Bingo's Facebook page for further details. The engagement for this unit was really high as the gamer always watches the entire video for rewards.

Results: In a span of 28 days this campaign saw 1.4 million impression with 1.3 million complete views (93% - the average is 70% to 80%) and a CTR of 4.3% above the benchmark of 2% to 3%.

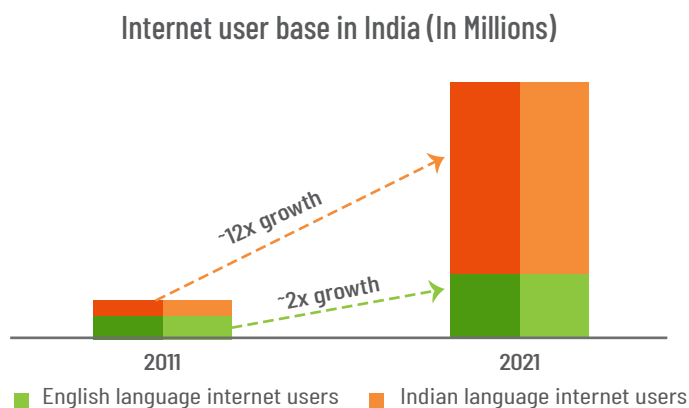**Campaign Name: GSK Boost Virat Kohli Campaign**

Objective: The objective of the campaign was to promote th Virat Kohli TVC to kids between the age of 9 to 14 in South India markets (Andhra Pradesh, Karnataka, Tamil Nadu & Kerala)

Action: The biggest challenge of the campaign was that the video was of 90 seconds which is too long for mobile viewing and a frequency cap of one is too less to create awareness (mostly it's 2-3 frequency). Boost chose reward videos as a ad unit on mobile gaming platforms. Engaged gamers never skip reward videos as they are always looking for more points, lives and powers while playing and reward videos is an easy way to achieve that so even a 90 sec video with one frequency cap can make an impact. This can only be achieved with mobile gaming, as on other platform consumers aren't this patient.

Results: The campaign got 6.5 lac unique views (20% more than planned) with a 42.34% of complete views and a CTR of 4.62% 4X times the benchmark of 1%.

(B): Rise of vernacular/Indic content in India

9 out of every 10 new internet likely to prefer vernacular/Indic content to access internet online

Internet user base in India (In Millions)

~12x growth

~2x growth

2011   2021

■ English language internet users   ■ Indian language internet users
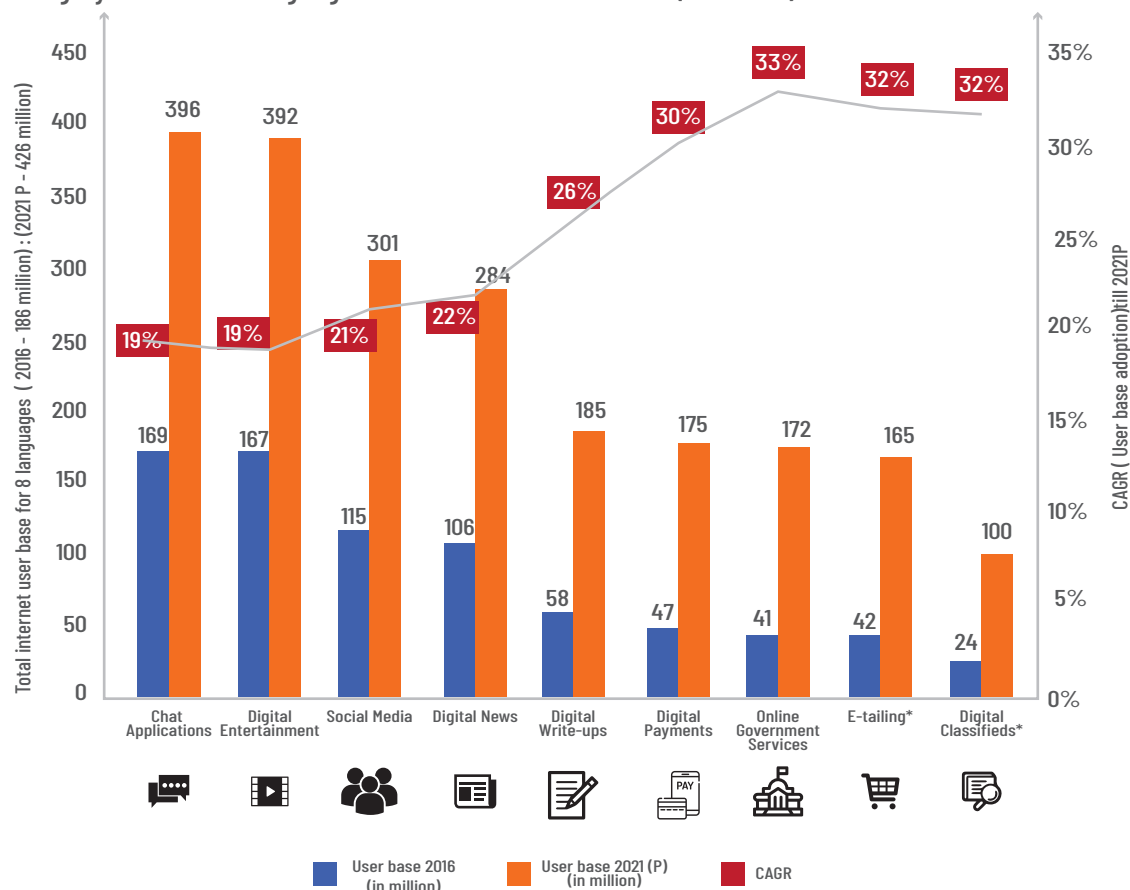
The Indian language internet users have grown from 42 million28 in 2011 to 234 million in 2016, a 12x growth, almost double from the 2x growth seen in the English language internet users. Over the next five years, it is expected that 9 out of every 10 new internet users in India are likely to prefer vernacular or regional languages to access the internet. The Hindi internet user base is likely to outgrow the English user base by 2021. The English language still accounts for 56%[28] of the content online, whereas, Indian languages account for less than 0.1%. The anomaly here is that in India only 12%[29] population can read/write English. The Indian government is investing on digital literacy and using digital media to help reach the rural parts of the country. Within the last year, Hindi content on the web has grown by about 94%[28], whereas English content has grown by 19%. Furthermore, the increase in the availability of local language content online would help in increasing the internet penetration by 24%[28].

While Chat applications and digital entertainment will bring new Indian language users online growing at 19% CAGR[30] in line with the growth in total Indian language user base. Going forward Digital write-ups, digital payments, online government services, e-tailing and digital classifieds are emerging categories among Indian language users. Indian language user base accessing these categories will grow at a CAGR of 26% to 33% over the next five years. With increased local language support and content, these categories will see increased adoption among users.

Category wise Indian language internet users-2016 & 2021P(in million)[11]

Chart data (Total internet user base for 8 languages; 2016 - 186 million; 2021 P - 426 million):

Category	User base 2016 (in million)	User base 2021 (P) (in million)	CAGR
Chat Applications	169	396	19%
Digital Entertainment	167	392	19%
Social Media	115	301	21%
Digital News	106	284	22%
Digital Write-ups	58	185	26%
Digital Payments	47	175	30%
Online Government Services	41	172	33%
E-tailing*	42	165	32%
Digital Classifieds*	24	100	32%

Legend: User base 2016 (in million) · User base 2021 (P) (in million) · CAGR

Source: Indian Languages –Defining India's internet, study by KPMG in India and Google April 2017

The next 5 years look really promising in the growth of Indian language usage penetration among various businesses. Digital Entertainment is already on its epitome with Hindi and seeks to reach the same with Gujarati, Kannada and Malayalam by 2021[31]. eTailing sees a comparatively low growth, whereas Digital News see a sustainable growth. The maximum growth is seen in Digital Payments with a 2x[31] growth across all languages.

Details of in-built local language support currently provided by the major device manufacturers

Device Manufacturer	No. of Indian languages covered	Device type	Type of keyboard	Handset Price range (INR)	Software development
Micromax	10	Mobile phone	Touch pad, Keypad	3,000 to 30,000	Partnered with MoFirst
Samsung	9	Mobile phone	Touch pad	5,000 to 50,000	In-house
HTC	10	Mobile phone	Touch pad	5,000 to 50,000	In-house
Apple	8	Mobile phone	Touch pad	20,000 to 80,000	In-house
Lava	21	Mobile phone	Touch pad	Less than INR 5,000	In-house
Karbonn	21	Mobile phone	Touch pad	Less than INR 5,000	In-house

[31]KPMG & Google Indian Languages Defining India's Internet Report 2017

The smartphone manufacturers also need to deploy Indic language supported keyboards as 70%[32] of the Indian language users find it difficult to operate English keyboards.

While many people are creating indic content, more effort required to make it mainstream

Affordability, accessibility, applicability, and awareness-building are the four areas where most of the work has to be done in-terms of mobile growth in India. The first 2 areas are growing, we really need to work on the latter two - applicability and awareness building. Many brands have taken a step forward and have included regional language in their interface. However, there is more that still needs to be done.

Mobile platform	Launch	Language	Purpose
makeMytrip.com	August, 2015	Hindi, Tamil, Telugu, Malayalam and Gujarati	India's first vernacular rail booking app in 5 languages
f	2012	Hindi, Tamil, Telugu Bengali, Punjabi, Marathi, Kannada and Gujarati among others	To double non-English users every 6 months in India
G	2009	Hindi, Bengali, Marathi, Tamil, Telugu, Gujarati, Punjabi, Malayalam and Kannada.	'Tap to Translate' 'Google Loon'- provide connectivity in rural areas
CC-Avenue®	January, 2015	Hindi, Marathi, Gujarati, Bengali, Tamil, Telugu, Kannada and Punjabi.	Create a localized experience; can deliver on a global scale sitting in India.
HDFC BANK We understand your world	November, 2012	Hindi	First to create a Hindi app to increase the account holders to 80% who use apps

[32]KPMG & Google Indian Languages Defining India's Internet Report 2017

ADOPTION OF INDIAN LANGUAGE USERS
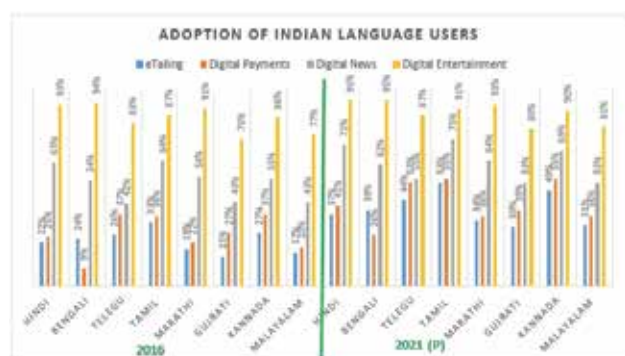
In December 2016[33] YouTube declared that it will be showing users in India more content in their preferred local language. The localized content languages will be available on both YouTube's homepage and in its trending section, and will be targeted based on users' watch history. The new languages include

Bengali, Gujarati, Hindi, Kannada, Malayalam, Marathi, Punjabi, Tamil and Telugu. A great decision by YouTube as by 2021 vernacular content consumers in India will be more than double[5] English content consumers (536 million[34] vs 199 million).

Where does the Future Stands?

User generated content:
We will see a rise in the participation of the Indian language users, due to the vernacular friendly apps and platforms. Thus, allowing a transition from passive users to active users, leading to a rise in opinion and user generated content. Tools such as dictionary, spell check, grammar check, translation & transliteration should be developed for Indic languages (publishers and developer both).

Size does matter:
The major issue when it comes to developing a web page/app in regional language is its size. Since regional language fonts are complex in comparison to English, such a webpage is often 'heavier'. This limits page size and it takes more time for a regional language web page to load. This limitation often restricts site versatility that ultimately affects the end-user's experience.

Indic Keyboards:
45% of Indian language users face challenges in text input on chat applications. Adoption of input mechanisms such as voice to text support, local language keyboards and transliteration is expected to improve user experience. Inclusion of Indian language fonts and keyboards in mobile handsets depends on the discretion of the hand-set manufacturer. So OEMs have to put their best foot forward and integrate keyboards that at-least have 22 national languages of India.

Voice to Text:
Facebook and Google are both developing "Voice to Text" software for different languages, which is a killer combination and will resolve the content creation problem completely. People who don't know how to write can also send messages and create content via this tool.

An outlook for Marketers!

1) Availability of quality supply for advertisers.
2) Ability of the Brands to connect with "Bharat"(multi-language and rural) and not only "India" (predominantly english speaking)
3) Better price realization for publishers will drive further investments in enlarging the quality base of Indic publishers

[33]http://indiatoday.intoday.in/technology/story/youtube-in-dia-will-now-show-more-local-language-content/1/830066.html | [34]http://brandequity.economictimes.india-times.com/news/media/how-ott-players-are-geared-up-to-woo-indian-viewers/57275909

Case study for Vernacular Content

Campaign Name: Horlicks Exam Time OBD

Objective: Exam time for kids is a very stressful period and they are often suffering from anxiety. Horlicks wanted to reach out to mothers in Bihar and Jharkhand, to tell them how Horlicks can help their kids 'nip the bud' for their exam time stress.
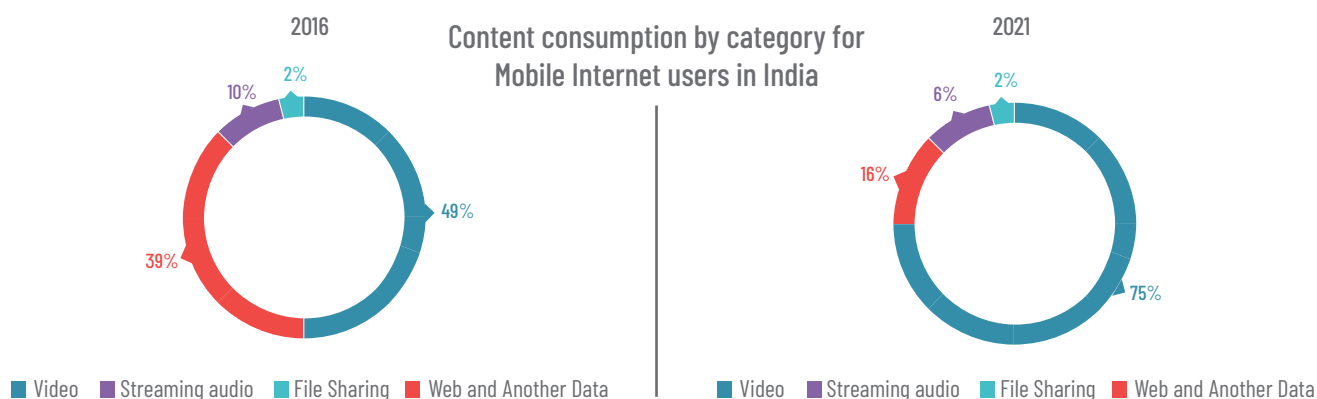
Action: Bihar and Jharkhand mostly has rural audiences which are low in data usage and also this market is a vernacular one with less English speaking crowds. Keeping this in mind Horlicks created a very targeted subset of women in these 2 areas who are lower-end mobile device users, low data users and have a low ARPU. Additionally, Horlicks went and created OBDs in Hindi (in a story telling format) and took the vernacular route. Two OBDs were created, the customers who heard OBD1 completely got to hear the OBD2 and then also got gratification in-terms of mobile recharge.

Results: The results were a knock out with 23 million women who heard OBD1 and 11 million women heard OBD2. The benchmark of full content heard was 15% and this campaign reached an average of 22% content heard. The high listenership was due to in-depth targeting and Hindi story telling.

(C): Mobile OTT Video

India has 250 million online video viewers, 100 million OTT viewers

India is a developed market for entertainment content consumption, with entertainment being one of the top 3 internet activities for both Rural and Urban internet users. The consumption of video has jumped many folds, especially on mobile devices. The future predicts, video being the largest share of the pie on content consumed on mobile internet, growing from 49%[35] in 2016 to 75% in 2021.

Content consumption by category for Mobile Internet users in India

2016

- 2% File Sharing
- 10% Streaming audio
- 49% Video
- 39% Web and Another Data

■ Video ■ Streaming audio ■ File Sharing ■ Web and Another Data

2021

- 6% Streaming audio
- 2% File Sharing
- 16% Web and Another Data
- 75% Video

■ Video ■ Streaming audio ■ File Sharing ■ Web and Another Data

The appeal of video is easy to understand. It lends itself to storytelling in a more engaging and entertaining way than print and radio. Consumers pressed for time and conditioned for instant gratification—meaning almost everyone naturally gravitate towards video. Online video is the fastest-growing segment with year-on-year (YoY) growth rates reaching 64% with almost 250 million online video viewers in India in 2017. (EY, India's Media and Entertainment Sector, March 2018 report)

Consumption pattern on various VoD platforms (January 2017)

Platform	Active subscribers (million)	Minutes spent on the platform (million)
Hotstar TV	63.0	11,300
Voot TV	13.2	2,800
Amazon Video	9.5	NA
Sony LIV	4.6	423
Netflix	4.2	495
OZEE TV	2.4	679

In India, the number of video-capable devices and connections are expected to grow 2.2X between 2016 and 2021, reaching 800 million[36] in number.

Currently, the number of OTT (Over the Top) / VOD (Video on Demand) players in India have significantly increased reaching over 100[1] million users with the likes of Hotstar, Voot, Netflix, Amazon Prime, Sony Liv and Zee5. In a very small period Netflix gathered 4.2 million[37] active subscribers, at a minimum of Rs.500 per month subscription for a single screen user. Leading the chart is Hotstar at 63 million[37] active users banking on its first movers advantage, live cricket streaming and premium HBO content (especially Game of Thrones).
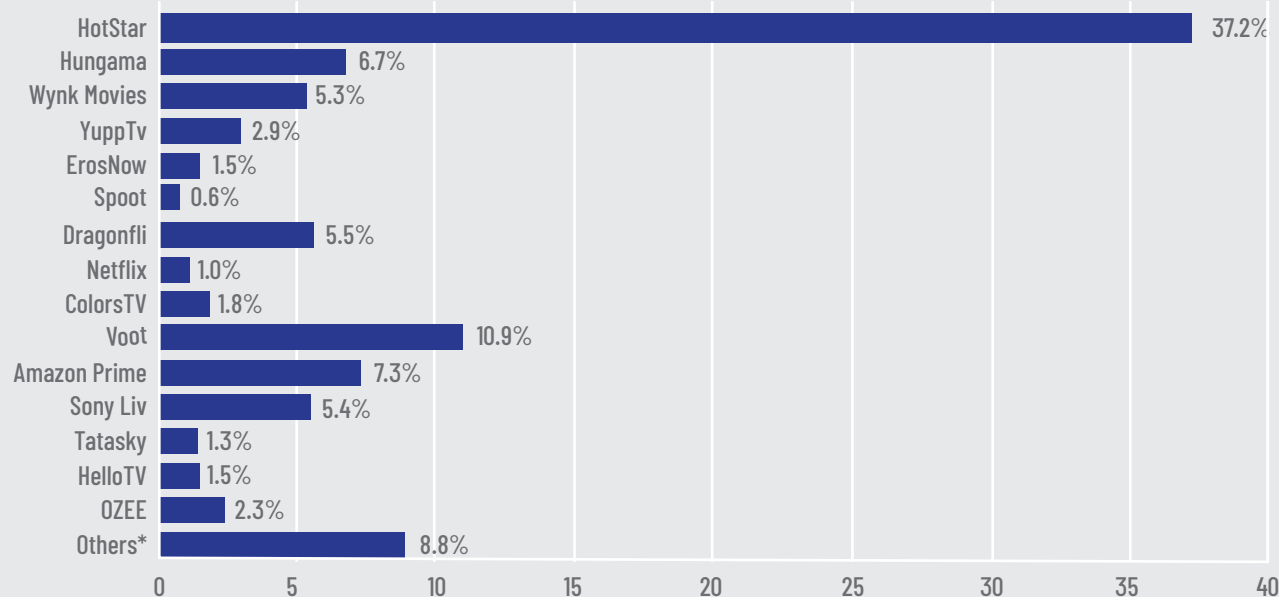
[35]KPMG Media and Entertainment Report 2017 | [36]EY Digital Opportunity 2017|
[37]http://brandequity.economictimes.indiatimes.com/news/media/how-ott-players-are-geared-up-to-woo-indian-viewers/57275909

Video Platforms
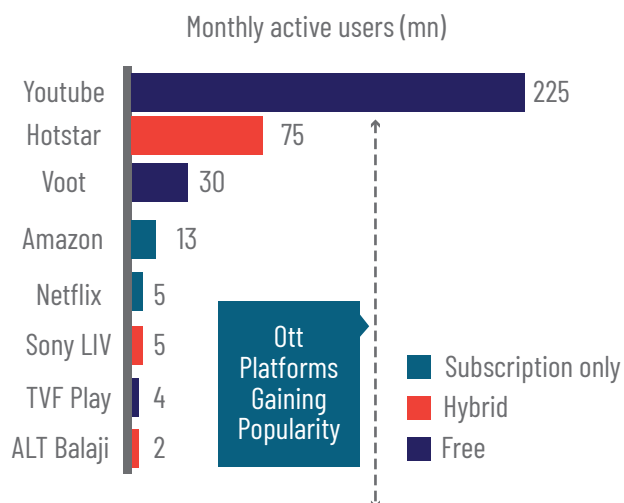**Online Video: Market share by installs**
March - 2017

Platform	Market share
HotStar	37.2%
Hungama	6.7%
Wynk Movies	5.3%
YuppTv	2.9%
ErosNow	1.5%
Spoot	0.6%
Dragonfli	5.5%
Netflix	1.0%
ColorsTV	1.8%
Voot	10.9%
Amazon Prime	7.3%
Sony Liv	5.4%
Tatasky	1.3%
HelloTV	1.5%
OZEE	2.3%
Others*	8.8%

Others consists of: TVF, The Viral Shots, Vixty, Viu, DailyMotion, TubiTV

OTT players running towards their share in the YouTube audience

Active users of Youtube and OTT platforms

Monthly active users (mn)

Platform	Monthly active users
Youtube	225
Hotstar	75
Voot	30
Amazon	13
Netflix	5
Sony LIV	5
TVF Play	4
ALT Balaji	2

Ott Platforms Gaining Popularity

- ■ Subscription only
- ■ Hybrid
- ■ Free

Source: OTT and VoD player interviews, Analysys Mason

YouTube stands 2x[38] in-terms of monthly active users when compared to OTT players in the country. With OTT players only 3 years old in India and YouTube was launched 10 years ago, the growth graph of the former is soaring high and (if not sooner) will reach near to YouTube in the years to come.

The drivers to growth in OTT consumption on YouTube are the growing web series and the growing regional content that caters to Indian's 90% (approx) regional language speaking audience. This has also led to the growth of long format content consumption (above 5 minutes[38]).
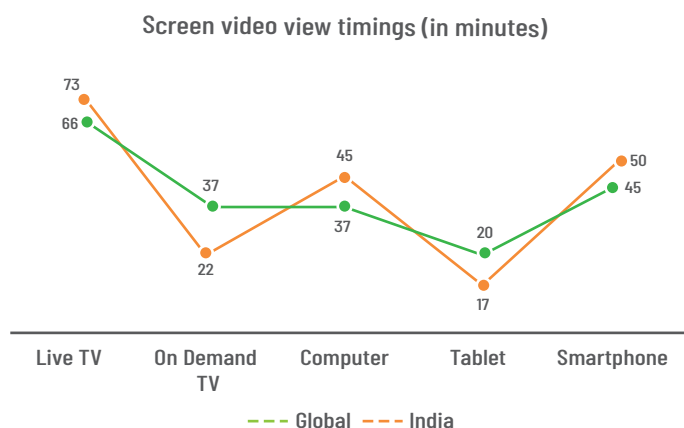
Top Video OTT apps of 2017

App name	Rank		
	By monthly active users	By downloads	By time spent by end of 2017
YouTube	1	8	1
hotstar	2	1	2
JioTV	3	2	3
JioCinema	4	4	6
Voot	5	3	4
Amazon Prime Video	6	5	5
Sony LIV	7	7	9
Airtel TV	8	6	13
Netflix	9	14	7
Tata Sky Mobile	10	11	15
OZEE	11	9	8
TVFPlay	12	21	12
YouTube Go	13	18	11
YuppTV	14	16	14
YouTube Kids	15	15	10
ALTBalaji	16	12	17
Sun NXT	17	10	19
Ditto TV	18	13	16
Viu	19	17	18
Eros Now	20	23	24
Hungama Play	21	22	25
nexGTv	22	19	22
Vimeo	23	25	21
Tubi TV	24	24	23
Zee Marathi	25	20	20

Source: All data has been provided by App Annie and has not been verified by EY. It has been presented in sumaary form

[38] Nokia MBIT Report 2018

VOD/SVOD blurring the lines between TV and Video content consumption

Screen video view timings (in minutes)

Live TV — Global 66, India 73
On Demand TV — Global 37, India 22
Computer — Global 37, India 45
Tablet — Global 20, India 17
Smartphone — Global 45, India 50

- - - Global   - - - India

[39] IDC 2018

Globally, people spend an average of 45 minutes daily on their smartphones to watch videos. India is slightly higher with 50[39] minutes spent daily on smartphone video viewing. Video viewing on Smartphones did beat that on desktop (at 45 minutes), however, has a long way to go to beat live TV time at 73minutes[39], a whopping 40% more.
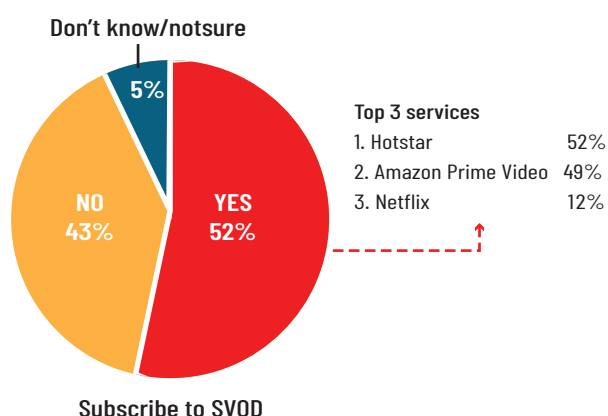
The Indian market has now seen an uptake in SVOD (Subscription video-on-demand) services. With Netflix, Hotstar Premium and Amazon Prime delivering great content, consumers are actually ready to pay for premium content on these platforms. A new addition in the Indian market will be YouTube Red which will see a surge in the next 2 to 3 years.

Homegrown production house like Culture Machine, Girliyappa, AIB, TVF, Blush, Bindaas, Eros Now, Hats Off Production, Open Window, Trend Loud etc. are creating web series to entice the Indian audience and also getting millions of views for it. Low priced services like Amazon Prime at Rs.999 yearly and Hotstar Premium at Rs.199 per month, SVOD will sky rocket in India in a couple of years.

India is in the state of Programmatic evolution, saw 81% growth in 2017

Internet users in India who subscribe to select suscription Video-on-Demand (SVOD) Services, Feb 2017
%of respondents

Don't know/notsure
5%

NO
43%

YES
52%

Subscribe to SVOD

Top 3 services
1. Hotstar   52%
2. Amazon Prime Video 49%
3. Netflix   12%

86%[40] TV viewing consumers also interact with Facebook as their second screen while watching TV, for Twitter it's 66%[40]. Social media in 2016 didn't only expand its portfolio with video content but also gave consumers a new addiction - live streaming. A global survey said that 50%[41] of marketers plan to use live video services for their marketing campaigns in 2017.

So now marketers have many opportunities with video advertising where they can, not only leverage made for TV content on platforms like Hotstar, Voot, Zee5 etc. but also leverage from consumer created content like vlogs, Snapchat stories, Instagram stories, periscope live feed or Facebook live video.

Integrated planning helps marketers to know their user's consumption habits both, on offline and online media. With mobile integrated you can also have more in-depth tracking of your campaign that is beyond reach and talks about clicks, visits and engagement etc. Further, retargeting your customers and lookalikes on varied digital platforms for your consecutive campaigns.

Case Study for Mobile Video (integrated campaign)

Campaign Name: Moonbow water purifier launch in India

moonbow
expect the unexpected

Objective: Moonbow water purifiers are a late entry in the Indian market, which is already established in this category. Hence, the objective of the campaign was to create buzz and visibility about Moonbow water purifiers and in the process also try to get a piece of the competitors SOV (share of voice).

Action: Water purifier as a category is very active on TV and so Moonbow wanted to utilize its TVC even in its digital campaign. Hence, they chose to do a TV + Mobile integrated campaign where the audience who are watching Moonbow's and its competitors TVC will be re-targeted on their mobile devices with a video ad about Moonbow water purifies. The thought behind using this integrated tech innovation is to catch hold of audiences who are receptive to an ad on TV and then elevate it to an engagement on the digital platform.

Results: The results were extraordinary with a 4X increase in Moonbow's SOV, with 29% engagement from traditional to Digital ads reaching 700k unique users.

[39]Millward Brown Ad Reaction Study | [40]http://www.socialmediaexaminer.com/wp-content/uploads/2016/05/SocialMediaMarketingIndustryReport2016.pdf | [41]https://www.nabshow.com/thought-gallery-thought-leaders/6-key-media-and-entertainment-trends-look-2016-nab-show
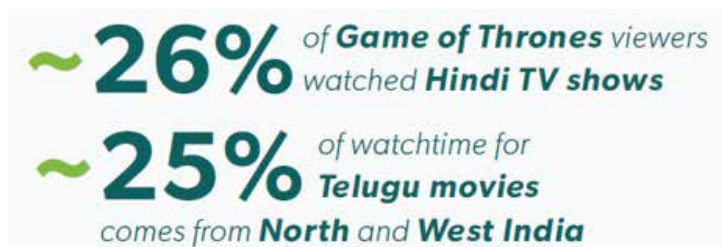
How to engage your video viewing audience?

When given the option, people don't always skip ads. Here is why?

Global		India
1	Content is Funny	1
2	They like the category	3
3	They like the brand	2
4	They get rewards in return	4

So, what makes a video ad engaging for the consumer? Make the add funny![42] The Millward Brown Video Ad Reaction Study found that funny content is the top priority for both Indian and Global audiences to not skip an ad. Consequently, if the ad is of their favorite category, brand or they are getting rewarded on seeing the ad, they would happily give marketers a complete view for that ad.

Breaking Stereotypes!

Since the growth of OTT video platforms from late 2015, a stereotype has been maintained on the usage of these platforms. Quotes like 'mostly metro audience use OTT video platforms as they have better access to 3G/4G network' and 'mostly premiere audience who wants to consumer English content only access the OTT video space'.
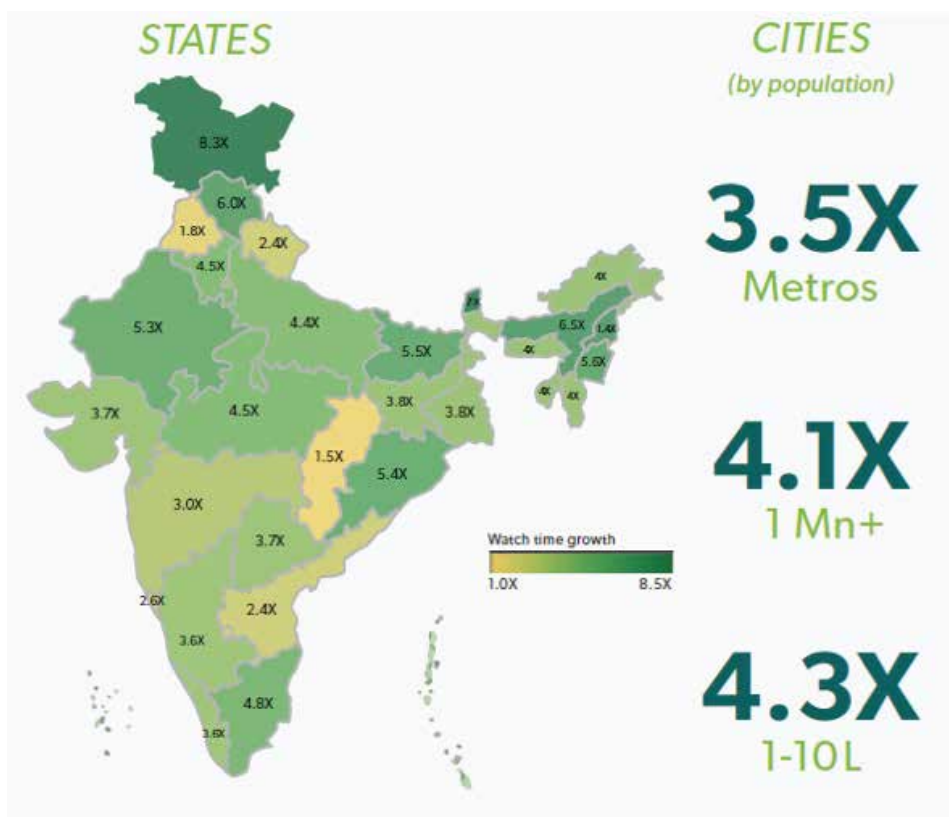
~26% of *Game of Thrones* viewers watched **Hindi TV shows**

~25% of watchtime for *Telugu movies* comes from **North** and **West India**

All of this is the thought of the past. 2017 saw a 360-degree change in OTT content consumption that shattered all perception that marketers had about video content consumption patterns.

As per the latest report (India Watch Report 2018) by Hotstar, we see that 26%[43] of premier English content consumption audience who watch Game of Thrones on the Hotstar platform also watch Hindi TV shows and 25% of North and West Indian audiences watch Telugu movies (virtually nullifying the language barrier).

The report also showed that non-metro cities showed more growth compared to metro cities in watch-time. Jammu and Kashmir and North East showed the maximum growth, 3x[43] more than metro cities.

This shows that the growth opportunity for OTT video players in India is beyond metros and in the coming 2 to 3 years we will see more tier 2 and 3 cities will absorb more on-demand content.

STATES

8.3X
6.0X
1.8X
2.4X
4.5X
4X
5.3X
4.4X
6.5X 1.4X
5.5X
5.6X
3.7X
4.5X
3.8X
3.8X
4X 4X
1.5X
5.4X
3.0X
3.7X
2.6X
2.4X
3.6X
4.8X
3.6X

Watch time growth
1.0X   8.5X

CITIES
(by population)

3.5X Metros

4.1X 1 Mn+

4.3X 1-10L

[42] Millward Brown Video Ad Reaction Study

Ad effectiveness, let's talk Viewability

Non Viewable ads 50%
Viewable ads 40%
Invalid Traffic 10%
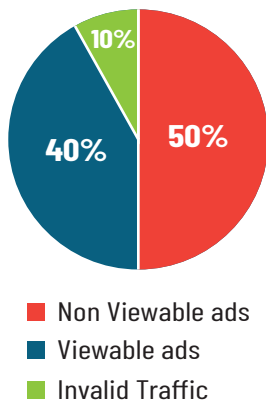
Did you really see an ad or you just scrolled through it or you were on another screen reading an article when the video ad was playing in the background? These are a few questions going in a marketer's mind. Do internet users engage with an ad to even recognize its presence while they are engaging with the content they went online for? This is the question of viewability. Viewability is an online advertising metric that aims to track only impressions that are actually seen by internet users.

Furthermore, when it comes to mobile display ads the thumb moves faster than the eyes can register. Users don't stop to see an ad then why should a marketer pay for a un-viewable impressions.

With only 40%[4] of ads viewable in the India market, ad viewability is the biggest risk that brands face; it is the biggest digital accountability challenge for delivering effective digital campaigns. For this reason many industry bodies and agencies have created viewability standards. While platforms like YouTube and Facebook have challenges on ad viewability, OTT platforms like Hotstar report over 85% ad viewability as they create a TV similar experience in serving ads to ensure completed views. They however cap ad breaks to a max of 60 secs to ensure sustained viewer interest in continuing with the content

[43] Hotstar, India Watch Report 2018

Contextual Brand Safety

Since the advent of YouTube, followed by platforms like Vine, Twitter, Instagram, and Facebook (and many other social platform); video content both brand and user generated has been a rage. However, this isn't exactly good news for marketers as the content created can be spam, criminal or adult. The question marketers need to ask is about contextual brand safety.? The content on which my brand's name and ad is to be seen, is it safe and blends with my brand's reputation?

No Advertiser Ads may be placed on inventory that contains material that:

Infringes the intellectual property rights of others (including but not limited to unauthorized copies, public performances or derivative versions of software, films, television programs, music, books, electronic games, or other categories of protected works)

Induces, facilitates, promotes, or enables financial benefit from such infringement (e.g.P2P/Bit Torrent/MP3 tracking and indexing sites, "linking" or "leeching" sites, ROMs, "warez", emulators, hacks, "phreaks," "cracks," or ripping software for illegally circumventing DRM or other copy protection devices)

Promotes or facilitates illegal activities, deceptive practices, or violations of the privacy rights of others

Promotes or facilitates activities generally regarded as Internet abuse, including but not limited to, the sending of unsolicited bulk electronic mail or the use or delivery of viruses, Spy-ware, or another malware

Relates to violence, sex, profanity, racism, sexism, religion, gambling, pornography, abortion

After the YouTube fiasco early 2017, contextual brand safety is the top most priority for many brands. YouTube and other Google sites have taken a fall due to brand safety issues as many big brands stop advertising on these platforms.

An outlook for Marketers!

Smarter Phones, Cheaper Data costs, and successful marketing has made OTT platforms all pervasive, and the App usage time for them has skyrocketed. Brand and advertiser today don't need to focus on only one platform for Video advertising, and can pick-and-choose quality supply given to them by all players.

OTT viewing compliments TV viewing - mobile is the new primetime!

Majority content of the homegrown video OTT players is from their TV channels. Even though people can now record the content on their TV via their digital set-top boxes, having one platform that has all the TV content available without the action of recording or browsing multiple channels has become one of the main reasons people have adopted OTT platforms.

Another dimension to the adoption is streaming sports in real-time, Hotstar saw tremendous growth in their viewership with IPL matches. Mobile is increasingly becoming the preferred screen as opposed to a catch-up screen vs. TV.

4.8 MN SIMULTANEOUS VIEWERS

HIGHEST CONCURRENCY SEEN IN APAC
During Champions Trophy Final 2017, India vs. Pakistan

Percentage aggregated reach during the IPL 2017 Final on TV and Hotstar

TV — Hotstar

The Next Content Evolution - ads go beyond 30 seconds as longer format creative content becomes more popular

Consumer engagement is a major issue for all advertisers due to the shorter attention span of the user today. Long story content offers the unique opportunity for marketers to talk to audiences engaged with content for 20 minutes[44] or longer. It also provides more slots to drive frequency of message.

[44] Hotstar, India Watch Report 2018

Time format of most popular videos on YouTube India

2015

10%

90%

2017

25%

75%

■ Short-format
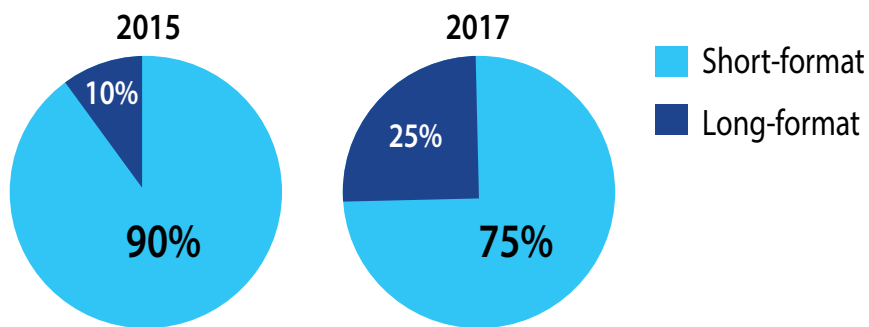
■ Long-format

Source: Vidsstatx, Analysys Mason

When compared to 2015, in 2017 the consumption of long format videos on YouTube[45] doubled and on Hotstar, the leading OTT player average time spent is 43 mins per day per user, with 96% of watch time coming from video greater than 20 minutes.

Long story ad format solves this problem by providing more emphasis on entertainment and story. Long story ad formats don't have the short lived objectives of clicks and complete views; they actually work on long-term objectives of creating brand affinity. Also, the brand has a bigger canvas (in-terms of time) to reinforce its message and a larger engagement opportunity with its consumer.

'Snacky' is passe: real stories matter

96% of watchtime on hotstar comes from **videos longer than 20min**

One third of all Hotstar entertainment viewers follow their favourite shows primarily on Hotstar TV

Source: Hotstar, India Watch Report 2018

Viewability and Brand Safety for Brands

Viewability and Brand Safety have now become synonymous to digital video advertising globally. As mentioned earlier in this chapter, contextual content and actual reach (in-terms of who has seen your video ad) now decide the performance of your video campaign. These two parameters should be followed to the 'T' and all brands should on-board third party tools like OpenSlate and MOAT to measure the effectiveness of their video campaigns.

[45]Nokia MBIT Report018

Case Study for OTT video platforms helping in creating better Brand Awareness

Campaign Name: Digital Ad Effectiveness on Hotstar Sports – IPL 2017

Objective: To understand brand uplift in key brand parameters for brands advertising on Hotstar Sports during IPL 2017.

Action: Hotstar on their platform did a control and exposes study to calculate change in awareness and ad-recall for brands (regular and first-time advertisers) under 5 categories. Demographic covered were 18-40 male from Metro cities and select 10-50L towns). Sample size: Interim Control (915) + Interim Exposed (1600)

Results:
1. On an average awareness of brands advertising during IPL on Hotstar across 5 different categories showed 9% higher awareness of brands than the control sample
2. Best in the industry Ad Recall. When respondents who were exposed to the ad on Hotstar during IPL were shown de-branded ad, still an average 82% (across categories) recalled seeing the de-branded ad– which falls at the top quintile of Nielsen digital ad effectiveness norms
3. Massive growth for first-time advertisers on Hotstar - First-time advertisers saw very high growth in Awareness of over 20%

(D): Mobile OTT Audio

OTT audio will increase at a CAGR of 15.8% till 2021

On-demand entertainment services led by audio and video content are at the cusp of inflection point in India. A very promising supply side ecosystem has evolved in India for streaming with multiple players.In the last 2 years with more smartphones, cheaper internet and launch of various domestic Audio OTT players, the scenario has changed. In 2016 India had 100[42] million Audio OTT users.

Music Industry size in India (in INR billion)

CAGR growth 15.8% (2016 vs 2021)

CAGR growth 13% (2015 vs 2016)

2011	2012	2013	2014	2015	2016	2017(E)	2018(E)	2019(E)	2020(E)	2021(E)
9	10.6	9.6	9.8	10.8	12.2	14	16.3	19	22.1	25.4
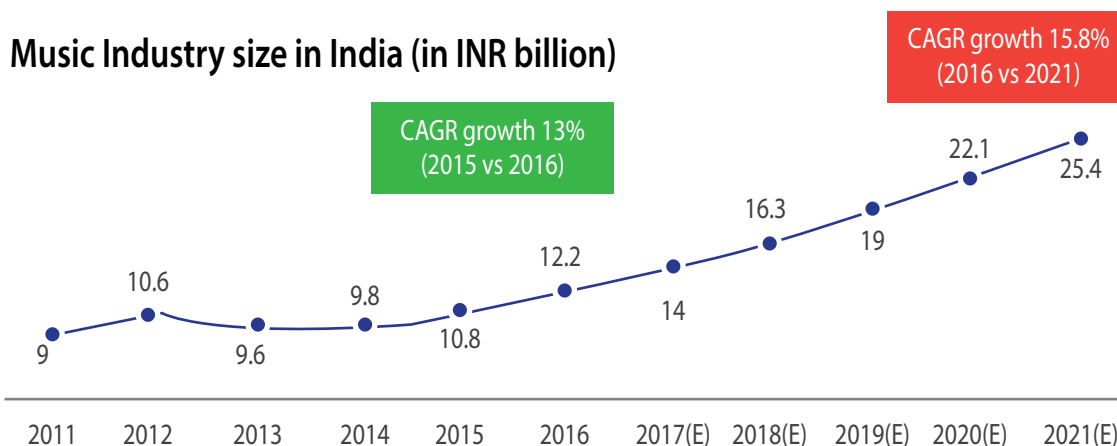
Source: KPMG and FICCI

Sales of music rights generated robust revenues, at about 5%[43] of the production cost of a movie for filmmakers in 2016. This was attributed to an increase in syndication and digital consumption of music and licensing of music from major labels by various music streaming platforms such as Gaana, Wynk, Hungama and Saavn. Apart from established players like Saavn, Gaana, Hungama and Wynk new players such as Google Play, Amazon and Reliance Jio have entered the market with even cheaper subscription models. In this competitive industry, with similar song catalogues and genres available across all service providers, platform loyalty plays a key role to improve monetization and retain consumers.

Due to increasing competition, music streaming services are investing in creating a platform that has exclusive content, non-music content and even selected video catalogue. For instance, Saavn has 'Originals' with audio stories, podcasts and commentaries while Gaana has 'specials', such as popular Radio Mirchi content, sit down comedy and exclusive programs, and Hungama has an original audio series called 'Mera Wala Music' that offers non-music stories.

[42]MMA and GroupM Mobile Ecosystem Report, India 2016 | [43]KPMG and FICCI Media and Entertainment Report 2017

This trend indicates that companies which had their primary focus on playlists and acquisitions are now also investing to generate original content to differentiate themselves and add monetization channels. The concept is similar to OTT video where in to reach more SVOD like Netflix and Amazon Prime, even Audio OTT platform need to create content that is different from their competitors.

Here's a look at the differentiated offerings of each music streaming apps:

	Pricing	Bitrate	Apps for	Trial Period	Offline/purchase	Metable Features
Saavn	₹99 (Android) ₹120 (iOS)	320kbps	Andriod iOS Windows	1 month	Yes / No	Collection of Songs & Curation
Saans	₹99	320kbps	Andriod iOS Windows	14 days	Yes / No	User interfece, Mirchi Radio
Wynk	₹99 (Plus) ₹129 (Freedom)	320kbps	Andriod iOS	1 month	Yes / Yes	Marathon Playlists & Collection
Hungama	₹99 (99 items) ₹99 (Unlimited)	320kbps	Andriod iOS	7 days	Yes / Yes	Video Streaming & Download
Apple Music	₹120 (individual) ₹99 (Month)	320kbps	Andriod iOS Windows	120 days	Yes / Yes (thru iTunes)	International Collection

To differentiate themselves, music streaming services are leveraging digital technologies such as analytics, machine learning and AI and investing on user experience, customization services and new type of content. For example[43], Saavn has integrated a social networking feature with its music streaming service which allows users to follow the profiles and playlists of their friends as well as celebrities.
Gaana has launched a first of its kind Facebook messenger bot inside the Facebook messenger application developed to provide streaming services to its users on Facebook. Hungama is rewarding points though gamification to its users, which they can then redeem to buy digital goods such as songs, music videos and movies.

OTT music contains 72% revenues of overall Indian music industry!

Digital music industry ad revenues are expected to mirror the growth rates to be seen by total digital ad revenues in India by 2020. The digital revenues would come majorly from display ads followed by video and audio ads (that are planned on OTT platforms). At the same time, the paid subscriber penetration among online music users is expected to reach 10-15%[44]. Contribution from digital music segment to overall Indian music industry revenues is expected to grow from 55%[44] in 2014 to 72% in 2017. Further, with that growth digital music industry revenues including streaming, downloads, and other format revenues and subscription and ad revenues are expected to cross INR 31 billion by 2020.

[44]KPMG and FICCI Media and Entertainment Report 2017

Case Study for Audio OTT

Campaign Name: Colors Rising Star Launch

Objective: Color's wanted to promote their new reality singing show 'Rising Star' before its launch on TV. The show was a first of its kind singing reality show that had a unique feature of live judging. It was a pre-launch campaign to create awareness about the show in metros in India.

Action: Colors had chosen Saavn as their OTT Audio partner and created a two way media strategy. First, creating a Bollywood hits playlist that had songs sung by the judges of the show to promote and create awareness about the show, this kind of solution can only be done by an Audio OTT platform. Second, with the help of high impact native properties on Saavn, Color's wanted to create both awareness and also get downloads for the Colors App. Using the same platform for both branding and performance campaigns.

Results: 4.8 million minutes of listener time on the playlists with 83% unique users. On the native properties they got an engagement of 6.2%, which is 2X of the benchmark of 3%.

Part V: Mobile Ad Spends

Mobile continues to enable digital ad spend growth and increase its share of pie significantly!

As consumers continue to spend more and more time on their smartphones, investments towards digital are rising.

Millennials accounting for 30%[46] of the Indian population and 72%[47] of the Facebook user base in India; are the key target audience among most marketers today. It is not only that the millennials spend disproportionate time online, they are also very engaged - 72%[48] of Indian digital shoppers are millennials and consume more than 102 minutes5 of streaming entertainment (music + video) every day, making digital & mobile a very significant part of an advertiser's media mix.

% Share of media spends in India

0.75% 1.10%
4.80%
45.64%
15.49%
28.27%
3.95%

■ TV ■ Radio ■ Newspapers ■ Magazines ■ Cinema ■ Outdoor and retail ■ Digital
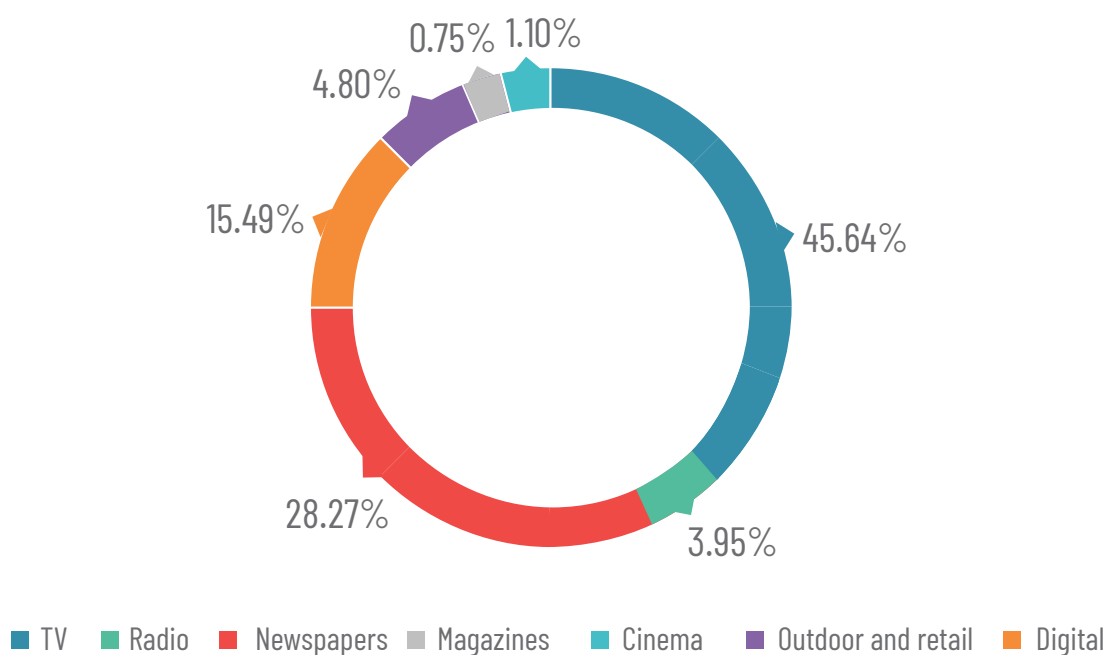
Source: GroupM TYNY Jun 2018

The global growth of the media ad spends industry in 2017 was 3%[47], whereas India saw a 13% growth in FY 2018. On the mobile marketing front, 70%[45] of the Indian digital ad spends goes on mobile.

[45]GroupM TYNY India, December 2016 | [46]Census Calculation | [47]Facebook Ad Manager | [48]IAMAI and Kantar IMRB|

Overall Adex (in USDmn) and Adex growth (%)

Legend: 2016 | 2017 | 2018 (F) | 2018 vs 2018 (% growth)

Categories: Worldwide, APAC, China, USA, India

Digital vs Mobile ad spends in India (USD mn)

Year	Digital	Mobile
2016 (F)	1,095	644
2017 (F)	1,424	996
2018 (F)	1,851	1,381

Digital | Mobile

Exchange rate used: USD 1 = INR 66.661
Source: GroupM estimates1,381
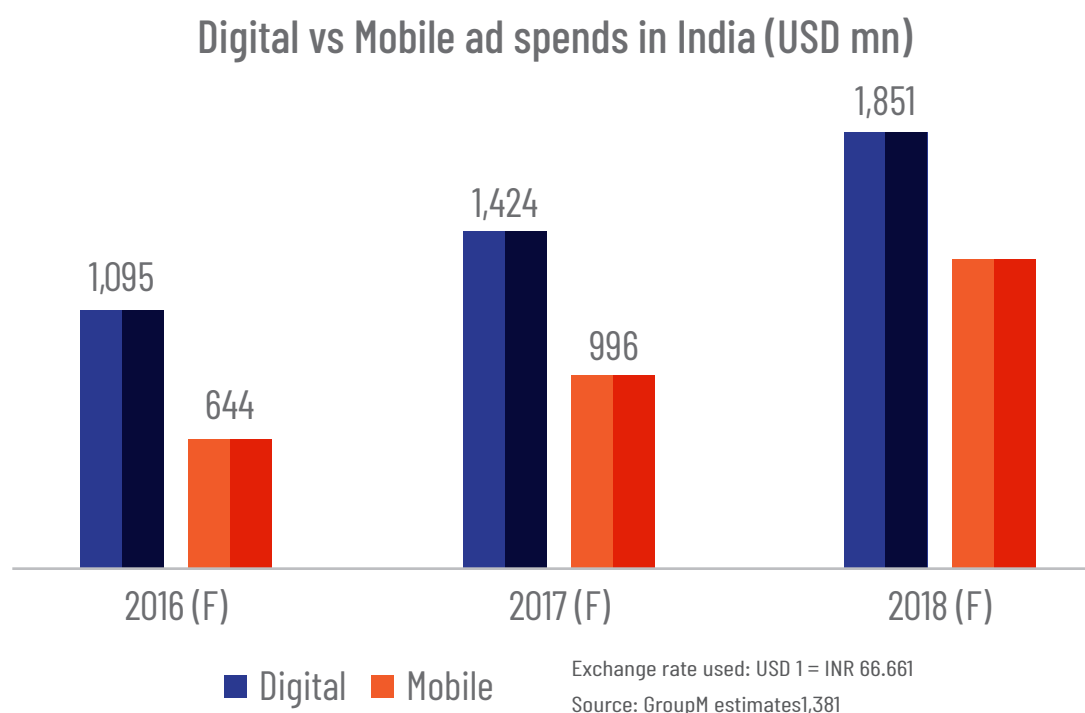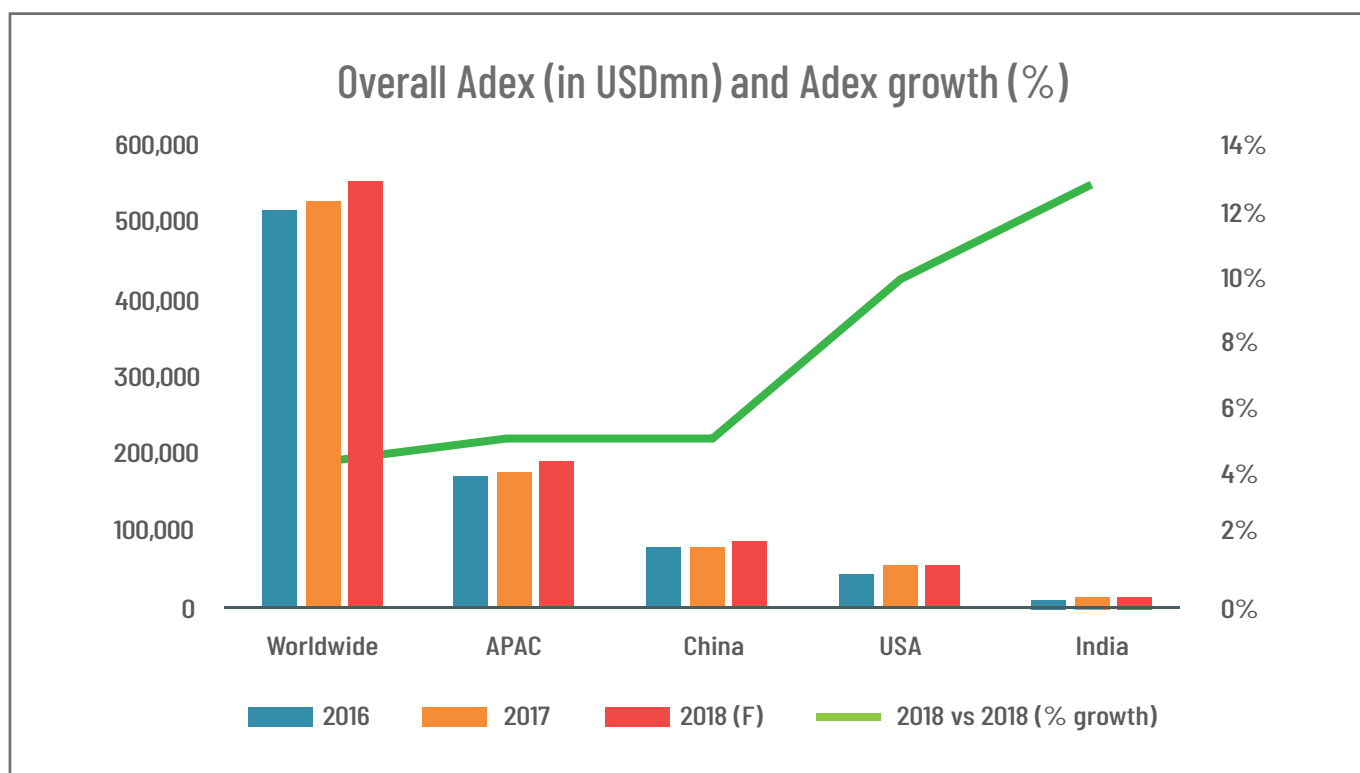
4G networks, cost effective data plans, smartphones has led to mobile becoming a 'Torchbearer' that is driving digital ad spend growth in India. This has shaped, Digital equals Mobile to Mobile now greater than Digital, India's has sprinted towards mobile growth.

The near future will not only see growth of mobile marketing in India, but mobile will enable growth of other mediums via Integrated Marketing as newer technologies grow. Going forward mobile video, audio, and gaming industries will power mobile advertising spends. However, IoT, AR/VR and AI will create newer channels to grow mobile in India and give marketers new platforms to experiment.

Appendix

The changing definition of a feature phone!*

Historically, "feature phones tend to use a proprietary, custom-designed software and user interface, and lack the capabilities of smartphones."The journey started with Cell Phones, they were first introduced in India in the early 1990s with basic capabilities of calls and messages. Then came feature phones which allowed the access of internet on mobile devices with the help of telecom partners. Almost, after 10 years from the advent of cell phones and their adaptation to feature phones came smartphones in the mid-2000s, where Ovi store from Nokia led the path. Then, in the late 2000s and early 2010s, Android and iOS changed the game completely with software that catered to third party application downloads in the mobile device which feature phones couldn't.

In the last 4 to 5 years smartphones have become cheaper whilst providing functionalities that a feature phones cannot, resulting in users switching to smartphones for a better experience at a lower cost, as low as 3k. Cut to 2015, feature phones have all functionalities included in them in under 2k. With Micromax and Karbonn leading the feature phone boat, you now have extended memory options of feature phones, better display, and faster processors. These extensions in the feature phone product portfolio gave them a longer shelf life. People who aren't much of app users and their mobile usage is minimalistic would now prefer sticking to these advanced feature phones than to adopt smartphones. This has led to the constant growth of feature phone shipments in India, which many industry experts thought would die.

In a recent study by IDC* reports that one out of two feature phone users have strong intent to buy a 4G feature phone in next 6 months. This clearly showcases how 4G feature phones will take the mobile device market by storm and give smartphones a run for their money.

*Reference to Page 5

POKKT
VIDEO ADS

INDIA'S MOBILE GAMES REVENUE IN USD (BILLION)

- 2017: 0.6
- 2018: 1.1
- 2019: 1.6
- 2020: 2.4

MOBILE GAMING IS AN ENGAGING MEDIUM
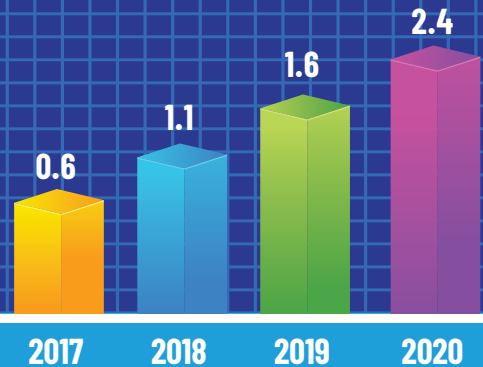
31% gamers play 4-5 times in a day

76% Three out of four gamers indulge in playing games on their mobile phone more than twice a day

44% of mobile gamers like to play during leisure time
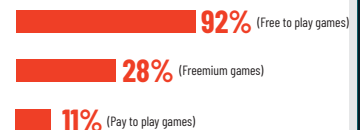
- 86% HOME
- 42% WHILE TRAVELLING
- 15% COLLEGE
- 14% WORK

'Free' lures gamers

'Free to play' is the most popular gaming model among gamers. Around 40% of gamers are likely to pay for the games at some stage of gaming

TYPE OF GAMES DOWNLOADED
- 92% (Free to play games)
- 28% (Freemium games)
- 11% (Pay to play games)

Female gamers – Mental Simulation games is a winner across age groups

Female gamers across age groups are highly inclined towards playing puzzle / quiz and word games. Given the multi-genre preferences, female in the age group of 20-34yrs are also like to play action / adventure and racing games.

Puzzle / Quiz / word
- 70% 15 - 19yrs
- 87% 20 - 24yrs
- 86% 25 - 34yrs
- 80% 35+ yrs

Male Gamers - shift in genre preferred as age increases

We observe a notable shift in the genre preferred among men as their age increases. Major proportion of younger male gamers are inclined towards playing games which give them an 'adrenaline rush', while preferences shift to mental simulation games for men in the upper age group of above 35yrs. About a quarter of gamers above 25yrs of age like to play casino / betting / card games.

Action / Adventure
- 72% 15 - 19yrs
- 72% 20 - 24yrs
- 71% 25 - 34yrs
- 52% 35+ yrs

Majority of the gamers spend more than half an hour playing mobile games

- 7% Less than 10 mins
- 25% 10 mins to half an hr
- 27% 0.5 hrs to 1 hr
- 26% 1 to 2 hr
- 16% More than 2hrs
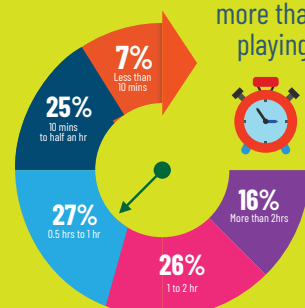
MOSTT - Marketing Organization Structure Think Tank

Short statement

Rethinking the world of marketing organization structure.

Mission

Accelerate marketing performance and business growth through best in class organizational design transformation.

Description

MOSTT is a community of marketing experts and professors committed to rethinking the world of the modern marketing organization; seeking to guide marketers on real innovation in marketing org design.

MOSTT goals:

1. To provide to customer-driven companies information about organizational marketing best practices and their potential for value.
2. To provide to CMOs information about marketing org trends, opportunities and benchmarks in order to help them foresee the future and develop innovative Marketing Org strategies.
3. To create a central source of all insights on marketing org in order to help accelerate the transformation of modern marketing organizations.
4. To facilitate engagement and collaboration between marketing and HR leaders in order to drive thought leadership.

MOSTT Projects

1. **Mobile Analytics Real-Time Social (MARS) Study**
   The main objective of this project is to define how marketing organizations of traditional brands need to adjust, adapt and organize in order to take advantage of and continue to lead business growth in light of changes in marketing and technology (e.g. new media and communication forms, platforms, etc...) - M.A.R.S.

2. **Mobile Maturity**
   Through the Mobile Maturity project we aim to help CMOs understand and activate the unique and specific role of mobile in creating and achieving greater overall customer centricity.

3. **Center of Insights**

We aim to provide marketers curated content on the topic of organizational structure in our MOSTT Center of Insights.

MOSTT Governance

MMA's MOSTT team will be led by a Sterring Committee comprised of nine of the top global brand marketing merketers.

KRISTI ARGYILAN
Senior Vice President, Media and
Guest Engagement
Target

JOHN COSTELLO
Former President, Global Marketing
and Innovation
Dunkin' Brands

JON SUAREZ-DAVIS
Chief Strategy Officer
Salesforce Marketing Cloud

NORMAN DE GREVE
CMO
CVS

BRAD FEINBERG
Sr. Director of Media & Digital
MillerCoors

DAVID GODSMAN
CDO
Coca-Cola

SANJAY GUPTA
Former Executive Vice President,
Marketing, Innovation and Corporate
Relations
Allstate

KELLYN KENNY
VP, Marketing
Uber

REBECCA MESSINA
CMO
Beam Suntory

LOU PASKALIS
Senior Vice President, Enterprise
Customer Engagement and
Investment Executive
Bank of America

SAVE

Short statement

With the increased complexity of protecting a brand's image and reputation from the rise in threats from fake news, inappropriate content, marketing tech, the digital supply chain, ad fraud and more, SAVE is here to help.

Mission

Participate on the future of the brand safety council and become a brand safe marketer.

What is SAVE?

SAVE is a marketer-led Future of Brand Safety Council created to ensure safeguards for brands in all marketing environments. The Council will develop processes, programs, benchmarks, and measures to protect your brand's reputation and marketing investment.

The MMA SAVE Brand Safety Agenda will initially focus on the following four guiding principles:

Creation of a Marketer Brand Safety **Strategy** Guide

Assessment and Benchmarking of Brand Safety issues by marketers

Validation of Brand Safety Partner Selection and Evaluation

Brand Safety **Education**

SAVE Working Groups

Comprised of senior-level marketers from leading brands, our newly-formed SAVE Brand Safety Working Groups are developing brand safety guidelines and best practices for the industry. To learn about or join the working groups, click here.

Strategy Guide for Brand Safety Template Working Group

This Working Group is likely to develop a templated strategy document that can be used by marketers to write their own Brand Safety strategy. This group will decide what areas should be covered by a Brand Safety Strategy, standard definitions, what should be addressed in each area, and best practices for a brand to become a Brand Safety Ninja.

Brand Safety Insights and Research Working Group

This Working Group involves working with Andrew Stephen, Associate Dean of Research and L'Oréal Professor of Marketing at University of Oxford, Said Business School, to define what marketers need to know about Brand Safety and the benchmarks and insights to guide individual company's Brand Safety programs and decisions.

Brand Safety Vendor Assessments Working Group

There are a number of directions this Working Group could go in, including, but not limited to, creating a map for all Brand Safety vendors and tools, developing an RFI for picking vendors in the various areas and identifying selection strategies.

SAVE Leadership

The creation of SAVE aligns squarely with the MMA's marketer-first mission with a focus on solving the biggest marketing problems brands face in this new mobile-driven era of dramatic changes in consumer behavior, technology innovations and market place disruptions.

SAVE is governed by:

Chair:

TERRI SCHRIVER
SVP Enterprise Media
Bank of America

Academic Advisor:

ANDREW STEPHEN
Associate Dean of Research and
L'Oréal Professor of Marketing at
University
Oxford, Said Business School

SAVE Member Participants

Brand Safety Issues are Not Going Away!

- 70% of Marketers State the Issue of Brand Safety is Escalating
- 48% of consumers said they would rethink purchasing or even boycott a brand if it appeared next to content that offends or concerns them
- Hundreds of brands have recently been "tagged" in the press for running ads aligned with controversial or "unsafe" content.

A rise in brand safety issues signals a potential nightmare for marketers.

And if ignored, brands can face serious backlash to your reputation, your customer loyalty, your revenue, and eventually to your bottom line.

How Mobile Marketing Can Boost Brand Engagement

India has up to **four times higher smartphone audience compared to desktop** today. This comes as no surprise, due to the affordability of mobile devices and increasing broadband coverage beyond Tier 1 cities in recent years. With **337 million smartphone users in India** by the end of thisyear – a growth of 16 percent since 2017 – the opportunities for marketers in the mobile space are vast.

As the only medium that allows a two-way interaction to happen in real time, the opportunity for brand engagement is huge. Alongside the emergence of artificial intelligence (AI) and machine learning, mobile has become a powerful device, bringing the world to our fingertips. Here are a few ways new technologies in mobile can boost engagement.

Tell it to the voice bot

With **over half of global marketers already using AI** capabilities to track and improve users' online journey, it is a powerful tool for increasing engagement. Combined with mobile technology, AI allows marketers to deliver personalized messages that target customers more effectively. Its ability to process information at high speeds also means that the level of personalization is becoming more sophisticated each day, even predicting what customers want before they know they want it.

Since Siri was introduced to iPhone users in 2011, having a virtual voice assistant has become commonplace. The introduction of voice bots in recent years have also changed the way people interact with technology, with a **penetration of just 8 percent in 2017, to an estimate of 39 percent** by the end of this year in India alone.

Growing in popularity, brands should tap on the potential of voice bots, offering a level of personalization that is unparalleled with any other form of advertising. Imagine a consumer about to go on her first date that weekend asking Alexa (Amazon's digital assistant) what she should wear. Alexa then comes back with recommendations from her favorite online stores, or stores along her daily commute, where she can pick up an outfit on the way home from work. Walking home the next day, her mobile phone prompts her to pick up the dress suggested by Alexa, and provides a discount code. Such technology is already available; it is a matter of whether brands are quick enough to capitalize on it.

Mobile attribution

Young people today are getting more and more impatient due to the immediacy that technology provides. Integrating mobile into a brand's multichannel marketing strategy can engage users in ways that conventional marketing is unable to do. It allows for a seamless experience across multiple touchpoints, so mobile users who previously searched for a product on desktop would be prompted with an ad of the exact product when on mobile, where they can continue on their purchase journey. For example, a mobile phone user may see an ad while playing a game, but may not pay too much attention to it. However, upon visiting another site, they are reminded of the same ad, and after seeing it three times, they may search for it willingly. Mobile attribution would be able to track the first ad of the product that user saw, to the point of purchase.

To effectively measure the impact of this multi-channel strategy, marketers are adopting multi-touch attribution (MTA), which measures user data across channels, linking their devices into a single point of reference. This allows brands to track the effectiveness of mobile in their marketing process. For a more seamless measurement, the Mobile Marketing Association (MMA), through its Marketing Attribution Think Tank (MATT) is constantly working to identify best-in-class MTA solutions. This is done by developing a more standardized way to measure MTA, so that marketers have opportunity to select and apply MTA solutions with confidence.

Boosting ecommerce through value-added apps

Ecommerce sales in India is said to **increase by 31% this year,** reaching the US$32.7 billion mark. This massive growth rate puts India as one of the top ecommerce markets in Asia.

Beyond non-perishables, marketers today are looking at expanding into food an groceries. This means that buyers will make even more purchases via mobile through repeat visits. The challenge then, is for brands to maintain customer loyalty. With a quarter of India's population becoming digital shoppers this year, investing in customer loyalty would be seen as a wise move.

Globally, we see the growth of ecommerce reflected through brands like Instagram, which is said to be working **on a new app dedicated to shopping.** As more local startups build their businesses on social media platforms, the competition increases, and brands need to look at creative ways to engage their customers. Providing value-added information through mobile can build a closer customer relationship, and trigger a positive emotion with the brand.

As an example, at the recent MMA Ideathon, one of the teams designed a language-based application for people to get a better understanding of nutrition.

Understand customer behavior

Mobile devices are also often the first and last devices people interact with, from the moment they wake up to the time they go to bed. While it can be very tempting to keep pushing information in front of mobile users to grab their attention, brands can run the risk of spamming customers. Marketers need to know their target audience and when they are most receptive if they want to remain on the right side of a very thin line between helpful, and annoying.

A fairly new medium for marketers, much of mobile's potential remains untapped, but requires brands to first understand what they want to achieve. While mobile can boost brand engagement, it will only work if organizations have a clear definition of success and a proper strategy behind it.

Smarties India 2018 Winners

MMA India 2018 - Awards List

S.No	Category	Entry Name	Advertiser Brand	Lead /Agency	Gold
1	Brand Awareness	Activating Infection Alert	Unilever / Lifebuoy	Mindshare India	1
2	Lead Generation / Direct Response / Conversion	Smart Search	Future Group / Big	Mediacom	1
3	Product/ Services Launch	#1CroreChallenge	Exide Life Insurance	Autumn	1
4	Promotion	When India Dared to Stare	MTV / Roadies	Madison	1
5	Relationship Building/ CRM	Castrol CRB Mini Truck Ka	BP / Castrol CRB Plus	Mindshare India	1
6	Socia Impact/ Not for Profit	Powerless Queen	Mahindra Rise / Project Nanhi Kali	WATConsult	1
7	Marketing Within a Mobile Gaming Environment	Powerless Queen	Mahindra Rise / Project Nanhi Kali	WATConsult	1
8	Messaging	MFC Uses Green Sim Data	Mahindra First	Isobar India	1
9	Mobile App Advertising	Chug Chug on Chuk Chuk	PepsiCo/ Pepsi	Mindshare India	1
10	Mobile Social	#JumpForHealth	Aditya Birla Capital	Mindshare India	1
11	Innovation	When India Dared to Stare	MTV - Roadies	Madison	1
12	Location Based services or Targeting	Google Maps Weather	Google / Google	Toaster Ltd.	1
13	Best Brand Experiences in Mobile Rich media	When India Dared to Stare	MTV - Roadies	Madison	1
14	Most Engaging Mobile Creative	Beauty for All - Retail	L'Oréal Paris / Infallible	InMobi	1

S.No	Category	Entry Name	Advertiser Brand	Lead /Agency	Silver
1	Brand Awareness	Rakhi with Fabelle	ITC / Fabelle Elements	Madison Communication Pvt. Ltd.	1
2	Lead Generation / Direct Response / Conversion	MFC Uses Green Sim Data Insights to Drive 8X Conversions	Mahindra First Choice / India Blue Book	Isobar India	1
3	Promotion	Godrej No. 1 Presenting Punjab di Beauty No. 1	Godrej Consumer Products / Godrej No.1	Mindshare India	1
4	Socia Impact/ Not for Profit	Maiam Whistle	Makkal Needhi Maiam	Interaction One	1
5	Socia Impact/ Not for Profit	Activating Infection Alert System in Rural India	Unilever / Lifebuoy	Mindshare India	1
6	Cross Media	Entertainment Wish Karo, DishTV Karo	DishTV	Affle	1
7	Cross Mobile Integration	Sabse Smart Kaun	Star Plus / Sabse Smart Kaun	Mindshare India	1
8	Marketing Within a Mobile Gaming Environment	Patanjali - Motu Patlu	Patanjali Ayurved / Patanjali Mango Juice	Pokkt	1
9	Messaging	Activating Infection Alert System in Rural India	Unilever / Lifebuoy	Mindshare India	1
10	Mobile App Advertising	Godrej HIT Dengue Back	Godrej Consumer Products / HIT	Interaction One	1
11	Programmatic	Transforming Pizza Hut Into a Delivery Business	Yum! Brands / Pizza Hut	Mindshare India	1
12	Mobile Social	The Story of a Night Napkin on Social Media	Energizer / Stayfree	Interactive Avenues Pvt. Ltd.	1
13	Mobile Audio	Saavn - Bira91: Hip Hop Association	B9 Beverages / Bira 91	Saavn	1
14	Best Brand Experiences in Mobile Rich media	Rakhi with Fabelle	ITC / Fabelle Elements	Madison Communications Pvt. Ltd.1	1
15	Most Engaging Mobile Creative	When India Dared to Stare	MTV - Roadies	Madison Communications Pvt. Ltd.	1

S.No	Category	Entry Name	Advertiser Brand	Lead /Agency	Bronze
1	Product/ Services Launch	BQ WhatsApp	Bloomberg	Quint	Quintillion Business Media Pvt. Ltd.	1
2	Cross Media	How Star India Aced Primetime TV Battle : 550,000+ New Viewers Across Three Major Shows	21st Century Fox / Star India	Zapr Media Labs	1
3	Brand Awareness	How Google Maps Helped Consumers "Weather" the Monsoons	Google / Google Maps	Essence	1
4	Cross Mobile Integration	Giving India the Sound of Friendship	Diageo India / McDowell's No.1 Soda	Mindshare India	1
5	Messaging	WhatsApping to Fitness - The Quaker Way	PepsiCo / Quaker Oats	Mindshare India	1
6	Mobile App Advertising	Share a Coke Integration with hello English, SHAREit, Truecaller, Jio, Hotstar & Google Assistant	Coca-Cola India Pvt. Ltd / Coca-Cola	Interactive Avenues Pvt. Ltd.	1
7	Mobile Social	#NotShaadiMaterial	StarPlus / Ikyawaan #NotShaadiMaterial	Mindshare India	1
8	Innovation	Google RailWifi : Leveraging MarTech to bring Wifi to the Masses	RailTel	Essence	1
9	Location Based services or Targeting	Maiam Whistle	Makkal Needhi Maiam	Interaction One	1
10	Mobile Audio	How Horlicks Proved that Content Hits Home Only When Localized	Glaxo SmithKline Consumer Healthcare India / Horlicks	Mindshare India	1
11	Mobile Audio	Activating Infection Alert System in Rural India	Unilever / Lifebuoy	Mindshare India	1
12	Best Brand Experiences in Mobile Rich media	Reebok - Floatride	Reebok	mCanvas Advertising Pvt. Ltd.	1
13	Most Engaging Mobile Creative	Rakhi with Fabelle	ITC / Fabelle Elements	Madison Communications Pvt. Ltd.	1

Best in show - When India Dared to Stare	Marketer of the Year - MTV – Roadies	Agency of the Year - Mindshare India

Publisher of The Year - Flipkart Internet Pvt Ltd

MMA India Board

PRIYA NAIR
Executive Director, Home Care
Hindustan Unilever Limited

SAMEER SINGH
Chief Executive Officer - South Asia
GroupM Media India Pvt Ltd.

ANUSHKA SHETTY
CEO and Co Founder
Autumn Worldwide

AJIT MOHAN
Chief Executive Officer,
Hotstar

D SHIVAKUMAR
Group Executive President
Corporate Strategy & Business Development
Aditya Birla Group

HEMANT MEHTA
Managing Director, Media, Digital &
Retail, Kantar Imrb
Chief Strategy Officer, Kantar, South Asia

JULIE BRAMHAM
Chief Marketing Officer
Diageo (USL)

KARTHI MARSHAN
Senior Executive Vice President &
head, group marketing
kotak

Moneka Khurana
Country Head
MMA India

Nandini Dias
CEO
Lodestar UM

Partho Dasgupta
CEO
BARC India

ROHIT DADWAL
Managing Director,
Mobile Marketing Association Asia
Pacific Limited

PRASUN BASU
President, South Asia
Nielsen

SAMEER PITALWALLA
Co-founder & CEO
Culture Machine Media Pvt. Ltd.

SASHI SHANKAR
Chief Marketing Officer
Vodafone Idea Limited

SANDEEP BHUSHAN
Director, South Asia
Facebook

Siddharth Banerjee
Executive Vice President, Marketing
Vodafone India Ltd.

SUNIL KARTARIA
Chief Executive Officer - India &
SAARC
Godrej Consumer Products LTD.
(GCPL)

Shams Jasani
Group MD
Isobar South Asia

UDAY SODHI
Business Head Digital
Sony Pictures Networks India

VINODH BHAT
Co - founder, President & Chief
Strategy officer
Saavn

VIJAY SHEKKAR SHARMA
Founder
One97 & Paytm

VIKAS AGNIHOTRI
Director, India Sales
Google India

Objective & Methodology of the Research

Following the successful launch of the Mobile Marketing Ecosystem Report in 2016, this report marks as the second edition to capture the significant changes and impact of mobile marketing growth in 2017 & 2018

2017 & 2018 has been another year of surge across various dimensions, an addition of 100+ million mobile internet users in India, growth of video OTT platforms and vernacular gaining prominence, significant investments in programmatic advertising across advertiser categories and much more.

The objective of this year's updated edition is to continue to give a comprehensive view of the mobile marketing ecosystem in India and delve deeper into some of the key elements that impact and influence the industry today. This report is brought to you by MMA (Mobile Marketing Association) in collaboration with GroupM, its agencies and partners.

This report is based upon both primary and secondary data sourced from GroupM and various digital media companies. Also primary data shared by IDC has been specifically shared for this report and is not otherwise available. Below is the list of reports that have been referred to:

1. Telecom Regulatory Authority of India (TRAI) Monthly and Quarterly Reports
2. KPMG and FICCI Media and Entertainment Report 2017
3. Nokia MBIT Report 2018
4. IAMAI and Kantar IMRB Mobile Report India 2017
5. GroupM TYNY Report, December 2017
6. Ericsson Mobility Report 2017
7. Millward Brown Video Ad Clarity Report
8. Facebook Audience Insights
9. Counter Point Research 2017
10. IDC May 2017 (special data only for this report) and Q1 2018 data
11. eMarketer Ad Spends 2017
12. MMA India and Kantar IMRB Smartphone Report (October – December 2016)
13. Nasscom and App Annie India Gaming Report 2016
14. Tune Mobile App Ecosystem India Report 2016
15. Gamesbond India Report 2016
16. KPMG and Google India Languages defining India Internet Report 2016
17. KPMG and CII Digital the New Normal of Marketing Report, 2017
18. Boston Consulting Group, The Rise of Programmatic Guaranteed Advertising in Asia-Pacific, February 2018

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