The Modern Marketing Reckoner

Nothing is Certain | **Everything is Possible**

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Introduction

Foreword

The age we inhabit is defined by technology; it is the singular force driving innovations within the digital and mobile ecosystem today. Technology is assisting organisations in developing new-age business models, scale rapidly at negligible incremental costs and learn about their customers in-depth. Technology has also triggered massive transformation across the business landscape, pushing us all into a new world.

Like all businesses, the marketing and advertising industry was also riding the curve of transformation, but the pandemic has had an impact like never before. The changes that we have seen in the past few months dwarf the ones seen in the last decade or so. If we try to crystallise the effect of the pandemic as it has unfolded till now, we can see that one of the biggest areas of impact that has emerged is the mobile-digital ecosystem. That ecosystem forms a huge part of our view about the business landscape of today.

When we talk about modern marketing in 2020, two big themes emerge. The first of them is "nothing is certain".

groupm

Prasanth Kumar
CEO South Asia
MMA India Co-Chair

It's about the uncertainty that has seeped into every aspect of the consumer's life – be it health, income, buying behaviour, work stress, family or routines because of the pandemic. As that churn is not yet over and the new normal has not settled completely, there is flux in her life. In trying to understand that uncertainty, we can take an empathetic stance and establish a connection that we can work with.

The second anchor is "everything is possible". Because uncertainty is not where things end, the flux also signifies opportunities. If modern marketers can apply deep insights to understand the changing landscape that will emerge, they will have an advantage. Those businesses that are outcome-driven and mobile-aligned will be ready with their renewed business models, brand offerings and media strategies to usher hope and dynamism into the life of the consumer again.

This report covers all relevant aspects of a huge arc. It discusses the huge changes in the industry, the new ways to embed data into every part of the business and decode them to get powerful insights, the thrust on direct-to-consumer and e-commerce. It taps into the changing face of content and influencers, new communication formats and channels, and the ways to build powerful brands.

The pandemic has triggered a definite shift in the consumer and the business landscape but if we display rigour and foresight and use effective advertising and modern marketing models, we can help businesses stay on top.

MMA Perspective on Modern Marketing

Here comes tomorrow, and its epicentre is modern marketing – closer, personalized, powerful. The marketing revolution we have all witnessed is about to further explode with the spread of 5G, AI, and martech and other emerging technologies. Add a growing generation of screenagers on the cusp of entering the workforce and mobile obsessed consumers to the mix, and you have a once-in-an-era transformation in the way brands and their customers interact.

By redefining what it means to be customer centric marketer through personalised, predictive, powerful consumer engagement, at the MMA, we believe is the best way to thrive – and the only way to survive.

The MMA helps marketers lead this imperative for marketing change – in ways that enable future breakthroughs while optimizing current activities. In all that we do, we are committed to science and questioning. We believe that creating marketing impact is steeped in constructively challenging the status quo. We invest millions of dollars in rigorous research to enable marketers with unassailable truth and actionable tools.

MMA

Moneka Khurana
Country Head
India

Marketers are expected to be leaders responsible for managing the different departments involved in driving customer engagement, brand experiences and revenue. Hence the need to be agile and responsive has never been higher.

The proliferation of new channels and technologies has dramatically changed the environment in which marketers function. Over the past two years, MMA's Marketing Organization Structure Think Tank (MOSTT) has set out to rethink the world of the modern marketing organization; seeking to identify best practices and trends that will help marketers accelerate performance and business growth through organizational design. The report being another step in the direction of empowering and enabling the marketer with the required understanding, insights and knowledge.

In response to new technologies, new competitors and new customer expectations in today's environment, marketers have initiated structure changes, added new activities and increased resource levels to create value and drive growth. Hence the report enables insights/POV and perspective on tackling the same.

The reckoner will focus on the successful practices of the modern marketing organization (MMO), including stacks, links and loops; the changing role of the marketer; how to measure performance, tools and technologies that support customer-driven organizations and more.

As marketing has become a sophisticated balance of art and science, the question of how to optimize the internal marketing organization to deliver increased performance and business growth is more important than ever before, the report highlights approach to enable the same.

By enlightening, empowering and enabling marketers, the MMA shapes future of modern marketing, while propelling business growth today with the Modern Marketing Reckoner being yet another initiative.

From the MMA Board

Rajesh Ramakrishnan

Perfetti Van Melle India

Managing Director
MMA India Board Member

"We have seen unprecedented changes in 2020 and this has an impact on consumer and shopper behaviour as well as on our media consumption habits. Yet, even as many things change, there are some things that remain constant- for brands to stick to their fundamentals, develop relevant differentiated products, build iconic brands, expand reach and create engaging communication. This report, as always, is basis extensive research and nicely encapsulates the changing landscape and the key considerations that marketers need to keep in mind as they navigate through 2021 and beyond".

Sandeep Bhushan

Facebook

Director & Head of Global Marketing Solutions India
MMA India Board Member

"We are experiencing unprecedented shifts in consumer attitudes and behaviors due to the pandemic. A significant digital acceleration has happened on the back of social media, and with over 400 million Indians connected on the Facebook family of apps in India, mobile is now central to media consumption and business impact. To build on the opportunity, businesses need to adopt the immersive tools on the platform, pivot the media-mix and measure true incremental business outcomes. Our playbooks for the new normal in partnership with GroupM and Ogilvy are now available for all marketers to accelerate growth".

From the
MMA Board

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Rohit Dadwal

MMA
Asia Pacific
Managing Director
MMA India Board Member

"The reckoner underlines the marketing industry's certainty when it comes to the rapidly expanding mobile channel. "The industry on the whole recognises that the modern era of marketing is upon us and we need to embrace it. This new age of marketing is going to be built on tools and technology that this report helps to outline, along with great examples through the lens of various industry leaders who are the torch bears of this change... helping @shapethefuture for marketers and agencies in India and abroad."

Moneka Khurana

MMA **India**
Country Head

"This report is an extremely holistic and robust report and has been written basis intensive research across multiple industry studies and reports, a lot of primary research which has been conducted in the past few months both by MMA and GroupM, POVs and contributions from multiple industry experts across multiple areas and verticals, POVs and contributions from GroupM leadership, GroupM subject matter experts and MMA board members".

Before it actually arrived, 2020 was supposed to be the year of corporate visions - a year anchored in benchmarks and buoyant stock-taking, easing the way into upbeat journeys ahead.

The script, as it has arrived, could not have been more anti-climactic.

The pandemic has simply changed it beyond recognition. While manufacturing, logistics and distribution issues plagued the supply side, income uncertainty deeply impacted consumption patterns. "Lockdown" cued both a social imposition and an economic reality as the country witnessed a decline of 23.9% in GDP in Q1 Fy21[1] owing to the contraction in consumer spending and investments triggered by COVID-19.

As a coping-up mechanism, the alarmed consumer collapsed the consumption landscape into two simplistic categories: essentials and non-essentials. Sentiment remained positive and/or neutral around the former (fresh food, staples, household & personal care, home wi-fi, OTT, insurance, education etc.) but became largely negative around the latter (travel, spas, restaurants, movies, fashion, home furnishing & renovation etc.)[2]. Not surprisingly, social distancing, health & hygiene and income uncertainty emerged as the three biggest themes impacting consumer behavior[3].

In the calamitous changes the year has unleashed, conventional frameworks have got hurt, traditional strategies have bled a little.

So how does the road ahead look like?

This report, across two stimulating sections, assesses the extraordinary turn of events that have unfolded recently and the journey ahead. While the first section examines the turbulence and the excessive uncertainty of the current business context, the second one paints a vivid picture of the exciting new opportunities just waiting to be discovered in the future!

Imagined as an effective reckoner for the modern marketer, the discourse this report captures stems out of data, tech and innovation within the mobile-digital ecosystem that has emerged as the powerful force of this period - helping consumers access all their needs with least friction, as well as enabling entire categories to rebound and grow.

Happy reading.

COVID-19 : Opportunities in a Crisis

Originally published in "A year off script - KPMG in India's Media and Entertainment Report 2020"

Tushar Vyas
group**m**

President, South Asia

The COVID-19 pandemic has substantially altered our erstwhile way of living and the steps taken to control the devastating virus have disrupted pretty much every individual and business, regardless of their orientation. For companies, it resulted in challenges and changes across supply chain, consumer demand, manufacturing, etc., but at the same time has presented an opportunity to turn the tide in their favor in the marketplace by taking advantage of shifting consumer preferences.

Trends that have got us talking

Social distancing is the new norm today and it has changed the way we shop, work and socialize. As a result, new habits have emerged, some trends have reversed, while others have accelerated.

⇄ REVERSAL OF PAST TRENDS

- From willing to experiment with new brands to gravitating to brands they can trust

- From experiential living to frugal living

⚙ ACCELERATION OF EXISTING TRENDS

- From using traditional means of communication to adopting digital tools to stay connected

- From using cash transaction to digital payments

- From local "kirana stores" to e-grocers

- From free content to rise in premium subscriptions

NEW HABBITS

- From binging to conscious consumption and wellness

- From being nonchalant on aspects related to hygiene to being conscious of personal care

- From education in campuses to online classes

The trends in consumer behavior have been detrimental to some industries while benefiting others. Tourism and hospitality have been severely hit as people avoid travel. On the other hand, sales of used cars and two-wheelers show signs of growth, as commuters opt for personal mobility options. Companies in the digital domain such as social media, OTT, e-wallets, e-commerce, ed-tech are gaining the most as Indians get more comfortable and confident in going online.

How has media and entertainment fared?

The pandemic has altered media consumption habits and it has caused a tangible impact across mediums in terms of ad-spends. TV ad revenue was impacted because of the lockdown despite an increase in total viewership during the same time. Smartphone usage and overall digital consumption increased specifically in OTT, social media, gaming and e-commerce. News and entertainment are likely to remain the most visited content categories with increased engagement across age groups. With most of the revenue for newspapers and magazines coming from advertising, monetization will continue to be a challenge for these businesses. Due to low spends from government and private industries, revenues in the radio segment suffered, but on the positive side, there was an uptick in listenership despite a drop in commute listeners. Revenue for the out of home segment has been severely impacted with people working from home, travel restrictions, closure of malls and multiplexes. The box office collections of films have also been affected and medium-term release pipelines may be derailed with shoot restrictions and a backlog of releases. Some movies will

continue to opt for a release on OTT platforms.

Marketers could remain cautious and ad-spends will remained measured. Overall, digital and TV are likely to recover faster while print, radio, OOH and films may take longer to rebound. Print could see some benefit on the back of demand for authentic and credible news and a pick-up in circulation as lockdown measures are eased. Recovery will be faster on billboards and transit inventory compared to destination inventory like cinema where social distancing norms are harder to implement. Radio could take a while to rebound but revenues from streaming could compensate.

Digital is some distance ahead

The resilience of digital advertising is marginally transient and predominantly transformational. For sectors that need the sensory (touch and feel) experiences, the higher than normal shift to digital could see a reversal (example, auto and consumer durables advertising by local showrooms/ dealers). Other service-oriented sectors like education, insurance, etc., are likely to carry forward the digital momentum garnered in 2020.

The brand versus performance differentiation has been more pronounced due to the growth in digital media. Brand health related advertising has always been measured for performance too. This happens in the form of brand track, brand lift studies and have been in existence for decades for TV campaigns. With the growth of video consumption on digital this segment could witness growth in the coming few years. Attribution to both types of campaigns is key.

Brands, be brave

This is a phase of extreme uncertainty and disruption for brands. Ones that can understand the user's preferences and her renewed agenda along with potential implications, are likely to survive and emerge stronger through the pandemic. The following three strategies could provide some direction in this respect:

01

Organizations should focus on building brand equity as much as they focus on performance. Consumers have shown a preference for embracing brands that they can trust rather than experimenting with new options during this period.

02

Resilience at both the organizational and brand level can be built with greater adaptability and agility, which is a function of risk-taking abilities.

03

Brands should focus on analytics and leverage data driven marketing to segment audiences and measure brand and business outcomes.

This time could in fact present an opportunity to enhance a brand's reputation, as the market gets quieter and competitors cut back on their market presence. Therefore, the battle for the consumer's mindshare is likely to be less intense allowing for the more courageous and forward-looking brands to emerge stronger.

MMA group*m*

02

Nothing
is Certain

The uncertainty that COVID-19 has unleashed has never-seen-before contours. Within the business and marketing context, it has dented all relevant areas right from supply chain to product manufacturing and pricing. But as a human tragedy, it has impacted the lives and behavior of consumers the most. In this section, we will try to absorb the sheer depth and width of these changes and then to decode the implications of that uncertainty.

We start by trying to frame the impact in socio-cultural context. Since COVID-19 has impacted all spheres of our lives – right from the GDP to the simple act of going out to buy an ice-cream in the evening – we need to understand the whole sweep of implications. As a pandemic, the outbreak has heightened the need for health and hygiene and the shaken-up consumer is seeking this promise in almost all categories now. But stipulations around social distance also have emotive ramifications and the consumer is adjusting to those as well.

We also look at the broad audience response in a variety of areas – how worried are they feeling, their outlook on discretionary categories and their adoption of the digital channels among others. We also cover a part of the organizational perspective and their steps around cost reduction across a variety of spheres as well.

The media consumption story starts with the obvious where the daily time spent on smartphones was found to have grown by 16% during the lockdown. While the new behaviors around social media, OTT, online news, gaming and digital wallets appear to be long term, the consumption patterns are also comparable across India and Bharat. Social media consumption increased by 32% and digital news apps & websites saw a 41% increase in time spent. News also went hyper-local and the regional languages saw a 141% increase in time spent/user.

Then we move to analyzing the shopping behavior to understand how the consumer is arranging her spend around the essential and non-essential categories; how she is buying more groceries and less apparels. We also analyze how the e-commerce channel has taken off, acquiring first time buyers in categories that aren't the usual acquisition categories for the channel. We see how the full baskets have begun to return and the drive to include the kirana stores for last mile relevance.

By understanding the sheer uncertainty that has gripped consumers we can dimensionalise their feelings and attitudes better. This section sets up that premise.

2.1

The Impact of COVID-19 from a Socio-cultural Context

COVID-19 A Socio-cultural Perspective

Piyush Sharma

MEDIACOM groupm

General Manager

COVID-19 is not just a health crisis but also an economic and social crisis. The spread of COVID-19 and subsequent lockdown has impacted all sections of society. The economic crisis can be assessed through the GDP contraction of 23% in April-June 2020, as per RBI. An estimated 21 million salaried employees have lost their jobs by the end of August 2020[2]. The distress of lockdown and social distancing has posed a never seen before socio-cultural challenge for India.

How are people braving the impact of COVID-19 crisis?

About 85% of people think that what they considered most important has changed since the pandemic crisis[1]. Personal and family health, continued spread of virus and income impact are taking centerstage as key concerns for individuals[1]. The COVID-19 crisis is forcing change in the way we live and work, broadly in 3 ways: Physical – hygiene, nutrition and fitness; Rational – cautious spending and convenience; and Emotional – sense of community and social engagement.

The primary impact of COVID-19 is the impact on physical safety of individuals. While 85% of the people agree that they won't feel safe until there is a vaccine[1], they are looking to meet the physical safety challenge by focusing on hygiene, nutrition

"What I think is most important in life has changed since the pandemic crisis"

Completely agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Completely disagree
49	36	11	03	01

and fitness. More than 93% people are now more careful about hygiene[1]. Masks saw a 380% surge in demand, sanitizer by 440% but it seems to have been stabilized now[3]. Across nutrition, Prime Minister Narendra Modi's focus on Ayurveda to enhance immunity resulted in immunity related searches increasing by 500%[3]. Keeping fit to enhance immunity is in focus with 75% people exercised more to improve their fitness levels[1].

With the economic downturn and looming job crisis, almost 90% of people agree that they are more careful about how they are spending their money[1]. The cautious living constraint is real as 50% people have

delayed big purchases and almost 38% have cut down on day-to-day expenses resulting in muted demand for products and services[1]. While the purse strings have tightened the chase after convenience can be seen in higher adoption across e-tailing, contactless delivery and use of online payments. As e-tailing rises by 30% over pre-COVID-19 period, the online penetration increases by 2X in grocery and 3X in non-grocery products[4]. The use of contact-less modes over cash has increased. UPI transactions have doubled since July 2019 and reached a record high in July 2020[5].

"I'm more careful how I'm spending my money"

60 Completely agree 🙂

30 Somewhat agree 🙂

6.7 Neither agree nor disagree 😐

1.6 Somewhat disagree 🙁

1.3 Completely disagree 🙁

Lockdown, social distancing and resulting economic crisis has developed into an unprecedented social crisis. Isolation from friends, family and colleagues is creating social stress. The 'vertical' social distancing (along class and caste lines) was easily introduced where informal workers (such as domestic help, office/ factory workers) were banned entry leading to job losses and subsequent migrant crisis. The 'horizontal' social distancing (within the same group of people) was much difficult to implement especially among the marginalized section of society[10].

During lockdown the closure of all educational establishments, offices, places of entertainment and leisure, and other social and cultural centers, led people to rely on digital technology for social transactions. While video conferencing increasing by 12X in users per week, the time spent on it increased by 6X[6]. Not just using technology to connect with the world, a distinct need to connect with the local community also increased with almost 84% people willing to support them[1].

"The life you thought was boring, is the life you're hoping to get back to right now"[8]

While most people believe that 'back to normal' is at least 4-6 months away, some people believe 'normal' is a year away. People are trying to revert to their routine cautiously as the initial stress, worry and panic perpetuated by COVID-19 pandemic subsides[7]. As our concern level drops the anticipated length of crisis increases. People are relying on digital infrastructure to tide over COVID-19 challenges by social networks, e-tailing, digital payments, online education, online entertainment, telemedicine, etc.

With the uncertainty of vaccine availability timelines, Indians are navigating their way around living with COVID-19 by leaning on their cultural values. Culturally habituated with accepting and accommodating challenges, fatalism and belief in destiny is enabling Indians to negotiate the shock and disruption by COVID-19.

How are consumers feeling since the start of the pandemic?

Chart categories (x-axis): Worried, Scared, Stressed, Frustrated, Prepared, Anxious, Hopeful, Confused, Doubtful, Confident, Calm, Overwhelmed, Inspired, Relieved, Happy, Adventurous, Lonely, Angry, Bored, Reflective, I don't Have any...

Legend: wave 1, wave 2, wave 3, wave 4, wave 5, wave 6, wave 7, wave 8

As Amitabh Bachchan, a cultural icon in midst of COVID-19, writes - "and you wonder .. wonder what transpired as a result of it .. and you wonder whether it should or could have been done differently ... but wonder as much you may .. **fated decisions remain fated."[9]**

Sources:

1 Live Panel 2020 Calibration Survey

2 https://www.cmie.com/kommon/bin/sr.php?kall=warticle&dt=2020-09-07%2017:57:52&msec=996&ver=pf

3 Google Trends Data, DAV for Feb - May 2020, MMA Webinar Series May 8, 2020

4 Redseer Accelerated Digitization In India Internet Post COVID-19 Part 2, July 2020- from GroupM ecom ppt

5 https://www.bloombergquint.com/business/COVID-19-crisis-continues-to-give-digital-payments-a-boost

6 BARC Nielsen Report 11

7 MS Tracker Wave 8

8 A teenager's quote: https://www.bbc.com/news/av/world-52589043

9 Amitabh Quote: https://www.hindustantimes.com/bollywood/amitabh-bachchan-gets-reflective-in-COVID-19-ward-wonder-as-much-you-may-fated-decisions-remain-fated/story-N3CAW1NyBFWM7Dlec8Qh1H.html

10 https://theconversation.com/indias-stark-inequalities-make-social-distancing-much-easier-for-some-than-others-134864

Recalibrate with Consumer Sentiment Insights

An MMA Study Exclusive

COVID-19 has wreaked havoc in all countries across the globe and India is no exception. At one level, this pandemic has impacted consumer purchasing behavior and at another it has also forced organizations and brand owners to adjust to this new reality and juggle their marketing spends in a big way.

More consumers in India profess to be "extremely worried" compared to other SEA countries like Vietnam and Indonesia. Impact on jobs and financial security is also more severe in this country – 62% have had an impact on jobs and 70% have reduced spending.

Due to the impact on income, consumers have become price conscious. 31% have not only downgraded their usual brand a good 73% of them plan to stick to the downgraded choice even post COVID-19.

Hardest hit are obviously the discretionary categories – 77% have reduced eating at restaurants. 55% have reduced buying clothing and fashion accessories and 48% have reduced spending on consumer electronics. What has seen a positive impact are the areas related to health and hygiene – 29% are exercising more at home, 24% are consuming more vitamins and supplements, 23% are spending more on groceries.

Lockdown gave rise to new digital categories with a host of consumers interacting with categories for the first time in within a digital ecosystem. Among the digital first timers - 45% streamed movies, 43% got WFH software, 33% used an e-learning app, 28% purchased grocery online and 22% consulted a doctor online.

39%
Much More Price conscious than before

31%
Downgraded my usual brand

73%
Will Stick to downgraded choices post COVID-19

% Consumers Trying Category for 1st time in Past one month

%	Category
45%	Movie Streaming
43%	Work from home software
35%	Online Cooking App
33%	Online Fitness/Workout App
32%	E-Learning App
30%	E-Books
28%	Online Grocery Purchase
23%	Online Health Blogs/ Health apps etc
22%	Online Doctor Consultation
22%	Online Investment Website/App
19%	Online Insuarance Website/App

Key Highlights: Movie streaming adoption at similar levels among 45+ and 18-24 yo group

Organizations too were impacted, and budget cuts were implemented across departments and activities. 62% slashed hiring budgets, 60% slashed BTL campaign monies, 44% reduced ATL media monies and 33% cut marketing research budgets. Digital emerged as the preferred countermeasure again with 97% of organizations looking at digital as their top media channel, 34% organizations increasing digital media budgets and 23% focusing more on e-commerce. 13% organization modified the supply chain flow to deliver direct at the consumer's doorstep.

How business are countering impact in India?

34% Increased digital media budgets

23% Focused more on e-commerce selling

13% Changed supply chain to deliver at consumer door steps

11% Increased TV ads

8% Increased our sales promotions budget

Budget Cuts Taken by Organization in India

62%
Hiring Budgets

60%
BTL Media campaigns (OOH Activities, Billboards etc)

44%
ATL Media Campaigns on TV/Radio

38%
Sales Promotion Budgets

33%
Market Research Budgets

23%
Digital Media Campaigns

19%
No significant cuts or postponement are happening in my organization

The future growth story was also arranged around the digital media landscape. When asked which online service/e-commerce category is expected to grow, 84% businesses named video conferencing/ video apps, 61% named e-learning, 55% named online grocery and 32% said traditional e-commerce categories like fashion and electronics. When asked to name the most expected change in consumers' digital behavior, 83% brand owners named rise in news consumption, 66% named rise in online gaming and 56% named online communities. When it came to leveraging increased mobile usage by consumers, 42% brand owners are making mobile first creatives, 36% named increased mobile spends and 32% said they are diverting other channel monies towards mobile and increasing frequency of ads.

Brand Owners' perception on change in consumer digital behavior

Rise of news consumption — 83%

Rise of online gaming — 66%

Online communities, web influencers will become more important — 56%

Online vlogging will rise — 47%

Digital PlayStation (Xbox, PS3 etc) will rise — 24%

2.2

Impact on Media Consumption and Digital Behaviour

Acceleration – The Stable and the not so Stable

Trends in digital consumption

Upali Nag

motivator groupm

Chief Strategy Officer

The social and cultural trends we saw earlier reflects in the way people have been consuming media and content as well. There have been many shifts in this short span of time, some of them long term and some transient. These are intrinsically linked to deeper needs, attitudes, behaviours and culture.

This 2x2 matrix captures behavioural and attitudinal shifts, some of which are new while others are accelerated

	Behaviour		**Attitude / Value**	
New	Gaming by women	"Easy recipe"	Mindfulness & Immunity	Self Reliance & appreciation
	Assisted shopping	Shifting impact of Influencer	Loyalty from Gratitude	
Accelerated	Gaming	DIY	Health & Wellness	Share Load
	e-commerce	Social & Influencer	Loyalty From inertia	

We shall be diving deeper into these behaviours. However, first a quick look at the digital and mobile ecosystem.

Digital and Mobile Ecosystem

India's internet subscriber base stood at 719 Mn in 2019 and is predominantly wireless.

India's internet subscriber base
In Mn

800

604

446

719

600

400

200

0

2017   2018   2019

— Internet subscribers
— Wireless internet subscribers
— Broadband internet subscribers
— Wired internet subscribers

Source: TRAI

Rural internet users are growing at a much faster rate than urban, even though the base is lower.

In Mn

314

132

391

213

450

268

2017   2018   2019

▲ Urban Internet users   ▲ Rural Internet users

Source: TRAI

As per the Kantar iCube Report 2020, the estimated monthly active internet users stand at 574 million, which is a growth of 24% over the previous year, taking the penetration to 41%. An 11% growth is projected for 2020 taking the estimated monthly active internet users to 639 million.

The growth in digital has been facilitated largely by two main factors - affordable smartphones and cheap data. Reliance Jio disrupted the telecom space by making data available at the lowest cost while low cost smartphones from Chinese manufacturers such as Xiaomi flooded the Indian market. This has resulted in mobile being the primary device to access the internet both in urban as well as rural India.

Device used to access internet
figures in %

URBAN		RURAL
99	MOBILE	99
6	LAPTOP	2
3	DESKTOP	1
1	TABLET	-

Source: IAMAI Digital in India 2019 Round 2 Report

With the advent of cheaper data plans, and the growth of video content, a majority of mobile users opt for 4G connections, both in urban and rural India. 2G and 3G are rapidly shrinking and the advent of 5G could be the next game changer.

Connection type - Mobile

- 2G: 3%
- 3G: 10%
- 4G: 88%
- Wi-Fi: 6%

Source: IAMAI Digital in India 2019 Round 2 Report

Indian Mobile subscriber growth has seen a 5x increase in the last 5 years

Wireless subscribers (3G + 4G) in India

- Mar 16: 133 Mn
- Mar 17: 258 Mn
- Mar 18: 395 Mn
- Mar 19: 545 Mn
- Jan 20: 654 Mn

Does not represent unique users and can include users with more than one SIM card.

Source: TRAI from Goldman Sachs Report

Mobile data usage in India is amongst the highest in the world

Data usage (Gb per month per user) on mobile excluding Wi-Fi

India
China
South Korea
France
US
Japan
UK
Spain
Germany

0.0   3.0   6.0   9.0   12.0   15.0

Data as of March 2020 or latest available

Source: Nokia MBiT, Goldman Sachs Global Investment Research

... with the cost of data one of the cheapest

Data price per GB ($US)

US	$8.0
Japan	$3.9
UK	$1.4
Brazil	$1.0
Indonesia	$0.6
China	$0.6
Russia	$0.5
India	$0.2

Compiled by cable.co.uk in February 2020. India tariff compiled by Goldman Sachs.

Source: cable.co.uk, Goldman Sachs Global Investment Research

This has led to an explosion in the app ecosystem, both in terms of number of players across segments as well as app usage, with India accounting for 9% of global app downloads, as indicated by the chart below

India
19Mn
9%

Rest of the World
185Mn
91%

Source: App Annie 2019 Report

While internet and mobile consumption is growing rapidly and a lot of macro factors are aiding the same, there is still a significant potential for growth, with penetration being in the range of 40%. Rural is expected to give the impetus to this growth. By 2025, India is expected to almost touch the 1Bn internet users mark, as predicted by Statista.

Number of internet users in millions (projected)

Year	Users
2020	696.77
2021	761.29
2022	820.99
2023	876.25
2024	927.44
2025	974.86

Source: Statista Digital Market Outlook

Impact of COVID-19

Lockdowns and restricted movement have served to accelerate digital adoption in India even more. Not only has the increase been in terms of number of users and time spent but has also given rise to various verticals on the one hand and has normalized extremes on the other.

Time spent on smartphones

The daily time spent on smartphones increased by 16% from pre COVID-19 to lockdown period from 3 hours 22 min to 3 hours 54 min. August saw a dip due to the ban of many apps. However, with IPL kicking in, the time spent has increased once again and currently stands at 3 hrs 29 min, which is still a 3% increase from pre COVID-19 times

Pre COVID-19 Pre mid March	**Lockdown** Week of 25th April	**Current** Week of 25th September
03:22 HRS MINS	**03:54** HRS MINS	**03:29** HRS MINS

Source: BARC Nielsen Report

Homogeneity in mobile consumption

This period also resulted in driving homogeneity across audience segments. Segments like older age groups, lower SECs and smaller towns showed as much of an increase as traditionally higher digitally skewed segments.

% change in time spent as compared to pre COVID-19

Week of 25th April (PEAK)

FEMALES 16%

MALES 15%

15-24 14%

25-34 14%

35-44 23%

NCCS A 18%

NCCS B 16%

NCCS C 11%

METROS 19%

NON-METROS 14%

Source: BARC Nielsen Report

The permanent vs the transient

While 2020 saw many trends in terms of digital consumption, similar to attitudinal and behavioral changes, some were transient, and some are here to stay. A study conducted by Facebook and BCG captures the new behaviors and maps them against short term and long term.

Spike in new adoption for social and digital media; high likelihood of new adopters to continue

Y-axis: % new adopters who are likely to continue usage once lockdown is lifted

X-axis: % users who have started/increased usage since lockdown

Data points: Social Media, Free OTT, Debit/ credit cards, Online News, Digital Wallets, Videocalls, Online shopping (essentials), Online banking, Online games, Paid OTT, Online fitness classes, Online hobby classes, Online educational classes, Online doctor consult

Social media
16% new adopters post lockdown;
74% new adopters likely to continue;
54% user have increased consumption

Free OTT
15% new adopters post lockdown;
68% new adopters likely to continue;
42% user have increased consumptioncontinue;
54% user have increased consumption

Online News
13% new adopters post lockdown;
60% new adopters likely to continue;
40% user have increased consumptioncontinue;
54% user have increased consumption

Paid OTT
20% new adopters post lockdown;
44% new adopters likely to continue;
33% user have increased consumption

Source: Facebook BCG Turn the Tide Report – Media and Entertainment

Among urban consumers only Question text: "Which statement best describes your usage behavior since the lockdown"? Question text: "In the next 6 months, how do you think your behavior will change as compared to before Lockdown"? Question text: "You mentioned that you started below activities since the Lockdown. How likely are you to continue below activities even after the Lockdown gets lifted"? Source: BCG COVID-19 Consumer Sentiment Survey (India) May 18-23 2020

While social media, OTT, online news, gaming and digital wallets are likely to be long term behaviours, trends like online hobby and fitness classes saw short term surges due to lockdown.

What is interesting to note is that consumption of these segments spans across town classes, blurring the lines between India and Bharat. This indicates a long-term shift which is at a very holistic and organic level.

January-February (Weekly average of Week 1-9)	Metros + Mini Metros (10L+ population)		Tier I + Tier II (Below 10L population)	
Online Categories	Reach (%)	Sessions per day	Reach (%)	Sessions per day
Video streaming	96%	7	97%	8
Mobile payment	73%	5	75%	6
Shopping	67%	4	70%	4
Games	59%	6	58%	6

Source: Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

We will now deep dive into each of these segments

The OTT Growth Story

OTT content consumption accelerated across demographics and devices as consumers spent more time at home due to lockdown. To attract new audiences, many platforms offered free trials and sign ups. This in turn increased penetration of subscription based digital models. As production houses were shut down and content dried up, players with large legacy libraries had an advantage. Many platforms also invested in actively creating new content.

Digital Video was showing high levels of viewership

Video OTTs witnessed spike in viewership

265 MINS

127 MINS

+28%

MAUs (2019)[5]

Avg daily time spent per user (2019)[6]

Increase in time spent per user on video OTT apps vs. pre-COVID-19 levels[3]

Source:
5. .[App Annie Video OTT Apps data, January 1 2017 -29 December 2019]
6. [eMarketer -India Time spent with media, May 2019] FROM Facebook BCG Turn the Tide Report – Media and Entertainment

The time spent on video and OTT exhibited a huge increase during lockdown and then gradually stabilized. There was a decrease in August due to many apps getting banned. And IPL in recent weeks has once again caused a surge. Currently, the time spent on video streaming is 7% higher than pre COVID-19 times

Video Streaming Weekly Time Spent

Source: BARC Nielsen Report

The already growing OTT industry got a boost during COVID-19, with more than 60 OTT platforms as of June 2020.

5x growth in OTT operators

No of OTT Platforms

| 12 | 36 | 60 |
| 2015 | 2017 | June 2020 |

Source: MPA The Future of Content and Connectivity in India July 2020

OTT Originals Investment (US$ mil.)   **Share of OTT Originals in OTT Investment (%)**

Source: MPA The Future of Content and Connectivity in India July 2020

The share of original content has been increasing exponentially both in width as well as depth to cater to varied and mass consumer preferences

	Pre COVID-19	**Post COVID-19** (Weeks 18 21 or 25 April 2020 to 22 May 2020)
Share of original series in the total smartphone OTT viewership time	5%	19%
Share of movies in the total smartphone OTT viewership time	12%	27%

Source: Crisis Consumption - An insights series into TV, smartphone and audiences (10th Edition) by Nielsen, BARC, July 2020ARC Nielsen Report

Some trends which emerged and are likely to continue are

1 Owing to the closure of movie theatres, many **movies had digital first releases** like Dil Bechara, Gunjan Saxena, Gulabo Sitabo, Penguin and others. There are many more slated to have OTT platform releases in the near future.

2 There was a **growing focus on SVOD** model and direct subscriptions

3 **Pricing models** have become more innovative – be it in the form of a mobile only packs, pay per view for movie premieres, entry level low priced subscriptions

4 Increase in **original content,** both in terms of depth and width

Social Media – accelerated by social distancing

Social media, which was already on a growth trajectory in India, addressed a very fundamental sociological need during COVID-19. Unable to meet others face to face, social media became a mechanism not just for communication and entertainment, but also to stay connected. Social media's explosive success is not surprising since we humans are hardwired to seek human interaction. Social media platforms have evolved from simple interactive platforms to being a channel for e-commerce, influencers, job seekers and much more.

Social media had been showing strong growth

351 MINS

MAUs (2019)[1]

146 MINS

Avg daily time spent per user (2019)[2]

Social media consumption sharply increased

+32%

Increase in time spent per user on social media platforms vs. pre-COVID-19 levels[1]

Source: 1. [Statista –Global consumer survey, 2019] 2. [Hindu –"How much time do Indians spend on social media, August 21 2019] - FROM Facebook BCG Turn the Tide Report – Media and Entertainment

Source: 1. [Statista –Global consumer survey, 2019] 2. [Hindu –"How much time do Indians spend on social media, August 21 2019] - FROM Facebook BCG Turn the Tide Report – Media and Entertainment

Weekly Time Spent on Social Networking

During lockdown, the time spent on social networking increased by 48% from 3.13 minutes to 4.46 minutes per week. While it has normalised over time, it was still 12% higher than pre COVID-19 levels

3.13
4.46
3.37

Pre COVID-19 | Week of 25th April | Week of 24th june

Source: BARC Nielsen Report

In a study by GWI, 59% of respondents said that they were spending more time on social media apps, of which 30% said that they were likely to continue the same even post COVID-19

Social Media platforms were even a fantastic enabler and support in these hard times and people turned to it not just for networking and entertainment, but also for information and support

WHO Health Alert service has reached 12M+ people via **WhatsApp**[1]

Globally, ~ **3Bn** average monthly active users **(MAUs)** across **Facebook, Whatsapp, Instagram & Messenger,** with 2.6Bn MAUs just on Facebook[2]

~ **700M** daily active use WhatsApp and Messenger globally **for calling, doubled since COVID-19 outbreak** in many countries[2]

Instagram live views increased more than 60% in a week[3]

Dedicated **Twitter handle** for **COVID-19 updates**[4]

Snapchat launched a new AR lens to connect with WHO's **COVID-19 Solidarity Response Fund**[15]

Source: Facebook BCG Turn the Tide Report

Some trends which emerged and are likely to continue are

1 Increased time spent on social

2 Making it more real – increase in "Live"

3 Social going beyond connections and entertainment – to creation and expression

4 The rise of influencers

News – A Paradigm shift

News consumption is a behaviour which exhibited a paradigm shift. Owing to supply chain issues which impacted distribution, while newspapers and physical print took a hit during lockdown, eyeballs shifted to TV and digital. At a time when "information" was in high demand, television news channels had unprecedented viewership spikes with a peak of 21% share of viewership. Similarly, digital news apps and websites registered a 41% increase in time spent from 40 min per week in the week of 28th March to 3rd April 2020, up from 27 min in pre COVID-19.

News based apps which was in its infancy pre COVID-19, got a huge acceleration in 2020

Print and digital news consumption was driven by increase in literacy rate

75 MINS

MAUs for digital news (2019)[3]

23 MINS

Avg daily time spent per user reading print & digital news (2019)[4]

Digital news also saw uptake in consumption

+20%

Increase in time spent pre user on digital news apps vs. pre-COVID-19 levels[2]

Source: 3. .[App Annie Print News Apps data, January 1 2017 -29 December 2019] 4. [eMarketer -India Time spent with media, May 2019 and BCG Analysis] - FROM Facebook BCG Turn the Tide Report – Media and Entertainment

Source: - 2.[BARC Nielsen – How are media habits changing as India enters week 7 of Lockdown? 14th may 2020] FROM Facebook BCG Turn the Tide Report – Media and Entertainment

While COVID-19 and lockdown gave a huge impetus to news on digital platforms, a lot of consumption is naturally linked to various events in the ecosystem. However, the genre has reached a new normal base which is much higher than pre COVID-19

How has % users/week for news moved W-o-W?

7% of top 100 google searches in this week on cricket

54%

48%

38%

42%

June 14: Death of Sushant Singh Rajput
June 15: Galwan Attack

July 24: Dates for IPL 2020 announced
July 27-29: first batch of 6 Rafale jets arrive

August 5: Ayodhya Ram Mandir Puja

August 15: Independence Day, Dhoni, Raina retirement announcement

Wk of 16th March
Wk of 21st March
Wk of 28th March
Wk of 4th April
Wk of 11th April
Wk of 18th April
Wk of 25th April
Wk of 2nd May
Wk of 9th May
Wk of 16th May
Wk of 23rd May
Wk of 30th May
Wk of 6th June
Wk of 13th June
Wk of 20th June
Wk of 27th June
Wk of 4th July
Wk of 11th July
Wk of 18th July
Wk of 25th July
Wk of 1st August
Wk of 8th August
Wk of 15th August

Source: BARC Nielsen Report

One key trend which came to the forefront was the growth of regional news and hyperlocal. Through lockdown and unlock, and different guidelines across various parts of the country, people were keener to be informed about what was happening in their immediate locality.

The digitisation of news has led a lot of publications to relook at their revenue models. Many e-papers like The Hindustan Times, The Hindu, Times of India and Indian Express have moved their content behind a paywall and are charging a nominal subscription.

(pre-COVID-19)

Regional Languages

Hindi

English

+141%

+101%

+36%

Digital news[2]

%change in time spent/reader (post-COVID-19)

Source: BARC Nielsen Report

Some trends which emerged and are likely to continue are

1	The movement to consumption of news on mobile
2	The growth of regional news
3	The rise of hyper local
4	Changing revenue models

In addition to social, OTT and news, there were several other digital activities which showed a significant spike and have evolved, having become ingrained as a way of life. In most cases, though, while the surges seen during lockdown have normalized, it has stabilized to a new normal which is higher than pre-COVID-19.

% Change In Time Spent Per User Per Week Vs Pre COVID-19	Week Of 16th March	Week Of 25th April (peak)	Week Of 16th May
GAMING	11%	62%	44%
CHAT & VOIP	23%	34%	20%
EDUCATION	14%	52%	46%
VIDEO CONFERENCE	103%	485%	415%

Gaming gained unprecedented traction across all regions in India, especially among youth as schools and colleges were closed for durations longer than usual. As overall time spent on gaming increases, paid models could see growth.

EdTech is expanding with a large number of students enrolling in online courses. Education is no longer limited to students but expanding to adults as well as professionals.

Online Education

Source: GroupM MInsights Analysis

MMA groupm | The Modern Marketing Reckoner | Nothing is Certain

The drive towards healthy living and fitness which was observed during lockdown continues and is likely to be a long-term cultural trend

Healthy Living

Source: GroupM MInsights Analysis

Larger than individual trends is the collective transformation that the Indian digital ecosystem has undergone in a short span of six months. When one reflects upon both the width as well as the velocity of change, surely "nothing is certain".

Emerging Themes from India's Digital Transformation

1 Homogenization of digital consumption across demographics

2 The blurring of lines between India and Bharat

3 Greater trust in digital payment mechanisms

4 The emergence of edutainment

5 From content consumption to proliferation

6 The rise of contactless and frictionless

What 2020 has meant for OTT Platforms in India

Raman Kalra

PwC India

Ent., Media and Sports Advisory Leader | CMO Advisory Leader Partner

COVID-19 driven acceleration to the vibrant Indian market of 40+ OTT players

2020 – the year of Lockdowns, Work from Home & Social distancing brought with it an unprecedented pace of digital acceleration across all spheres of life & industries. It also led to massive shifts in consumer behaviour and habits that would have occurred otherwise in many years to come.

While many segments of the media industry like cinema, outdoor events, sports etc. got severely affected due to social distancing norms, it also proved to be a boon for the OTT players. In the absence of any outdoors, smart phones, laptops and connected TVs became the primary source of entertainment for people stuck at home during the extended lockdowns. Family entertainment on the large screen also made a comeback at the same time.

This accelerated shift fuelled the growth of India's diversified OTT market with coexistence of global biggies like Netflix, Amazon Prime, Disney (with Indian born Hotstar), YouTube on one hand and ZEE5, Voot, MX Player, Sony Liv, AltBalaji and many others on the other hand. At the same time, multiple audio OTT players for music streaming like Amazon Prime Music, Spotify, YouTube Music, Google Play, Gaana, JioSaavn, etc also saw the much faster growth in general.

World of Originals, Regionals and 'Direct to Digital' movies fuelling the subscriber growth

Long before the COVID-19 slowdown, OTT players had started building content strategies around 'originals'. The edgy storytelling & production made these originals even more attractive for consumers. Building some of these shows with the backdrop of smaller towns in India upped the appeal with the audiences from the heartlands.

Regional OTT players targeted the country's large local-language populations. From Hoichoi for Bengali content to more recently launched Aha TV for Telugu content, 2020 saw emergence & growth of niche regional players fulfilling the large gap in local language content for local audiences and the global diasporas.

At the same time, cinema halls shutdown forced the film producers to move from theatrical release to 'Direct to Consumer' release on digital OTT platforms. While this shook the film distribution industry, it also added a whole new segment of consumers as paid subscribers on various OTT platforms.

The world of short form video after Tik Tok

Government enforced ban on immensely successful & popular Tik Tok paved way for multiple Indian players to launch their short video OTT platforms like Chingari, Mitron, Josh, Sharechat's Moj or MX's Takatak. While some of them have found the initial success in the tractions, the influencer engagement and various monetization strategies will evolve over a period. At the same time, the global biggies have started testing the waters with Instagram Reels & YouTube Shorts. The user generated short video format is certainly set for a fiery competitive battle in times to come.

Distribution reach with partnerships – a win-win for all

OTT-telco partnerships had been in existence for long. 2020 pushed this further with heightened activity in the distribution partnerships among OTT & telecom players. The bundled packs offerings by telcos provided the ARPUs breather to them on one hand with increased relevancy & gave the power of extended reach to the OTT platforms on the other hand. While this might work in the interest of all, it needs to be seen how OTT platforms work to build the first party connect deeper to be able to understand and serve their primary subscribers better in more personalized relevant ways.

Experimenting with monetization strategies

'One size doesn't fit all' – this has been well learnt by the OTT players in India and the year 2020 saw a range of experiments on the variable pricing models by many players including even Netflix who have historically held onto the global pricing model. Netflix experimented with a unique 'mobile only' plan at almost half of its lowest price otherwise. Likewise, multiple Indian players have experimented with 1 Rupee a day model to 'sachet' pricing for the snackable contents. While Indian video OTT market is largely AVOD and SVOD, TVOD also saw initial traction with direct movie releases being priced at TVOD and the same is expected to expand deeper as we go forward.

The advancements in the ad-tech world in 2020 also made ZEE5 launch their own ad platform to leverage their deep subscriber database and deliver best returns to the brands without being too intrusive to the consumers in their content viewing experiences.

As we go forward, more and more OTT platforms might move towards a mixed pricing model between AVOD, SVOD & TVOD.

The world of hyper personalization

Personalization across a massive consumer base has become sufficiently efficient and cost-effective to give rise to the creation of highly accurate recommendation engines such as those offered by Netflix and Spotify. A world of almost infinite consumer choice is no longer a futuristic notion.

And to sum up with an outlook for the future

As per PwC global outlook 2019-24, India's OTT market is now set to grow at a CAGR of approx. 30% over next 5 years and overtake South Korea, Germany and Australia and become the sixth-largest market in 2024. Subscription VOD will be the prime driver of revenue, increasing at a 30.7% CAGR from US$708mn in 2019 to US$2.7bn in 2024.

Powering Businesses to Resurgence

Sandeep Bhushan
Facebook

Director and Head Global Marketing Solutions, Facebook India MMA India Board Member

It's been a few months since the new normal entered our lives. Amidst the economic and health uncertainties of the last few months, it is mobile connectivity that has created gateways for people, communities, and businesses to connect in ways not thought of before. Whether it is education or healthcare, information or entertainment, immersive mobile experiences have brought access and continuity to the lives of billions despite the physical constraints. On our own platforms, we saw Instagram Live views increase 60% in the first few weeks after the lockdown. Live broadcasts from Facebook Pages in India had tripled in June from the same time last year. We are privileged that 400 million Indians continue to build deeper communities around friends, family, and interests while expressing in newer and richer formats across our family of apps.

As business after business deepened its digital adoption in light of the pandemic, they also felt the urgent need to understand the evolving consumer behaviour as well as the new standards for creativity and media on digital. This inspired Facebook to partner with industry leaders such as Boston Consulting Group, Ogilvy, and GroupM and release eight industry-specific studies. Together they are a marketer's ready reckoner for navigating the new normal.

Understanding the consumer

The findings from our consumer behaviour study with Boston Consulting Group showed people relying increasingly on their mobile phones to make purchases. Digitally influenced purchases increased significantly, by 25% in urban consumers, in just three months after the pandemic. Seven out of ten mobile phone buyers and nearly six out of ten fashion buyers are now using their mobiles to shop. We also know now that these aren't just temporary surges - the adoption of digital technologies is structural and will last beyond the pandemic.

Recrafting Media and Creative Strategies to Unlock Growth

The Facebook-GroupM Media Playbook is built to cater to these key consumer behaviour shifts, and calls out four pillars that are key for businesses:

01 **Embracing the full spectrum of consumer segmentation:** With the evolution of a value-conscious mindset, robust consumer segmentation based on hyperlocal strategies has become crucial for business impact.

02 **Mastering the full funnel of performance marketing:** In times of physical distancing, it's essential to stay in touch with the customer and continuously eliminate friction across the path-to-purchase. For instance, conversational marketing digital solutions driven by WhatsApp, Facebook Messenger, and digital CRM tools can prove to be very effective.

03 **Integrating innovations with business outcomes:** Interactive ad formats such as Playable ads and augmented reality (AR) ads can increase favorability and conversion rates. Influencers can also play a key role in lending an authentic voice to the brand.

04 **Realigning media mix models:** Most critically, it's imperative for businesses to relook at media mix models to drive growth with focus on cross media modelling. Methodologies such as Nielsen's Custom Mix Modeling (CMM) can help attribute retail sales impact of media channels, whether traditional or digital.

While re-aligning media strategies, it's also important to understand the power of mobile platforms and the brand expression that consumers best respond to, from dynamic catalogues and video ads to Stories. One of the most crucial takeaways from the Facebook-Ogilvy Creative Playbook is the importance of building for the mobile rather than adapting for it.

This festival season will underline the significant change in consumer behaviour, both towards consumption categories and media. With people continuing to stay at home, video, AR, influencers, vernacular content, and messaging will play a crucial role going forward.

A YouGov study points that social media plays a special role in this journey with Facebook and Instagram together influencing nearly 80% of Gen-Z and Millennials' festive shopping. More than a half of festive shoppers post or watch videos on their social media feeds, and nearly half of apparel consumers said they are influenced by videos posted by influencers during the festive season. Further, Indians prefer messaging businesses during festive shopping with 61% respondents saying they used WhatsApp for messaging a business, and 36% saying they used Facebook Messenger. The implication is loud and clear - whether your brand is large or small, and whether your category is digitally native or fulfilled with a combination of traditional and digital mix, consumers are influenced by brand expression and engagement on mobile.

As businesses head for this unprecedented festive season, building for people who are looking for both engagement and fulfillment on their mobile devices will be critical to business recovery, success, and turning the tide.

What 2020 has meant for News Platforms

Umang Bedi
Dailyhunt
Co-founder

2020 has been a tipping point for all kinds of digital platforms. The only other thing as omnipresent as the pandemic, is today's mobile environment. As societies increasingly move online, digital platforms will be expected to embrace, even mimic various aspects of social behavior. Digital platforms and apps, whether utility or social or informational, are a ubiquitous part of every-day life accelerated now by the pandemic and resulting lockdowns. In the first week of lockdown, Indians spent more than four hours every day on social media. This is an 87 per cent increase from a week before lockdown. Internet browsing saw a 72 per cent spike during the first week of lockdown. The social media usage graph has gone up from 2 hours pre COVID-19 to 5 hours during COVID-19. It's no surprise that global and Indian data reflects upward trends in consumer behaviour on their mobile devices. In fact, COVID-19 followed by the government's call for a self-reliant Indian app ecosystem, has served as tailwinds for Dailyhunt as people now rely even more heavily on mobile phones for news, information and entertainment.

News and regional content consumption on mobile platforms have undergone a significant shift. User behaviour on Dailyhunt concurs with recent trends, recording 285 Mn MAUs, higher occurrence of sessions in the day, with greater time spent per session. With video consumption on the uptake, we're also witnessing a tremendous appetite for short-form video. Testament to this is the success of Dailyhunt's Josh, which is now the fastest growing and most engaged short-video app in India at 23+ million daily active users (DAUs) and 21 mins time spent per DAU. The success of our mobile apps – both regional content and short-video – is a reckoning that users are no longer mere consumers but curators, conversers and creators, and need to be co-opted into app offerings. It's a tried and tested formula at Dailyhunt which is also seen to be working for Josh that attracted top 200 leading creators who have a social following of >300Mn users across social platforms because it was built 'with' them.

We may live in difficult times, but consumer aspirations will continue to thrive. Players in this ecosystem should bear in mind the merits of delivering offerings that are content-forward, creator-first and consumer-focused. We must commit to building technology that can justify and maintain these elevated levels of installs and attract revenue to overcome the persistent challenge of monetization, despite growing consumption. Developers must also

acknowledge that apps with 'social capabilities' play a key role in driving digital consumption – we've witnessed this firsthand in the growing adoption of both Dailyhunt and Josh.

The pandemic has precipitated unique challenges for mobile platforms in India, but it has also inspired a problem-solving culture that our ecosystem should adopt and scale. With an estimated **760 million smartphone** users in India by 2021, the potential for mobile platforms in the country is incredible, especially with the opportunity to connect with an increasingly younger user base. We, at Dailyhunt, have retained our singular focus on solving for the real content requirements of a country as diverse and intricate as India. And we have learnt that only those who build bottom-up for India and from India, to identify sustainable solutions for her unique and vast challenges, will not only survive but thrive.

Roposo India ka Apna Video App

Mayank Bhangadia
Roposo
Co-founder

Roposo is India's #1 short video app and part of the InMobi Group, headquartered in Bangalore. The app allows people to share engaging video content on the always-on device: the mobile. Roposo offers a personalized "For you" feed and several channels where users can enjoy videos by genre. The app creates a high social value wherein consumers can directly like and comment on the videos and interact with the content creators.

State-of-the-art Trends in Video Consumption

With the onset of the global pandemic, Indians have adopted new ways of sharing and consuming video experiences on mobile apps. With consumers spending more time online, short video apps have emerged as a major destination for users looking for entertainment.

1 Video Consumption Consistently Shoots Up

With the changes in lifestyle during the lockdown, users above 18 years of age are engaging even more with Roposo's content. While users are on the app throughout the day, peak consumption is seen between 8 PM to 10 PM. The younger generation below the age of 25, adopted the Indian video apps and constitute 59% of the Roposo's total userbase. An average user spends 40 minutes per day on the app.

2 Unique Content Surfaces, as Creators, Get Innovative

Consumers are driven by a desire to engage with a new type of content and video channels.

> Food channels are on the rise

Food has become a trending topic during the pandemic, as video creators have turned to create content around cooking. Creating standard recipes with a smaller number of ingredients remains a favorite trend. Foodies on the platform have given Roposo a reason to create "Hungry TV" - a channel that caters to everything related to food.

> Awareness of the pandemic

The pandemic that has had a catastrophic effect on people around the world, has obviously surfaced the need for information on the pandemic presented in a fun way. Roposo created a new channel where creators could share responsible content on the current state of the pandemic in a fun

way. This initiative has encouraged video creators to create informative videos on the pandemic from general awareness to preventive measures. The rise in comedy, health, and fitness-related content for this category led to an increase in the overall time spent and the number of video shares.

> Inclination towards India-specific content rises

Roposo awakens the need for supporting Indian content through the "**Roposo - India ka apna video app**" campaign. The campaign engaged massive audiences and created awareness for supporting local content. This is aligned with the #VocalForLocal initiative announced by the Indian Prime Minister, Mr. Narendra Modi during the early days of the lockdown. Roposo became the #1 Social app on the Play Store in June 2020 on the back of its engaging content, powerful platform, and demand for #MadeInIndia social video platform.

3 Content Preferences are Driven by Regional Diversities

With people coming from diverse backgrounds in India, content choices on Roposo are driven by regional influences. While the Hindi-speaking audience prefers to watch and share videos related to art forms such as music, dance, and poetry, consumers from South India show a keen interest in devotional content especially during festivals like Ugadi and Onam.

Roposo, the Robust Platform with Endless Opportunities

Given the wake of the pandemic, Roposo is staying ahead by delighting consumers and creators through a seamless experience.

1. Influencer Marketing Goes a Step Higher with Content Democratization

With different genres of content being created and consumed, there's a definitive surge in the impact that micro-influencers create on consumers. With micro and nano influencers creating and delivering higher engagement rates, more brands are collaborating with influencers to drive stronger consumer connections. This is creating an opportunity for content creators to monetize their efforts. Roposo provides a robust platform for influencers to create and share innovative video content and thus get recognized by brands. On the other hand, brands get to choose influencers who are a great fit for the brand.

2. Driving Seamless Consumer Experiences with AI & ML Based Algorithms

Roposo engages content creators with a powerful set of video creation tools that allows them to engage with multiple collaborators and create quality content that can be easily monetized on the app. With a network of 60% women content creators, Roposo is a user-friendly platform that safeguards data and user privacy in a transparent environment. The AI-based algorithm enables consumers to see videos from their preferred genre and language choices.

Roposo Aims to Make Influencer Marketing Mainstream

As forward thinkers, Roposo aims to create better video experiences through a high-quality influencer network. With influencer marketing being at a nascent stage in India, and wealth creation being a major challenge for content creators, Roposo provides real monetization opportunities, directly within the app environment. With real and impactful influencers joining the Roposo network, the app aims to grow manifold, contributing to the growth of influencer marketing in India and enabling it into a mainstream, professional career avenue.

Consumer Pattern of the Modern World is Complex

Abhishek Joshi
MX Player
Head of Marketing and Business Partnerships

While everybody has adapted to the existence of the pandemic and the new normal, there is still a considerable amount of uncertainty about the future. Having said that, we are likely in the midst of a generation-defining event that will influence how consumers behave and respond for years to come.

Caution is good but innovation is better, I'd say. A new, open-to-change outlook is what is expected from a global crisis. Consumers today want a quicker response and want to be reached on a medium and at a time convenient to them even more now than the recent past. And, the ever-increasing leaps in marketing tech has managed to completely change the horizon – with mobile leading the way. Every couple of years, a wave of disruption comes along and changes the face of businesses. Early in this decade, we saw brands experiment with social media to communicate with customers and today, it has become the preferred two-way interaction platform to be able to tell your story and tell it well, while also listening to the consumers' stories.

With the world restricted at home, dependence on mobile usage has significantly spiked - from everyone managing their work from home schedules virtually to online payments, from entertainment to shopping and even

healthcare - mobile has taken centre stage in our lives, ingraining new app habits and permanently shifting the consumer landscape to a mobile-first world. Mobile gives target audiences all the tools they need to engage with that all-important call-to-action – be it "buy now", "watch now", or "download now". Efficiency is key here. When you invest in mobile advertising, you can reach the right person at the right time with the right message as compared to any other medium and at a much more efficient cost (Yes, this is true).

This means that marketing - the link between businesses and consumers, has a critical role to play as companies adapt at every turn/navigate through these unprecedented times. However, one limitation when it comes to mobile marketing is that you have very little room for error up front, so your communication and approach need to be right at the get go.

It's hard to overstate how big mobile gaming has become. Over the past few months, our gaming offering on MX Player has seen a significant jump in consumption as well, having grown to 25mn Monthly Active Gaming Users, and is seeing engagement north of 70 minutes/user per day, further showing how consumer patterns have changed and moved to the digital world. It also highlights the change in

definition of an entertainment super-app which has evolved keeping in mind the growing needs of the digital consumer.

In fact, with nearly more than half the Indian population already connected via smartphones, mobile offers an abundance of unique propositions for marketers to leverage, like AR or new types of content. Consumer pattern of the modern world is complex. Marketers need to pre-empt and be ahead on the curve to get an immediate sense of customer motivations and behaviour. As a new world of marketing opens up, we can be assured that the one thing constant is the action to change and not just the change in itself. To create worthwhile experiences, what is key is to remain flexible, adaptable, resilient, have a constant eye on the pulse of the audience and to then satisfy those needs.

2020 and its Impact on Gaming Platforms

Sameer Pitalwalla

Epic Games

Business Development Director, India and SEA

In our year of the pandemic, the word 'metaverse' has been thrust back into popular culture. While the concept has been around since 1992 ever since sci-fi writer Neal Stephenson first coined the word and concept, of a global space shared by many. While industry stalwarts have debated questions over AR and VR, the foundations of a global metaverse are now being built with game engines.

Have you ever envisioned your oasis? A place with no restrictions, where you can be or do what you want. Ernest Cline's book and the subsequent film by Steven Spielberg, **Ready Player One** put such a tantalizing world into perspective. A physically occupied space that had the visceral feeling of being fully immersed but was yet, virtual. This world is not as far off as you may think.

Beyond engineering games that test the limits of virtual landscapes, immersive gameplay and realistic cutscenes – technologies such as photorealistic rendering, lifelike animation and robust data translation truly create the perfect conditions for a new real-time world. These tools give creators from across industries the ability to deliver cutting-edge content and interactive experiences.

A paradigm shift

Industries across sectors have had to test their mettle against a global pandemic. For the gaming industry in particular, this has been its watershed year as masses have adopted new entertainment forms. In a post-pandemic world, the adoption of virtual technology will impact every aspect of content production, which is why the real-time capabilities of gaming engines have acted as a rallying point for industries outside of games as advertising, architecture, product design, and even filmmaking. For example, Jon Favreau utilized the Unreal Engine in the Star Wars TV series "The Mandalorian." Similarly, When Honda wanted to promote its new Civic hatchback, it created a mix of photorealistic ads with CG and anime elements in partnership with the iconic anime series Evangelion©.

The full-fledged movie production process involved creating commercials using Unreal Engine, rendering in 4K resolution without compositing. Graphinica, the Japanese animation studio tasked with this project, started full-scale production with almost no experience in using Unreal Engine. With the help of tools training, it delivered the project in only three months.

To sum it up, tools that power gaming are now powering the world and asset building across multiple industries are changing along the way the very process of how things are done and what is possible while significantly reducing costs and time to market.

The seeds of creation

As the world of 3D graphics rapidly evolves, game engines have become a force of innovation, enabling companies across industries to initiate advancements in product design. From animation to visual effects and virtual production, the platform makes real-time visualization even more accessible.

Take advertising as an example. Back in 2019 Audi partnered with RTT (now Dassault 3D Excite) to build its first digital showroom using Unreal Engine. Audi already had an existing application running, the retailers were working with it and customers were aware of it. With Unreal's engine, the team was able to use existing CAD data with real-time lighting, shadows and realistic reflections.

Previously, the team needed to pre-bake lighting ad shadows each time the marketing, engineering and product data changed. With the engine, this problem was solved. An excellent lighting and shadowing system made sure that those workflows were no longer needed.

Filmmakers are also reaping the benefits of game engines. With older production methods, actors would have to play out each scene individually, subjecting themselves to multiple takes with a green screen to showcase the environment around them. With the tools available in game engines, studios can pre-visualise the environment and how a battle would play out right down to the smallest detail, like the hero's sword markings.

CONCLUSION

As innovation takes a front seat, the lines between artificial and real continue to blur – as will the lines between gaming, entertainment and product design.

As more industries turn to virtual production, a world of interdependence that strives on creativity, will act as a catalyst, changing once again how we communicate.

2.3

The Impact on Shopping and Buying Behaviour

One of the largest shifts in 2020 was in terms of shopping and consumption – what people bought, how much they bought, where they bought and why they bought.

The causes for this lie both in the tangible and in the intangible space.

The intangibles were around cultural trends like

- increased preference for healthy and natural (40+% may increase spend on Health & Wellness)

- affinity towards local brands (63% consumers are paying more attention to origin of product)

- seeking brands and products one trusts. (Since lockdown 54% have been more likely to buy from brands they know and trust)

Whereas the tangible factors revolved around three large things

01 Economic impact of COVID-19 leading to cautious spending (43% consumers are expecting a decrease in overall spend in next 6 months)

02 Lockdown leading to an acceleration of online shopping and ecommerce (50% of all consumers expect to increase e-commerce spend in next one month)

03 Contactless and frictionless translating to a rapid adoption of cashless payment mechanisms (51% consumers saw an increase in payment via digital wallets)

The Facebook Turn the Tide Report offers this interesting summary of the shifts observed across multiple categories:

Spending sentiment translating differently across categories; marketers need to react accordingly

💡 Right strategic actions needed to win disproportionate share

"Growing" Categories (Categories with net increase in spends)	Wave 1 (23-26th Mar)	Wave 2 (17-20th Apr)	Wave 3 (30 Apr-03th May)
Daily essentials			
Fresh foods	Positive	Positive	Positive
Staples	Positive	Positive	Positive
Household care products	Positive	Positive	Positive
Personal care products	Positive	Neutral	Neutral
Utilities (electricity, water)	Positive	Neutral	Neutral
At-home entertainment			
Mobile services	Positive	Positive	Positive
Home wifi connection	Positive	Positive	Positive
Paid OTT subscription	Positive	Positive	Positive
DTH services	Positive	Neutral	Neutral
Toys & games	Positive	Neutral	Neutral
Saving/Investments			
Savings	Positive	Positive	Positive
Insurance	Positive	Positive	Positive
Health			
Preventive diagnostics/test	Positive	Positive	Positive
Vitamins, herbs, supplements	Positive	Positive	Positive
Medical procedures	Positive	Positive	Positive
First-aid	Positive	Positive	Positive
Education			
Education	Positive	Neutral	Positive

💡 Marketers will need to identify pockets of opportunities

'Shrinking' Categories (Categories with net decrease in spends)	Wave 1 (23-26th Mar)	Wave 2 (17-20th Apr)	Wave 3 (30 Apr-03th May)
Travel			
Vacation/leisure travel	Negative	Negative	Negative
Business travel	Negative	Negative	Negative
Public transport	Negative	Negative	Negative
OOH Entertainment			
Spas, theme parks, concerts	Negative	Negative	Negative
Restaurants	Negative	Negative	Negative
Movies at cinema hall	Negative	Negative	Negative
Discretionary spends			
Luxury brands/products	Negative	Negative	Negative
Cosmetics, makeup, perfume	Negative	Negative	Negative
Apparel/fashion	Negative	Negative	Negative
Apparel/fashion	Negative	Negative	Negative
Tobacco & smoking supplies	Negative	Negative	Negative
Alcohol	Neutral	Negative	Negative
Food delivery	Neutral	Negative	Negative
Electronics			
Sports equipment & clothing	Neutral	Negative	Neutral
Non-mobile consumer electronics	Negative	Negative	Negative
Mobile electronics	Negative	Negative	Neutral
Home			
Home construction/renovations	Negative	Negative	Negative
Home furnishings and décor	Negative	Negative	Negative
Auto			
Scooters/bikes	Negative	Negative	Negative
Cars	Negative	Negative	Negative
Packaged food & beverage	Neutral	Negative	Neutral

Consumer sentiment ▮ Positive ▮ Neutral ▮ Negative

Turn the Tide Unlock the new normal

Question text: "How do you expect your spend to change in the next 6 months across the following areas?" Categories with Top 2 Box > (5% more than average) classified as winning categories. Categories with Bottom 2 Box > (5% more than average) classified as losing categories. Categories neutral across waves: Baby/children's food, Non prescription medications, Prescription medicines, House rent, Home purchase & Home loans.

Source: BCG COVID-19 Consumer Sentiment Survey March 23-26, April 17-20 2020, April 30-May 03 2020 (N = 2,106, N = 2,324, and N=1,327 respectively)

This section aims to analyze in more detail the changing consumer shopping patterns of 2020.

Sources: Facebook Turn the Tide Report
Mindshare COVID-19 Global Tracker Wave 8

How COVID-19 has Evangelized E-commerce

Suraj Dhillon

groupm

National Director - E-commerce

It's been surreal these past 5 to 6 months. In what would be probably one of a few occurrences in our lifetime, we have seen consumer behavior and preferences change at breakneck speed, be it how they interact with media or how they cater to their needs and wants. Time spent online has increased, digital payments have soared, and spurred by repeated and lengthy lockdowns, there has been a significant acceleration in online commerce.

Despite Google's Mobility Report for Grocery and Pharmacies in September showing a slight deviation from pre COVID-19 benchmarks, e-Grocery has doubled in size to approximately 3 billion USD. Meanwhile, Non-Essential Retail & Recreation mobility still

Indian Consumer Internet Market Monthly GMV Annualized (USD Bill $)

	Pre COVID-19	June 2020
Grocery & FMCG	1.5	2.9
Non Grocery	27.9	33.5
E-Tail	29.3	36.4

Source: Redseer Accelerated Digitization in India Internet Post COVID-19 Part 2, July 2020

shows a 60% drop in September from pre COVID-19 benchmarks, which has resulted in a similar drop in offline purchase value. However, online Non- Grocery has seen a 20% increase, leading to its value penetration skyrocketing to 25%.

Coming to the source of growth and the contribution of consumers doing their first purchases online to this growth, we saw that during this period, 20% of E-Retail and 33% of E-FMCG purchasers were new consumers. These new consumers were spurred by the need to shop online for their daily needs, resulting in 30% of them making their first purchases in Grocery or Beauty, which are traditionally not acquisition categories. These new consumers continue to skew towards Tier 2 cities and smaller towns. With e-grocery user penetration levels at 0.1% in "Tier 2 and Below", and new hybrid models like Jiomart leading the expansion of e-grocery's reach in these towns, we will see a quantum jump in e-grocery users. In fact, it is expected that by 2024, the e-grocery market would increase 10X over it's 2019 size.

While one of the strictest lockdowns in the world compelled consumers to shop online, the length of it and the trajectory of the disease brought in stickiness to this behavior. Despite initial hiccups due to constrained supply and overwhelming demand, operations normalized by May, leading to consumers experiencing the

breadth of assortment and convenience that are natural advantages of the online channel. Consumers started widening their purchases across categories, spending more per order and buying more frequently. In fact, 40% of FMCG shoppers who started online shopping in April placed Full Basket orders* in May. Along with the fact that existing consumers of online vertical players are moving from top up purchases to Full Basket orders as well, the signs of stickiness that would not relegate this to a temporary shift, are there for all to see.

*Full Basket Orders: 4 or more FMCG categories or order value > INR 900

Increse in No. of subcategories purchased per customer

40%

Increase in no. of orders placed per week per customer

10%

Increase in FMCG Average Order Value*

31%

This sticky behavior is even reflected further up the funnel. Consumers are now relying more on online commerce sites not only for purchases but product research as well. This does not just impact online purchases. With around 50% of urban internet users researching online but purchasing offline, we could see a significant impact once consumer mobility to offline channels normalizes.

However, on the flip side, the pandemic has had an impact on overall spends and spends

Increase in Average Daily Search Volume

59%

Increase in Average Daily Product Consideration

41%

Increase in Average Daily Time Spent Per Visiting Customer (Mins.)

37%

profile. With economic uncertainty, consumers continue to prioritize fundamentals and remain bearish on discretionary spends. That means more groceries, household supplies and products for children and less apparel, beauty and luxury brands. Discretionary categories may continue to have a short-term impact in terms of bargain seeking behavior and down trading. Meanwhile, changes in entertainment, dining out and work mobility have led to spikes in products for home office setups, kitchen goods and appliances and home entertainment.

Brands have had to be agile to keep up with the consumer's changing needs and preferences. For example, on account of people working from home, features in headphones to enable seamless communication became must haves, leading to headphone manufacturers making tweaks in their communication, and in some cases, their products. With hygiene being on the top of consumers' minds, we saw a slew of extensions in the personal and household hygiene space, as well as a spike in Ayurvedic entrants in the health immunity space. e-commerce also allows for a faster route to market, thereby enabling companies to get these products to consumers quickly.

In fact, marketing innovation has hardly seen a more widespread and rapid pace of deployment. What is certain though is that this shift of purchases online will only accelerate. With India's e-commerce market expected to reach 100 Billion USD in the next 5 years, we need to quickly re-evaluate vis-à-vis our consumers' changing needs, as to where we stand on our digital & e-commerce maturity journey, and organizational structure and capability and ensure we embrace agility in this rapidly changing landscape.

The Impact of E-commerce Growth on Consumers and Brands

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Senior Director of Monetization MMA India Board Member

Background

At ~$850BN, the Indian retail market is among the top 5 globally. The last decade has witnessed the transformation of Indian retail across all geographies, spurred by rising incomes, urbanization and changing demographic profile.

An important part of this growth narrative is the rise of e-commerce, which is democratizing shopping across India. E-commerce reaches almost 100% of serviceable pin codes in India, thus empowering consumers, small sellers and large brands alike. While the adoption for e-commerce has been burgeoning by the month, the penetration is still less than 5%, thereby creating a tremendous headroom for growth.

This e-tail market is set to grow at ~30% CAGR, serving over 300-350MN shoppers and creating a Gross Merchandise Value (GMV) of ~100-120BN by 2025*

*Source - How India Shops Online, 2020 - A Flipkart and Bain & Company report

India exhibiting markers of getting to massive scale in e-retail in line with global benchmarks

Growing online population

~1B

Indian Internet users by 2030

Cheap, ubiquitous data

95%

reduction in data prices since 2014

Digital natives coming of age

75%

of India's population by 2030 will comprise Millenials and Genz

Rising online share of spend

32%

online penetration in mobiles and electronics

Nearly 30% CAGR expected over the next five years

Indian online retail market ($ Billion)

30 — FY20
100-120 — FY25E
30% CAGR

Online product shoppers (million)

~100-110   ~300-350

What has changed in the past few months

Driven by the need for safety and convenience, the pandemic has accelerated e-commerce adoption across the globe. For example, e-tail penetration in US grew from 16% to 20%+ (~5 years' growth) in just the period from March to April 2020

China e-retail penetration
(% of retail sales)*

33% **32%**

26% 25%

23%

21%

18%

15%

-29%
YTD CY20
Penetration

| 2015 | 2016 | 2017 | 2018 | 2019 | Jan -Feb 2020 | Mar 2020 | Apr 2020 |

US e-retail penetration
(% of retail sales)*

20%

16% 16% 16% 16%

15%

13%

12%

11%

National emergency declared mid-March, Stay at home advisory effective April

| 2015 | 2016 | 2017 | 2018 | 2019 | Jan 2020 | Feb 2020 | Mar 2020 | Apr 2020 |

*Source - How India Shops Online, 2020 - A Flipkart and Bain & Company report

How's the scenario playing out in India?

In India too, online channels have gained significance. During this pandemic, e-commerce has been focused on providing consumers convenient access to a wide assortment of products across all geographies and income segments in a safe and secure manner, enabling growth to happen on two axes

① Selection and spending expansion by existing e-commerce customers.

② New e-commerce users.

30%

Higher share of wallet

Online shoppers who increased purchases in existing categories

16%

Expanded trialist

Online shoppers who purchased new categories

11%

First time trialist

Consumers who tried online purchases for the first time

*Source - How India Shops Online, 2020 - A Flipkart and Bain & Company report

Despite a consistent increase in the number of COVID-19 positive cases in the country, India is displaying unique and resilient behavior with consumers being more worried about day to day disruptions.

July   August

Japan
Australia
Malaysia
Spain
Great Britain
Peru
Canada
India
United States
Netherlands

40% 45% 50% 55% 60% 65% 70%

*Source: Ipsos "What Worries the World: Coronavirus concern rebounds"

The Indian consumer context* can thus be clustered as follows:

1. Sentiment - Edginess exists, but large swathes of the country are eager for normalization.

2. Growing online dependence - Spending expansion by existing users, new to online users.

3. Switching loyalties - Consumers are migrating to safe and sustainable options.

4. Future forward - Despite the near-term blip, 57% of the surveyed customers are optimistic about the future and have confidence in the country's economic recovery.

*Source - Flipkart Insights & Research team.

Should brands go online?

If there ever was a time for brands who haven't carved out an online growth path for themselves to get started on their online journey, it is now. The macro factors to propel this rise are all in place and the current environment is acting as an accelerator. Apropos online presence, we can categorize brands under four archetypes, basis the quantum of sales online:

<5% Majorly offline brands

5-40% Emerging online brands

15-40% Significant digital brands

40%+ Digital first brands

As more and more customers migrate online, building a robust presence and keeping your stores running 24x7 is now an imperative for all brand archetypes and

sellers. There are two large pillars around which e-commerce centers its customers' value proposition.

Affordability

a. Affordable products - Unique selection and constructs like product exchange

b. Affordable credit - Data and distribution are used to create seamless buying opportunities like Buy Now, Pay Later, Cardless Credit etc.

Access

a. Physical access - All serviceable pin codes in the country are reachable via e-commerce today. And it is small town India that is turbo charging growth and now accounts for 3 of 5 online orders*

b. Digital access - 3Vs - Vernacular, Video and Voice.

Three of every five orders are from tier-2 and smaller towns**

Split of order volume by city tier (%)

Metro tier 1 towns

Tier 2 and smaller towns

2016   2019

Average selling price (ASP) in tier-2 and smaller towns is only marginally lower than in tier-1 / metro cities

Category wise ASP (in INR)

	Metro tier 1 towns	Tier 2 and smaller towns

*Source - How India Shops Online, 2020 - A Flipkart and Bain & Company report

India's e-commerce market is at an inflection point. Built for India capabilities, as mentioned above, create an even more compelling proposition for brands to be a part of this journey and leverage e-commerce to:

1. Find new customers
2. Build deeper relationships with existing customers.

How can brands win online?*

Optimal online assortment

(a) Range-width depending on category dynamics.

(b) Modified pack sizes and combos for the online buyer.

Right operating model

(a) Complementary assortment across channels/sellers.

(b) Synergistic roles of channels (marketplace, own site).

Product and supply chain execution

(a) Highly rated products—good quality.

(b) Supply chain: Fill rate, promised vs. actual delivery timeline.

(c) Good, discreet packaging.

(d) Low returns relative to the category.

Kicking off the marketing flywheel

(a) Marketing mix optimization and content hyper-personalization (including vernacular).

(b) Inorganic/paid visibility.

(c) Organic visibility—content, search engine optimization, conversion.

(d) Role of influencers and digital-specific advertisements in improving engagement.

Conversion

(a) Descriptive product display pages with the right mix of images, videos and pithy product summaries.

(b) Appropriate pricing.

Consumer insights feedback loop

(a) Leverage e-commerce's granular consumer insights and ability to do rapid prototyping, A/B testing, etc. to accelerate new product launches/ improvements and improve targeting and go-to-market efficiencies

*Source - How India Shops Online, 2020 - A Flipkart and Bain & Company report

Customer trends to watch out for

1 Mobile is the new store front. ~80% of online shoppers shop via mobile.

2 3Vs (Vernacular, voice and video) will bring the next set of shoppers online.

- **a** Share of voice searches in India is increasing. 270% YOY increase^

- **b** India now has more rural AIU than urban. 500MN Indian language internet users are expected by 2021 (against 200MN English users)*

- **c** Consumers are spending 30X time on video content vs product shopping. Video thus will be a critical tool for acquisition and engagement*

3 Hyper Personalization - Brands should customize experiences for every cohort. e-commerce understands customer journeys deeply, enabling brands to create differentiated experiences.

4 Elevated need for convenience - Selection, affordability and access are now perhaps the most important vectors for consumer decision making now.

5 One stop shops - Top e-commerce companies have started to develop ecosystems that combine their core e-commerce business with sticky customer services such as video streaming, gaming, booking and payments in a single platform or application. Ecosystems attract a huge customer base, which in turn attracts retailers who want easy access to a critical mass of consumers. And customers gain a one-stop shop for all their needs.

*Source - How India Shops Online, 2020 - A Flipkart and Bain & Company report

^Source - Google - Year in Search — India: Insights for brands.

Purchase in Pandemic – Pause, Persist on Period

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There is a maxim which goes "Never waste a crisis". As we grapple our way out of the Pandemic crisis, it does present its own opportunities, particularly to the FMCG marketers. How do we bring our categories to the forefront, how do we redefine the codes of our categories, what substitutes what and what makes way for what are all questions that can define these opportunities?

In the last 5 months, our consumers have learnt to live in confines, stay distant, work distant yet collaborate, manage purchases with minimal occasions, manage budgets under tightening wallets, manage aspirations of our families and manage the occasional tryst into indulgence as well.

Here is a quick summary of 10 things we believe have been significant changes in the purchase behaviour of consumers in India.

1. Consumption grows

The period from March to August 2020 saw a sharp growth of 4% in volume and 9% in value of FMCG purchases for in-home consumption. Every month registered a growth over the last year at percentages highest in the last 2 years. Value growth is more driven by the increased purchase of hygiene offerings.

2. Accelerating hygiene

The hygiene segment has doubled in growth to 22%. While the segment includes a whole lot of categories, the growth clearly has been accentuated by sanitisers and handwash. The annual penetration for sanitisers in 2019 was 1%. The monthly penetration now is 20%. In the first four months of the Pandemic, over 350 brands of Hand Sanitizers were launched. That should explain the explosion in hygiene as a segment.

3. Fewer shopping trips

The number of shopping trips for FMCG has dropped from 70 to 63 for the period Mar-Aug'20, contrary to the trend of increased trips observed for years now. The implication of this is clearly an increased effort in engaging with the consumer outside the store and that highlights the need for communication in whichever medium that makes sense.

4. Grooming gets hit

As consumers stayed home more, the need to groom themselves has perhaps taken a backseat. Categories such as talcum powders, deodorants, hair colours and face creams have seen sharp drops in the period Mar-Aug'20. The categories are slowly coming back in July and August. Who knows, the consumer may surprise us by way of some revenge spending on good looks as the festive times approach.

5. Snacking booms

As more of us stayed at home, what we would have snacked outside of home moved into homes and much more. The extent of damage caused by the reduction in out of home snacking was to a good extent made up by increasing snacking at home. Categories like biscuits, noodles, salty snacks all grew close to double digits in this period.

6. Is immunity the new natural

Milk products, ice creams, biscuits, bread and many more such have started talking about boosting immunity. Even a popular shirt brand spoke about the goodness of Neem and Tulsi. Two years back, every brand and category spoke about " Natural". Today perhaps Immunity is the new Natural.

7. Retail ruffle

A Lot has been written about the e-commerce roll. That is true in FMCG as well. While the percentages are still small, the growths have been very sharp. This apart, the growth in the role of the Chemist in dispensing FMCG has got substantially accentuated in this phase.

8. Brands win

The pandemic period has been a sharp driver for the growth of branded products in many categories. This is particularly so in categories of internal consumption such as edible oils, tea, spices, atta etc. The trend is also noticed in categories like toilet cleaners etc. Good time for brands.

9. No compromise

Lot of theories were spread about the consumer downgrading in these times of uncertainty. However, volume and value have moved in similar trends across categories. The consumer has only followed a principle of "no compromise" even in these times.

10. Rural on a roll

Both from the macro factors as well as the demand generation POV, rural is all set to be on a roll. Rural India suffered on account of restricted supplies in the early part of the pandemic, resulting in growth rates marginally lower than urban India (3.9% vs 4.3%). However, good rainfall, MSP, harvest and brand actions are all just perfectly placed to propel rural demand even ahead of urban.

Will these trends pause, persist or is it just a period? This could help you weave your strategies in these uncertainty laden times.

03

Everything is Possible

Dealing with change in times of uncertainty can be challenging for anyone. Navigating ambiguity, however, is no more an option in these given times as most marketers are grappling with situations that have very little precedents to draw learnings from. In this section of the report we explore multiple dimensions of marketing that are evolving with the intent of shining the torch on how these elements will shape the way brands will connect and establish a relationship with consumers.

The initial part of this section puts the spotlight on the **business sentiments** along with the toplines that covers the state of the industry from MMA's perspective.

We then look at introducing newer ways in which marketers are trying to understand consumers better. This part focuses on some of the key reasons why and how marketers have adopted a **data driven approach towards understanding and segmenting consumers.**

Understanding and segmenting consumers is intrinsic to how a brand communicates with them. And with the rapid evolution in the way consumers consume content, another aspect of marketing that has evolved in a mobile centric world is the area of **content and creativity.** This space has seen multiple aspects change over time, be it through the formats of communication or through the use of influencers and the means through which creativity is expressed. This section of the report will attempt to throw some light on how this space is expected to evolve and what are some of the key points one may need to keep in mind while planning communication strategies for the year to come.

Elements highlighted in this section lends itself to one of the most talked about yet ambiguous aspects of marketing which is

MarTech. Technology is now clearly the driving force behind marketing, and in this section we shed a perspective on the ways in which MarTech can be used across the consumer journey.

While MarTech aims to be the unifier of various elements in the consumer journey, that brings our focus to the purchase stage of the journey. In view of that, we will explore **ideas and ways in which distribution channels have changed** over the last few months with more emphasis now being given to e-commerce. Over the last year we have now seen the conversations on e-commerce changing from "good to have" to "must have" as part of the marketing mix. Navigating this change isn't as simple as it may seem, given the dynamic changes we have witnessed in the various platforms and the surge in traffic and brands across marketplaces. This section will explore multiple perspectives from different brands and marketers as they share their experiences on how they have managed to navigate the various challenges of digital commerce.

Finally, everything we do needs to be measured and hence follows a detailed section on evaluating **ROI in marketing.** One of the biggest challenges faced by marketers today is to find meaningful ways to attribute success to the right channels of investment and effort, and this section explores ways in which this is being done and highlights best practices.

We could agree that there isn't a single or standard way to address uncertainty in areas of marketing. However, through this report we have tried to share multiple perspectives, opinions, facts, case studies and ideas that can help marketers see these elements of ambiguity in better light.

Mobile Marketing in India - The State of the Industry: 2020

As per a survey conducted by MMA & WARC

Mobile marketing has been an area of focus in recent years and the COVID-19 context has only enhanced it. As it becomes more and more important for marketers, it becomes critical to understand the fundamentals of mobile marketing. The data which follows is based on a survey.

#1 The impact of mobile

~51% of marketing professionals consider mobile to be a major industry disruption. According to predictions, consumers will spend an average of 930 hours a year accessing the internet via mobile by 2021, accounting for 31% of global media consumption. Majority (88%) of respondents agree that mobile plays a significant role within the purchase journey. Watching video (37%) and mobile payments (36%) have the most significance for the marketing industry.

Of the following consumer behaviours that are increasingly involving mobile devices, which do you think has the most significance for the marketing industry?

37%	Watching video
36%	Mobile payment
32%	Streaming video via OTT devices
26%	M-commerce
26%	Playing games
25%	Multi-screening
23%	Social media live content
14%	Voice interaction (e.g.amazon echo)
13%	Engaging with augmented
13%	Engaging with virtual reality
13%	Streaming music
12%	Photo - sharing
10%	Showrooming
6%	Webrooming
3%	Mobile as a remote control for other devices
3%	Mobile loyalty programmes
1%	Other

#2 Mobile marketing types and technologies

45% of respondents are making mobile video their biggest focus in 2020 and about half of them (49%) are planning to use AI and machine learning. The majority of marketing professionals (59%) have adopted a mobile-first approach. Clothing and accessories are the sectors that are seeing the most innovation in mobile.

Are you/ your clients planning to use any of the following and their associated mobile technologies in 2020?

49%	AI & ML
45%	Chatbots
45%	Location data
38%	Augmented & Virtual Reality
36%	QR codes
36%	Live streaming from mobile
30%	360-degree videos on mobile
28%	Mobile wallet
26%	Voice interaction (e.g. Amazon echo)
25%	Digital out of home (DOOH)
23%	Internet of things & smart home
14%	Rich communication service (RCS)
11%	Near field communication (NFC)
10%	Blockchain
9%	Beacons
1%	Other

In which sectors, in your region, are you seeing the most innovation in the way that they are using mobile to reach customers?

Sector				Total
Clothing & Accessories	5%	5%	4%	14%
Leisure & Entertainment, including gaming	6%	2%	5%	13%
Financial Services	4%	4%	5%	13%
Automotive	8%	2%		10%
Fashion & Luxury	2%	4%	3%	9%
Food	2%	4%	2%	8%
FMCG	1%	3%	2%	6%
Technology & Electronics	1%	2%	2%	5%
Pharma & Healthcare	1%	1%	2%	4%
Retail	2%	2%		4%
Media & Publishing	2%	2%		4%
Alco-bev				2%
Telecoms & Utilities				2%
Government & Non-profit				2%
Business & Industrial				2%
Household & Domestic				1%

#3 Mobile budgets

While 20% of respondents said they allocate more than 35% of their budget to mobile advertising, 27% said COVID-19 is set to decrease budgets. On average, 1/3rd of the mobile marketing budget is allocated to mobile video. Around 49% of marketing professionals are investing 10% or less of their budget into MarTech.

How much of your budget for 2020 will be invested in marketing technology such as marketing automation systems, data management technologies, or attribution technologies

49%	33%	13%	5%
0-10%	11-25%	26-50%	More than 50%

#4 Mobile effectiveness

Nearly all marketing professionals (97%) view mobile as an effective channel. Business metrics are most commonly used for measuring mobile marketing effectiveness. 79% of respondents agree that customers reached through mobile are highly engaged. 55% respondents said that metrics and measurement are the biggest barriers to growth in India.

Which of the metrics below do you or your clients most use to measure mobile marketing effectiveness?

- Business metrics **65%**
- Engagement metrics **63%**
- Behavioural metrics **55%**
- Audience delivery metrics **49%**
- Attitudinal metrics **27%**
- Communications metrics **10%**
- None of the above **2%**

In your opinion, what are the biggest barriers to the growth of mobile marketing and advertising In your region?

- Metrics & measurement **55%**
- Consumer concerns about privacy / security **44%**
- Ad fraud **43%**
- Fragmentation of mobile ecosystem **42%**
- Lack of network & internet reach **30%**
- Budgets **27%**
- Ad blocking **15%**
- Other **8%**

#5 Mobile tactics

69% of respondents use personalization to increase engagement and over 77% consider ad length and design of creative for mobile. When it comes to a media channel used most frequently with mobile, TV (68%) is the most popular and Facebook is used by nearly all (97%) marketing professionals in India.

What are you doing to increase engagement on mobile devices?

- Personalisation **69%**
- Mobile-optimised web design **60%**
- Creating mobile specific content **59%**
- Contextual relevance **48%**
- Geolocation **39%**
- Gamification **38%**
- Remarketing via push notifications & SMS **33%**
- App development **28%**
- Other **3%**

TAKEAWAYS

1	Mobile video is the biggest focus for 2020
2	Despite COVID-19 budget cuts, mobile is resilient
3	Metrics and measurement is the biggest barrier to growth
4	Personalisation is key to increasing engagement

https://www.mmaglobal.com/documents/state-industry-report-2020-mobile-marketing-india

COVID-19 Impact on Business Sentiment

COVID-19 just levelled businesses everywhere and APAC was no different. In Indonesia, 66% of the organisations agreed that their day-to-day activities were disrupted while the number was 70% for Singapore. India fared only slightly better at 54%. For obvious reasons, retail and travel & tourism were hardest hit sectors at 95% and 88% respectively.

inspired most optimism were e-commerce and FMCG.

Another territory that COVID-19 impacted was business budgets. At 61% and 58%, hiring and BTL media budgets saw maximum cuts across organisations and those in Singapore were most aggressive in implementing the cuts.

69% Total APAC

%	Sector
95%	Retail
88%	Travel & Tourism
83%	Manufacturing
78%	Transportation
75%	FMCG
63%	E-Commerce
58%	Media, Publishing & Advancing
55%	IT/ Software
53%	Research & Consulting
52%	Financial

Budget Cuts Taken by Organizations

Category	%
Hiring Budgets	61%
BTL Media Campaigns (OOH Activities)	58%
ATL Media Campaigns on TV/Radio	38%
Sales Promotion Budgets	37%
Defer Market Research Projects	25%
Digital Media Campaign	23%
No Significant cuts	14%

The Asian Development Bank put the Asia GDP growth forecast at a grim 2.2% as an estimate for 2020. The Purchasing Managers Index told a bleak story as well – for Indonesia and India, the index went down to less than 35 in Apr 2020 (from ~50 and 50+ respectively in Dec 2019). Singapore thought it will be 6.9 months before the situation to normalize while India put it at 6.5 months (in May 2020). The sectors that

Budget Cuts Taken	Total APAC	India	Indonesia	Singapore	Vietnam
Hiring Budgets	61%	62%	58%	70%	53%
BTL Media Campaigns (OOH Activities)	58%	60%	54%	70%	48%
ATL Media Campaigns on TV/Radio	38%	44%	33%	37%	30%
Sales Promotion Budgets	37%	38%	39%	35%	25%
Defer Market Research Projects	25%	27%	24%	28%	25%
Digital Media Campaign	23%	23%	17%	24%	28%
No Significant cuts	14%	19%	13%	9%	8%

Companies operating in sectors like finance, retail, tourism and transport imposed the highest budget cuts when it came to hiring. Digital has played a major role in shaping the counter strategies; 43% businesses increased digital media budgets while 42% focused more on e-commerce and Indonesia and Singapore showed most appetite in implementing the same.

How businesses are countering impact?

Increased digital media budgets	43%
Focused more on e-commerce selling	42%
Changed supply chain to deliver at consumer door steps	21%
Increased our sales promotions budget	14%
Increased TV Ads	12%

When it came to shifts in consumer behavior, the spheres that are expected to see fastest digital migration are work meeting, e-learning and grocery shopping.

Countries	Total APAC	India	Indonesia	Singapore	Vietnam
Rise of Video meeting apps	80%	84%	56%	85%	67%
E-learning will be a new normal for education	62%	61%	44%	63%	61%
Consumers will shift major part of their grocery shopping to digital	57%	55%	28%	83%	41%
Online services such as Online Doctor Consultation will rise	49%	49%	44%	70%	28%
Traditional e-commerce categories such as Electronics, Fashion will also get a boost due to COVID-19	35%	32%	33%	39%	36%
Consumer will start shifting their entire purchase basket including big ticket items to online	29%	27%	22%	37%	27%

For the at-home consumer media viewing on both TV and digital platforms have gone up the most. At 56% and 42% respectively, India and Indonesia believe the most about online communities and web influencers playing a big role in consumer decision journeys.

At an APAC level, news consumption on digital media and online gaming are seen as the strongest signifiers of the shift towards the digital medium. During the period of lockdown, many consumers tried many categories for the first time; in India e-learning and online cooking apps along with WFH software saw maximum trials.

This event also positioned digital as the new normal. 98% of businesses in Singapore and 97% of those in India are seeing digital marketing as their top marketing channel. Within APAC, digital media is solving the most for creating brand awareness and recall, sharing knowledge and building emotional connect.

Online Communities & Web Influencer will play a big role in consumer decision journey

56% Total APAC

56%	India
56%	Vietnam
46%	Singapore
42%	Indonesia

Role played by Digital Media in Marketing Mix	Total APAC	India	Indonesia	Singapore	Vietnam
Brand awareness and recall	68%	66%	68%	76%	61%
Share knowledge to consumers	52%	51%	53%	48%	58%
Building Emotional connect with consumers	52%	50%	47%	65%	47%
Induce trust in the brand with production/ business process access	43%	41%	37%	54%	41%
Providing online services/ delivery to doorstep	40%	37%	37%	50%	38%

Brands are also framing their responses to this change. The two most important attributes that consumers are seeking from products include health & well-being and safety. 83% consumers want brands to be helpful, 79% wanted brands to inform them about their efforts and 72% wanted brands to offer a positive perspective.

Some of the ways in which brands can be future ready include:

1 **Embracing digital**

2 **Exploring new channels**

3 **Product and range innovations**

4 **Supply chain enhancement**

5 **Responsive and responsible marketing**

MMA MARCAPS Assessment Tool

The MMA MARCAPS assessment tool is an online tool which enables marketers to assess their marketing capabilities

Marketers can leverage the MarCaps framework for an assessment of their marketing organization's capabilities to create value and drive growth. All one has to do is answer a few questions to receive via email, a PDF report benchmarking the assessment of marketing capabilities in one's company.

Please click on this link to assess your own organisation today

https://www.marcaps.com/research-2/

For a full comprehensive review covering 72 specific marketing capabilities email **info@marcaps.com.**

3.1

Use of Big Data to Understand Consumers in Real Time

Time to make Real Time Insights a Reality

Ajay Gupte
Wavemaker
CEO
South Asia

To say that the marketing ecosystem has seen a massive upheaval this year would be an understatement. We are dealing with rapidly transforming consumer behaviour and social trends hitherto not experienced by any of us. The consumer insight rule books of the past have lost relevance and the time has now come to recalibrate our consumer understanding using real time consumer data.

Today we have the capability to generate, curate and activate insights on the fly due to the access to big data and the ability to use AI to generate meaningful insights. To make this a reality, organisations need to build a big data culture. A culture which requires a change in mindset of everyone in the company to participate in generating, managing and reading into data. This change in culture will bring us closer to our consumers and continue to build value for brands in the new world order.

The Need for Real Time Consumer Insights

Sumant Bhattacharya

motivator
group**m**

Head Communication Planning

Today's consumers inhabit a 24x7 world. It's a world of excessive media and content inputs, brand choices, shopping channels and social interactions.

In this 24x7 world, stimulus is neither static nor contained. In this world, platforms tom-tom crores of products, social media channels dish out infinite feed, and content plays out through unending recommendation loops. The information and stimulus ecosystem that surrounds today's consumer is therefore, truly hyper-continuous and personalized.

Technology is a great enabler in this context, allowing personalization at scale, real-time interaction and engagement, rich behavioral data, insightful and actionable analytics to constantly improve outcomes efficiently.

In this scenario defined by constant change and dynamism, real time insights can positively help brands at every stage within their communication and campaign planning journey.

At the pre-campaign stage, social listening can be as close to gathering real time insights as possible. Many a time, the in-the-moment social data is a better marker of consumer perceptions than stated responses that come out of conscious rationalizing. Real time social listening and research can mine useful strands around the opinions of consumers about brand, products and campaigns. It was tapping into real-time conversations that UK retailer Tesco forecast the unpredictable barbeque season, Disney planned its marketing budget for its offering Frozen and footwear brand TOMS identified niche target audiences for very specific designs.

During the campaign roll out, programmatic techniques can map and stay with the consumer affinities and content choices in real time. During the general elections 2018, Zee5 had used moment marketing and delivered real-time election headlines on Google search ads themselves to drive user engagement. Campaign optimization can draw on real time campaign performance around a range of parameters that can include demographics, markets, media platforms and affinity targeting among others.

While real time consumer insights are an incredibly powerful tool, certain guardrails can only make them work better:

1 Real time must not override strategy - real time insights must bring agility into the strategy, not replace it altogether.

2 Even if they are real time, insights must be brand aligned - A consumer behavior insight that's not aligned to the brand's strategic template should be abandoned.

3 Stay away from fads - Not every real time event is a strong insight. Short-term fads create no brands.

4 Real time doesn't equal bottom funnel centricity - Allow for agility and efficiency but keep the balance.

Use of Big Data to Understand Consumers Better

Zaved Akhtar

Unilever

Vice President Digital Transformation and Growth, South Asia

Context: Data and Why it Matters

Today the normative way of assessing any country's progress is to look at its economic indices and complement it with movement of human development indicators. Very soon this will be augmented by the 'economic value' of the data generated and used. World Economic Forum anticipates that by 2025 463 exabyte (1000^6 bytes) of data[1] will be created every day. The sheer volume of data and the ability to use it as a force for driving growth will determine the course economic emancipation. Closer to business this will mean that 'enterprise data' will become a key asset and it is only a matter of time before we start accounting a 'value' to that and reflect it on our balance sheets.

Macro Forces Governing Data

Our world is changing rapidly, and macro forces are also reshaping so fast that unless we have pulse on the signals that are being generated, we could be off by a mile in

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1 **https://www.weforum.org/agenda/2019/04/how-much-data-is-generated-each-day-cf4bddf29f/Infographic comes to us from Raconteur**

understanding consumers. We are living in a polarized world pulled apart at one hand with protectionism on the other liberalisation; people are increasingly becoming conscious about the environment and equally splurging biodiversity. Similarly when we are amidst the biggest digital and tech revolution, digital inequality is also becoming a concern. These paradoxes are making consumer behaviour more unpredictable and making it critical to unleash the power of looking at big data and then stepping back to look at the small data to understand impact on consumers. Traditional panel-based consumer insights from a larger base will become passé soon as digital makes it economically viable to understand multiple segments at scale while serving them individually. Learning from latent behaviour, i.e., observing what consumer does, rather than asking questions (leveraging wearables to send signals for instance) will become new reality.

Building Real Time Data & Insights Engine

Data and insights are interwoven and we need to create a pipeline that constantly brings in signals and ensures a seamless flow of data, have a proper attribution model that leads to deeper understanding of people as individual, if not cohorts and equally have the means of culling them out while holding ourselves to the highest standards of ethics. This will need a comprehensive approach to harness data and insights:

a **Holistic View:** We need to look at data from the consumer lens and not from the organisation or brand lens. This will emanate from understanding of consumer journey, behaviour and lifestyle and enable

us to know the consumer intimately and design content and innovation accordingly.

b **Value Exchange:** A new age critical marketing skill is the art and science of 'value exchange'. We have moved from the broadcast to a narrowcast model making us have deeper data (Directly Addressable Data) over superficial (Directly Identifiable Data) to build profound relationship and deliver a bespoke solution.

c **Enriching Data:** Once we have the data it is important that we continuously strengthen the signals from multiple sources, be it, offline data ecosystem, partnership to get even deeper appreciation of the consumers and get more attributes so that we may understand them better.

d **Building Communities:** A connected consumers also fosters a connected community that will be now turning the table of how brand perceptions are built. We will increasingly see 'Brand Management' evolve to 'Community Management' who will reshape brands of the future.

e **Measurement:** As we garner more data, we need to ensure that we are measuring the use and deployment and constantly optimising on the fly to ensure that properly curated messages are being addressed at the right moment and we are getting the return on our investments.

f **Ethics & Governance:** While all these are enabled, we need to hold ourselves to the highest standards of data ethics and governance. It is not only about compliance rather more about the trust that the consumers put on us and we should use our degree of influence to constantly raise the game of the industry.

These comprehensive set of actions mean an organisation will need to create the ability to capture the data, build a repository, ensure proper tagging to enable algorithm to cull data and connect all the disparate data and distil them to actionable insights for businesses. This then creates another loop of data being generated and so and so forth. Multiple MarTech exists today solve for these, but the real question to the business is to understand across their value chain and assess where these tools bring the best return for the investment.

Realtime Data to Trends in Action

Over the last few months the disruption has changed things that otherwise would have taken decades. We are seeing rapid demand shifts; significant channel movements and even new business models evolve as people and the ecosystem leapfrog to adapt to the changing environment. To illustrate some:

a **Hygiene Paranoia:** People are becoming more discerning about brands and products they choose for disinfection as the language around germs has evolved. We are seeing a heightened need for hygiene and efficacy as consumers demand more clinical disinfection to keep their homes and surroundings safe.

b **In Home Cooking:** As people cocoon themselves many are resorting to in home cooking. This is enabling significant shift in product usage as well as new family socialisation moments.

c **Immunity & Nutrition:** Consumers are looking at fortifying themselves with immunity building nutritious food. Immunity searches in India have grown 800% and have moved from being generic to highly specific on "how to boost immunity" and people are resorting to consumption of inherited home remedies, Ayurvedic product while others are consumption of micro-nutrients like Vitamin C, D and Zinc etc.

d **eComm and Omni:** At the back of a rising eComm, we are seeing emergence of omni as offline MT retailers move to a hybrid model. Sharp rise in omni is also creating new demand spaces that needs to be catered to.

e **Credit Unlock for Traditional Trade:** Evolution of retail channels has necessitated acceleration of the wiring up of Kirana shops to make them competitive. New data signals are emanating from the point of purchase and unearthing newer shopper insights while equally opening opportunities for Kiranas to access credits from financial networks.

CONCLUSION

Data is irrelevant unless is disseminated and distilled into actionable insight. Never ever before in our lives we have gathered so much data as we have done now and never ever before we have gotten so much divergent signals as well. What will differentiate from the winner vs the laggards will be how one constantly use data. The 'value exchange' of the data for mutual good will be critical for the next generation marketeers.

Will Big Data & AI be Two Major Drivers for a Digital Future?

Bharat Khatri

XAXIS

groupm

Country Head India

During the pre-pandemic era, most people in my neighbourhood bought their daily essentials from the nearby milk booth. Knowing the purchase patterns of the customers, the shopkeeper already had the milk packed in specific quantities along with loaves of bread bagged and ready. While accepting payments, the shopkeeper would strike a conversation with the shoppers by asking how the other family members were doing or how their business was going. Interactions such as this made the shopping experience more personalized, which encouraged the shoppers to keep coming back to the store.

Given the strict lockdown, the ongoing pandemic pushed a lot of people to buy their daily essentials online. Without interactions with shopkeepers, buyers miss the personalized experience from their local neighbourhood stores versus shopping online. With the rise of big data, companies are working on establishing a more personalized relationship with their customers. Forrester Research calls this trend 'The Age of Customer'. By placing the customer at the core of an organization's strategy and investing in big data and analytics technology, companies are getting a 360° view of their customers' profiles to understand what the customers truly want.

In mobile-first markets such as India, consumers are leaving their imprints everywhere - from online searches and product comparisons to the type of content consumed on mobile devices. There is a trove of data that brands can leverage to understand their customers better. Further, as online purchases increase and more interactions with customers take place on mobile devices, brands are collecting large amounts of data at different points in the consumer journey. With the help of this data, brands can have a better understanding of their consumers' purchase behaviours and post-purchase engagements and be able to map out personalization strategies.

5 ways brands use big data to understand consumers better

1 **Predict consumers' wants before they express the need for it:** Online grocery stores can now drive personalization and fine-tune recommendations by using past purchase patterns, consumer location, websites and apps visited and social media platform behaviours. By anticipating the customers' wants, companies can improve their overall shopping experience. Household brands such as Netflix, Spotify and Amazon are some of the early adopters that utilized these predictive technologies.

2 **Boost consumer acquisition and retention:** Data-driven customer acquisition and retention strategies can help brands in a big way. Brands must consider multiple

variables related to the prospective consumer such as age, gender, income level, marital status, location, past purchase history and social media platform interactions when using big data with predictive modelling techniques for customer acquisition or retention. By unifying these variables with other external and internal transaction data, predictive models stack rank potential or existing consumers and focus on groups with higher potential conversion based on an offer or service. Depending on different consumer segments, sales and marketing teams can adjust and implement the most appropriate acquisition and retention strategies. Indian brands like Hotstar, Byju's, Grofers have established themselves as leaders in personalized communication and rolled out the best in-class acquisition strategies utilizing data and predictive models.

3 **Understand consumer pain points:** Companies are digging deep into their data to uncover the problems their consumers are facing. Leveraging the insights from their data, organizations can solve these difficulties and improve the consumer experience to drive better retention. A quick-service restaurant (QSR) brand noticed a huge number of consumer drop-off's before completing orders both on web and in-app environment. The company shared this observation with their web developer and decided to build lighter and mobile-optimized webpages, changed their user interface (UI) and reduced the steps towards final order page. With data analytics, the brand was able to improve their customers' app ordering experience. Similarly, a lot of consumer-packaged goods (CPGs) brands in India are using retail Point-of-Sale (PoS) data to understand the reasons for low sales in specific locations across cities.

4 **Improve customer service interactions:** Big data is the key to improving customer service. Brands are leveraging the insights drawn from their data to ensure that customer care representatives are well-equipped when a consumer reaches out to them for support on past orders, transactions and issues with services or products. With the right information on hand, customer care representatives can readily provide answers to basic questions, which saves a lot of time and resources for both brands and consumers. In the social media space, brands are now empowering social media managers with multiple big data tools to help enhance and manage customer interactions, mentions and tweets.

5 **Make consumers excited about their own data:** With increase in digital touchpoints and the rise of wearable technology such as smart watches and fitness bands, customers now have access to more data about themselves than ever before. Once hooked on their own personal data, consumers are more likely to continue logging and using the product. Brands that give consumers access to their own data like Google, Fitbit and Facebook are building a base of loyal fans.

How to take advantage of Artificial Intelligence (AI)

The volume of data available in today's environment represents an unprecedented opportunity for marketers. However, marketers are unable to maximize their data resources and fail to optimize their media spending on consumer segments to deliver expected business outcomes. Using AI and machine learning, brands are working towards solving most of the challenges modern marketers face today. In advertising, AI enhances campaign effectiveness by using technology to find and define audiences, refine creative messaging, generate audience personas and develop optimized bidding strategies for brands. By taking advantage of the full capabilities of AI, advertisers can do much more in order to elevate performance metrics.

In concerts, for instance, AI-enabled applications can gather data and generate real-time insights to help develop a digital advertising strategy that drives results.

We at Xaxis, the advanced programmatic arm of GroupM, created a proprietary AI technology called Copilot. By utilizing an algorithm built on thousands of learning models to drive smarter, faster optimization on programmatic media buys, Copilot empowers brands with artificial intelligence for customized bidding and investment optimizatioDemand-side platforms (DSPs) can help in faster decision-making and optimize campaigns to achieve performance goals. However, DSPs are not built to find unique trends or feature combinations.

SUPERVISED VS. UNSUPERVISED, APPLIED TO ADVERTISING

SUPERVISED

Train the model on data where the correct answer is included.

E.g. What bid price is likely to win this impression?

vs

UNSUPERVISED

Train the model on data with no answers and see what it comes up with.

E. g. What do people who click my ad have in common?

TODAY'S PROGRAMMATIC CHALLENGES

- Difficult to find value in massive volumes of data.
- Online KPI's do not reflect business results.
- Brands want to increase efficiency despite rising industry complexity.
- Brands want to improve performance and save time.

XAXIS

BENEFITS OF COPILOT ARTIFICIAL INTELLIGENCE

- Leverage the data with the strongest proven value for your business goal.
- Combine multiple metrics into optimization decisions.
- Identify & shift delivery to unique patterns humans don't have time to identify.
- Dynamically predict performance and alter bids and investment in real time.

Copilot

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Copilot

Demand-side platforms (DSPs) can help in faster decision-making and optimize campaigns to achieve performance goals. However, DSPs are not built to find unique trends or feature combinations. By offering a more granular, machine learning analysis of feature combinations, Copilot ensures that brands and marketers do not miss out on opportunities.

Copilot is built upon a complex technical infrastructure and has many direct lines to data sources. Supported by a team of data science experts, the technology uncovers delivery insights and finds the granular value of each opportunity in real-time. Running for more than four years, Copilot has showcased strong results across verticals and continues to improve models for brands and get the most out of their investments. In some of our recent campaigns in India, Copilot has helped auto brands lower their cost-per-action (CPA) by 32 percent and doubled retail store footfalls. Similarly, a fast-moving consumer goods (FMCG) brand vertical improved its cost per completed video views by 40 percent.

SCIENTIFIC SOLUTION

Customized algorithm appended to DSPs to modify bids in real time.
Results tested vs Control lines.

The AI was tapped by a pharmaceutical brand to optimize a YouTube campaign on display and video 360 (DV360) DSP across different affinities, in-market audiences and relevant contextual channels. As shown in the below screengrab of our dashboard, Copilot was able to optimize the overall campaign and improve the cost-per-completed video score.

Is Insight-led Engagement the Silver Bullet to Win Mobile Customer Engagement?

Ashwin SL
VP Marketing
MoEngage

We live in a world with customer experiences connected across multiple devices and channels. Today's consumer can choose from a plethora of product and service options. As the quality of user experience overtakes price as the key purchase influencer, brands must adopt a customer-centric approach.

Understanding and analyzing user behavior is the key to providing a personalized and relevant experience, which, in turn, increases conversion, retains existing users, and creates brand loyalists.

Insight-led Customer Engagement - What's That?

Marketing teams usually work with a complicated stack of tools for campaign management, automation, analytics, and more. Most times, these tools operate in silos and do not offer a 360-degree view of the consumer. Therefore, most marketing teams run campaigns, measure the results, and iterate to optimize for better performance - insight-led engagement turns this process around on its head.

With increasing attention to ROI and more demanding customers, you almost always need to get your campaigns and targeting right. For example, we've noticed that over 56% of consumers uninstalled an e-commerce app within a week after completing one or two sessions. Unless you're able to quickly demonstrate your product/app's value, consumers will move on. To meet these expectations, marketers need to lead with insights.

We recommend our clients and users to analyze consumer behavior and then engage with them instead of the approach where they might be running campaigns first and then iterating. The fundamental framework for marketing remains the same. Brands still need to follow the principle of Analyze, Segment, and Engage. The only difference is to start by analyzing consumer insights, segmenting them based on behavior, lifecycle stage, attributes, preferences, and engaging them with relevant messages across touchpoints.

Mobile Customer Engagement: How OYO, Bigbasket, and Apparel Group Get It Right

Top brands in India and the Middle-East across retail/e-commerce, online grocery delivery, media & entertainment, ed-tech, travel & hospitality have all adopted and prioritized mobile customer engagement.

For example, India's leading online grocery brand bigbasket improved conversions by 10% using the MoEngage platform. Similarly, the world's largest travel and hospitality brand OYO engaged 5X more users with

intelligent omni-channel engagement. Apparel Group, a leading retailer from the Middle-East, has achieved 4X growth in its business by leveraging insights through MoEngage.

There are so many examples where companies have offered delightful experiences and truly live up to the brand's promise.

Why MoEngage is Perfect for Modern Customer Engagement Needs

The MoEngage platform offers the 'analytics- engagement-in-one-place' advantage and comes with the right tools to support consumer brands' evolving engagement needs.

1	Marketers can leverage tools such as behavioral trends, cohort analysis, RFM to analyze their customer needs.
2	User Paths help in visualizing how users are navigating the app by providing Sankey Analysis, thus identifying the most popular paths users take and bottlenecks in the user experience.
3	Deep segmentation, coupled with the ability to build multiple flows, enables them to map out engagement journeys unique for each user.
4	AI-enabled recommendations can help choose the right message and the right channels for engagement.
5	Marketers can also optimize the most suitable time for sending these messages based on the user's preference.

In a mobile-first world, consumers can choose when, where, and how they engage with brands - and MoEngage helps brands live up to this expectation.

Final Words

The journey to becoming a customer-obsessed brand can be long and riddled with challenges of understanding user behavior, personalizing recommendations, dissolving silos between analytics, engagement, and automation, and enhancing cross-team collaboration. But as the saying goes, 'a journey of a thousand miles begins with a single step.' That single step is implementing an intelligent Customer Engagement Platform!

If properly implemented, the right Customer Engagement Platform breaks down silos, breeds collaboration, helps you better understand customer behavior, and improves segmentation and targeting to drive an increase in conversions while simultaneously boosting retention.

MoEngage is an intelligent customer engagement platform that lets marketers gain insights into consumer behavior and engage them with personalized messages across multiple channels.

GroupM Facebook Turn the Tide Playbook – Segmentation

COVID-19 has forced the whole business ecosystem to adjust to a new normal, learning newer effective ways to navigate through it. One of the key pillars in that process is segmentation.

With the evolution of smart shoppers, robust consumer segmentation is critical for media impact and future ready segmentation needs to be pivoted for business outcomes, covering the full spectrum of targeting capabilities. It's critical to understand that segmentation isn't merely narrow/micro targeting, but a principle anchored in business outcomes.

The two important tools that can be applied are:

1 6 brilliant basics of segmentation, and

2 Advanced segmentation solves for hyperlocal

The 6 brilliant basics of segmentation include:

#1 Identify the business need:

It could be simple or complex depending upon the product's core benefits, and variants amongst others.

	Simple		Complex
Business Context	A mouthwash brand with a core product focus on freshness	**Business Context**	A pet food business with complex category needs based on species
Core Benefit	Mouth Freshness	**Core Benefit**	Multiple distinct benefits such as long hair, short hair, big breed, small breed etc
Variants	Flavour -based	**Variants**	Species and size based
Segmentation	Not essential because of single core benefit so the message to all audiences is the same	**Segmentation**	Requires identifying and segmentation of dog owners
Business need for personalization	Simple. The brand could potentially explore a demographic (age x gender) based creative strategy.	**Business need for personalization**	Complex. The brand needs to identify complex audience segments to deliver relevant messages.

The amount of data available guides the extent of personalization possible for a brand.

LEVEL 4
Behaviour
Select people based on their prior purchase behaviours, device usage and other activities.

LEVEL 3
Intent
Segment people based on their offline and online interactions with brands as well as their interests.

LEVEL 2
Socioeconomic indicators
Select people based on device type, internet speeds and so on.

LEVEL 1
Demographic
Choose an audience based on age, gender, education, relationship status, job title and more.

Depending on the business need and data capability, there are four strategies that bards can employ.

	Low	**High**
Complex	**Enhance** **data capability** • Build first -party data using Facebook solutions e.g. Lead Ads, Offer Ads • Reach lookalike audiences based on acquired first -party data • Customize creative for specific segments identified	**Exploit** **full suite of solutions** • Use full suite of signal -based solutions – from platform targeting to first -party data from Facebook or owned databases • Leverage partnership data e.g. from retailers or Collaborative Ads • Reach lookalike audiences and customize creatives for specific segments based on all audience data available
Simple	**Execute** **with simplicity** • Use platform native targeting tools like demographics, device, page followers • Customize creative for segments identified	**Evaluate** **& activate when necessary** • Use platform native targeting tools and partnerships data e.g. from retailers or collaborative ads • Reach lookalike audiences where necessary based on available data • Customize creative for segments identified

#4 Segment audiences with 1st, 2nd and 3rd part data:

Utilize data to create core, custom and look-alike audiences.

1 CORE AUDIENCE
Sophisticated targeting with accuracy

- Reach people based on info shared on their profiles:
1. **Demographics**
2. **Life Stage***
3. **Connectivity**
4. **Location**
5. **Interests***
6. **Behaviors*** from Pages Likes, Mobile Device used

2 CUSTOM AUDIENCES
Reach & re-target the most valuable people you already know

- Use your data to create and connect with valuable audiences, based on :
1. **Your CRM customer list**
2. **Actions taken on your website or app** (requires Facebook Pixel / SDK)
3. **People who have engaged with your content** on Facebook
4. **Leads**

3 LOOKALIKE AUDIENCES
Reach people who look like your best customers

- Use Lookalike audiences for advanced prospecting to acquire new customers that look like your most valuable audience.

- Based on customers in your CRM, or people who have visited or converted on your Website.

#5 Use the platform placements for more opportunities, better results and higher efficiencies:

Cost per outcome

Time Elapsed

Avg. cost per outcome: Instagram only*

Avg. cost per outcome: Facebook, Instagram and the Audience Network combined*

* Example for Illustration Purposes only

The Facebook pixel can signal audience preference and behavior. Those signals can then be used to build custom audience for sharper targeting.

IDENTIFIER

- E-mail address
- Phone number
- Device ID
- Website Pixel

❌ Avoid Poor Quality Signals:
- Cookies (cannot be integrated with FB)

QUALIFIER

- Brand Buyers
- Category / Segment buyers
- Add to Cart pixel
- Sample Redemption

❌ Avoid Poor Quality Signals:
- Non buyers cluster
- Attitudes/ Interest based cluster

SCALE

- 5,000 – 10,000 p / segment

COMPLIANCE

- Gathered responsibly with impeccable integrity and all required permissions

Advance segmentation solves with hyperlocal:

Hyperlocal strategies have assumed critical importance in a post COVID-19 scenario. It should start with communicating local store capabilities and helping retailers to expand their storefronts. Offline and online signals (pixel, measurement & reporting, optimization, audiences, offline conversions and store visits) can help build advanced hyperlocal journeys for businesses. While offline events and behavior can segment the custom audiences and personalize their experience, lookalike audiences can help a store get new shoppers.

Incorporating store sales can maximize campaign efficiency and performance results by reaching people more likely to buy in store. Offline insights can make a campaign sharper.

SET UP
Connect your offline event sets through Events Manager or the API

CREATE
Create offline event-based Custom Audiences based on offline behaviors and attributes (or LAL)

RUN
Run your campaigns across the Facebook family of apps and services

VIEW
View your results in Ads Manager, Facebook Analytics or Lift Tools

Hone your campaigns with offline insights

An increase in store sales data increases the match rate all the way down to the funnel. Expertise of skilled partners can be used to personalize the offering and communication.

All sales in all stores

Sales attached to eReceipts, rewards, or other loyalty programs

Subset of those sales uploaded to Facebook

Subset of uploaded sales matched to Facebook users

% of sales exposed to Facebook ads

% of sales caused by Facebook ads

MEASURABLE TRANSACTIONS

UPLOAD RATE (TO FACEBOOK)

MATCH RATE (TO FACEBOOK)

ATTRIBUTED SALES

INCREMENTAL SALES

Facebook Marketing Partners:
Video Personalization
Video template technology allows advertisers to create potentially hundreds of unique videos from one video.

More info on Facebook Marketing Partners

Find more Facebook Marketing Partners for personalization

To outline the action points

1

Use outcome metric (business objective) as opposed to an input metric (reach).

2

Assess the data requirement and capability beforehand.

3

Follow the audience-first approach by ensuring all possible relevant placements on a platform are chosen.

4

Create custom audience only on the basis of robust signals.

3.2

The Changing Face of Content, Creativity and Communication

The 3Cs will get Real Time

Navin Khemka

MEDIACOM

CEO
South Asia

2020 has been a watershed moment for all marketers. Marketeers will be under immense pressure going forward to adapt to the changing face of content, creativity & communication (the 3Cs). These 3Cs effectively encompass how to communicate in any given category, and will be well defined as the era of measurement & accountability takes shape going forward. Results will be transparent, and marketeers will know exactly if the communication worked. The key to great communication will be mining for actionable insights. These real time insights will fuel innovation going forward.

Understanding the consumer is also critical to adapt. As we get back to normalcy or the new normal, we need to closely watch the consumers when they come back into the category. We need to actively look out for emerging signs of normalcy and how their behavior & attitudes have changed. These observations will offer important focal points for the 3Cs for the future.

Omni-channel marketing experience refers to a multi-channel sales approach that provides a consumer with an integrated shopping experience. The customer can be shopping online from a desktop or mobile device, via phone, or in a brick-and-mortar store, and the experience will be seamless. This will become even more relevant post COVID-19 and it will be critical that all brands are able to walk this path in their brand life cycle. It will be critical to ensure that this omni channel is well explained in the 3Cs.

We are going to see an expansion of creativity and innovation. However, successfully drawing real time insights, better consumer understanding & investing in an omni channel experience will be how marketers will stay ahead of the game.

The Changing Face of Brand Communication

From creativity to proliferation

Kartik Nagarajan

Wavemaker
group**m**

Chief Content Officer

About five years back, it was unthinkable to suggest a social media strategy for a brand that did not include Facebook and Twitter. In fact, it was fairly unthinkable even to think of starting up a new social network as an entrepreneur. The entry barriers were just way too high. The top 2-3 networks in most countries pretty much represented the overall internet usage between them. However, things have changed rapidly in the last few years and today, it seems like we are entering the age of fragmented social media.

What does it mean? Five years back, the reason you would visit a social network was still the number of friends you had on the platform. Today, that is not really the case. Audience are OK to explore newer networks for the experience, or in many cases, the creators and influencers on that platform. This means that we might well be looking at a more diverse social media and content consumption ecosystem that we ever had before. The advent of TikTok in many ways was really the paradigm shifter for this trend. Today, we have platforms like Roposo and Trell posting staggering MAU numbers in record time. Add to this the dramatic increase in the number of OTT platforms that we spend time on and we are easily looking at the most diverse content consumption phase, across platforms, in the history of the internet. More than anything else, this is great news for Tier 2, 3 towns and cities in India, which is where the majority growth comes from.

What does this mean for a brand or a marketer? A fragmented social media ecosystem – in terms of platforms, languages and content form-factors, means that creating brand owned assets across all key platforms might not necessarily be viable and in most cases even be necessary. Brands will need stronger and more reliable advocates to carry their messaging. The communication emphasis will move from great creativity to great cultural relevance. What this means is that the proliferation of a key brand communication will be as important as the creation of it, if not more. The best, award-winning case studies of the future will not be great super bowl or IPL commercials but ideas that resonated culturally and were curated beautifully across different social media platforms.

This shift needs major retooling at a brand's end. It should start with how they look at content. The last 7-8 years saw brands becoming great publishers and creators. In the coming decade, they need to become better conductors of the orchestra and not just performing artists. This means that they will need partners who can curate the cultural narrative in a creative as well as efficient manner. This means that they will need measurement frameworks that are platform agnostic and advocates who are brand safe. What defines success will not just be views and engagement but whether

a brand has been able to move the needle on its associations, and on what it stands for. In an increasingly performance driven world, communication will also be measured against conversion, more than ever.

All of this means that successful brands of the future will author their own culture and not just ride a wave.

KEY TAKEAWAYS

1

Against the social media landscape of the recent past that was dominated by a couple of big platforms, we are now moving into a more fragmented social media ecosystem.

3

A fragmented social media ecosystem defined by diverse platforms, languages and content form factors will force brands to move away from an asset owner to a collaborator.

2

The new driving reason to be a part of a social media platform is the sheer diversity of experience – in terms of content and the creators/ influencers behind it.

4

From creative brilliance, the communication emphasis will shift to cultural relevance and great brands will seed, strengthen and own large, relevant cultural narratives.

Time to be a Connected Brand

Dheeraj Kummar
motivator
groupm
Head of Content

P&G put "soap" into "soap operas'. If we go into the history of brand advertising and communication, P&G introduced the radio audience to "The Puddle Family," the first "soap opera," so called because of the sponsor. It also had a top-notch radio studio in its own backyard. P&G was prolific, producing several long-running soap operas for radio and television. What P&G was doing? It was entertaining and enabling housewives, to make their choices and chores better! But most importantly, in my opinion it was becoming a connected brand.

Across the world, some brave brands have defied the dominant design of advertising & marketing by giving importance and committed budget to "stay connected with consumers". Along with traditional advertising & marketing as an essential part of brand building, they thrived to become more than a logo, a product, or a service; To become a lifestyle, a teacher, an enabler or even a friend. As the media landscape evolved, the delivery of content and formats also evolved.

With digitization, content fragmentation has increased drastically. Today, whether its morning audio playlist for working out, online tutorials, how to-do videos, influencers, trip advise, product reviews, live sports or weekend binge watch, they are not available at one or few platforms. Audio-Video content dominates the overall consumption with affinity for long form to short snackable content. Many platforms have enabled consumers to become creators, to showcase either their talent or make use of their expertise to enable others for taking well informed decisions. All this has led to the availability of connected consumers all the time. Getting personalized messages delivered to these consumers, with data privacy in mind, has become nothing less than the holy grail.

To become a connected brand, look at the opportunities in the complexity of today's content fragmentation. I am a great advocate of "Brands as publishers" or "Brands becoming media owners". If everyone has ability to become a content creator today, your brand must become one itself. A content creator, producer or a collaborator with long term partnerships. Find shared purpose with your consumer, stay true to it and drive it passionately.

This needs a committed budget and strategy: Have a separate content AOP with all stakeholders. Build brand assets that disseminate content on regular basis. Find formats that are effective, economical and easy to execute. But do grand things too!

GroupM's premium annual content event BREW has reiterated the same last year with its theme "Author Your Culture". It facilitated brands to peep into emerging platforms and technology.

Also, building a connected brand via content is not an outward task. Find people across verticals in your organization who can contribute to execute things. Create an ecosystem of internal participation quarterly and what should be next to publish. Make them stakeholder in driving content for the brand.

Though things look fragmented, there is always a way to stay connected with your consumers, the way they always expected; by becoming a lifestyle, a teacher, an enabler or even a good friend!

HIGHLIGHTS

01
"Find a shared purpose with your consumers, stay true to it and drive it passionately"

02
"Enable consumers to make their choices and chores better with engaging content"

03
"Find formats that are effective, economical and easy to execute. But do grand things too!"

04
"Create an ecosystem of internal participation quarterly and what should be next to publish. Make them stakeholder in driving content for the brand"

BRAND

The Role of Influencers in Modern Marketing

Ashwin Padmanabhan

group**m**

President - Partnerships and Trading

I am sure we all have wondered, should my brand work with influencers? Do influencers have any influence? Is there ROI? I have personally believed influencers can literally move mountains for a brand, and for society. I have seen this up close while running the BIG FM network of radio stations and the sheer equity the RJs have with their listeners.

But last week this realization hit me up close. I was having a conversation with my mom who is 74 years old and a sceptic at most times; she was describing this YouTuber whose cooking channel she subscribes to. In the video my mom was talking about, the YouTuber-influencer mentions that one could buy a hamper of all the ingredients used in the recipe by just clicking on the link! And guess what? My mom, all of 74 years was telling me how we should try that out!

That was further proof of the power of trust and credibility and the unshakable bond that these create between an influencer and his/her followers.

So, if the impact an influencer can have is so evident, why don't more brands work with influencers? And why don't they work more often?

The reasons are many, but I have tried to highlight some critical barriers:

01 **Don't erode but enhance an influencer's equity:** Influencers have built their equity on the core skills or art that they practice; when a brand hijacks an influencers core message or content, the influencer's equity starts eroding. A brand needs to work with an influencer to enhance their equity. The moment one can do that, the brand can bask in the glow of the influencers aura and reap the benefits of their equity!

02 **Not knowing who is the right influencer to work with:** Tens of thousands of influencers around, how does a brand decide whom to work with? Are the followers real or are they bots? What's the demographics, geographic spread of their followers? Have they worked with any competing brands earlier? Till recently, getting answers to such questions would be next to impossible; but now with tech platforms like GroupM's INCA it's a lot easier for a brand now.

KEY TAKEAWAYS

INCA's AI based data mining technology scours data across accounts, content, audience, profile and product to generate the right macro, micro and nano influencers.

03 **Benchmarking, Measurement, Accountability:** As a brand when you invest any marketing rupee, it needs to be accountable. Unfortunately, the influencer marketing industry has been largely ad hoc with limited to no accountability. But as brands invest more with influencers, a few players are building their own accountability model - GroupM's INCA, for instance, guarantees outcomes for every campaign. Using historical benchmarking, predictive performance technology and unmatched negotiation power, INCA helps brands get the desired outcomes.

04 **Scalability:** Tech is coming to rescue here as well, helping manage the workflows between the influencer, the agency and the client.

1

A winning partnership is where a brand enhances an influencer's equity rather than eroding it.

2

The choice of the influencer must come out of a strategic perspective on campaign objectives and the influencer/followers fit.

3

Brands and influencers must harness the latest technologies to bring measurement and accountability.

Emergence and Growth of AR and VR

Niraj Ruparel
group*m*

Head of Mobile and Emerging Tech

The digital world today is just a 'rectangle' in our pocket but soon it will be everywhere around us. We are already outnumbered by computers by almost 1:3; the pandemic will only hasten the onset of the technological revolution.

Let's talk about what's going to happen in 2021:

01 More people are going to talk about science and technology

02 Telecoms will race to reach every corner of the country

03 World-class manufacturers can now deliver products customised for India

04 More people will get educated, thanks to the internet.

Emerging technologies will only have a greater role to play. They will drive change in every aspect of lives. Consider technology a science, and our future a coalition of that science. A whole lot of new technology is gearing up to come to India. Now more than ever, an India-focus is required to provide for both the uplifted and the unreached.

Technologies coming to you this year:

1. Immersive Conferences

Even though there are a lot of new tools that promise to make the technocrat 'immersive capable', the idea is to give the same value to clients who are either not comfortable or can't reach such technologies. The idea of immersion, in general, is just a I/O (input-output) mechanism. The carbon footprint of an MNC AGM was analysed in 2017 — a total of 5 metric tonnes of carbon emission was saved using immersive conferencing!

2. VR Training & HR Onboarding

VR training has been one of the best markets for adoption because it had a 10X impact on the overall stake pool.

HRA: The management of a company had to do these "mundane" tasks only once.

The candidate: Got more knowledge and connections with the company they are joining.

Productivity: Immersive technologies have a way to create an illusion of space, which allows companies to take advantage of a person's time and deliver to him all the information he needs before being onboarded. With backend analytics, it becomes easier to take an unbiased call over the effectiveness of the hire.

3. Virtual, Augmented & Mixed Reality Workshops:

WFH is the new norm. More companies are quickly adopting to this new normal. But there are fundamental differences of working in an office than working from home. One of those is teamwork. Even though we are connected constantly on the internet, it's still hard to ideate with a multi-disciplinary team. Extended Reality workshops allow a seamless transition to this new normal without having to compromise on your projects. At GroupM, we use these tech interventions to conduct engaging workshops.

4. Broadcast Augmented Reality:

Advertising is no longer on billboards; advertising can take over everything that a user sees in a frame. Now, your favourite footballer will sport your favourite brand through targeted advertising and Broadcast AR.

5. Volumetric Captures & Photography:

Now that traditional 2D screens are going to cease to exist, we need a new capture method as well. Volumetric Capture allows you to capture every voxel of space-time so you can manipulate to fit your needs.

6. Interactive OTT:

Users should be able to buy a dress they see on their favourite celebrity in real time. Interactive OTT allows you to do just that. In Bandersnatch on Netflix, the user determines the flow of the story and also gets to make choices. Gamification of content is on the rise and interactive OTT is driving the bus.

7. NAVIC-powered GPS (at least 4 times better than GLONASS):

The GPS that we use to hail our cabs, our food, or look for partners to meet in our vicinity was made in 1984. India launched a home grown satellite for the same purpose in 2017.

8. Cheaper, faster data:

Cheaper data will take care of the path to the next billion but these billions are unlike the last billion. We will have to craft forward-looking strategies that allow us to stay on top of the game. If data becomes cheaper, value from that data has to increase 10X.

9. Virtual avatars that are finally not a gimmick:

With machine learning and computer vision research reaching its own milestones, it's safe to say that beyond 2020 virtual avatars will make more sense than before. While the tech giants are busy making these avatars more human, we are busy making them more efficient.

With single-point data coming in from immersive consumers, you'd be able to learn more about the needs of your consumers and target your advertising efforts with precision. Immersive adoption allows us to create a 1:1 ratio amongst consumers. As these devices are capable of acting like your phone, laptop, TV, theatre, video game, fitness coach, etc., promoting products that augment the human capabilities is going to be the new talk of the town.

KEY TAKEAWAY

Marketers now need to start thinking on how they can leverage the gimmicks of the past. Smart mirrors, Touchless payments, Virtual Reality -commerce, Augmented Reality Retail, IoT powered lean inventory management & retail shopper analysis – these are going to be the holy grail of resurrection for the entire retail space. No matter what industry.

Conversational AI in COVID-19 Times

Niraj Ruparel

group**m**

Head of Mobile and Emerging Tech

Consumer behaviour in the last nine months has changed drastically across the globe and people are spending more time on messaging platforms than ever before. Not that conversational commerce has become relevant only in the COVID-19 times, but indeed, COVID-19 has accelerated digital transformation across industries. It is propelling brands to rethink their e-comm strategies and automate processes to reduce dependency on manual processes.

Secondly, when COVID-19 hit, most of the businesses depended on e-commerce sites for their online business. And these aggregators take up roughly 10% to 30% of the margins from brands. While it may work for volume sales, it does impact the brands' revenues greatly. Hence Direct-to-Consumer works much better. COVID-19 just cemented the fact that offline retail cannot be depended upon forever. Things have to move to digital and c-commerce is the only way to replicate that experience on digital channels.

Traditionally, in the chat-based solutions, chatbots were more or less used for half-baked experiences. In India, we are enabling brands to ditch traditional chatbots and enable full-scale conversational experiences. Key ideas would be to go omnichannel (WA, FB Messenger, iMessage etc) and use a different approach for different use cases (Automated Chat, 1:1 Human Chat between Brand Advisors and customers, or a Hybrid approach) to power the entire customer lifecycle.

Conversational Experiences are not just about Customer Support Automation or redirecting to websites anymore. They are bigger and better when it's full-scale with 360 media surround. We are helping brands strategize conversational commerce and the approach. While we use partner tools to enable these experiences, a 360-degree strategy has to be coupled with the tool. Areas like content, marketing strategy etc. also come into play.

Unlike campaigns, conversational commerce is driven as part of the business strategy by the brand teams. It's an integral part of the digital transformation of a brand. And to help brands achieve optimal results and ROI from these channels, we play a vital role in the customer experience.

Clients across industries are gunning to double or triple their revenue using these channels to complement their e-commerce website. Traditional e-comm websites have conversion rates of less than 1%. Conversational Commerce gives you much higher conversion rates.

Conversational AI engine is designed keeping in mind the behavioural patterns of consumers while making a purchase. The Sales Engine effectively replicates the behaviour of a Sales Assistant and is able to guide customers through their buying journey. It is built to deliver

the most relevant recommendations to the user with the least friction and is optimized for a superior Customer Experience over Voice or Text.

Let's understand this better by deep diving into these five key components, each of which helps in creating a deep understanding of products and consumers, of the kind that exists in the mind of any sales expert.

1. Domain Knowledge

Much like a human sales assistant, the Sales NLU models are pre-trained to acquire all the knowledge of the domain they are built for. The NLU models learn all common concepts and relationships across products, reviews and customer questions.

Within any industry, there are various types of products. Each of those products has different features, attributes, qualitative aspects, quantitative aspects, price ranges, dependencies, etc. among a host of other factors. Furthermore, the questions by customers in any domain fall into a variety of types. The engine learns to understand all these concepts and their synonymous representations using publicly available data such as open webpages, forums, Wikipedia articles etc. It also adds to this domain knowledge once it integrates with the business inventory data by learning new concepts present in the inventory.

2. Information Extraction

The domain knowledge becomes the basis for the engine to extract structured information from natural language product descriptions. The engine syncs with the inventory data of the business and is able to extract structured product features and numerical attributes from any unstructured form of text using advanced semantic

extraction techniques. This is similar to how a human sales assistant would read a product's description, understand the information in a structured manner by making the required deductive conclusions and store that information for later use.

This domain knowledge is also central to understanding any incoming messages from the customer. It allows the engine to quickly extract the domain concepts present in the message and match them reliably with known customer query patterns.

3. Sentiment Analysis of Reviews

Since reviews today form a critical component of the customer purchase journey in many domains, engine too relies on creating a deep understanding from reviews about overall product quality, as well as for specific use cases. In reviews, different types of consumers talk about different attributes and what aspects of the product have specifically resonated with them or left them dissatisfied. The engine maps this in order to be able to have this context while recommending products.

4. Recommendation Engine

Since the effectiveness of any sales expert is primarily based on the quality of their recommendations and personalized guidance, this is a critical piece of our sales assistant engine. The recommendation engine takes into account not only information learned from user reviews and product descriptions, but also uses deductive logic and reasoning to come up with personalized recommendations based on the customer's use case and needs. Further, it can be easily configured by the business to prioritize new releases, specific brands or products.

5. Context Manager

Once a consumer has started interacting with the IVA, they often keep refining their search further based on preferences. The Context manager helps maintain the various parameters that a consumer has already mentioned over the course of the conversation. It keeps in mind factors such as objective of discussion, stage of discussion, known preferences and criteria, products that the customer has shown interest in.

Use cases across categories :

All Industries (1-way Conversations)

Sending alerts & notifications on WhatsApp to customers (Much like receiving a ticket from Makemytrip / Goibibo etc)

For consumer brands

3 different approaches

1. Automated Conversations
2. Assisted Brand Advisor led Conversations
3. Hybrid model

Use Cases

Marketing Chatbots

Conversational Commerce

Customer Support

Product Recommendation

Connecting Offline Stores

Sampling

Product Consultation (Beauty advisors, Style advisors, Nutrition Experts etc.)

For Banking, Automobile, Insurance

Automated Customer Experiences

Lead Generation

Assistance using Relationship Managers, Wealth Managers etc.

Connecting to branches, showrooms

Booking appointments etc.

KEY TAKEAWAYS

1

COVID-19 has been instrumental in accelerating digital transformation across industries and cementing the fact that offline retail cannot be depended upon forever. Brands must move to digital and c-commerce is the only way to replicate that experience on digital channels.

2

C-commerce is much more than merely implementing traditional chatbots. Marketers should enable full-scale conversational experiences by moving to omnichannel services (WA, FB Messenger, iMessage etc) and using a different approach for different use cases (Automated Chat, 1:1 Human Chat between Brand Advisors and customers, or a Hybrid approach).

3

Conversational commerce must stay strategic and align itself to a brand's digital transformation template.

Voice for Bharat: Building Smart Solutions for 'Not So Smart' Phones

Niraj Ruparel
group^m

Head of Mobile and Emerging Tech

With rural spending overtaking urban markets due to higher agricultural incomes, and decent rain and government stimulus harbouring hope of a faster bounce back, 2020 maybe a year of rural markets in India.

There is a clear rise in demand from Rural India due to the large number of migrant labourers going back home and thus fuelling the demand at a rate higher than before. Thus, there is no surprise that consumer companies are focussing their spending on rural markets with promotions, products and offers.

However, there is a large population with no or limited access to the internet. For this less connected group, voice technology has been not just a convenience but a necessity. Interactive services accessed on standard telephone numbers are a key source of information and education – and as AI-driven voice recognition technologies have evolved, these services have become increasingly sophisticated and have provided brands unique opportunities.

In India, even Google Assistant can be accessed without the internet, simply by calling a phone number. Google Assistant is available in nine Indian languages, while Alexa is only available in English and Hindi. Having said that, even the addition of Hindi has been a boon to the Amazon smart speaker. As they go regional, they would find more fans for their technology with more people adopting to it. The sonic identity and personality of Alexa in Hindi is so powerful that we're seeing a lot of people engaging with her. Close to 1 million people have proposed to Alexa already.

Cost is one important factor driving the underprivileged to feature phones, which means that the only way to access interactive services is via voice. But there's another potent driver that has made voice tech a particularly useful tool for this demographic: education. The adult literacy rate in India is 73.2% - meaning 26.8% of adults (almost 370mn people) are illiterate. Even as cheap smart phones grow in popularity, voice remains the king. Voice is going to be important in the near future because in a market ecosystem like India, the next couple of million consumers, who are going to come on board, might not be conversant with typing at all.

Build For Voice

'Fastcard Ki Paathshaala' a voice-based education IVR: In certain parts of rural India people struggle on a daily basis to fulfil basic needs such as food, electricity and water. Due to such conditions, children end

up working alongside their parents to provide them a helping hand. Thus, the literacy rate in rural areas of the country are significantly lower than urban areas. Godrej Good Knight, a repellent brand, felt it can play an important role in a child's education, by offering protection from mosquitoes, which distracted them during their studies. With this insight Good Knight Fastcard decided to conceptualise 'Fastcard ki Paathshaala' – a voice-based education IVR – which could penetrate into rural markets and be an enabler of education. And, effectively bringing a school into their homes though a mobile phone.

Alexa Guru – Here's another interesting story about voice technology. In a small school, 170 km from Nagpur, Alexa has turned into a teacher for kids. An Alexa fitted into a mannequin dressed as a teacher is changing the way students are learning in the Marathi medium school.

Pocket Dentist - Voice based platforms: In rural India, it is rare to find or get access to a professional dentist. In fact, most people go their entire lifetime without ever getting

to visit one. Since most households have access to a mobile phone, Colgate decided to use mobile voice technology to provide India's rural population with basic oral care as it avoids data dependency and doesn't limit access. Colgate created the "Pocket Dentist," which used voice recognition technology to answer questions about common oral health problems for individuals lacking access to dentists. Callers can dial the service and then hang up. Pocket Dentist returns the call, free to the caller, and answers common oral health questions. For less common queries, callers are connected to an actual professional dentist.

Colgate Audio Lectures With BYJU'S- Colgate partnered with BYJU'S, the education app, to give children access to free lessons. Each pack offered a free one-month video tutorial subscription. We also converted the BYJU'S video content library

available for consumers into audio format accessible to users who had to just dial a number from their phone. This enabled the audience without a data plan or not having

a smartphone to get education through their phone in an easy and convenient manner.

Last year, Mindshare took home a Silver Media Lion and Bronze Creative Data Lion at Cannes with the Infection Alert System for Lifebuoy soap campaign. The project takes live government data from rural community health centres. When infection reached a certain number in a local area, it triggered an automated voice calling system alerting nearby people in their local language, reminding them to take precautions, including handwashing.

And finally mSamvaad: India's largest audio-conferencing bridge solution 'mSamvaad' helps connect and engage leading brands to its audience in media-dark areas. A Voice-based solution uses the power of telecom as the key channel to engage, educate and create awareness through SMS, chat rooms and voice calls for one-on-ones as well as conference connections. It also enables a two-way communication on a selected basis. The key

differentiator of the platform is that it operates on any phone and enables massive outreach in the most cost-effective way. With this platform roll, feature phones are also giving those cut off

from the internet a taste of social media. The first project on this platform was for GSK brand Horlicks where callers could listen to and submit questions to actor and politician Ravi Kishan. A similar system was also used during last year's general election campaign, allowing thousands of village heads to dial into a giant 'town halls'.

Out of the active 958 million mobile subscribers in India (based on the date of peak VLR in June 2020) the share of rural penetration is roughly around 46%. A major chunk of these rural users have basic feature phones and there is resistance in upgrading to a smartphone, considering the price difference and battery back-up issues in the absence of regular electricity, digital illiteracy and network issues.

In light of the above facts, how do brands reach out to these users in rural or for that matter even to the underprivileged in the urban areas who use a basic feature phone. It is estimated that roughly 350-400 million of mobile users are on feature phones on 2G networks. Mobile, no doubt, is the best media for reach but then if these users are out of the digital landscape, how do brands reach them for promotions. The answer still lies in the conventional mobile modes of communication – Text and Voice broadcasts. While text may have its own challenge and solutions, Voice is still the preferred choice of media consumption for many of these users, especially if the communication is in their language of choice with an interesting content-laced promotion. While thinking as an urban smartphone user, we may say that we don't respond to promotional voice calls, yet there are a significant number of other smartphone users (besides the urban poor and rural feature phone users) who do – after all we are a country with 1.3 billion people.

Brands from FMCG, e-commerce, NBFC and many other sectors are the ones increasing their spending in such markets after having perfected the medium over a period of trial and error. The biggest and the most effective change is in the creative content of the voice call broadcast. Gone are the days when a brand used the same radio advertisement or TVC advertisement to broadcast over a voice call to a mass audience. Now content is devised specially for voice calls to replicate the experience of a phone call which leads to higher listenership and engagement from consumers.

What works

Customised creative designed for voice broadcast-based calls along with sharp and near accurate targeting of mobile users identified as the brand's TG are leading to higher listenership and engagement. Knowledge of user's preferred language of communication helps in customising the voice creative in respective language which further leads to higher engagement.

Simple gratification based voice calls works wonders for the rural markets where a basic talk time recharge or data recharge gratification leads to users completing the call and also engaging with the message through a key tone press.

Ability to monitor the responses and performance of a promotional campaign to macro levels like full listenership, duration of listenership, getting the numbers of opted in (interested) users, post campaign analytics, survey to opted in users to check brand score or recall help in designing future engagements.

Examples of voice creative or platforms being customised for voice broadcasts calls leading to all-time high engagement levels are evident from the learnings of:

- A leading financial product company using near-real p2p sounding voice broadcasts based calls to its customers.

- An entertainment show engaging users with voice broadcasts – again sounding like a near real phone call and driving viewership for the show.

- One of the leading E-comm brand targets specific audience in semi-urban markets over regional language voice broadcasts, educating users about the features of the platform.

- An FMCG brand targeting women audiences with humour laced content tips leading to higher opt-in ratios from the users.

- A TV channel promoting rural and semi-urban users over voice broadcasts to watch a show and set a reminder/alarm for the show time by pressing a key on their phone during the broadcast call led to more than 3% users responding for alarm setting.

- An FMCG brand targets users who may have a pre-existing ailment with voice broadcasts about free doctor consultation in real time led to high number of people willing to engage.

The possibilities of engagement are endless on Voice and are reaping benefits to brands who use the medium in a tactical fashion consistently.

KEY TAKEAWAYS

1

Limited access to internet, low literacy rate and proliferation of feature phones in rural area has made voice technology a need of the hour.

2

Marketers should customise creative for voice broadcast-based services after taking into consideration the user's preferred language of communication as such creatives lead to higher engagement.

3

There is a clear rise in demand from Rural India due to the large number of migrant labourers going back home and higher agricultural income, thereby presenting an opportunity to brands to build and leverage voice solutions.

GroupM Facebook Turn the Tide Playbook – Innovations

In the churn triggered by COVID-19, navigating the new normal most effectively has become critical. One of the key pillars in that process is innovations.

As consumer experience shifts from offline to online, virtual experiences can be designed to simulate product touch-and-feel elements and drive purchase.

The guiding principles are to Interact, Immerse, Involve and the tools available include interactive ads, AR ads and influencers.

Interact: Playable ads enhance interactivity the most; they showcase a brand in an immersive way, offer an interactive experience and engage users. Best practices that level up a playable ad include grabbing attention with video, making the demo clear and fun, tailoring the creative and testing multiple assets. Playable ads have 3X higher ad recall lift rate, 10% higher CTR compared to other awareness campaigns, 70pt engagement rate and 7.5X CTR.

Poll ads in mobile feed encourage people to interact with the brand and can drive people to a personalized browsing experience or the app store.

Early Success: Playable Ads

3X
higher ad recall lift rate

10%
higher CTR compared to other brand awareness campaigns during World Cup

70pt
engagement rate with the playable ad

7.5X
click -through rate (CTR) at end of screen

* All numbers compared poll ads (test) with standard video ads (control)
Source: Facebook for Business Case Studies, Q3 2019

Immerse: AR (augmented reality) ads offer the most immersive ad experience. They allow consumers to connect with a community in new ways, allow people to experiment with your effect or product in camera and increase favorability or conversion rates. AR ads are created in Ads Manager while AR effects are built-in and published through Spark AR.

What we've seen work

27.6pt
lift in purchases

53%
higher CTR

20.4pt
lift in ad recall

14%
incremental lift in conversions

* All numbers compared poll ads (test) with standard video ads (control)
Source: Facebook for Business Case Studies 2019 | WeMakeUp and Michael Kors

Involve: Influencers play a huge part in creating involvement. The attributes that make an influencer voice authentic and trustworthy include relatability, passion, further research worthiness and recency. Brand can choose from a mega, macro and micro influencer looking at the right fit. The three operating principles for activating influencers are transparency, relevance and authenticity.

The 3 principles for maximizing effectiveness for influencer marketing are right match, right message and right measurable media. Any influencer-led creative must be a perfect match between the brand and the influencer where the right message must be transmitted but the authentic voice of the influencer must also come through. For any influencer-led campaign, the best practices for mobile must still be adhered to, which means keeping the branding element(s) prominent, delivering the key benefit early, sizing for mobile and keeping in mind the sound-off environment.

Choose from a wide spectrum of influencers

Celebrities ————————————
have multiple points of influence
beyond social & digital

Mega-influencers
1MM+

Digital influencers ————————————
serve a significant social & digital audience

Macro-influencers
10K-1MM

Media & experts ————————————
are part of a pre -existing. popular
media outlet or category authority

Microinfluencers ————————————
serve a small, but often more specific,
social & digital audience

Micro-influencers
500K -10K

Advocates ————————————
a consumer -level army of well -wishers

To outline the action points

1 Innovations are part of the overall business strategy and should have the ability to contribute to business outcome.

2 Innovations are not only limited to executing new creative formats, they need to be deeply rooted in overall communication strategy.

3 Innovations should follow the three guiding principles of interactivity, immersion and involvement.

From a Blink to an Imprint, to a Heartbeat

An MMA Cognition Study

To view the report click here:

https://www.mmaglobal.com/documents/mma-first-second-strategy-report-blink-imprint-heartbeat

With the proliferation in media touchpoints, there has been an explosion in the number of brand messages a consumer is bombarded with – every day, every hour. In this scenario, consumer attention becomes an immeasurably prized property for any brand. Commanding it is necessary but isn't easy at all.

Some marketers believe that attention and impact stems from exposure time. Two questions loom larger than anything else: How much stay time does an ad need on screen to trigger attention and cognition? What makes an ad work and what is the role of exposure time on effectiveness?

One way to decode this is to bring measurability into the equation and apply those into the territories of Attention and Cognitive Processing for mobile ads. The former can be measured through the percentages of ads seen and the latter can be investigated using cognitive load (CL) and motivation/emotional response.

The numbers, like always, tell a story.

On mobile, more than 67% ads are already seen and cognitively recognized at 0.4 seconds. This compares favorably with desktop where ~60% of ads are seen at 2-3 seconds and only 52% are cognitively recognized at 0.4 seconds.

Attention

5% 25% 67% 84% 85% 88% 89% 82% 93%

Total Exposure time

Cognitive Load

29% 67% 67% 71% 96% 96% 100% 100%

*= significant at p<0.05

Attention

Attention (left chart, device comparison)

- 25%, 67%, 84%, 85%, 89%, 92%, 93% (purple)
- 12%, 30%, 44%, 48%, 50%, 62%, 58%, 88% (gray)

Total Exposure

📱 💻

Cognitive Load

- 29%, 42%, 67%, 67%, 71%, 96%, 96%, 100%, 100% (purple)
- 22%, 30%, 52%, 52%, 57%, 57%, 57%, 61%, 65% (gray)

Attention

- 25%, 66%, 84%, 84%, 85%, 88%, 89%, 92%, 93% (purple)
- 24%, 68%, 83%, 84%, 88%, 90%, 92%, 94% (gray)

● Known Brand   ● Less known Brand

Cognitive Load

- 43%, 79%, 79%, 86%, 100%, 100%, 100%, 100% (purple)
- 40%, 50%, 50%, 50%, 90%, 90%, 100%, 100% (gray)

Motivation

- 57%, 57%, 64%, 64%, 64%, 64%, 71%, 80% (purple)
- 20%, 20%, 20%, 30%, 50%, 50%, 70%, 71% (gray)

Well-known brands convert attention to a stronger emotional and cognitive response. 79% of known brands are cognitively recognized at 0.4 seconds compared to 50% of less known brands. Video as a format inspires faster response compared to static. 58% of video ads inspire motivation at 0.4 seconds as against 25% of static ads.

Weak ads work fast and fail faster. At 1 second, 54% of high-performance ads are processed compared to 91% of low performance ads but at 3 seconds, 31% of high-performance ads generate positive emotions compared to 18% of low performance ads.

To grab attention, it has come down to the very first instance of the impression. So much so that brands need a 'first second' creative and media strategy.

For an ad to work, the creative needs 4 powers:

01
Stopping Power

Get attention and start the cognitive process.

02
Transmission Power

Ensure the ad is going to be understood.

03
Persuasion Power

Ensure the ad triggers positive emotions and appeal

04
Locking Power

Ensure the ad message is memorable enough to create impact

As only a fraction of messages cut through the stimuli overload to enter our consciousness, it's good to know about certain codes that work better than the rest. When ads first appear on the screen (1/10th of a second), they are seen mostly as a blur. But can trigger emotional responses due to colour and composition; red signifies love and passion while green signifies life and health. A handle is recognized early and has an effect. Visual elements have stopping power – contrast, angles, colour composition and picture density play a part. Complexity works but item and platform complexity work together inversely. Humans react favorably to faces so putting them in your ad works. Even gaze direction matters.

The first second strategy checklist:

1 Use colour and contrast judiciously

2 Pre-test attention, salience and complexity

3 Use people and faces; they work

4 If relevant, trigger primary needs

5 Add motion (even if perceived)

6 Make the first frames of a video count

7 Adjust for platform complexity

8 Adjust for brand familiarity/ likeability

These steps enable ads to grab attention in the very first second, but it doesn't end there. Beyond the first second, ads should stay fast pacing, play video with sound-off, deliver the key message immediately, show products in action, use early or always-on branding and entertain up to a point.

To be impactful, ads must have 'first second' media strategy as well.

01 **Win attention instead of paying for it:** develop the right creatives

02 **Quantify the value of "high velocity" impressions:** Inventory that doesn't meet time thresholds may still hold value for marketers

03 **Develop buying tools:** Existing systems allow marketers to track viewable vs non-viewable impressions but tools that can isolate non-viewable impressions and quantify their value will help further.

Seven Strategies from Brands Leading the Conversation

Preetha Athrey

Twitter

Head Marketing India

In this time of upheaval, many brands are asking themselves the hard questions: Is now a good time to launch a new product? Can we use messaging that's lighthearted and playful at a time when people are neither? What's the best way to stay agile in the face of uncertainty?

It certainly is not an easy time being a marketer! In fact, there has never been a more challenging time to be one.

Everyone is searching for an answer... and brands are looking to their peers and partners for insights and inspiration to act. At Twitter, we've seen how conversations can make a difference. We've been humbled and inspired by the brands that have stepped up over the past few months to lead the way for others.

For brands that are considering how to take action during this time, we've got you.

Here are seven strategies and insights that draw on the best practices from the multiple brand activations on Twitter so far this year. These strategies draw from the recent success of brands that have led the way by understanding the consumer's mindset and today's new landscape before taking action.

So, how did these brands succeed?

Lead by listening	01
Lead with purpose	02
Lead by example	03
Lead with something new	04
Lead by connecting	05
Lead with agility	06
Lead with positivity	07

Sources:
GlobalWebIndex, Coronavirus multi-market study, Wave 4 amongst Twitter visitors/ users in India, May 19-26 2020; Kantar COVID-19 Barometer amongst 25,000+ consumers across 30 countries globally, Mar 2020; Nielsen. Global. Budgeting for the upturn—Does share of voice matter; Association of National Advertisers (ANA) survey. March 2020, n=196 (companies)

Lead with listening

The brands that have thrived have understood that people want brands to be credible, communicative, supportive, and people-first.

89% of Twitter's audience in India think that brands should be providing practical information/ tips which help people to deal with the situation.

Be supportive

Majority of consumers expect brands advertising during this time to make a positive contribution to society

77% Talk about how the brand is helpful in the new everyday life

75% Inform about their efforts to face the situation

70% Offer a reassuring tone

Think people first

93% of Twitter audiences in India think that brands should be offering flexible payment terms (e. g. instalments, payment plans, etc.)

Hyundai -
https://twitter.com/HyundaiIndia/status/126
0472368268546049

Samsung -
https://twitter.com/SamsungIndia/status/124
8248059319861250

VIVO India -
https://twitter.com/Vivo_India/status/125224
4624028008448

Lead with purpose

Now, more than ever, brands need to show their ideals.

61% of Twitter audiences in India think it is 'a lot more important' for companies to behave in more sustainable/ eco-friendly ways post the COVID-19 outbreak.

You can identify your brand's place in this moment by clarifying your three Ps

Purpose

What guides your brand

People

how you are supporting those most impacted by a crisis

Purpose

how you plan on giving back

Purpose

Purpose -
https://twitter.com/ArielIndia/status/1243171
857064292354

People

People -
https://twitter.com/ibm_in/status/1281477911
380234240

Purpose

Pledge -
https://twitter.com/AxisBank/status/1271709
200398249985

Lead by example

89% of Twitter audiences in India think that brands should show how they are responding to COVID-19 or helping customers.

Conversation leaders also tend to follow a common set of rules:

DO'S

· **Provide useful information to help people navigate uncertainty and remain calm.**

· **Broadcast any initiatives you've launched that address issues customers have raised.**

DON'TS

· **Make promises you can't keep.**

· **View misfortune as a marketing opportunity.**

· **Shun interactions with frustrated customers.**

MG Motors -
https://twitter.com/MGMotorIn/status/12757
43276948062209

Uber India -
https://twitter.com/Uber_India/status/12562
24347334889473

Upgrad -
https://twitter.com/upGrad_edu/status/12561
42027839832064?s=19

Lead with something new

Brands that launch (or relaunch) in a downturn experienced

15-25%

greater excessive share of voice growth than the general average growth.

Disney Hotstar - https://twitter.com/DisneyplusHSVIP/status/1277576274685255681

Xiaomi - https://twitter.com/XiaomiIndia/status/1270331588631384065?s=08

Oppo - https://twitter.com/oppomobileindia/status/1265205564444999680

Lead by connecting

05

Brands lead by connecting and maintaining relevance by

Turning Live Events Into Virtual Ones

Connecting To Virtual Celebrations Of Occasions

Leaning Into What People Care About

State Bank of India

Pranayama helps you achieve a peaceful mind. Our online services enhance it further by enabling you for Ghar Se Banking.
#HappyInternationalYogaDay #YogaForAll

SBI

Breathe in

Asian Paints

To the man who supports our ambition, no matter how far-reaching it is. To our secret fellow fan who can bring alive any fantasy, #HappyFathersDay 🙏.

Share your dad's most memorable #SecretSaviour stories with us!

asianpaints
celebrates har ghar ka
Secret Saviour

HAPPY FATHER'S DAY

ZEE5Premium
@ZEE5Premium

Is your bond of friendship stronger than the Chaukadi gang's yaari? Tell us about it in a tweet.

Make us laugh, make us cry with #MeriEpicYaaraKahani. The most dil ko choo jaane waale tweets will be re-tweeted by the cast of #Yaara and us.

Watch #YaaraOnZEE5, on 30th July.

KITNI GEHRI HAI AAPKI DOSTI?

YAARA

SBI -
https://twitter.com/TheOfficialSBI/status/127
4408926965108736

Asian Paints -
https://twitter.com/asianpaints/status/12745
58475104747522

Friendship Day -
https://twitter.com/ZEE5Premium/status/128
77746001239855105

Brands have led with agility and used creative ideas to solve existing limitations. In fact,

92% of companies have evolved their marketing creative in light of COVID-19.

They have brought this change about by transforming old assets into new ones, creating new content with creators and influencers, and rethinking their live events.

Prime Video -
https://twitter.com/PrimeVideoIN/status/128
6544776716664837?s=19

Sony TV -
https://twitter.com/SonyTV/status/12471873
06764619779

Google India -
https://twitter.com/GoogleIndia/status/12815
71293511380995

Lead with positivity

At a time when people are hungry for lighthearted content, it's important for brands to help boost positivity and promote positive stories

Sharing moments of humanity and levity with their followers

Creating unique experiences

Engaging people

Spotify - https://twitter.com/spotifyindia/status/12878 36404135862273?s=19

Coca Cola - https://twitter.com/CocaCola_Ind/status/125 7619701925965824

HCL Tech - https://twitter.com/HCLConcerts/status/1274 698679031525384

Heart Connection is the Tonic for the 2020 Uncertainty

Paula McGlynn

Gulbadan Talkies Pvt Ltd (BhaDiPa)

CEO and Co-Founder,

The darker the world is outside, the more we treasure our moments of respite. Comic relief is living up to its name now more than ever. The difficulties faced by television were evident during the lockdown, and as they failed to deliver new content, more and more audiences picked up their smartphones. Audiences discovered digital entertainment through mediums like YouTube, where creators were churning out new videos every day in a variety of genres and languages available only online. Because of algorithms, vernacular language creators saw a boost as audiences were more engaged with videos in their mother-tongues. Several Marathi comics we manage initially suffered losses due to cancelled events but then started YouTube channels which grew from 0-100K subscribers within five months which is massive growth by any standards.

Despite brand conversations coming to a halt in the shock of lockdown, our Marathi creator brand BhaDiPa (Bharatiya Digital Party) ramped up its video production. Unlike large brands and companies who faced interruptions in their supply chains, we had a direct connection with our audience. We took advantage of the increased consumption online even if it required some mind-bending innovation in

shooting methods. We paid close attention to our audience response as we experimented with new formats and topics, and as we approached our flagship season of Ganesh Chaturthi, conversations with brands picked up again… but this time in a new content climate.

With the firestorm that is now ever-present in the news, audiences are sensitive to narratives popping up in their entertainment content. As brands start to increase their advertising presence, they should consider incorporating more socially positive values to pacify a traumatized audience. By now, brands are aware that family-friendly videos tend to be brand-safe as well, hence the massive popularity of our series "Aai & Me" (Mom and Me) with an audience ranging from toddlers to septuagenarians. Now, with a hyper-sensitive, polarized, and volatile media ecosystem, it is vital also to recognize our power to influence and inform the public. If we wield this power wisely, it will generate massive returns in public perception.

Our content that generated the highest and most positive engagement has carried messages such as mental health during COVID-19, diabetes awareness, openness about homosexuality, promoting entrepreneurship, and environmental sustainability embedded in

fun and entertaining videos. Our audience showered us in kind words of appreciation, but the positive response reflects in our numbers too. In the last six months of lockdown, we had a watch time of 3.5 Million hours and 20% growth in followers compared to the previous period with 2 Million hours, and 15% growth. Our social responsibility wasn't just good for the soul, but for loyalty as well.

With the economic slowdown and lockdown losses, we understand the importance of value for money. However, brands should look for beyond reach and seek added emotional value. By working with creators who share an emotional bond with, and speak their audience's language, brands will benefit from the positive messaging and brand recall.

Connecting through Voice: How Marketers can Use Voice Tech to Augment Brands

Sreeraman Thiagarajan

Agrahyah Technologies

aawaz.com

Co-founder and CEO

There are now apps and desktop widgets that remind us to drink water periodically. Our smart watches help us breathe well and breathe right. These are telling tales about how busy we are and how technology comes to help us live a better life.

Every technology advancement has held true of the first principle, that it must make our life easy and better. AI enabled voice technology checks all the right boxes when it comes to helping us lead a better life.

For those who are busy, voice assistants like Alexa and Google help get things done, make multi-tasking less stressful, aid them in moments when their eyes or hands are engaged (say, while driving a car or cooking). From giving directions to destinations to directing to your favourite podcast – voice assistants let you access everything the most simple way.

On the other end of the spectrum, we have millions of first time internet users who may lack proficiency in using technology. For them too, voice plays the profound role of creating better access and inclusion due to their usage of NLP (natural language processing) that decodes the spoken word and the intent behind it.

As humans, speaking is a trait we develop even before we start walking. Voice, thus, is a natural way for us to interact with devices.

Although primitive voice-based products existed as far back as the 90s, the AI enablement in them makes it revolutionary. More importantly, they are an evolution in computing and not a passing fad.

While all the AI and tech comes to make voice assistants as an easy-to-use interface, it is still an input mechanism like a mouse or touch screens. The insight hidden in plain sight is that, when people interact with voice assistants such as Alexa, they are primarily getting some form of audio content – be it weather, news, music, jokes, education, spiritual teachings or anything else.

Brands can utilise this simple, human attribute to connect with people. All they need is a robust, coherent content strategy for voice – just what they devised and unveiled to leverage the internet ecosystem with websites or the mobile one with apps.

"When we win a Golden Globe, it helps us sell more shoes" – this was a quote from Jeff Bezos on how Prime Video helps Amazon upsell to its customers on their e-commerce platform. The beauty of content is that it delights people; if conceptualised and executed well, it helps engage & retain users with the brand in a more evocative way that can build long-lasting customer relationship.

Many brands have a starting trouble on answering two fundamental questions: "what needs to be done?" and "why now?"

Firstly, imagine your brand if there were no logo, typeface or colour associated with it. What does your brand sound like? Fun? Young? Wise? - the archetype that you have built over years for your brand now simply needs to be morphed to a sonic avatar.

The second question is related to the time context. Well, there are just over 300 million reasons for brands to start investing in voice today. India is a strong Android-first market and Google Assistant comes as embedded in all of them – a cherry on top if you consider another 100 million Jio phones that have no touch, but voice.

If you know, the first-ever TVC was actually just one static slide displayed on a TV screen for 10 seconds; today commercials have evolved on the medium and TV continues to command a lion's share of media spends. So, it is absolutely fine if you start with something simple and elementary for your brand today and then formulate a sustained way to grow your voice play.

Marketers go where their audiences are, and voice is a sphere customers are fast gravitating to. Are you there to welcome your audiences?

MMA group*m*

3.3

The Growing Importance of Marketing Tech

Creating Meaningful Consumer Experiences in Volatile Times

MA Parthasarathy

MINDSHARE

CEO
South Asia

The breaking down of the silos of Brand Building & Demand Generation has been accelerated by the

COVID-19 pandemic. Even in a time of cautious investment, marketers are investing in MarTech more than ever before, to effectively connect with their consumers across the entire journey. From leveraging their existing First Party Data to investing in new modes of engagement like AI Chatbots, Augmented reality and IoT, marketers are finding ways to drive consideration and preference with improved ROI.

However, there is also a significant "Discontentment Gap" between marketers' expectations from their MarTech investment and the actual outcome, as stated by a recent HBR study. This is largely because of a disproportionate focus on the technology & its implementation, with less focus on the way it will actually be used to solve marketing problems across the journey. A seamless integration of MarTech & Adtech is key to transforming the consumer experience of the brand.

The Growing Importance of Marketing Tech

Vishal Jacob
Wavemaker
group**m**
Chief Digital Officer

Is marketing possible without MarTech? Yes. But will you be able to build an effective marketing plan and measure its impact, as well as be data influenced and real-time? Not likely. Today, the complexities of marketing, with the number of channels of consumption, the expectation of personalization and demand for immediate gratification from customers is high. To orchestrate cross-channel campaigns and be able to adapt quickly to consumer interest and engagement & at scale requires technology backed solutions.

The 2020 edition of chiefmartec.com's Marketing Technology Landscape shows upto 8000 solutions, 1 of 5 of which were not even there last year. There are solutions across Advertising, Content, Social, Commerce, Sales, Management and Data, the fastest growing category. In our current landscape of more online consumers and remote working, digital and data are at the heart of marketing. Making effective use of that requires investment in the right technology. Make no mistake, the technology does not come first. The strategy does. Understanding how technology enables you to achieve your strategy comes next. It's the customer experience design that determines which technology is needed and for what purpose.

Overview of MarTech in India

David Raab

Customer Data Platform Institute

Founder and CEO

Marketing technology – or MarTech for short – is the collection of technologies used by marketers to do their jobs. The reason such a self-evident term exists is that, until fairly recently, marketers used very little technology: they bought advertisements via printed insertion orders, tracked results on paper spreadsheets, and managed projects by recording progress on a wall chart. That started to change fifty years ago when computers began to manage customer lists, but the real growth began when the Internet made it possible to capture vast amounts of information about customer behaviour and to use that information to target messages directly at individuals. Email was followed by Web display ads, e-commerce sites, social media, mobile devices, and more new channels, each spawning its own constellation of systems to create, deliver, and analyse customer interactions. At the same time, technical developments such as cloud computing, application exchanges, and Software-as-a-Service made it easier for anyone with a smart MarTech idea to start a company to execute that idea and for marketers to find those companies and buy their products. Today, Gartner reports that MarTech accounts for one-quarter of enterprise marketing budgets (Gartner CMO Survey, 2020).

The scope of MarTech grew still broader as old barriers between marketing, sales, service, and operations were eroded in a world where all interactions are effectively digital. Customers increasingly expected that every contact with a company would be informed by all previous contacts, regardless of internal organizational divisions. This stretched the definition of MarTech to include technology used by other customer-facing departments. More properly, it meant that technologies used by all departments – which might otherwise have been called salestech, servicetech, supportech and such – all merged into a consolidated whole. MarTech is still often used to describe this expanded set of technologies.

The importance of MarTech has expanded along with its scope. It is now nothing less than how a company interacts with its customers – and, thus, from the customer viewpoint, it is the company itself. This means that creating an effective MarTech infrastructure is essential to finding, keeping, and growing customer relationships. It makes MarTech the foundation for business success.

MarTech in India reflects both these global trends and local conditions. The Indian market is young in many ways: the age of the population, degree of Internet adoption,

and maturity of business practices. Moreover, the Indian economy shows huge diversity in consumer wealth levels and in business sophistication. The result is a wide disparity in MarTech adoption, ranging from world-leading MarTech deployments at the highest level to no MarTech at many small businesses. Companies find themselves at different stages in the adoption curve, often starting with small, tactical deployments of isolated systems to solve specific needs. As companies gain expertise, they move towards broader-scale, more strategic deployments backed by more advanced controls and analytical techniques. Maturity varies widely within each industry, but the most advanced sectors include e-commerce, hospitality, and financial services.

One particular feature of the Indian economy is the combination of low labour costs with large numbers of technically educated workers. This has led Indian firms to favour building their own systems and to run packaged systems in-house. This contrasts with most other regions, where MarTech adoption has been eased through use of packaged software that runs in vendor-managed data centres. The result has been slower adoption of standard MarTech systems in India. This gap is likely to shrink as Indian companies see that the standard systems mature more quickly and integrate more easily than home-built products. This higher quality and flexibility of packaged systems will eventually overcome any cost advantage from in-house development.

The net effect of these factors will be continued expansion of MarTech in India, both in scope and sophistication of deployment. MarTech will increasingly be seen as a strategic technology used throughout an organization. Marketers will benefit as they gain more powerful tools, but the true winners will be the customers who receive a more effective customer experience.

What CMOs feel about MarTech in India

Vishal Jacob

Wavemaker
group**m**

Chief Digital Officer

Over the years, Marketers have embraced MarTech to automate and streamline many aspects of their day-to-day marketing activities, right from media planning to analyzing results, to forecasting. Marketers have adopted MarTech tools to understand consumer behavior, enrich customer targeting process, deliver better consumer experience and analyze results for the business. As entire consumer journey has evolved and become more complex, MarTech tools are gaining prominence in Marketer's arsenal.

1. MarTech spends are poised to increase

Spend on MarTech in next 5 years

81%
Increase

17%
Stay the same

2%
Decrease

In India, CMOs are increasing spends on technologies such as cloud, blockchain, AI/ML. According to a survey by Mirum last year, more than 80% of the CMOs are planning to increase spends on MarTech tool over the next five years. This bullishness on MarTech has come forth on the back of growing awareness and adoption of MarTech by organisations across sectors.

2. ROI and efficiency are key motivations behind adoption of MarTech

It is not suprising to see that the key motivation behind adopting MarTech remains ROI and efficiency since Marketer's have always been demanding better results from their spends.

As channels for promotion are expanding rapidly leading to vast amount of consumer data, it's challenging to manage such campaigns with numerous channels. But MarTech has revolutionized the way campaigns and data were handled traditionally. Now a single platform is empowered to track all digital activations and tools like this are the reasons why brands are adopting MarTech.

Marketer's motivation to adopt MarTech / automation

91%
Increasing marketing ROI & efficiency

62%
Single platform to track all digital activations

60%
Getting better insights from current marketing activities

45%
Automating activities to save time & resources

34%
Creating better sales attribution

28%
Improving data security

3. MarTech's benefits accrues over a longer duration

84%

42%

0%

Years of implementation: <1 | 1-2 | 3+

Percentage of marketers who felt MarTech has definitely benefited their organization, according to the number of years they had used it.

There is a stark contrast between the opinions of CMOs regarding the impact of MarTech on their organization. While organizations which have utilized MarTech tools for more than 3 years are confident about the positive impact MarTech has created, those which have adopted MarTech recently are unsure of the impact it had. This shows that it takes time to see the benefits of using MarTech tools and maximum benefit of MarTech accrues to marketers who have stuck with it for a longer time.

4. CRM and Personalization as the most effective technologies

95%	CRM
90%	Personlization
89%	Dashboard & Visualization
85%	Unified View
82%	Remarketing
80%	Geotargeting
78%	DMP
73%	ORM
62%	Chatbots
62%	AR/VR
57%	Voice Search
48%	Facial Recognition
48%	AI
42%	IOT
37%	Wearables
36%	Blockchain

Technologies that marketers feel can make a lot of difference from a digital marketing effectiveness point of view

The choice of tools CMOs prefer is perfectly in line with the motivation of ROI behind adoption of MarTech. More than 90% of the CMOs feel that CRM and Personalization tools are the need of the hour and these tools would make the most difference in terms of ad effectiveness. New age technologies such as Blockchain, IOT are scored quite low, ostensibly due to lack of any specific use-case.

5. Both B2C and B2B offer big opportunities for MarTech and for solutions providers

	Consumer facing	Non Consumer facing
AI	28%	55%
Blockchain	37%	37%
Facial Recognition	28%	55%
Voice	44%	60%
Wearables	42%	37%
AR/VR	50%	67%
IOT	14%	46%
Chatbots	66%	64%

■ Consumer facing companies   ■ Non Consumer facing companies

Perceived effectiveness of various digital marketing technologies

Historically consumer facing sectors such as real estate, banking, retail, entertainment etc were a step ahead in embracing new age MarTech tools. The present scenario is no different. What has changed is the gap between B2B and B2C firms in terms of perception of these technologies. Apart from IOT, the gap for other technologies has been narrowing.

Modern Marketing Tools and Technologies

Saket Agarwal

Onnivation

Founder and Managing Partner

2020: The year of MarTech

The year 2020 has been a year of many changes. One of them being a shift in how marketing is done. Technology has now become front and centre in every aspect of our lives including advertising and marketing. Even though MarTech has been evolving for several years now and is estimated to be an over $120 billion market worldwide, it wouldn't be an understatement to say that 2020 could possibly be the year of reckoning for this segment, as more people come online and marketers find newer ways to keep their users engaged. Onset of the COVID-19 pandemic has accelerated tech adoption and the marketing sector isn't an exception.

But first things first. Let us understand what MarTech really means.

What is MarTech and why is it important?

MarTech is any form of technology that is used to digitize the workflow from attention to traffic. So, any kind of campaign tracked using technology to grab attention and drive traffic or any marketing project that is bolstered using technology — all come under the umbrella of MarTech.

Technologies used for this purpose can be on a wide spectrum, ranging from something as basic as a Customer Relationship Management (CRM) tools to robust technologies such as Big Data Analytics, artificial intelligence, augmented reality and virtual reality.

MarTech, as with any kind of technology, is important as it leads to higher retention and scalability at lower costs. Even a person with minimal understanding can run a successful campaign by simply subscribing to the best tools available. That said, it's of utmost importance for digital marketers to constantly upskill themselves to stay relevant.

MarTech landscape in India

The digital marketing landscape has been growing in India at a steady rate. Around 80% of marketers are expected to increase their MarTech spends over the next few years, according to The India MarTech Report 2020. However, what lacks is the adoption of digital skills by marketers in India. I think the first step for everyone in MarTech would be to familiarize themselves with data analytics. MarTech usually revolves around content, social media, data management and commerce, among other things. To be able to conquer any of these, data analytics is key. This can help a digital marketer in mining social media trends, managing a data management platform or conducting market research analysis.

Globally, too, marketing spends are mounting. According to Gartner, CMOs in North America and Western Europe are expected to spend more than 26% of their total marketing budget on MarTech this year with an intention to increase their investment in tech next year.

One caveat:

Even as MarTech spends increase, the pandemic has led to companies giving a razor-sharp focus on the direct impact of tech-enabled marketing on company profitability.

Israel: Home to some of the top MarTech companies

While India has been catching up on the different ways technologies can be used in marketing, Israel has been a leader in bringing to the forefront some of the top MarTech companies. They have been able to do so because of their military background that requires them to mine a lot of data, and profile every individual entering the country for safety. This skill has been used by Israeli start-ups to create multiple deep tech companies in the field of marketing. For instance, Taboola, an ad-tech platform from Israel powers 450 million content recommendations monthly and partners with some of the world's top publishers and news websites including The Atlantic and NBC News, among several others. Israel has been the birthplace of many other such top notch MarTech companies.

What lies ahead for Indian marketers?

While these are challenging times, it's also an opportunity to accelerate the use of technology for marketing purposes and targeting your customer. As I mentioned earlier, upskilling is of utmost importance. So Indian marketers should use this time to upgrade their digital marketing skills with a plethora of courses that are available online and apply these in their daily work to witness changing results.

Apart from that, I would suggest marketers to start preparing for a cookie-less future. According to a Google study conducted last year, publishers lose 52% of their ad revenue due to cookie blockers. To solve this, a London-based start-up called Permutive uses edge computing to track first-party cookies and help drive business for their clients which includes The Financial Times, The Guardian and many others — which is one of the main features of the future of MarTech, with privacy concerns being paramount for consumers.

Lastly, as the COVID-19 pandemic makes virtual events indispensable, a strong coordination between the sales and marketing team will go a long way in creating successful results.

Using Artificial Intelligence and Data to Transform Marketing

Anindya Datta

Mobilewalla
Founder and CEO

Artificial Intelligence (AI) and machine learning (ML) underpin many core enterprise operations including those used to help drive business outcomes and grow revenue. This is especially true of predictive modeling, which turns historical data into behavioral insights and predictions about future behavior. While the value of first-party data in marketing is undeniable, its use in machine learning to build predictive models is less so. That's because the predictive modeling (PM) process relies on an appropriate breadth and depth of data, that isn't captured by first party data alone, to train the ML algorithm and generate insights.

First-Party vs. Third-Party Data

Understanding the challenges in common ML processes requires knowledge of certain data types:

First-party data is information that a company collects about its audience firsthand. Virtually every company believes their own customer data is solid, and it is. That's because it's usually generated by tracking customer activity as they engage with your brand both online and offline, or by asking the customer for this data directly. This sharing of data is based on a mutual relationship between you and your customer.

Third-party data is information collected by companies that don't have a direct relationship with consumers. This information is usually licensed or purchased from a third-party data vendor or a data management platform partner who compiles anonymous visitor information, deriving demographic and behavioral insights. This data is aggregated from multiple sources, so its scope and scale exceed that of any single source.

For organizations looking to increase the return on investment in artificial intelligence or machine learning, it's critical that companies enrich their owned data with data from a third party. This additional information will help to increase the breadth and depth of data, significantly increasing the effectiveness of the AI techniques that you apply. Once you have your data strategy in place there are many practical applications of AI techniques and uses within marketing

An AI-driven 360-Degree View for Improved Customer Experience

To provide a meaningful experience, we need the ability to recognize and identify customers as they interact with us across channels. While many of these interactions are visible to us, those that are not visible leave us with an incomplete picture of our consumer.

AI-powered solutions that have developed a single customer view are able to understand individual interactions across channels and create a consistent consumer identity. These interactions can be associated with online and offline behaviors that are used to map the path to purchase.

The ability to pull this data together at the speed and accuracy that AI has, provides marketers the opportunity to offer a hyper-personalized customer experience and deliver the most appropriate and tailored messages that are most likely to convert the lead into a sale, at the best possible times to drive conversions.

Predictive Modelling for Strategic Marketing

One of the benefits of AI in marketing is its ability to identify 'intent' in a potential audience. AI technology uses patterns in data and statistical methods so the 'intent' can be gleaned from multiple drivers including geographies, demographics, or past behaviors and characteristics like the kinds of apps they use and how they engage online.

Businesses that are using AI in this way will have the advantage of being able to market to those already inclined towards a product or service, who are most likely to convert and potentially to the highest-value customers.

For example, when you identify the defining characteristics of your highest-value customers using predictive analytics, you can target audiences of prospective customers that share these traits (commonly known as lookalike audiences).

The benefits of understanding your best customers don't end there. It streamlines

your whole marketing approach and helps accelerate ROI with insights that inform brand partnerships, business strategy, customer experience decisions, and more.

Artificial Intelligence (AI) is already changing the way companies do business, providing a competitive advantage for early adopters of these applications. AI is expected to have an enormous impact is in marketing, mainly because artificial intelligence is transforming the way companies understand and interact with their customers. Using artificial intelligence, marketers can identify patterns in data and turn them into actionable insights. By enriching their data marketers gain additional data points and information that can help paint a fuller picture of the consumer, allowing for more personalized messaging at scale. Early adopters of the technology stand to gain the most from AI – now is the time to get started!

Mobilewalla is a leader in consumer intelligence solutions, combining the industry's most robust data set with deep artificial intelligence expertise to help organizations better understand, model and predict customer behavior.

How MarTech is Changing the Marketer in Us

Shoury Gupta

ValueFirst
Head of Marketing

It is safe to say that we are at long last headed towards a frictionless experience economy. How could we arrive? Where nearly communication has gotten so moment, where we're immersed with decision, convenience, and access? How could it happen so quickly?

The rapid development of MarTech engaged marketers to automate and streamline numerous parts of their everyday promoting activities.

These days, most MarTech tools are moving towards being programming driven, which is eventually about automating the process and saving time for marketers. Having experiences on tremendous information about the intended interest group is currently conceivable due to the Marketing Technology devices. What's more, those insights often arrive in real-time, allowing marketers to pivot when things aren't going as expected.

While the MarTech landscape keeps on developing, it's not disappearing at any point in the near future. MarTech is and will keep on being, the catalyst for reaching and engaging the modern consumer.

But why is MarTech so important? In today's world managing marketing assets is an evolving, complex battle. The industry is shaken by new disruptors, technology, and tightened regulation. It is very much necessary for a company to gear itself up with its marketing tools in this fast-moving world of cut-throat competition.

Pathbreaking thoughts are regularly found on the streets more unfamiliar. MarTech as a thought is a birth of interest and a creative mind. An intersection of marketing and technology — utilizing the qualities of the two — improves marketing through the use of innovation. Its benefit lies in the effective use of technology tools on different platforms to serve your customers.

MarTech is like a 360-degree cover that includes e-mails, Customer Relationship Management (CRM) platforms, web analytics, search, social media, and data analytics to comprehend customer needs and respond appropriately. In the good old days, marketing was based on trial and error, now with MarTech, companies have an advantage with better foresight on their marketing activity to help them make smarter choices. MarTech allows companies to do marketing wisely with real-time data on performance.

> **"The market is moving so quickly that if you plan and plan and plan you'll find the plan is very quickly out of date,"**
>
> *- Glenn Flower*

Thinking about what was the need of MarTech for organizations?

Businesses were already getting an ample amount of success, but still, they had to integrate marketing and technology to accelerate it. It's the utilization of programming and web-based services to manage automate or execute promoting marketing tasks and processes. Utilizing data and analytics, MarTech engages organizations with better bits of knowledge into clients and markets and encourages them to react as needs are.

MarTech spends are poised to increase

80% of marketers expect their organizations to invest more in tools and technologies over the next few years.

Adoption of MarTech/automation tools

Partially implemented but not completed
32%

Completed as per our goals
25%

Not thinking about it yet
15%

Discussions have started and we will get started soon
28%

The global MarTech industry could be worth $121 billion and growing. What else can we expect for MarTech in 2020 and beyond?

A business without a procedure for marketing over different channels would have been probably not going to change over the customer above. With just one of every three purchasers being a mono-channel customer, and more youthful shoppers liable to utilize at least three channels, organizations need to advertise across channels now like never before.

The Change

Audience

Today's audience is more informed

They are clear about their needs/wants

They have multiple solutions available for the same requirements

Mediums

Unlike the traditional days, there are multiple mediums available online today to connect like – Instagram, Facebook, etc.

Massive informative content is available online today for any product/service

The Challenge

Visibility

What's good has other players in the market

Increased naysayers due to multiple social platforms

Brands need to maintain uniformity across multiple platforms

Preferred-time Interactions

The expectation of customers for instant communications from brands at their preferred time of the day

Steps your platform has taken to address the above shifts and trends

Kill your data silos

Centralize your data. Have all your data from all your sources in total sync on a single platform and get better visibility of your customers for hyper-personalization

Understand your user behavior

Increase your lead quality and lead score by focused targeting of your audience based on their user behaviors across devices. Deep dive into your customer needs based on their location, preferred platform use, drop-off points etc.

Never leave any customer un-attended again

Drive engaging customer experiences by building automated and personalized campaigns across multiple channels even with complex conditions and rules and automate entire customer communications scalable across your entire customer journey.

Unified view of customers

Map your customer life cycle journey and capture valid data across all possible touch points and get a unified view of your customer's persona. Based on these insights, craft customized campaigns for richer customer experience.

Measure finer, optimize better

Get actionable insights out of your data. Visualize it, monitor it, understand what works best for which of your user and then optimize your campaign activities to improve your sales funnel and generate revenues.

DATA
- Personal & Demographics
- Mobile & Device Data
- Onsite Behavioural Data
- Engagement Data
- Transactional Data

Data Integration

Data & ID Management
The unified view of customer

Analytics
Descriptive & Predictive

Journey Orchestration
Multi Channel Campaigns

Customer

- Email
- Push Messaging
- Chat Bot
- SMS
- Voice
- Web

Executions Integration

What's Next?

The tide is changing from software islands to all-in-one solutions that empower not just tools but also teams to play nicely together. Rather than simply growing larger, tech stacks are getting smarter, more streamlined, and ultimately connected. We still need to respect channels such as SMS when it comes to messaging. Despite being a traditional telecom channel, it has given marketing a new approach to meet the targets and set the edges of market standards. It has the ability to convey business, promotional, transactional and personal messages to the user base directly.

Always remember a good balance of tools is a key to successful MarTech stack.

3As of Modern Marketing Tools & Technology

Deepali Naair

IBM

Chief Marketing Officer India and South Asia

Authenticity

Marketing Tenets

Ability

Agility

Deepali Naair's tenets of Marketing in 2020

The mantra for any Marketing team ought to be Authenticity, Agility and Ability - the 3 As of Marketing.

Authenticity is at the heart of Marketing – it's also at the heart of Brand Purpose and Voice. We can refer to authenticity as the 'Art of Marketing'. Authenticity leads to customer centricity and creativity. It is the A which guides Marketers to develop the Brand Identity which presides over the Ps of Marketing.

Agility and Ability (the other two As') are the relatively newer pillars. We can refer to them as the 'Science of Marketing'. Agility is best explained in this quote from Jeff Jones,

the CMO of Target – "Technology has completely changed what fast means. We are on an agility mission right now because speed is different than agility. What we're trying to build is the capability to go in new directions fast, not just go straight ahead fast, and that's a really different muscle for us to build." Agility is about being comfortable with constant change which has primarily been brought on with societal and technological changes. Agility is about Marketing's ability to imagine the future and then pivot quickly. Agility is about the Culture of Evolution within the Marketing team.

The last A is Ability and this one is about adding skills. On one side these are human skills and on the other, ability is also about the tools of marketing. It is the need for enhancing 'ability' that nudges Marketing towards adoption of MarTech solutions (new brains for Marketing). As per a recent Gartner CMO survey, one third of a CMO's budget is now going into marketing technology. And as per chiefmartec.com, there are about 8000 MarTech solutions vying for the attention of the marketer. These two data points outline both the demand and supply side of the MarTech stack.

	Total Solutions 8,000	Growth Since 2019	Biggest Subcategory Growth (Percentage) Since 2019	
Advertising & Promotion	922	**4.1%**	Print	**35%**
Content & Experience	1936	**5.6%**	Video Marketing	**26%**
Social & Relationships	1969	**13.7%**	Conversational Marketing & Chat	**70%**
Commerce & Sales	1314	**9.0%**	Retail Proximity & IOT	**15%**
Data	1258	**25.5%**	Governance, Compliance & Privacy	**68%**
Management	601	**15.2%**	Projects & Workflow	**41%**

https://chiefmartec.com/2020/04/marketing-technology-landscape-2020-MarTech-5000/

COVID-19 has further accelerated the demand for MarTech tools. This is on the back of:

1. Digital transformation of businesses

2. Need for enhanced digital customer experiences

3. Robust ROI demonstrated by early adopters of MarTech solutions

The proliferation of MarTech tools is a function of technological changes and newer business models in enterprises. The MarTech stack is evolving constantly. Cloud and AI based MarTech solutions have grown dramatically in recent years. In years to come, blockchain based MarTech tools will also come into the consideration set of Marketers.

However, it needs to be said that the integration of the MarTech suite with the rest of the technology stack of a business is the bedrock of long-term success.

Marketing Teams will need to choose and then focus singularly on integration of the MarTech tools. Not only this but we must keep in mind that adoption of MarTech by a single organisation is not adequate. The entire marketing ecosystem must be comfortable with it, for robust ROI.

Now let's talk about the human skills aspect of Ability. What is very well known is the requirement of addition of skills like Analytics, CX, UX, Content Creation, Content Marketing, etc. What is less documented is that re-organization of the marketing team is a must for success. Re-organisation with redefined KRAs will ensure that the marketing team demonstrates ROI. For matching right skill sets to the right roles one can focus on the following four questions

1	Is the Marketing team's organization structure ensuring that the team acts as unifiers for the rest of the organisation?
2	Will this new structure enhance data driven decision making within marketing and the rest of the organisation?
3	Do the KRAs ensure a growth mindset and ROI mindset among the marketing team?
4	Does the organization structure ensure Agility and Authenticity?

While the mantra of Authenticity, Agility and Ability guide you in balancing the Art and Science of Marketing, remember that the process of adoption and integration of MarTech stack needs to be really fast paced because the journey of the end consumer is changing at a faster pace.

Unlocking Success with CRM

Adarsh Noronha

Hubspot

Country Director, Indian Subcontinent

In the last few years, CRM software has evolved far beyond being just a tool for contact management.

Historically, B2B sales teams used CRM to create and manage company records and report sales performance to their leadership teams. This worked well until products in their respective industries were commoditized and the new, and only way, brands could differentiate themselves was through providing a superior customer experience.

If your CRM is used only by your sales team, prospects and customers are left with a disconnected customer experience. Your CRM plays a key role in elevating the experience across the customer journey - right from the time a prospect lands on to your website, to when they become a satisfied customer.

From a marketing perspective, before a lead even gets to sales, marketers can populate CRM with valuable data by creating forms that enrich contact records, collecting and interacting with leads via live chat and bots, sending personalized emails at the right time, and automatically collecting engagement data. This means the moment a lead becomes sales-qualified, your sales reps will have deep insight into who they're talking to. They'll know who they are, their communication preferences, and information about their business, goals, and

pain points. This is what HubSpot terms as "Inbound Methodology".

Marketers can also use their CRM to personalize their campaigns and target prospects to deliver an elevated prospect experience.

• Combining your CRM with email automation tools helps you go beyond "first name" email personalization. You can segment your contacts into different lists based on any CRM data point like location, page interactions, and more. Not only can you personalize text, but you can switch up CTAs to send a contact to a different landing page based on data you've collected. By being relevant and personalised in your communication, you can build trust and provide value to customers and prospects

• Integrating your Content Management Tool and CRM allows you to access the data you need for a complete view of your visitors' interactions with your site. You can use this data and adapt your site to each visitor by optimizing website content, forms, and more.

• Similarly, combining your CRM with ad platforms like Facebook, Twitter and LinkedIn can provide your customers with targeted, contextual ads that help them make educated buying decisions, and move through their buyer's journey.

• A CRM can also help your sales and marketing teams save time. You can avoid exporting and importing lists of contacts into your email service provider when your email is connected to your CRM. This keeps all your contact information up to date, helping your team stay compliant with CAN-SPAM laws, send segmented emails easily, and effortlessly report on email deliverability.

While there are so many ways for marketers to get value out of their CRM, a vast majority of companies in India still use CRM in the traditional way. CRM is a stand-alone software that only the sales teams use, and the CRM is not integrated with marketing automation and helpdesk platforms, resulting in a disconnected customer experience.

Increasingly, we are seeing companies in India adopting tools like HubSpot CRM to create a better customer experience. HubSpot provides a complete CRM platform that sales, marketing and customer service teams can use to grow their business. With HubSpot CRM, you can view the entire journey of your customer, send personalized emails, automate sales reach out and delight your customers, creating ambassadors and leveraging the power of word of mouth.

For a business to be successful in this highly competitive market, companies should focus on delivering exceptional customer experience. One of the ways of achieving this is by having your entire go-to-market team - marketing, sales and service use CRM as a single source of truth.

Modern Marketing Tools and Technologies

-The Growing Importance of Cloud for Marketing

Kerry Lau

Acoustic

Head of Marketing, Asia Pacific and Japan

Marketing Matters Now More than Ever

The challenges that we as marketers face today continue to grow in scale and in complexity. As a marketer who leads marketing in the region, I empathise with my fellow marketers. From grappling with data—including understanding and navigating data privacy regulations—to dealing with the various tools in the marketing stack, there's much to consider. Finding ways to ensure that marketing is demonstrating value to the business – by acquiring new prospects, and converting customers to drive revenue growth, and growing brand loyalty – represent just a sampling of marketers' responsibilities. The current pandemic that we're facing just adds to the complexity.

Reach me where I am

Consumers' expectations of brands grows continuously. The benchmark of what constitutes as "good" experience is not necessarily set by your competition in the industry, though. Instead, customers' interpretations of their interactions with your brand drives CX.

Given the current situation where many consumers are at home, and with more than 504 million active Internet users, mobile marketing is critical to marketers focused on growing their brands in India.

Mobile marketing takes many forms – including email, SMS, social media, and mobile app promotions. In India, a mobile-first strategy is required.

When so many customers are transacting via their mobile apps, it is more important than ever, that the transaction is able to be completed seamlessly. Cross-channel marketing as a strategy will soon be replaced by contextual marketing with targeted messaging based upon a specific action that a consumer takes as the future.

These all means that brands need more detailed information than ever before about who their customers are, and how they can help them. Insights from your marketing cloud platform on how the customer is progressing on their journey, identifying where they are struggling, fixing those struggles. and being able to retarget the customer to bring them back into the customer journey are all key components to improving the customer experience and conversion from a prospect to a customer.

Let's talk about data

According to the Gartner CMO Spend Survey (2019-2020), 26% of the average CMO's marketing budget is allocated to

MarTech; at the same time, marketing teams struggle to get more out of their marketing technology stack.

One of the key challenges marketers face is siloed data i.e. the data that marketers have in each of their tools are not connected, preventing them from getting a better view of the customer in order to drive a seamless customer experience. This situation will be exacerbated as more is added to the marketing ecosystem.

In the situation mentioned above, where brands need more detailed information than ever before about who their customers are, and how they can help them – breaking down the walls of siloed data, by making it simpler for data to be connected and by ensuring the marketing ecosystem is fully integrated is key.

This would enable brands to deliver more effective experiences wherever they are needed. A marketing cloud platform such as Acoustic's is useful, as our always-expanding network of technology partners makes it easy for marketers to add to their marketing ecosystem.

Data privacy

While customers want personalised experiences, these same customers do not want to share the personal information that would easily facilitate that personalised experience. With changing regulations on data privacy to control the collection, processing, storage, usage, transfer, protection, and disclosure of personal data, data privacy is top of mind for all marketers.

For a marketing technology provider such as Acoustic, giving marketers more control over their marketing data, to engage with their customers and create personalised experiences is our mantra. And with the

data hosted on a local data center, in India, it gives marketers proximity, scalability, and—more importantly—helps them meet privacy regulatory requirements, especially in highly regulated sectors such as banking and insurance.

Marketers need both efficiency and effectiveness in their tools and to demonstrate value to the business, and frankly, to do better marketing. With the growing importance of cloud for marketing, having control over your marketing data, breaking down the silos across the marketing ecosystem, and having insights about customers – to provide a great customer experience – will help marketers pivot during these challenging times.

Privacy + Personalization

How APAC brands can responsibly unlock the full value of first-party data

Matt Brocklehurst

Google APAC

Head of Apps, Partnerships and Platforms Marketing

First-party data has become one of the most powerful assets a marketer can have. It paints a clearer picture of consumer behavior, segments, and trends; it fuels tailored, timely messages; it's crucial to help measure increasingly fragmented consumer journeys with more accuracy.

The savviest marketers link all their relevant data sources, online or offline, to define their key audiences. However, changing regulations and policies have impacted the way brands can **effectively use their first-party data in a responsible, privacy-led way.** Consumers are also becoming more aware of how their data is being collected and used to drive relevance. According to Salesforce's **2019 State of the Connected Consumer report**, 65% of consumers in APAC believe that most companies aren't transparent about how they use their data, 45% don't believe that companies care about the security of their data.

As data becomes more critical to delivering effective digital marketing, marketers need to reflect, refocus, and reorganize their first-party data while ensuring consumers understand the benefits of sharing it.

To build on our latest study with Boston Consulting Group (BCG), "**Understanding the Path to Digital Marketing Maturity**,"

we dove into how APAC advertisers are responsibly using their data and what impact it has on their effectiveness and overall success.

New obstacles and opportunities with first-party data

Most of APAC brand leaders (87%) understand that first-party data is important — but they also recognize they're not making the most of it. More than half of the brands (56%) responded they're "below average," "average," or "average at best" at using their first-party data. Only 5% of brands believe they are using data to create more relevant experiences for their customers. With the amount of consumer touchpoints and advanced marketing technology available, APAC brands clearly recognize that there's still untapped value in first-party data.

A few key factors are preventing brand leaders from making more of an impact with their data. The top barriers are tech-related -- collecting, analyzing, and activating data sources from various platforms is a mammoth challenge, particularly for **older companies or companies with legacy systems** and multiple databases that complicate the transition or integration with

new technology. Up to 62% of brands cited the inability to link technologies (data silos) as the top barrier, while 46% of brands said they're inhibited by a general lack of understanding of data and how it can be used.

Breaking down silos, adopting new technology, and keeping up with the latest regulations is an ongoing journey, but the benefits are proven. Cloud solutions are a valuable resource; they're used by every brand at the multi-moment stage and 62% of brands at the connected level.

We found brands that used their first-party data in four specific cases — lifecycle marketing, personalization engine, cross-channel lead management, and audience identification — achieved higher impact than those that don't.

Read the **original article here** and download the full BCG report on **Think with Google here**.

What to keep in Mind when Investing in a MarTech Stack

Namrata Balwani

MMA India
MarTech Advisor

Digital and Customer Experience Consultant

Does this sound like a familiar scenario?

You're a marketer looking for technology solutions to increase the effectiveness of your campaigns or to better manage certain processes. You ask a few people you know in other companies for references to good tools. You then go ahead and decide on one of these tools. After implementing it, you find that there's a lot more that needs to be done to get the best out of the tool. Perhaps you simply did not need as advanced a system since data is not available to the depth that is needed. Or there's a key factor that you need to get your IT team to enable before you can fully utilize a functionality, but guess what, IT will take weeks to make that happen.

If you've nodded along, or have similar scenarios that you can think of, you are not alone. I don't believe that there is a standard tool with a definition of "good" or "best" when it comes to MarTech. What is the objective being fulfilled? What are the use cases? What sort of integrations are required? Is there a separate housing of golden records? What's the scale needed in terms of customers and platforms? What level of customisation is required? How often are the products updated? What level of support is provided? What kind of resources does the company have to manage the tool? There are a lot of questions to answer to find a solution that best fits a company's needs.

Apart from this, hurdles that companies face post-MarTech adoption often come down to not thinking through company culture and structure. Typically, I find these issues:

01 Lack of clear role differentiation between Marketing and IT so there's a struggle over who does what. MarTech tools are customer oriented so Marketing has a much clearer idea of how they are to be used while IT has more experience with integration & technical usage. No-code tools are taking away this some of these pain points.

02 Lack of people planning before taking on a tool so now there's no one who can dedicate themselves to understanding it well enough to use it strategically. It needs an understanding of business needs, not simply literal tool workflows.

03 Not budgeting for additional training or not working with the SaaS companies' specialists who can help get the best out of the tool. It's always better to budget for a tool and continued training in it. You don't want to be left with a situation where it's been months and it's still not being used right.

04 Decisions taken only at a senior management level and trickling down to the team when it's time to take action. Involving teams in the process gets them prepared for what the tool does and how they could use it.

Thinking through post-implementation scenarios is important as your conclusions will also influence the tool that you choose.

There is no one size fits all. You need the best tool after accounting for all variables in play. Simply asking for references to tools is not enough to take these decisions as every company is different. Choose wisely!

It's Over for the Third-party Cookie. What Now?

Projjol Banerjea

Zeotap
Founder and CPO

This year, Google dropped a bombshell on the advertising industry saying it would "phase out support" for third-party cookies on Chrome by 2022.

The Wall Street Journal and other outlets reported that the Association of National Advertisers and the American Association of Advertising Agencies (4A's) issued a statement that Google's decision could hurt digital businesses, consumers, and technological innovation. The statement specifically reads, "it would threaten to substantially disrupt much of the infrastructure of today's Internet without providing any viable alternative, and it may choke off the economic oxygen from advertising that startups and emerging companies need to survive."

So, what now for Digital Advertisers? Google's answer – go play in the Sandbox

Google has suggested its Privacy Sandbox - a set of web standards (web browser APIs)- as a replacement for cookies. The solution is supposed to still give advertisers the ability to target and measure campaigns while preserving user privacy. It represents a new way of sharing data over the internet in which an advertiser must call an API to get a certain cohort of users (not an individual user) who have performed a specific action. This process addresses the privacy problem, but it will also severely limit the ability to offer customization to a user or the 1:1 experience so many of us have come to expect from our favorite brands.

That's what everyone is worried about, but the good news is that Google is asking for feedback from the ecosystem.

The cookie-less future

Digital identity - or cross-channel and cross-device identity graphs - is critical to the future of advertising. As discussed in my previous article, MAIDs (mobile AdIDs) are inherently mobile-based and more sustainable and efficient identifiers than cookies - and will take center stage as the cookie-less world approaches. The industry now has more reason to improve on known in-app mobile challenges to drive more demand towards it - considering that 90% of a user's time on their smartphones/tablets is spent in apps (vs. 10% on web browsing).

Historically, the migration of marketing spend from web to in-app advertising hasn't kept pace. Google's announcement should help catalyze the industry to improve on these issues and finally drive the deserved demand to in-app advertising.

First-party offline is key

Brands will always have the need to identify their customers in their CRM database through hashed email/phone numbers with a digital identifier (ideally, mobile AdIDs, smart TV IDs, and other digital device identifiers). Therefore, identity linkages that originate from more permanent CRM data will still be a viable solution for advertisers.

There is no doubt that brands will hold tight to their offline first-party data as the cookie-less future becomes a reality. Why? Simply because emails and phone numbers will still be the most permanent identifiers that brands can rely on for digital re-identification.

The Universal ID

Some technology platforms that currently rely on cookies to resolve identity are already producing their universal, agnostic ID solutions to bypass the upcoming Google restrictions. A real universal ID used by every single player in the industry would provide the underlying plumbing for the marketing ecosystem in an ideal world. However, it's an ambitious goal for any company undertaking this path.

The race has already started so vendors only have two years remaining to develop their universal ID solution, win enough partners to become relevant in scale, and a feasible industry alternative (in fact selective Customer Intelligence platforms have started establishing such Ids.)

It's a new frontier for digital advertising and it's time for all parties to adapt — ideally before 2022 rolls around.

Elements of Growth and what to Watch Out for in MarTech 2021

Vishal Jacob

Wavemaker

groupm

Chief Digital Officer

Key areas of MarTech that may see an increase in adoption in time to come.

Content Management System

Marketers are competing with each other to capture consumers' attention who are constantly bombarded with advertisement on the websites they visits, apps they use etc. Brands can win this battle through dynamic, personalized engagement with visitors across all channels and devices without compromising on price. The process of building personalized content has become hassle free and very simple with Content Management System (CMS). Initially, the process was complex and it heavily depended on developers but now CMS facilitates delivery of digital content more quickly and with consistency. Organization with CMS tools have an advantage of providing consistent message across multiple touchpoints. Thus personalization seems to be the next logical step given many brands have achieved greatest return through personalized communication. The future of CMS is decoupled or headless CMS. A headless CMP allows marketers to deliver content across communication channels like websites, apps, IOT devices, bots, VR etc in any format through API integration and backend technology. A headless CMS provides higher level of security and a much better scalability.

Customer Data Platform

As the consumer journey was becoming more complex with an increasing number of touchpoints, marketers were having a hard time dealing with this large dispersed consumer data. With the advent of Consumer Data Platform (CDP), marketers can now gather this data and merge it to create a single and holistic view of the consumer and their behavior across touchpoints. CDPs have been transformed into a tool which can autonomously create rich customer profile by gathering data across various online and offline channels. One area we expect to see innovation is CDPs enabled to add additional API endpoints to automatically perform actions. It is likely that the entire tech stack would be huddled around CDP together in the cloud. CDPs which are presently generic are anticipated to become specialized, catering to niche sectors.

Programmatic advertisement

Advertisers have come a long way from the times when they had to manually scout for ad spaces to purchasing advertisement automatically through algorithms. Programmatic has made buying process faster and cheaper by minimizing human

intervention and by creating a marketplace for publishers and advertisers. Advertisers

are increasingly utilizing programmatic buying to deal with issues such as ad fraud and to improve the efficiency by managing frequency across platforms. This technology has been adopted by advertisers across the globe and it is set to dominate the digital space in future too. As programmatic technology is improving, the underlying inventory would widen to include channels such as connected TV, wearable devices, digital OOH etc.

Attribution tools

The consumer journey has become far more complex with increasing number of touchpoints making the job of attribution and measurement far more complex. The industry traditionally has taken a simplistic view of attribution, mainly last touch attribution. Simple attribution models based on clicks or rules such as last touch, first touch, are easy to use but these methods are subjective and have significant flaws. The industry is slowly moving towards sophisticated models such as Multitouch attribution and Market mix modelling which use advanced statistical techniques to measure attribution across channels. In future the attribution tools would be equipped with automatic Ad spends mechanism which will redistribute the budget automatically by optimizing ROI.

Artificial Intelligence, Machine Learning and Big Data

AI, ML and Big Data have become a part of every marketer's conversation nowadays. AI and ML has changed the way marketer's perform task such as data analysis, content management, customer management etc. These technologies have become an integral part of the emerging MarTech tool. AI powered chatbots are increasingly deployed

to interact with consumer in real time and improve customer experience. Marketers are analyzing huge data sets and building predictive analytics using AI technology. Thus AI and ML are poised to play a large role in marketing optimization and are considered to be essential features.

How MarTech is deployed in the consumer journey and the role of first, second and third party data

A MarTech stack is more like a MarTech matrix. Data flow is not linear or uni-directional. While a stack is visually a neat representation, in most cases, the truth is that it is more like a matrix because you already have some tools in play and a lot of the technology that you adopt has to integrate with what already exists.

For MarTech tools to be used effectively, it is important to understand the following:

1	What is the business objective?
2	What is the use case in the Customer Journey where gaps have been identified? (for e.g., sending emails is not a use case. It needs to be customer specific.)
3	Where is the customer data currently housed and what is the expectation after tool implementation?
4	What is the long term improvement in Customer Experience desired after the tool is implemented?
5	Which other tools and platforms are expected to integrate with this one?
6	Which team will use the tool and what time will they be given for training?

It is important to understand what the source of truth is i.e. what is the unified customer view based on the customer journey. If you understand your customers and their journey, you will identify the broken experiences and the gaps in the way that the data is housed.

The reason why such broken experiences exist is that different departments take different MarTech tools for different purposes, without thinking through the unified experience. The sales teams may use a tool for lead management, but the marketing teams use a siloed one for social media, another one for email marketing, another one for website data and the operations team use a siloed one for transactions.

Sometimes these decisions have been taken over years, at different stages of team evolution, and the end result is not pretty. Having a 360-customer view makes your marketing effective, rather than just noise. The purpose of using MarTech is to make more effective through data backed decisions and automate many use cases that are required to provide a holistic customer experience. Hence data management is of utmost importance as the tools can only be effective if the data input is correct.

There are different types of data – first party, second party and third party.

First party data is explained above. Second party data is essentially someone else's first party data. It comes directly from the company that owns it so it can enrich your first party data with additional information or help you reach a new audience that is not your typical customer, or it can also help to add scale to first party data. In a world where the cookie is crumbling, second party data

partnerships are increasingly important to have access to privacy compliant data.

Third party data is data acquired through aggregators and is available through data exchanges. It enables marketers to reach target audiences or augment first party data and is bought programmatically. But there is no transparency, so the quality of data and how it has been acquired can always be a concern. When it comes to deploying MarTech, having the right solutions for effective first party data management is crucial as second and third-party data both play a role in augmenting first party data.

MarTech is an enabler. The consumer needs and marketing strategy come first. So having tools does not make your marketing more effective. The right strategy and creative thinking, implemented with tools to enable real-time, data fueled decisions is how magic happens!

Interplay between 1st party data and 3rd party data

Companies give a lot of importance to 1st party data as it is a reliable source of consumer data, but the information collected is usually limited and not sufficient for targeting. This is where 3rd party data plays a crucial role. By enriching 1st party data with 3rd party data and external signals, brands can create models to reach more

prospective customers by predicting consumer behavior more accurately.

1 Enrich 1st party data to get insight into consumer behavior

The 1st party data has limited information which does not portray the entire picture. For ex, a brand might have only emails of the consumers which can be used for targeting,

but it does not tell much about other touchpoints, thus creating inefficiencies in the targeting process. If the brand wants to know about the location, age, browsing behavior, etc, 3rd party data comes in handy. The combination gives a holistic and wider targeting options to the brand across channels and devices. This is more relevant in COVID-19 times as consumer behavior is constantly changing.

2 Develop new audience

At times such as launch of a new product, brands need to reach to a wider audience than those possible through 1st party data. In such scenario, brands buy 3rd party data to create lookalike audience and scale up the reach.

Cookieless world and its implication

Google announced in Jan 2020 that it will stop sharing cookies by the end of next 2 years. A major part of the 3rd party data is in the form of cookies collected when a user surfs websites online. These 3rd party data is sold by publishers to DSPs which in turn charge advertisers for using the data. Thus the new norm of cookieless world is set to disrupt the supply chain which includes the publishers, DSPs and the advertisers.

How will this change impact various stakeholders?

1 Consumers

Ban on 3rd party data will reduce the extend of personalized communication, thus hampering the consumer experience. On the positive side, consumer would have a better privacy control of their data.

2 Advertisers

Short term effect on advertisers would be reduction in 3rd party cookies and challenges in navigating the cookieless consumer targeting process. Advertisers would need to deploy new strategies to overcome the deficit in consumer data.

3 Publishers and DSPs

Since publishers earn large revenue by sharing 3rd party data with DSPs, their business would get impacted in short term. This would require them to look for new mechanism to collect consumer data. Similar to publishers, DSP too be would severely impacted by the ban as these companies charge advertisers to use 3rd party data unlike Facebook and Google which offer audience data free of charge for targeting within the ecosystem. DSPs need to strengthen data collection capabilities and they should revisit existing marketing strategies to sell their product.

How solutions may evolve as we move to new era

While we move into cookieless world, tech giants such as Google, Facebook, Amazon would gravitate towards data clean room environment. In this data clean rooms, platforms would share aggregated rather than customer-level data with advertisers.

Clients can then merge their first party data with the aggregated platform data, match it and create a single holistic database of consumers. With this database clients can check for inconsistency and remove any duplicated reach while engaging with the signals they get on the platforms.

Facebook and Google offer aggregated audience data collected from platforms

such as Google search, Youtube, Facebook etc. Dearth of 3rd party data would bring these aggregators to the spotlight. Google's Ads Data Hub (ADH) can be a potential gainer out of the ban. ADH which is a data clean room lets advertisers run targeted ads without having direct access to users' personal details.

Though a majority of DSPs rely on cookies, some of the data collectors build database in transparent manner through mediums such as quizzes, survey forms etc. More of such aggregators should emerge in future.

GroupM Facebook Turn the Tide Playbook – Performance Marketing

Perhaps the most critical response to COVID-19 lies in the ability to navigate the new normal. One of the key pillars in that process is performance marketing.

Since consumer habits have shifted to accommodate D2C in their purchase habits, performance marketing expertise will be a game changer for the traditionally upper funnel focused agency ecosystem.

There are 6 performing marketing tools that can help brands win in the new normal.

#1 Fuel the funnel:

Gain more insights about the customer using pixels, offline conversions, custom audiences and mobile SDK and create purchase intent.

#2 Allow products to find people:

Connect with people where they spend their time (FB, Instagram and the audience network) and automatically promote your entire catalogue. Shopping on Instagram also allows you to reach new audiences.

#3 Collapse the path to purchase:

People expect businesses to provide fast, frictionless mobile experiences. 40% of people abandon a site if it doesn't load after 4 seconds and 49% of people say that they will purchase more on mobile if it were easier. Keeping this in mind, Facebook has designed ad formats that have 10x faster load time than standard mobile web.

#4 Stop thinking offline and online:

While e-commerce is growing, 92.2% of purchases are still made in store. However, digital interactions are increasingly influencing purchases – 56% of store purchases are influenced by digital interactions and 66% of those interactions are on mobile!

#5 Optimise for results:

Focus on real business outcomes and not on proxies. By understanding your customer value, you can find more profitable customers and Facebook's automated solutions will help you get more from your spend and efforts.

#6 Measure people, not cookies:

Cookies and clicks just don't give you the full picture.

Performance @ FB
Our 6 key principles

Action Points

1

Fuel the funnel

FB Pixel, SDK, Offline Conversion

1

Performance campaign objectives should not be different from your marketing/business objectives

2

Allow products to find people

Dynamic Ads, Collaborative Ads, Instagram Shopping

3

Collapse the path to purchase

Adapted creatives, Lead Ads, Messenger

2

Signals are key to drive optimal performance and hence enabling and tracking all relevant events on path-to-purchase are crucial

4

Stop thinking online & offline

Store traffic, Offline conversions

3

5

Optimize for results

LTV, Automatic Placements, CBO, Lowest Cost Bidding

Robust measurement of audience action is critical, set up and learn from measurement to keep correcting your path to purchase

6

Measure people not cookies

Measurement framework, Split Test, Lift Studies, Test & Learn, Attribution, MTA

3.4

Changing Distribution Models

Of Glaciers and Avalanches

Mausami Kar

motivator

Managing Director

Shifts happen, that is in the evolutionary nature of ideas, concepts and entities. The only question is that of pace; is it glacial - deliberate and unhurried or avalanche like - sudden and speedy. In the matter of consumer behaviour, for instance, we have examples of changes on both ends of this spectrum and also some that sit on various points across the gamut in between.

Certain catalysts can hasten or reduce this pace. A sector that has witnessed dramatic acceleration in recent times, nudged by the catalyst of the current pandemic is the marketer's distribution model, bringing focus to omni-channel marketing with spotlight on e-commerce. Hitherto, e-commerce adoption by marketers has been limited to some usual suspects like mobile phones or apparels categories. Significant proportion of marketers have treated e-commerce as just another channel in their distribution pipeline, albeit with the view of investing in the future, but not as the primary source of distribution. Physical distribution has been the focus pivoting trade-off decisions like own vs. multi-brand retail, kirana vs modern trade. e-commerce has been largely a playground for retailers with limited physical access or internet-fuelled brands. Consumption spikes have been skewed to marketplace initiated 'special days' and festive fervour aided with deep discounting.

Shift happened.

One virus later e-commerce adoption is through the roof cutting across categories and cornering varying ticket size of marketing spends. The critical point to note is that this is not an 'either-or' choice. The distribution model for mass marketers needs to be a continuum, with pure-play e-commerce on one end and physical in-store on the other. We are also finding a growing adoption of the "in-betweens" like 'curbside' and 'BOPIS' by both marketers and marketplaces. The uneven market access and unpredictable nature of the pandemic has given boost to hyperlocal e-commerce players and marketers have onboarded them with alacrity. The adoption of the digital mode of distribution one can argue has been the catalyst of the much awaited 'digital transformation' of enterprises in recent times.

Omni-channel presence and the associated marketing models are evolving with brands experimenting with in-housing, boutique outfits or multiple partners. Even for brands with significant e-commerce presence there is a scope for adopting a more wholistic view, given that e-commerce provides a critical link between the marketer's distribution model and the brand's digital presence.

The rise of the smart shopper, who navigates multiple channels before an actual purchase necessitates an omni-channel distribution model. A possible solution is consolidation with agencies that offer end-to-end services and the ability to connect online-offline.

Today, online-offline linkages are being provided by leading digital platforms and ad-tech suites of leading media agencies that can help retailers and marketers drive better consumer segmentation and personalisation at scale. In simple terms this means better consumer insights and superior business outcomes.

Consumers are embracing a digital or quasi-digital purchase journey and not recognizing that will be detrimental to brands that want to survive in the short term and flourish in the future. There are many advantages of e-commerce. For new marketers this means a quicker go-to-market option. For all marketers, existing or new, it can be more than a peg in the omni-channel marketing pipeline. It provides the opportunity for building brands, enhancing differentiation and telling meaningful stories to consumers. A parting thought, marketplaces are great to start the e-com journey, however adding the brand's own e-store at some point is critical. Insights, optimization and measurement through data would be the reward for this effort.

The steam engine and the spinning jenny ushered in the Industrial Revolution putting an end to the earlier era. The wheel of tech-revolution in distribution is turning fast. The choice is simple, glacial pace or avalanche speed.

Changing Distribution models - the Growth of E-commerce & Omni Channel Marketing

Suraj Dhillon

groupm

National Director - E-commerce

The onset of COVID-19 and the ensuing lockdowns brought with it a host of unprecedented challenges to industry. On one side, consumer priorities and purchase points underwent a drastic change. Access to offline stores and hygiene concerns accelerated online purchases. On the other side, due to one of the most stringent lockdowns worldwide, we saw traditional supply chains severely disrupted – be it sourcing, production, distribution or logistics. This dual impact saw categories with an increase in demand, struggling to make their products accessible, while categories with a significant drop in demand saw partners in the value chain grappling with liquidity under pressure.

These disruptions in supply chains saw industry changing gears quickly to ensure uninterrupted access to the end consumer. With mobility levels dropping across the board, companies started embracing "direct to home" routes to market, tying up with Hyperlocal apps, Food Aggregators and Last Mile Delivery Providers. Companies opened direct to consumer access through social commerce, portals & apps, and even housing society/RWA tie-ups via community management apps like MyGate. Even up the value chain, E-B2B firms and B2B delivery providers ensured retailers were well stocked. The need to embrace change was on the retailer's end as well, with a spurt in the digitization of Kirana's in cities. The number of retailers actively using a PoS terminal at their store doubled, and kirana stores were more open to partnering with online delivery platforms and purchasing from E-B2B firms. We have had significant movement on existing players as well as major entrants and announcements in the form of Jiomart's hybrid model and Flipkart.

While some of these may be transient measures, what the extended period of the pandemic has made certain though, was that the shift in consumer behavior and purchase patterns online is here to stay and further accelerate. E-Grocery value penetration doubled, and we saw new as well as existing consumers moving quickly to full basket purchases and sticking with it, well after grocery mobility came close to pre-COVID-19 levels. We saw e-commerce platforms and food delivery platforms expanding operations in new geographies and categories. Jiomart, with its hybrid model, brings forth the possibility of India's smaller towns opening up to online grocery purchases.

However, COVID-19 does not mark the end of 'brick and mortar' business models. Once fears of the pandemic subside, people will return to offline purchases, especially in categories

where there is a need to experience the product before purchase. While e-commerce will grow rapidly to become a 100 Billion USD industry by 2025, penetration levels will still remain in single digits and the bulk of purchases would still be happening offline. Alternatively, consumers are spending more time online researching products before a purchase and would growingly get accustomed to the natural advantages of assortment and convenience that e-commerce offers. The interaction and distinction between research and purchase online and offline is already blurring with almost half of urban internet users researching online but purchasing offline and vice versa.

It is here that we see the importance of an omni-channel approach by creating a cohesive and unified customer experience, be it online or offline. In addition to a seamless transition in experience that reduces friction for the consumer, omnichannel capabilities can lead to optimized inventory management, efficient & effective fulfillment, and even remote selling.

With these changes in play, there are three key areas where brands can start to ensure they stay abreast with these accelerating trends:-

02 Understand your e-commerce Maturity & build your presence

It is important to understand where you stand on your e-commerce maturity from the perspectives of operational readiness, retail readiness, effective & efficient acceleration of demand, and ability to measure, optimize and build momentum. Hyperlocalized & personalized targeting, engagement, and omnichannel attribution help in improving effectiveness of messaging and efficiency in marketing spends.

03 Conduct a comprehensive review of Omnichannel capabilities

It is important to assess the technological capability & competency of people, partnerships, and marketing & channel services. This would help in arriving at an understanding of one's maturity and a clear strategy to build the necessary capabilities & competencies.

01 Re-Analyze your brand's path to purchase

The starting point is to re-analyze your consumers path to purchase and understand the new pre purchase and purchase touchpoint map. Brands need to understand the specific friction points in these paths and look at omni channel approaches to solve these problems.

Will 2020 be a Boon for the Track Pant Industry?

That and other lessons for Omni channel retailers.

Rajat Tuli

USTRAA

Co-founder

2020 will go down in history as one of the most interesting years in the life span of people who are in the working age group. Not to say that it did not impact the kids at school or people who have retired. But for the working population it fundamentally changed things that may not go back to the old way again. For instance, some organisations have already offered work from home for life to their employees! This is huge. It also makes us want to get into the track pant industry, but we will wait till a few other big companies to offer permanent WFH to their employees.

At Ustraa we are a digital first brand which is a polite way of saying more of our sales come from online than offline. We have been at the side lines, watching how now everyone wants to go online. The signs were already there what 2020 did was push everyone to change their shopping habits faster than any other force could. However, we do need to thank the smart phone revolution and the internet connectivity as they played a key role in enabling the online sales revolution. Without these two we would still be social distancing outside supermarkets. But have things changed forever? There is enough data that shows currency usage got back to pre-demonetisation levels once the dust had settled. So once the COVID-19 scare is over and the masks come off will people remain loyal to digital? I am not entirely sure. There may be a generation growing up somewhere which will do everything online, but they are not customers yet. For the present set of people as things go back to normal so will their old ways. What these times have taught us is that it is a bad idea to completely hedge our bets on one channel.

You will have to chase customers everywhere. As an organisation if you ask us what the one big change is, we are focussing towards post the COVID-19 I would say increasing our presence offline. And our focus is the kirana store not modern trade. The belief in the tried and trusted neighbourhood kirana came back and by all indications the kirana stores are not going anywhere. Using Tech and modern payment methods the kirana stores have upgraded and with rise of e-distributors last mile data which has always been a pain point is now easier to get. The Modern Trade is a different matter altogether and will take a long time to recover. As an organisation we never warmed to MT. The online while it is growing (tempted to use the word exponentially but that would be incorrect) has its own share of problems, the biggest among them is the menace of cash on delivery which is unique to the Indian eco

system. That and the need to cover every serviceable pin code in a reasonable time is the greatest challenge that the online business faces.

To sum it up I would say if you are strong offline player create a separate team and run your online operations separate from the main sales force. Let them not interact except to fight about how online is offering discounts more than the trade margins permit in offline. We do this daily. Online first brands like ours need to ramp up their offline capabilities. There is no other way to grow. One needs a strong presence in both to build a big business.

3.5

Marketing becomes more Accountable

With Greater Responsibility should come Greater Authority

Anand Chakravarty

essence

Managing Director, India

Should marketing be held responsible for business results or return on marketing investments?

Ofcourse it should!

And has marketing and marketing related investments been accountable in the past?

Ofcourse it has!

But the yardstick of accountability has shifted from primarily brand health measures to a larger focus on business impact measures. And this has perhaps never been more true than today – in a COVID-19 scenario.

It's not very uncommon, especially today, for briefs to begin with a brand objective – awareness, drive consideration etc., but eventually, by the time strategy is done, the client expectations are business outcomes or the ask for a clear measurement framework to justify the media investment.

By no means am I suggesting that marketing should be less accountable. However, that **accountability** needs to also come with an increase in authority within the organization. E.g. If conversion within an App Ecosystem is the marketing KPI, but Customer Experience is led by another team, beyond a point can marketing be held responsible for low conversions or engagement (often interpreted as poor quality acquisitions because of

incorrect targeting). Give marketing teams more authority and by all means then hold them accountable.

And this works both ways. Marketing teams have also been known to be comfortable operating in silos. In a world of increased Martech, Automation, Enterprise Solutions etc., within organizations, there is increased specialization to manage customers through and beyond acquisition. Marketing teams cannot deliver on accountable measures, unless they foster and encourage a **collaborative approach** to building the business.

And finally, on, **Measuring Accountability**. It would be unfair to assume that all organizations can use a similar way of measuring and evaluating marketing accountability. This is especially true in an increasingly digital media ecosystem. The assumption that because digital investments can be tracked more effectively so all digital investments need to be measured against business objectives, is flawed. The ability to do this in a meaningful way, differs significantly between different categories – E.g. For a Direct to Consumer brand it is relatively easier to do, as compared to a retail brand. Having a fair & meaningful measure of accountability is equally important to create a marketing team that is truly and willingly accountable.

Shifting of Focus to ROI; Changing Metrics in the Aftermath of COVID-19

Preeti Mascarenhas

MINDSHARE
India
Head of Strategy and Product

Return of ROI

> "It was the best of times, it was the worst of times… it was the spring of hope, it was the winter of despair…"
>
> *- Charles Dickens*

How is the marketing landscape going to look after COVID-19? Should businesses go back to following the same strategies that worked for them in the past, or have we entered into whole new territory?

Realistically, both of those assessments are correct. Following marketing best practices is still important, yet much has changed about what businesses should prioritize and focus on. Arguably the most important tactic that will help businesses navigate the post-pandemic ecosystem is **MONITORING MARKETING ROI**

While a lot has been said and discussed around Returns on Investment, the focus has never been so much on short-term revenue and measuring Returns on Investment. Classic debate of marketing objectives – that of brand building vs. short term sustenance have re-emerged. On one hand, the new-age companies are leading the battle of economic resurgence, and on another, the classical marketing models are being revisited by decade old brands – shifting the narrative towards a more ROI driven approach.

A phase of business volatility; and the role of Promotions

Out of the 4 P's of marketing, never has been the role of 'Promotions' so accentuated. Of the many moods captured during the pandemic, these were the times when brand loyalties were tested…consumer needs got re-evaluated. To quote frugality was the most dominating one. As per Prof. Pingali Venugopal, consumers view products in shades of 'White' (i.e. required) or 'Black' (i.e. not required). Hierarchy of needs modified:

Consumer choices depended on multiple factors:

● Promotions offered by brand

● Brand's assortment levels – if I need smaller SKU, I will choose a brand that provides me smaller SKU

Often times, variety of assortment + the promos doled out by brands led to brand purchase. It further laid emphasis on the measuring the ROI. Is it because I was well known that I got selected? Or was it the discounts I offered as a brand? Or was it the assortment levels which I provided to the customers? NO – it was all the 3; more so the last two factors.

Returns are non-linear; and more Online – a segue into E-com way of life

Online channels emerged as a blessing in disguise for the 'Locked' Indian. During this period, India saw the highest spike in E-com adoptions.

	Household Care (%)	Personal Care (%)	Fresh Food (%)
China	19	22	7
India	33	44	31
Brazil	4	5	10
Indonesia	18	33	12
Thailand	9	11	-16
Philippines	-6	-7	-12

	Packaged Food (%)	Health Supplements (%)
China	9	7
India	34	43
Brazil	2	3
Indonesia	13	47
Thailand	3	26
Philippines	-17	14

The lockdown jumpstarted digital shopping adoption for traditional offline shoppers across categories

Data showing Categories purchased 1st time online in past 30 days

Food & Beverages	Clothing & Accessories	Cosmetics & Personal Care Products	Electronics	OTC Pharmacueticals	Services
24%	20%	18%	15%	26%	17%

■ I Purchased it online for the first time this month

Source: Kantar Barometer report

Most purchases were made from Tier 3 or below cities

74% — Tier 3 and Below
10% — Metro/Tier1
16% — Tier 2

■ Tier 3 and Below ■ Metro/Tier1 ■ Tier 2

Source: Amazon sales

Indians were not only researching online, they were purchasing online and sharing their reviews online as well **(classic ROPOSO model).** Thereby, influencing more people and extending their Lifetime Value for the brand in the process.

This period also saw a rise in Hyperlocal and Online B2B solution providers. Even with malls re-opening, people are still preferring e-commerce as the go to place for shopping.

e-commerce Shoppers

Unlock 2.0 ■ Unlock 3.0 ■

This change in behaviour calls for bespoke approach to calculate ROI:

1. Offline to Online attribution – Offline advertisement to gauge Online sales

2. Direct attribution by accounting for the buzz created – Till such time, all ROI models accounted for Sales to be the end metric; it changes now – with after-sale buzz from sharing becomes a critical metric. Each customer is a micro-influencer today. More and more brands will vie for a Share of Buzz in coming days.

Power of NOW – how brands helped customers navigate troubled times

ROI for brands will depend on how they communicated, led purposefulness, were utilitarian in approach and by being all these, helped the common man to pass through their troubled times during the pandemic. Brands which drove purpose created a meaningful differentiation for themselves for days to come – which will have a stronger impact on their returns

As the repercussion of the pandemic continues to unfold, preferences among

consumer groups are changing week-to-week, and almost day-to-day. The best way to ensure that marketing message is still relevant in the long run is by constantly and maniacally monitoring performance. It is claimed that most of Indian consumers are interested in reading or hearing news that is not related to the pandemic. Many also say they want to be inspired by brands so they can be hopeful about the future. Any brand that caters to these changing sentiments is pivoting itself towards a better ROI driven future

ROI also depends on consumer experience

Why does one prefer one platform over another, despite the fact that same items are available on both platform? It all depends on its UI, UX in today's parlance – how seamlessly they were able to connect, conduct in app search, select, log-in, and checkout after payment. The kind of in-app tracking mechanism available determined how rooted an anxious Indian consumer would be to that platform.

There is an additional emphasis on safety and convenience during these times. After sale service and fleetfooted nature of the customer service was essential for all Indians

Dialing up the health quotient

Change in narrative – From Brand > To Product > To Ingredients

It is not about what the product is; it is about what the product is made of. During the pandemic, a lot was talked about with respect to what the ingredients are in a product. The more granular the product went into its ingredients, the more it drove reasons to believe – thereby returning higher ROI.

Aatmanirbhar Bharat

Another important development during the COVID-19 period was Government's rally for products Made in India.

The Road Ahead

5 Pillars of Self-Reliant India

Economy
Quantum jumps, not incremental changes

Infrastructure
One that represents modern India

System
Technology driven

Demography
Vibrant demography of the largest democracy

Demand
Full utilisation of power of demand and supply

Bold Reforms – Need of the Hour

- Supply Chain reforms for Agriculture
- Rational Tax System
- Simple and Clear Laws
- Capable Human Resource
- Strong Financial System

Indians were seen boycotting Chinese goods and apps, and adopting brands which were Indian. This was followed by government's ban of Chinese apps – which say a rise of home-made apps like Elyments, Roposo, Chingari, Khatabook.com, etc. Indians will be wary of using any Chinese goods or services in post COVID-19 world also, and being Indian will have ramifications on the ROI for the brand

As Stephen Hawkins once said, **"Intelligence is the ability to adapt to change...",** brands that will garner more ROI are the ones who are fleetfooted, agile and who can adapt to the changing landscape and segue better in the post-COVID-19 era

3 Things marketers should do in terms of investing in MROI

1

Frugality redefines the norms of value in COVID-19 times and hence the role of promotions will play a key role in delivering similar promise at pocket friendly proposition

2

ROPOSO and the changing p2p makes it imperative for marketers to recraft omnichannel and social commerce planning for next few months

3

Power of Now makes it necessary to relook at 4Ps with new lens of place of manufacturing, purpose of brand and product innovation that will demonstrate the agility in marketing.

MMA Measurement POV - Outcome based Planning

MMA has launched a disruptive Outcomes-Based Planning (OBP) research initiative, refuting reach-based planning models that have dominated marketing during the age of mass media. As part of this research, a new Outcomes-Based Planning (OBP) growth framework has been developed in partnership with analytics firm Neustar, representing a major step forward in the nearly decade-long quest of MMA and its leadership to prove how to best drive growth and continually build marketing productivity. Outcomes-Based Planning was crafted using scientifically verifiable measurement and research techniques while also offering a pragmatic basis for execution in a digital - and mobile-first world.

OBP starts from the simple thesis that, for any given brand, there is a sizeable group of consumers who are more likely to respond to and be impacted by the brand's advertising. The ground-breaking new research offers scientific validation and a practical approach to identify and target this group and to achieve up to 50% higher ROAS (Return on Advertising Spend), compared to decades-old reach-based plans that overlook the importance of how consumers respond differently to advertising.

The analysis estimates that this most responsive group of consumers falls somewhere in the middle in terms of their probability to buy a brand—between those most likely to buy and those most unlikely to buy regardless of any exposure to advertising. Referred to as the "moveable middle", MMA and Neustar's analysis shows that this group in between those two ends can be estimated with 99% accuracy for each brand—using the Beta

distribution—and, most importantly, this group can be converted to buyers with up to five times higher ROAS compared to the less responsive groups.

The key takeaways of this analysis show that OBP is a framework uniquely positioned to maximize marketing productivity, present and future:

1

Outcomes-Based Planning is mathematically proven to overperform reach-based planning by at least 50% in terms of campaign ROAS;

2

It can outperform reach-based planning even when considering the much higher advertising costs of targeting;

3

Importantly, OPB also provides a profitable "way in" to winning over non-buyers and building towards the future of the brand. The reason for that is that by targeting the "movable middle", brands can identify the most responsive non-buyers—in other words, consumers who are buyer "lookalikes" and have a much higher ROAS (up to three times).

New Outcomes-Based Planning (OBP) model identifies the mechanics that drive growth and proves how to generate 50+% increases in ROAS and MMA is enabling inroads to take this POV to marketers and enable them to maximise on the ROI by applying the same.

Brand as Performance initiative by MMA enabling a balanced view on reach vs targeting

Digital marketing has ushered in an obsession with immediate measures and short-term focus, making it increasingly difficult to justify an allocation of marketing dollars to longer-term brand-building. Even when marketers judge advertising by its ability to lift brand KPIs, there is no solid evidence of the performance value of these metrics over time: Does brand lift translate into business outcomes and how sustainable is it?

Similar to the above, marketers are faced with contradicting information in other decision areas, particularly in respect to the balance between reach and targeting in their media.

Existing growth frameworks still advise marketers to solve for maximum reach with their media buys, thereby avoiding targeting altogether. Still, marketers know that this runs counter to documented evidence that targeting existing heavy and medium buyers can lead to high ROAS.

At this time, it is unclear and unproven what the right balance is on these factors (brand vs performance, reach vs targeting) so marketers are unsure how to best balance their media resources for the present and the future of the brand.

MMA is enabling a working council with below objectives :

01 To introduce a comprehensive new growth framework for maximizing multi-year returns.

02 To provide scientific market research evidence and guide marketers to achieve the right balance on two important dimensions:

- Balancing brand vs. performance marketing initiatives
- Balancing media strategies on reach vs. targeting

03 To map and assess key media tactics in relation to their brand-building vs. immediate performance benefits.

The need for a comprehensive growth framework has never been greater for brands

GroupM Facebook Turn the Tide Playbook – Media Mix

More than anything else, COVID-19 has enforced upon us the behavior of navigating the new normal. One of the key pillars in that process is the media mix.

As digital influence in urban consumers has risen up to ~70%, media mix models must be re-aligned keeping in mind the current reality.

The two guiding principles in this sphere are 1) reach and cost and 2) metrics that matter

#1 Evaluate reach and cost with cross media method:

Accounting for pre-disposition and other influence avoids over-claim while using a measure of OTS, Facebook assess the exposure of media on the brand. This in turn, helps in understanding how a campaign has performed across media channels.

ACCOUNTING FOR PREDISPOSITION & OTHER INFLUENCES AVOIDS OVER - CLAIM	USING A MEASURE OF OTS WE ASSESS THE EXPOSURE OF MEDIA ON THE BRAND	UNDERSTANDING HOW THE CAMPAIGN PERFORMS ACROSS MEDIA CHANNELS
Campaign	Facebook	How did my campaign perform?
Ongoing influences	Print	What role did each channel play?
Underlying involvement	TV	What was their cost efficiency in delivering uplifts?

CrossMedia is a survey-based approach that quantifies the impact of multi-media campaigns (paid, owned, earned or shared) on key brand metrics and provides actionable insights to help improve media planning.

#2 Define and measure metrics that matter:

The current media mix in being measured on input metrics like views and clicks; it should be measured on output metrics like brand and sales instead. The right metric should be 1) a metric that matters 2) is vertical/industry agnostic and 3) works for both long and short term business plans. Brand metrics can include ad recall, brand awareness, message/campaign awareness and consideration & purchase intent while sales metrics can include ROAS < sales lifts and other surrogates like bookings, showroom walk-ins etc.

Tools available to measure output metrics include:

1. Facebook Brand Lift

Measures awareness, consideration and conversion for a ful-funnel view

2. Cross Media

Measures single source campaign GRPs, reach and frequency with duplication/ overlaps. OTS based regression modelling then isolates the campaign impact on brand and the contribution by each media and media budget optimization is achieved through diminishing return curves for frequency thresholds and budget relocation.

Tools available to measure output metrics

Solution	Provider	Platform measured	Method	Outcome metric
Facebook Brand Lift	Facebook, Nielsen, Milward brown	Facebook	Control exposed Lift	Brand Metrics
Cross Media	Milward Brown	All Offline and Digital	Regression Based	Brand Metrics
Media Mix Modelling	Nielsen, Milward Brown, Cartesian Consulting, Rainman Consulting, Agencies (x,y,z)	All Offline and Digital	Regression Based	Sales, or other metrics of interest (e.g. traffic)
Custom Mix Model	Nielsen	All Offline and Digital	Regression Based	CPG Sales (select categories)
Sales Lift	Nielsen	One channel at a time (online or offline)	Regression Based	Sales
Matched Market tests	Nielsen	One channel at a time (online or offline)	Control exposed Lift	Sales

Cross Media study

Media Coverage

Single source campaign GRPs

§ Reach & Frequency
§ Duplication/ overlaps

Total Digital

8%

Incremental Reach% on TV

Facebook

Other Digital

7%

Print

6%

4%

Radio

3%

OOH

3%

100 + multimedia India campaigns analysed across product verticals; 1000+ robust sample collected through primary research for each study

Impact on brand

OTS based (not recall) Regression modeling isolates –

§ Campaign impact on brand
§ Contribution by each media

15%	5%	40%
24%	10%	31%
36%	15%	26%
		3%

- ● Word of mouth
- ● PR
- ● POS
- ○ Copyright Impact
- ○ Ongoing influences
- ○ Underlying Involvement
- ● TV
- ● Print
- ● Online
- ● Outdoor

Media Budget optimization

Basis media efficiencies and effectiveness

§ Diminishing return curves are prepared to suggest frequency thresholds
§ And budget relocation

Planned frequency -16
ceiling : 12-14

Media 1

Wk 1 Wk 2 Wk 3 Wk 4 Wk 5 Wk 6 Wk 7 Wk 8 Wk 9 Wk 10 Wk 11

Salience   — % GRP wastage   ● % of TG overexposed

-10% + +20% = +10% uplift on band KPI

Media 1   Media 2

17% Savings on investment

Cross Media study

Campaign Impact
Isolates media impact and Put all media (even low reach) on same playing field in terms of ability to impact the brand.

On-going Influences
Estimate the impact of non   - advertising factors

Underlying Involvement
Important to understand differences in how people feel about the brand   before the advertising hits.

| 15% |
| 24% |
| 36% |

Word of mouth
PR
POS

| 5% |
| 10% |
| 15% |

Media contribution
On going influences
Latent predisposition

| 40% |
| 31% |
| 26% |
| 3% |

TV
Print
Online
Outdoor

Cross Media Study

Shows overall campaign impact

Total Score

SPONTANEOUS AWARENESS	40.8% 2.5% **5.7%**	49% 3.7%
*IMAGERY	60.8% 7.7% **4.0%**	72% 4.4%
CONSIDERATION TB	14.6% 12.0% **1.7%**	28% 3.0%

* Avg of all Imagery Statements

■ Underlying Involvement   ■ Ongoing Influences   ■ Campaign Impact

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3. Media Mix Modelling

4. Custom Mix Model

Media Mix Modelling and Custom Mix Modelling

Align sales with media, promotional, and non-marketing factors ⇢

SALES
TV
FACEBOOK
OTHER DIGITAL

▼

Statistically attribute results to activities corresponding to peaks and dips ⇢

■ Base   ■ TV   ■ Facebook   ■ Other Digital   ■ Print

24
18
12
6
0

▼ POINT IN TIME SNAPSHOT TO DECOMPOSE KPI   ▼ CALCULATE MARKETING ROI

Analyze performance ⇢

■ Base
■ TV
■ Facebook
■ Other Digital
■ Print

5%
7%
8%
10%
70%

FACEBOOK 5
OTHER DIGITAL 4
TV 3
Print 2
Radio 1
CINEMA 0.5

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5. Sales Lift,

and

6. Match Market Tests

Action points:

1	Evolve a media mix model for each brand based on tested methodologies of reach/cost efficiency and output metrics
2	Focus on output metrics only

AppsFlyer-Facebook Report Provides Strong Retention Playbook to Sustain Business Momentum for E-commerce

The pandemic has accelerated e-commerce adoption like never before, and the app marketers need to relook at their marketing strategies in order to sustain the growth this festive season and beyond. The AppsFlyer and Facebook report sheds light on key themes for this festive season, based on the trends in 2020, and taking cues from last year's festive season. Brands across Shopping and Food & Drink verticals are expected to gain from the boom in digital adoption and the expanded mobile market. Insights from the report reveal that social media is a massive opportunity for brands as the festive season approaches. The report analysed 500 apps and 720 million installs over a specified period to gauge the shift in customers' online shopping behaviour and to help app marketers unlock growth this festive season and beyond.

The key messages from the report are as follows:

1	Building a strong consumer acquisition and retention playbook with profitability and Life-Time-Value at its core.
2	Measuring incrementality for each marketing dollar spent towards the acquisition and retention goals.
3	Sustaining the media momentum, post the peak Diwali season as consumers continue to engage and shop

Key findings of the AppsFlyer report:

Acquire consumers efficiently

1. While pandemic drove a large number of organic installs initially, marketers should continue to drive the acquisition momentum with a stronger LTV and profitability lens this festive and beyond.

2. Paid media acquisition improved revenues by 1.5X in Food & Drink category, and 1.2X for e-commerce category vs organic installs (Jan-Aug 2020). It's critical to drive paid media initiatives to grow revenues

Retargeting boosts revenues

01 Building a strong retargeting playbook to drive higher frequency and ARPU will help accelerate the path towards profitability.

02 Retargeting improved ARPUs by **25%** (Sep-Nov 2019). Retargeting campaigns improved 30day retention by **33%** for e-commerce and Food/Drink categories. Retargeting improved conversions by **31%** in Q3-20 as compared to Q3-19

Sustain advertising to continue the growth momentum

01

The Average Revenue Per Paying User (ARPPUs) is growing month-on-month (May-Sep'20 trend). Indicates revival in consumer spending, a positive indicator for the festive season and beyond

02

In-app revenues increased by **1.6X** during post-Diwali (Nov 6-27'2019) vs Diwali week, and the paid installs increased by **1.3X** during post-Diwali vs Diwali week. Brands need to sustain advertising post Diwali, as the shopping season continues.

The report comes at a time when brands need guidance to navigate the new normal and sustain business continuity even beyond the festive season. With digital making inroads into all walks of life amid the pandemic, brands must amp up their marketing strategy to drive more conversions and retain users on the verge of making the first online purchase. The complete report can be downloaded here.

The Importance of Measurement and Accountability to Deliver Better Marketing Outcomes

Elizabeth Venkataraman

Kotak Mahindra Bank Ltd.

Joint President Consumer, Commercial and Wealth Marketing

Marketing & Accountability

For a considerable time now, marketing has evolved into a strategic function that has the power to listen to and converse with customers. Today, these conversations have a direct relation to the bottom line and hence, the pivotal responsibility that comes with it – accountability. From the representative TV ratings to sharp & precise digital programmatic measurements, the need for ROI examination has increased with the rising investments in the function. Measurement helps to understand the effectiveness of marketing investments, not only from the point of view of impact but also understanding the mediums that resonate the most with the target audience.

Today, we have real-time data that can be analysed to see how effective a particular marketing campaign or strategy is. But even before that, it is imperative to first understand the specific questions that need to be answered, whether it is market share, customer value, revenue, cost of acquisition or lifetime value. A campaign should not be initiated without setting precise objectives.

Learning & Applying

In banking, our aim is to develop and maintain a long and healthy relationship through the entire lifecycle of the customer. For e.g. when we launched Kotak 811 in 2017, we implemented a digitally skewed campaign, which was later amplified through an integrated media plan. The idea behind the strategy was to create awareness and enable consumers to avail the product simultaneously.

An extensive digital marketing campaign including social media, programmatic, OTT, e-mail marketing was executed. This made it essential to keep track of customer touchpoints & the customer journey. Correctly placed calls-to-action helped understand the traffic from a channel. The surround created through traditional media post the digital launch helped intensify the message but the real-time results from the digital campaign helped us in understanding customer segmentation, geography-wise response, creative affinity and more.

Accountable to the times

Today, accountability and responsibility have become even more important. COVID-19 has adversely affected many businesses; however, as a brand one must continue to ensure steady communication with customers. Marketers need to be more cognizant of budgets, to ensure that every marketing penny counts. This makes it imperative for marketing teams to be more accountable to their business than ever before.

With the world moving rapidly to digital, a close watch on real-time campaign data can help make timely adjustments to allocate the money effectively from one format to another, or even withdraw to avoid wasting budgets in feeble formats. ROI analysis has become a key priority to design leaner and more effective marketing campaigns.

Mindful Accountability

Measuring marketing effectiveness is a path that needs to be treaded carefully. Marketing teams need to obviously walk-the-talk here, but if they don't handle it carefully, they can derail business effort.

A marketer has a plethora of data sources available today and many platforms may capture the same data point in a different way, sometimes making it a futile apples-to-oranges comparison. Therefore, judiciously applying the right sources and measurements to derive sharp insights is important. But this is often overlooked.

Finally...

With great budgets, comes great accountability. As marketers, we should use it as a tool for targeted campaigns with learnings for today and tomorrow. Start with setting the right objectives, followed by the applicable metrics and processes, topped with the right medium and then analyse the results.

Disclaimer: The views expressed in the article are personal.

The Growing Importance of Data Analytics in Pandemic Era Marketing

Kunal Aman

SAS

Head – Marketing and Communications, India

Even prior to COVID-19 taking the world by storm, marketers across the world acknowledged the importance of data and analytics as a vital element in their overall MarTech ecosystem. However, adoption was slow as marketing leaders had to overcome several organizational and cultural hurdles to make progress happen.

Today, time is a luxury we don't have. With businesses operating in extreme uncertainty, consumers behavior shifting rapidly and marketing going exclusively digital, analytics with its problem-solving and predictive prowess, is now an essential tool to navigate these unchartered waters.

By virtue of working with an analytics leader, I , have had the privilege of having a ring side view of experiencing how quickly organizations both Public and Private —even those with limited analytics experience, have looked up to analytics to adjust their sales, rethink marketing strategies and adopt novel approaches. Here are 6 ways that I have seen some of the smartest organizations leverage analytics over the last few months:

1. Prioritizing Scenario planning

As Marketers dealt with extreme uncertainty and hurriedly shifted marketing mixes, one of the top operational steps by forward looking organizations was to plan for multiple scenarios. Scenario Planning originally arose out of military planning techniques A very common & effective way the military predicts & prepares for alternate scenarios is to run war simulations. Its an effective tool for corporates too. And a critical ingredient for effectively planning scenarios, whether its corporates or military is data. For marketers, data & accompanying analytics offer a portal to tap into current consumer behavioral trends, allows for simulation analysis that avoids costly errors in decision making and aids in charting a way forward in an agile manner in dynamic environments.

2. Tracking & Responding to Changing Customer Preferences

The last few intense months of living have exposed Marketers to significant shifts in consumer habits – for example the sharp focus on safety and zero touch e-commerce, shifts toward remote learning and streaming services and high consumption of ready to eat categories. In fact, our recent research conducted across 4000 consumers, executives, marketers and technology professionals, has indicated that 62 percent

of consumers actually prefer to order online & 67 percent of consumers say they would talk with a doctor or counselor online if they could avoid having to go to a doctor's clinic. These behavioral shifts have meant definitive changes for sectors, right from Retail to Education to Healthcare. Which of these are temporary and which ones become permanent remains to be seen. Analytics can play a key role not only in tracking consumer preferences and behaviors over time, but also in enabling a rapid response to such opportunities or threats.

3. Personalizing customer interactions

From finding out about product to purchasing it - consumers no longer had a linear journey even in pre pandemic times. With customer journeys now going completely digital, marketers need to capture the new wave of information coming through digital channels to not just understand newer journeys but also better personalize messages and offers. Adding Analytical firepower to your marketing stack can transform digital data into predictive, customer-focused insight. The best brands are using such insights to guide customer interactions, making contextual decisions in real time that result in highly personalized, relevant messages that set their brand apart in a crowded and noisy market.

4. Improving Cross Channel Visibility & Attribution

One of the biggest advantages of data driven marketing is greater visibility. Web visits, email, SMS, display ads, virtual events & social media touchpoints all combine to create a complex web of interactions which propel your customer from awareness to the final purchase. Add to that, multiple platforms and devices & visibility into channel performance & attributions can get significantly harder to achieve.

Sophisticated analytical packages enable marketers to gather not just channel-level data but also detailed customer-level digital data points across apps and the web to confidently answer questions such as:

• Which online interactions most successfully attracted customers that proved loyal and highly profitable?

• Did that promotional campaign cause an uplift in sales, or was it just a coincidence?

• How is each channel performing and what was its contribution during a campaign?

• Which customers prefer to research online and then purchase offline?

What this also allows you to do is to analyze the impact and accurately attribute the business value of marketing interactions across channels to help make the best marketing investment decisions.

5. Gaining a Unified view of customers

Customers have dual expectations of businesses: Understand me as an individual and protect my privacy, and yet, treat me differently basis where I am and who I am. In fact, our study reveals that 72 % of brands believe consumers will accept increased collection of personal data & a similar number (73%) agree the future of CX is in real-time data collection and analysis. Understanding your customers as people and treating them differently is possible only if you have a 360-degree view which needs stitching disparate data sources – something that marketing analytics suites excel at.

6. Spending Marketing Dollars Wisely

In uncertain times, scrutiny in Marketing tends to become intense and the pressure on budgets increase exponentially. With easy to use dashboards and strong reporting, Marketers can use data to report on performance of campaigns and programs, which allows for a clear and confident discussions with management. Predictive modeling & Forecasting allows marketers to project to enable forward-looking trends and expected outcomes.

So, instead of quite simply axing marketing budgets, marketers can advocate a scalpel approach by selecting programs that may generate the least returns. Having this sort of information at hand lends credibility to marketing and could go a long way in conversations with our friends in finance.

In conclusion, the pandemic has shown that rapid change is both possible and critical for business survival. Used well, analytics can significantly accelerate business and marketing strategies by improving the quality of decision making and empowering the people needed to execute on them. It can be a competitive differentiator for an organization & ensure that its customer relationships indeed outlast the virus. Its up to us marketers, to use this opportunity to effect a change in the culture of our organizations to make it more data driven and future ready. Because as William Gibson once said, the future is here already, it's just not evenly distributed.

Make It Count!

Marketing accountability via accurate ROI measurement

Madhubanti Banerjee

Nielsen

Director, Marketing
Effectiveness
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It is now a cliché to say that the COVID-19 pandemic has been a system reboot for everyone, both personally and professionally. One of the critical markers of behavioural change during this period is frugality. It is a well-known fact that people have become extremely budget-conscious through various trends seen across geographies. Wallets are opening primarily for non-conspicuous consumption. Whether or not this is a positive 'moral' upliftment is a point of debate, but what is true is that the depression in demand is negatively impacting the economy.

This frugality in behaviour has transcended personal boundaries and has been largely observed in businesses as well. It is common knowledge that when tightening of purse strings happens for an organisation, the first brunt is borne by marketing. Unsurprisingly, a reduction in advertising investments has been a common trend across companies, right from the onset of the pandemic. The belief underlying this phenomenon was that consumers were not purchasing anything outside of essentials. Something that was widely overlooked was the longer term impact of advertising. Biel & King wrote in their 1990 WARC publication 'What we know about advertising in a Recession' that "...cutting back on advertising during a

recession can hurt sales during and after the recession, without generating any substantial increase in profits." At Nielsen, we have observed, from our sales ROI norms database, the following risks and rewards of advertising:

01 For every media-dark quarter, there is a -2% impact on year 2 revenues

02 It takes 3-5 years to recover equity losses from going dark for extended periods of time

03 There was a 0.5pts share gain for brands that maintained or increased ad spending vs. those that decreased spending

Hence it is a clear conclusion that maintaining a level of advertising during recessionary periods is imperative to a brand's health. But the importance of having one's eye on the 'profit' ball does not go away. While the above observations are important topline considerations, the mounting cost pressures make it inevitable

to get a good grip on the 'bang for the buck'. Hence holding your ad investments accountable is of utmost importance as you continue to advertise during these periods. To do so, the key things to keep in mind are:

01
Robust measurement of returns on investments (ROI) on these advertising investments

02
Measuring ROI on right outcome metrics like sales and conversions, rather than only top of funnel measures.

At Nielsen, we have always been a proponent of outcome-based, robust ROI measurement. This measurement of ROI is a highly nuanced approach, the critical elements of which are, **measuring the right metric, at the right granularity, and at the right frequency.**

The ideal approach to a continuous system of measurement of accountability of advertising investments is an integrated approach which encompasses:

- An on-going optimisation of digital investments for near-term tactical planning via Multi-Touch Attribution,

- Coupled with strategic planning of the overall mix via mix modelling, which includes digital media effectiveness intel from the MTA modelling

Under the present challenges in the marketing measurement environment, we have also recently launched Nielsen Compass. This robust, world-leading database leverages our global scale to establish syndicated normative standards for outcomes measurement for media investments. Nielsen Compass arms marketers to make data-driven decisions to maximise their marketing ROIs, with velocity and affordability.

I will wrap up by stating an observation from our many years of experience in performance measurement: An average 25% of ad monies can go waste if invested without a scientific ROI based decision-making system. So while it is critical for brands to keep advertising through the inclement weather, it is even more important to establish hard accountability of the investments made. Today, the measurement to ensure accountability should be treated as the North-Star rather than a mere blip on the horizon.

Nielsen's Media Mix Modelling Study Sheds Light on the ROIs from Traditional and Digital Media Channels

It's proven through the MMM meta-analysis conducted by Nielsen, that return on media investments has been increasing for CPG from 2014 – 2019. This has been driven by digital channels which delivered a higher ROI compared to traditional media. With digital media investments going up – overall ROI too has been improving.

Digital has delivered a higher ROI ~1.5x, and Facebook delivered an even higher ROI of ~1.9x as compared to traditional media. Facebook delivered higher ROI for both niche brands as well as mass brands. Increasing platform reach, on-target delivery and lower cost per impression are responsible for FB driving highest ROI over time and at scale.

Source: Nielsen MMM meta-analysis, 2014-2019. Base: A list of studies compiled by Nielsen. This list includes studies across 53 India Brands across the Total CPG category. Efficiency is Retail ROI, defined as total incremental sales divided by total media spend. The ROI numbers in the claim are spend-weighted averages across all studies for each channel. Meta-analysis commissioned by Facebook.

MMA groupm

3.6

Brand
Safety

Everything is Possible

Taking the High Road to Data Privacy

Baldeep Singh

The Washington Post

Director - Global Agency Relationships

The ever-increasing weightage on efficiency within the media and communication landscape has turned the audience identification and targeting process into an incredible quest. As the process of finding the perfectly defined consumer on a set of diverse yet sharply defined demographic and behavioural data across a hugely fragmented media channel ecosystem has become increasingly more frenetic, it has begun to grate against the idea of privacy.

Yes, there are privacy norms defined by GDPR and CCPA but user consent is still a hazy territory. There are paths that are not so well-lit and yet lead you to the doorstep of the audience you seek - HNI, NCCSA+, B,C,D or competition brand users who watch arthouse cinema and such.

I'm not sure about you, but I've been tempted many a time to go down that path. After all, each of those shiny wares have been backed by the quality of jargon heavy consent driven mechanisms having been put in place, and so use of them would be perfectly legal, shouldn't it? Maybe.

Just because a vendor claims to be GDPR compliant, are they? Who's vetted them and verified their claims? SDK backed data is probably the most over abused data source of all. Most app vendors claim to be GDPR compliant and peddle their data from one agency to the other, however when you ask them to show how the consent mechanism works they balk. Upon downloading the app itself one finds that there is a lack of explicit consent, use of data isn't defined specifically, the users aren't informed that their data will be sold to as many 3rd parties as possible and their data can be joined with other data assets to derive more information about their locations, purchases, and searches. For example; some vendors capture keyboard stroke information; but do they explicitly inform their end users that they can capture their passwords and websites visited? Some vendors ask to read SMS rights; but do they explicitly inform their end users that they will also read financial info received from agents such as banks? Some vendors even go as far as program the device to record and filter each sound for catch phrases; but do they explicitly inform their end users that they are recording sounds? Due to the nature of my role I get asked by friends and family: "Why do I start seeing ads for Goa, every time I talk about Goa when enjoying with friends?" I smile and let them know that maybe it's their conscience noticing the ads as a reminder to stick to those promises. If I told them how this was possible one of two things would happen. The first is a look of a deer looking at headlights indicating everything has gone over their heads, the second would be their jaw droppings, indicating the obvious hold technology has over us.

In order to find a resolution, all we have to do is look at the history at some of the biggest fashion brands that sold coveted merchandise which was produced of the back of sweat shop labor and material wastage. Just because they did and could at one point didn't necessarily mean that it was right to exploit cheap labor, give in to inhuman working conditions, and negatively impact the environment. The system eventually woke up to this reality and corporations went through transformation towards sustainability, commitment to improving the environment and ensuring decent working conditions in their supply chain.

GroupM prides itself on leading data privacy and security by questioning the ethics behind data sources and will not use data derived from non-explicit consent mechanisms. All of our data vendors, and technology partners, are assessed on privacy program management, consent & preference management and third party risk management using OneTrust technology that powers privacy, security and data governance programs that comply with the CCPA, GDPR, LGPD, PDPA, ISO27001 and hundreds of the world's privacy and security laws.

And so, I remind my colleagues at large to refrain from taking short cuts down questionable paths even though they may lead to data derived from shoddy consent mechanism or vendors who claim to follow GDPR norms. It's easy to throw jargons and sell snake oil... we don't need to look for those type of goods being sold online. They are a click or two away at most. What we need to ask ourselves is "Would I be comfortable allowing my personal data to be derived the same way?" Just remember; when you speed through the dirt path, dirt will fly all around and eventually settle on you. Is your reputation worth tarnishing while dealing with unknown players that have far less to lose?

Building Brand Love means Mastering Brand Safety

GroupM Brand Safety Playbook

The GroupM Brand Safety Playbook is a masterclass in digital advertising practices that ensure consumer trust.

In this report, we look at what the future may hold. We begin with an overview of political, social and technological shifts impacting brand reputation at a high level. We then look to specific challenges in five categories currently undergoing rapid transformation: Connected TV, Digital Out-of-Home, Location Data, Audio and Gaming.

Here are 10 key takeaways from Brand Safety: A GroupM Playbook for Marketers

1. Policy shifts such as GDPR and CCPA, among many others around the world, have created a seismic ripple throughout the industry, the full effects of which are yet to be felt. As old measurement methodologies such as third-party cookies fall away, the industry has an opportunity to collectively create better standards.

2. The COVID-19 pandemic has established a 'new normal' 'digital first' lifestyle for the majority of the global population. Consumption habits have changed (more news, gaming and streaming content). Where consumers go, advertising follows and, with it, new opportunities to strengthen brand safety measures arise. Aggressive keyword avoidance demonetizes online news as the audiences increase and at a time when the public needs reliable information. Local news faces an existential crisis.

3. **Fake news** and technologies that create deepfake videos are growing more sophisticated and threaten to further erode institutional trust. Brands must be more proactive than ever in preserving their core assets and demand transparency in all transactions.

4. **Too much brand safety is also a concern.** As brands work to preserve their equity and authenticity, they should beware of becoming overly cautious. Doing so may decrease the impact of overall performance.

5. **Connected TV** promises to command a larger share of budget in the coming years. However, measurement is fragmented across devices and publishers. Brands should demand greater transparency and interoperability among key players.

6. **Digital Out-of-Home** is set to grow more advanced and complex as programmatic buying becomes more commonplace. While out-of-home has long been used for broad awareness, it remains an open question as to whether brands will have—or need—access to more granular targeting and measurement solutions.

⑦ **Precise location data** is a sensitive issue that will require additional due diligence. The development of location verification services and aggregate learnings could mitigate some risk unless personal data becomes less available.

⑧ **Audio** is growing as streaming music and podcasts become further entrenched in consumers' lives. Currently, advertiser controls are in their nascence, and brand suitability/adjacency remains a concern, particularly in the world of podcasts, where content standards remain loose across the board.

⑨ **Gaming** presents a huge opportunity in terms of audience, but brands must navigate a vast landscape of platforms, titles, player personalities and publisher relationships. Esports continues to grow in popularity, but brands must be aware of adjacency risks (violence and language, particularly). If people continue to stay home in the aftermath of the coronavirus, gaming audiences will retain some of the recent, rapid growth.

⑩ **Fundamentals still matter.** As brand safety continues to shift and evolve with media and technology, brands must not lose sight of established best practices, which serve as a vital North Star in uncertain times.

To download the full playbook please visit
https://www.groupm.com/groupm-brand-safety-playbook

MMA Ad Fraud Elimination Guidelines

MMA, in association with mFilterIt has published <u>Ad Fraud Elimination Guidelines</u> recommending the best practices to combat the challenge through collaborative endeavours of advertisers, agencies and the publishers.

This approach recommends for the first time ever, how advertisers, agencies and the publishers can collaboratively work together, implementing the best practices, to combat ad-fraud collectively and holistically. Only then a trust can be ensured throughout the value chain building an effective, RoI driven, and synergetic digital advertising ecosystem.

The document looks at both technical aspects as well as reporting and process guidelines which each entity should adhere to.

Some of the key recommendations include

1

Conduct extensive due diligence of partners with deep data analysis.

2

Encourage systematic measurement of analytical metrics instead of thumb rule norms.

3

Educate and spread awareness across the ecosystem.

4

Engage with a neutral and independent media ad-fraud detection tool.

5

Upskill your teams in ad-fraud.

To know more on these and other granular recommendations, click here.

MMA Attribution Fraud Assessment Tool

The impact of mobile attribution fraud can be costly and significant for brands. In fact, top line results from a previous MMA survey suggests that 84% of marketers expect mobile ad fraud to continue being a significant problem. Over 60% think it will increase in the future, partly because their individual efforts can´t address the fundamental drivers of mobile fraud - strong incentives for perpetrators, lack of penalties and overall complexity of the mobile ad ecosystem.

That's why the MMA has launched a FREE attribution Fraud Assessment Tool. The tool provides marketers with an initial estimate of the amount of attribution fraud for app downloads based on an aggregated make-up of advertising on their partner networks. This directional understanding will allow marketers to take deliberate action to decrease the level of waste and get a better return on their marketing spend.

This extent of the fraud can be calculated based on a limited amount of data consisting primarily of the configuration of paid install data for a company's mobile apps across the ad networks where the application is promoted.

Please click on this link to use the tool

https://www.mmaglobal.com/attribution-fraud

Brand Safety Pivotal to Experiential Digital

Amit Relan

mFilterIt

Director and Co-Founder

Digital Transformation creates a level playing field where differentiation will not essentially come from technology but the experience it creates. Brand Safety has a major role in creating experiential digital.

For any user going about similar digital services over app or a web platform is a hard call to make. If we look at them from the value addition point of view as well as technology framework, these 'parallel' offerings which are almost identical substitutes are very difficult to differentiate.

This trend is going to be more visible as every brand eventually takes up the digital transformation journey to engage with stakeholders including customers. What will ensure stickiness, hence brand value, is the experience that the platform offers. Therefore, customer experience or CX has become of the important pillars for brands to focus and invest in. With D2C (Direct to Consumers) catching up fast and even digital laggards joining the bandwagon, CX becomes only critical.

CX has gone beyond the typical understanding of look & feel and design elements. It is the sum total of all elements which constitute a screen or display at a given point of time. Of course, the backend plays crucial role in enriching the screen experience. While there may be subjective elements more to do with the designing and layout, the expectations on

certain things are uncompromisable. These include trustworthiness of the platform, safety, data integrity, reliability, and accuracy. Many a times, digital solutions do not give the due priority to these elements and think experience is only about tech and the process.

Much ahead of even experiencing the platform, the first interface for any potential user is an advertisement. Even after a user is engaged with the platform, the outreach out new services, offers, retargeting, etc., is all through an ad. Customer Experience (CX) is determined by all that is served through an ad to a potential user. This includes the promise

being made through message in the advertisement, genuity of the offers and discounts being presented, immediate surroundings where ad is being served, originality of the web assets like app and website, among others. All of these, if not continuously monitored can be, and are exploited by the bad actors in the play. The bad actors, representing a brand, focus on quantitative objectives without giving a heed to the qualitative aspects. This risks the credibility and reputation of the brand. As such partners are not with the intend of long-term relationships with the brands, they wind up after getting noticed of doing wrong. By that time, they not only make good money, but also result in irreversible reputation damage of the brand they represent. This too for no fault of the brand.

Every brand has a philosophy it pursues and wants to be identified with. The entire digital value chain of a brand – its ads, messaging, presence points and the platform (app and web) should all point towards that philosophy. There should not be any digital shocks alike cultural shocks which are always distasteful and erode the experience.

mFilterIt is happy to have developed Brand Safety guidelines in collaboration with MMA along with some of the leading advertisers. These guidelines should lay foundation of the best practices that advertisers can incorporate to run campaigns with entire control on reputation and integrity of the brand.

The key recommendations include:

A Due diligence of partners

Conduct a comprehensive due diligence backed by data analysis of the partners and their work before engaging them on any digital campaign. In situations where it's not feasible, have a real-time monitoring of the performance to take corrective course limiting the damage.

B Look for the real performance

There could be an intentional or un-intentional trigger which jacks up the performance. It is advisable to always look for deeper analysis possible only at transactional level data which gives the real performance by cleaning the pollutants which result in unreal results. This also impacts the performance assessment of internal teams and the partners.

C Upskill your teams

Ad-fraud and Brand Safety challenges are very nuanced issues. These require specific skill sets looked in totality. While digital marketing specialisation gives an overview of the entire spectrum, it is important for the entire digital marketing value chain to acquire the right skills which can help in understanding and managing ad-fraud

and brand safety issues maturely. While the validation can be done through third party neutral partners, the in-house teams should also be capable of understanding and interpreting the implications.

Any marketer's dream is to bring a sparkling smile on the face of the customers. Just like for gifts, the smile should only brighten after unpacking the gift wrap. Similarly, the wrapping as well as the promise inside should be experiential in the digital world to bring that glittering smile on the face of the consumer. That will serve the purpose of digital transformation and the complex technology invested in. There are no sustainable and growing returns on investment possible without Brand Safety in the digital world as well as otherwise. Let's prepare for the festive season and give customers experiential digital so that we see them smiling while looking for promises and value over digital during the upcoming festive season this Diwali and beyond.

Top 10 Questions to Ask Publishers to Secure Brand Safety Whilst Planning

Nachiket Deole

DoubleVerify

Head of Sales, India

The mobile app market is booming, and the mobile web is similarly in significant growth mode. India is home to more than half a billion smartphone users, and they are consuming content on their devices in record numbers.

Brands that are utilizing the right technologies in their advertising campaigns - including advanced targeting and measurement - are already winning. They know where their audience is consuming quality content, and are using the right digital placements to ensure their advertising reaches consumers that are most likely to engage.

Advertisers are faced with the challenge of placing their ads in a fragmented media market, and mobile is now a key part of their media plan. They need a verification solution that spans web and mobile app environments and provides content classification at the most granular level – even classifying underlying content within mobile apps.

According to a DoubleVerify/Harris Poll study, 87% of consumers believe that brands bear responsibility for ensuring their digital advertising runs beside content that is accurate, safe and trustworthy.

The mobile ad world can be the Wild West when it comes to brand safety and ensuring that the media being bought is suitable to a brand's values. While a brand safety strategy is aimed at reducing any risks to an advertiser's public reputation, brands are also now demanding suitability controls, and the ability to target towards contextual relevance. Clearly, brands want to avoid running on adult sites, or next to hate speech or inflammatory content., However, brands should also be seeking to avoid content that is specifically inappropriate for their unique sensitivities and values — even though it may be considered appropriate for another brand.

Marketers need to be armed with a set of tools and ask questions of publishers to ensure they are protected against content that may damage their reputation, or simply not reinforce the messaging of their campaigns.

Here is a brand safety checklist that can be posed to publishers and their digital media authentication partner.

Top 10 Questions Brands Should Ask:

1 How many and what types of content categories are available for protection?

2 What languages are covered?

3 Is it possible to set inclusion and exclusion lists at the site and app-level?

4 How can fake or inflammatory content be avoided?

5 What classification methodology is utilized? Is it just keyword protection?

6 Is there protection against breaking news that has not yet been analyzed or classified?

7 What is the coverage across devices, especially for mobile apps?

8 Are you able to customize the brand safety controls based on issues specific to your brand?

9 Are you able to make exceptions to your brand safety controls for apps, sites, or event pages that you trust?

10 Are you able to classify the content within a mobile app, or do you only classify the entire app itself??

Creating a Brand Suitable Environment

As advertisers seek clarity and confidence in their digital investment, it's more important than ever to track quality and performance. An advertiser does not want their digital advertising content to appear on websites that are not in line with their own brand suitability guidelines. The preferred approach for both media buyers and sellers is to avoid the attempted delivery of an impression that is unsuitable for the brand during the ad selection process.

In the programmatic advertising world, publishers should be concerned about this as advertisers, and that fraud filtering needs to take place at the platform/publisher level, as well as pre-bid within the DSP, and post bid blocking and monitoring. Transparency throughout the transaction is what will drive the greatest value - and trust - for advertisers.

Brands want peace of mind and they want their digital ad content to run in safe and controlled environments. Having a robust ad verification toolkit in place for all parties is the best approach.

04

MMA
Initiatives

MMA Working Councils

The MMA has enabled council formation on the MMA board with a mission to shape the future of modern marketing and adopt it at scale. With this goal in mind, MMA formed two new councils in 2020: MarTech Council & Voice and Audio Council.

MMA councils are focused on driving change and enabling POV in the areas of creative content, media effectiveness, MarTech, voice and brand safety and building guidelines, standards and best practices in modern marketing.

Creative Council

The creative committee continues to strive to build guidelines and best practices for effective short format advertising content - a primary focus area. MMA's What's your First Second Strategy based on Cognition Study: From a Blink to an Imprint to a Heartbeat and the From a Blink to a Heartbeat – Playbook by MMA & Facebook forms the bulk of the initiatives under this charter.

Initiatives Undertaken:

MMA's What's your First Second Strategy based on Cognition Study: From a Blink to an Imprint to a Heartbeat

Using neuroscience to really understand the human brain's reaction to advertising (actual cognitive process) is a relatively new technique applied to advertising that pushes our knowledge boundaries beyond what previous eye tracking studies allowed. This study is focused on the 'opportunity to see' both in mobile and desktop. The research builds on the MMA´s commitment to science and truth in marketing for brands. Additionally, this is the first project the Advertising Research Foundation (ARF) has reviewed as part of their drive for 'radical transparency' and truth in advertising research.

One of the world's first and most extensive neuroscience-based studies on consumer response to mobile ads – Cognitive Processing of Advertising in a Mobile Environment by the Mobile Marketing Association, has brought to light the fact that consumers now take less than half a second to process the message of an ad viewed on their mobile phones.

The Questions Being:

Attention: What % of ads are consumers seeing?

A simple, straightforward question, this is compounded by the numerous questions asked and answered with regards to cognition.

Cognition: Are consumers processing the information? Are they experiencing information overload and stress? Is there interest and desire? Are consumers motivated to approach or avoid?

The Takeaways

With the human brain requiring less than half a second to process the information in an ad, the trigger is quick but the reaction could be positive or negative. In the case of mobile feed environment, attention and cognition are significantly faster than on desktop feeds.

In terms of the disproportionality, attention does not differ for aspects such as: well-known brands vs lesser known brands, and video ads vs static ads. In fact, even low performing ads get attention at roughly the same time as high performing ads.

The defining factor then is the differences in cognitive load, and thus the impact this has on emotional responses, recall value and persuasion power. Colours, handles, visual elements and complexity, all decide how impactful a mobile ad is. This research by MMA covers all these key points, providing insights into the kind of research that should go into building an effective mobile ad strategy.

Source: From a Blink to an Imprint to a Heartbeat

From a Blink to a Heartbeat – Playbook by MMA & Facebook

As you finish reading the first word of this sentence, mobile users have already processed the overall sentiment of the latest video ad to pop up on their social media feeds. One of the world's first and most extensive neuroscience-based studies on consumer response to mobile ads – Cognitive Processing of Advertising in a Mobile Environment by the Mobile Marketing Association, has brought to light the fact that consumers now take less than half a second to process the message of an ad viewed on their mobile phones. The reaction that is triggered can be either positive or negative, and for ads that show poor performance, negative emotions from viewers have already decided the brand's fate in the first second itself. Testament to the huge impact that short videos can have, are Facebook's Thumbstopper videos, a concept built on multiple meta-analyses of thousands of campaigns.

Five creative best practices for Thumbstopper videos:

MMA in partnership with Facebook recommends the following considerations for effective short video creatives on mobile. They are based on MMA's Cognition research and Facebook's understanding of Thumbstopper videos.

a **DURATION:** Short video ads under 10 seconds work better

b **BRANDING:** Showcase your brand early and often

c **VISUALS:** Use striking visuals, colour and contrast to catch attention and move hearts

d **SOUND:** Design for sound off, but delight with sound on

e **OPENING:** Make the first frames of a video count

Together, the MMA's First Second Checklist and Facebook's Thumbstopper Creative Best Practises, form a detailed and insightful guideline of sorts for marketers and creative agencies to ace the game of the short video ad. From colour and contrast to the need of designing for sound-off modes, while still incorporating impactful audio for sound-on viewers – these two sets of recommendations provide an effective breakdown of the do's and don'ts of short ad video making, all backed by scientific research and deep consumer insights.

Media Effectiveness Council

The council has been working extensively to enable POV on cross-media reach and effectiveness of mobile versus other media and assess the impact of new media on business outcomes.

Initiatives Undertaken:

MMA measurement effectiveness industry survey

To gauge the industry view and pattern of how marketers measure impact, MMA along with board members carried out a survey on effectiveness measurement. The survey which had 30 respondents in all including PepsiCo India, HUL, Maruti Suzuki India Ltd, ICICI Bank, Vodafone Idea Ltd, Godrej Consumer, Marico, L'Oreal, Tanishq, GCPL, BMW, TATA Motors Limited, Johnson and Johnson and VIP Industries, to name a few, helped in understanding the gaps in media metrics and the current measurement methods being used to measure effectiveness.

When these organisations were asked about the biggest challenges/gaps in marketing measurement today, this is what they had to say:

The Biggest Challenge/Gaps in marketing measurement today

- Lack of standarised measurement methods
- Inability to optimize spend across online and offline channels
- Other (please specify)
- Non availability of tools for measurement
- Lack of comparable cross platform metrics

MEASURES RANKED IN ORDER OF IMPORTANCE FOR BUSINESS

1.47 — Input/Audience metrics-reach, frequency, on target accuracy

1.97 — Brand Metrics-Brand awareness, consideration etc

2.57 — Sales Metrics-ROI, ETC

POV on metrics that matter

The results of the survey enabled in initiating a POV with regard to Cross-Media and Cross-Platform measurement. Two key concerns that were often heard were 'What are the metrics that matter and must be measured?' and 'How do we measure the cross-media impact of advertising in a comparable way across all digital and non-digital media?'

Hence the measurement effectiveness council set out to focus on the following metrics that matter:

1. Brand Metrics

2. Sales Metrics

This is true for both brand advertisers and performance advertisers, regardless of industry verticals. For example, e-commerce clients as well as CPG advertisers run brand advertisements across media channels, with the objective of improving mind measures via-a-vis their brand or positioning in the market. Similarly, CPG advertisers expect that such brand advertising will have an impact on actual sales and expect a meaningful return through incremental sales from their brand spends. Likewise, e-commerce companies and banks rely on digital performance ads and expect higher tarffic on their web assets and apps, in addition, they expect higher sales online sales conversions or offline conversions (account opening etc. for banks).

Output vs Input metrics

The key metrics that matter to business are output metrics, the Brand and Sales metric described above. Very often, advertisers measure input metrics (such as TV GRPs, Click on ads, etc.) as a way to quantify or metricize their advertising efforts. While these metrics are important to ensure hygiene and efficiency of campaign input, these are not output metrics that ultimately matter to business growth.

Output metrics are quite hard to measure. Mind measures are subtle and changing, and sales is influenced by a variety of factors; throw in the reality of an ever-changing multimedia environment and shifting consumer behavior–and it becomes clear that isolating and measuring the impact that advertising alone had can be a challenging task.

Key Brand outcomes that matter to businesses are listed below:

01 Ad Recall (did the consumer recall seeing an ad for the brand?)

02 Brand Awareness (is the consumer aware of the brand?)

03 Message/Campaign Awareness (did the intended communication register in the consumer's mind?)

04 Consideration and Purchase Intent (did the advertisement improve consumer intention to purchase the product?)

Type	Methodology	Robustness	Ease of Deployment	Limitation
Control/ Exposed	Pre Post	Low	Easy to Execute	Aggregate campaign impact measured, not impact of each media
Control/ Exposed	Geo Tests/ Region based:	Medium	Requires changes to media plan	TV is very hard to control by Region
Control/ Exposed	Lift studies audience based	High	Easy for digital channels with "Lift" measurement capability	TV is very hard to control by Region
Regression based	Market Mix Models	High	Intensive data collection effort	Long history (uoto 3 years required when only montly sales data is available

SmoX Cross Media case studies: How Brands Can Make Smarter Decisions in Mobile Marketing.

An extensive global study called SMOX carried out by MMA to understand cross media reach and effectiveness has irrefutably proven that mobile is 1.9 times more effective than other media. It helps to learn how Brands Can Make Smarter Decisions in Mobile Marketing.

It highlights results from 11 case studies the MMA conducted for top brands, including Allstate, Unilever, AT&T and the Coca-Cola Company. Each of the 11 studies in the report determines the effectiveness of a real cross-marketing campaign against its own marketing-associated goals. The details for it have been published by ARF and can be viewed on the below link:

SmoX- Case Studies, How brands can make Smarter Decision in Mobile Marketing

The larger challenge in this context is to carry out accurate attribution across all marketing channels. With all these insight gaps in mind, MMA's research provides some perspective on better decision-making in marketing. Other observations highlighted in the study include:

Produce Creative Content Specifically for Mobile: The current research validates that marketers can maximize the impact of their advertising when they align creative concept, format, advertising unit, data, and delivery to communicate a brand message that is relevant in the specific moment in the customer journey.

Target More Deeply: Most of the data targeting approaches assessed in the current case-study series more than justified their premium (cost) and significantly improved the impact of mobile advertising per dollar spent. This validates the theory that marketers can find great value in understanding the customer journey and operationalizing planning insights to target "moments of relevance" across the customer journey.

Adapt to Continuous Optimisation: This research, therefore, has implications for how a marketer organizes teams and agencies around continuous optimization, as opposed to an annual planning cycle.

Over and above this, MMA has launched a guidebook to delineate a MTA (Multi-Touch Attribution) solution to maximise marketing impact.

For marketing efforts to be successful in a data-driven, real-time attribution age, it's crucial to use an MTA solution. About 80% of the marketers agree that MTA (multi-touch attribution) is important for maximum marketing impact but the adoption has been slow with only 40% of the marketers actually implementing MTA till the first half of 2019.

MMA Multi-Touch Attribution Journey Map

MTA can be simple, straightforward to apply and can maximise the return on advertising. To apply it's required to follow a process through five different stages, each having five common components. Along

the way, things to do and not do, previously released MATT tools and documents have been included to help in the deployment and success of MTA.

Stage 1: focuses on understanding how MTA will benefit your organisation and what is required to successfully apply it.

Stage 2: one has to assess whether the necessary data is available to create MTA models.

Stage 3: focuses on setting up the first MTA project.

Stage 4: the first MTA project will be implemented.

Stage 5: the final stage requires one to maintain and expand the value of MTA to the organisation. Instead of conventional marketing, marketers can deploy multichannel marketing strategy to engage users in impactful ways. This makes way for a smoother experience along multiple checkpoints which can effectively be measured by MTA (multi-touch attribution) which is used to measure user data across channels, while linking the mobile phones to a single point of reference.

https://www.mmaglobal.com/documents/mma-multi-touch-attribution-mta-journey-map

Source: MTA Journey Mapping

Brand Safety Council

The Brand Safety Committee works extensively on enabling best practices, standards and guidelines for brand marketing and performance marketing by driving compliance at various levels in the ecosystem amongst stakeholders to deter ad-fraud. The aim is to provide guidance and learnings to brands and performance marketers.

The top challenge faced by marketers is Mobile Ad Fraud, which will continue or even magnify in the future. An absence of a clear system to penalize the perpetrators and a lack of transparency have contributed to the rise of mobile fraud.

The three highly unsafe categories of frauds are:

1. Traffic Fraud
2. Misrepresentation Fraud
3. Attribution Fraud

Out of which traffic fraud poses the highest risk followed by misrepresentation and attribution fraud respectively. Marketers have resorted to outsourcing the task of tackling the issue to external parties.

The most popular vendors which provide solutions for preventing and tackling frauds are mFilterIt, Appsflyer, Moat and IAS from an overall brand safety standpoint.

Source: Mobile Ad-Fraud in India

Initiatives Undertaken:

Mobile Ad Fraud India Report

MMA has also released Mobile Ad Fraud in India Report in 2019 to enable insight and learnings on marketer challenges on ad fraud, most common frauds and barriers to investing in robust solutions.

Mobile Ad Fraud Roadshow

Thought leadership and collaborative learning enabled by MMA by bringing experts and marketers under one roof from Mumbai, Delhi and Bangalore. 5 most impacted verticals being travel, e-commerce, finance, gaming and foodtech.

Source: Mobile Ad-Fraud Roadshow 2019

The newly formed council seeks to create leadership & evangelism for marketers to better understand the dynamically evolving nature of modern marketing.

MMA has got on board Namrata Balwani, a MarTech expert to avail of her expertise in MarTech and to enable and advise on effective industry content.

ACCELERATING THE GROWTH OF THE MMA INDIA MARTECH CHARTER.
Namrata Balwani
MARTECH ADVISOR MMA INDIA

Modern Marketing Era - Time to Reset & Reboot with MarTech

A webinar held with leading industry market leaders and brand custodians as they dived into four key areas:

- Relevance of First-Party Data in post COVID-19 scenario.
- Digital Spending post-COVID-19
- Are we investing enough into muscle memory - The right MarTech stack
- How the D2C Strategy for brands will evolve

The theme was for the whole marketing community as a whole to be -

1. Agile
2. Customer-centric
3. Technology-enabled

Source: Modern Marketing Era - Time to Reset & Reboot with MarTech

Modern Marketing Confluence – A Three-Part Series

A three-part series, in partnership with Google, hosted to reach out to the advertising and marketing ecosystem which is witnessing one of the largest push through-out to adopt digital transformation and embrace digital agility. This series sought to inspire and enlighten marketers to be better equipped with modern marketing techniques that can help transform their marketing with the help of MarTech.

Part 1: Responsible Marketing with First-Party Data

Part 3: Cloud For Marketing

KEYNOTE SPEAKER

VIVEK BHARGAVA
CEO
DAN PERFORMANCE GROUP

dentsu
AEGIS
network

TOPIC:
UNIFIED APPROACH TO DATA-DRIVEN MARKETING

SPEAKER

KAMOLIKA PERES
DIRECTOR, GOOGLE CLOUD

Google

SESSION CHAIR

KARTIK L JAIN
EXECUTIVE DIRECTOR, DIGITAL BANK

DBS | Live more, Bank less

PANELIST

RAJESH SHEWANI
CUSTOMER ENGINEER MANAGER, GOOGLE CLOUD

Google

PANELIST

ACHINT SETIA
VICE PRESIDENT, MARKETING

Myntra

PANELIST

DEEPAK ORAM
HEAD - MARTECH & AUTOMATION

HDFC BANK
We understand your world

HOST

MONEKA KHURANA
COUNTRY HEAD - INDIA

MMA

Source: Modern Marketing Confluence – Growth Hacks Delivered

Make Modern Marketing Work - 3 Part Series

The 3 session series on Martech in partnership with Oracle was hosted to deep dive into everything Martech that a practitioner needs to know and do for successful martech implementation, and to get the most out of these technologies. The series began with a session on personalization in times of data privacy and the remaining two sessions deep dived into designing 'Industry-specific Best Martech practices' for BFSI and Retail & Ecommerce industry respectively.

Part 1 : Personalized User Experience in the Age of Privacy, November 18, 2020

Speakers:

RAKESH JAITLY

Senior Sales Director - Customer Experience (CX) Solutions
Oracle

ORACLE
Customer Experience

JAHID AHMED

Vice President and Head - Digital, Content and Social Media Marketing
HDFC Bank

HDFC BANK
We understand your world

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https://www.mmaglobal.com/webinars/personalized-user-experience-age-privacy

Part 2 : Martech Implementation in BFSI - Challenges & Management, November 25, 2020

Speakers:

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https://www.mmaglobal.com/webinars/martech-implementation-bfsi-challenges-management

Part 3 : Unlock higher ROI in Retail & Ecommerce with personalization, December 9, 2020

Speakers:

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https://www.mmaglobal.com/webinars/Unlock-Higher-ROI-Retail-Ecommerce-with-Personalization

Source : Make Modern Marketing Work

MMA Exclusive: Modern Marketing Techniques Shape The Future Survey

The MMA is committed to drive modern marketing & with MarTech being the central focus to shape the future of MarTech in India.

MMA released a survey to evaluate and understand the current conditions and future expectations of the MarTech industry in India. The results of the survey was unveiled by leading marketers in India on Marketing Technology adoption.

Source: MMA Exclusive: Modern Marketing Techniques Shape The Future Survey

KEY TAKEAWAYS

1
Current usage of MarTech

2
Share of marketing budget for MarTech

3
Mostly used types of marketing technology

4
Future of marketing technology adoption trends

UNVEILING THE MMA MODERN MARKETING SURVEY RESULTS

THURSDAY : DEC 10 | 2:30 PM

KUNAL AMAN
HEAD – MARKETING & COMMUNICATIONS
sas

VIJAYANT DHAKA
SENIOR VICE PRESIDENT
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RAJEEV DHAL
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ZEE5

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DIGITAL & CUSTOMER EXPERIENCE CONSULTANT

HOST
MONEKA KHURANA
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Voice and Audio Council

The newly formed Voice and Audio Council seeks to create leadership & evangelism for marketers to better understand the dynamically evolving nature of voice marketing and enable guidelines, use cases, expertise to exploit the platform.

Build For Voice

In less than 3 years, an entire ecosystem for voice has emerged from voice platforms to developers to brands that are building and adopting voice. We are at an inflection point where voice will further accelerate in the next couple of years.

MMA's Voice Webinar focused on sharing and having a discussion on the voice ecosystem in India, voice insights from Google & a panel discussion with brands and agencies that are building for voice.

Source: Build For Voice

About MMA

The MMA's mission is to enable marketers to drive innovation and enduring business value in an increasingly dynamic and mobile connected world.

Comprised of over 800-member companies globally and 14 regional offices, the MMA is the only marketing trade association that brings together the full ecosystem of marketers, tech providers and sellers working collaboratively to architect the future of marketing, while relentlessly delivering growth today.

Anchoring the MMA's mission are four core pillars;

1 To cultivate inspiration by driving innovation for the Chief Marketing Officer.

2 To build the modern marketing capabilities for marketing organizations through fostering know-how and confidence.

3 To champion the effectiveness and impact of modern marketing through research providing tangible ROI.

4 To advocate for modern marketers.

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05

Conclusion

With the various shifts that have happened in 2020, as well as mobile always being an important part of our daily lives, this year's report has enabled two major perspectives – the **consumer lens and the marketer lens.** The consumer lens focused on the theme **"Nothing Is Certain"** and it captured the uncertainty and the changes which happened in 2020 at various levels, from a consumer's point of view.

The second part of the report focused on providing a **Modern Marketing Reckoner** to marketers on the key strategic tentpoles they should look at, so as to navigate the ambiguity and the uncertain business and economic landscape and is themed **"Everything is Possible".** It highlighted the strategic pillars of modern marketing which marketers should deploy to not only deal with the current uncertainty, but is a reckoner, even beyond.

The report in turn acts as a toolkit for marketers, as a go to resource for key decisions and expert industry POVs. Keep the **Modern Marketing Reckoner** handy as we bring in 2021 with a bang, renewed energy and an elevated consumer focus.

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The information contained in the Modern Marketing Reckoner 2020 ("Report") provides the readers a comprehensive overview the changes that happened in the digital and mobile ecosystem in 2020 as well as key strategic tentpoles for marketers going forward The information contained herein is purely for reference purposes only and we assert that no business or investment decisions be made solely based on the information presented in the Report. If any such decisions are made based on the contents of the Report, the same shall be entirely at the cost and consequences of the decision maker alone.

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