

MMA EXCLUSIVE: RECALIBRATE WITH THE CONSUMER SENTIMENT INSIGHTS

MMA Webinar Series
June 10, 2020

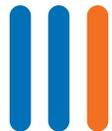
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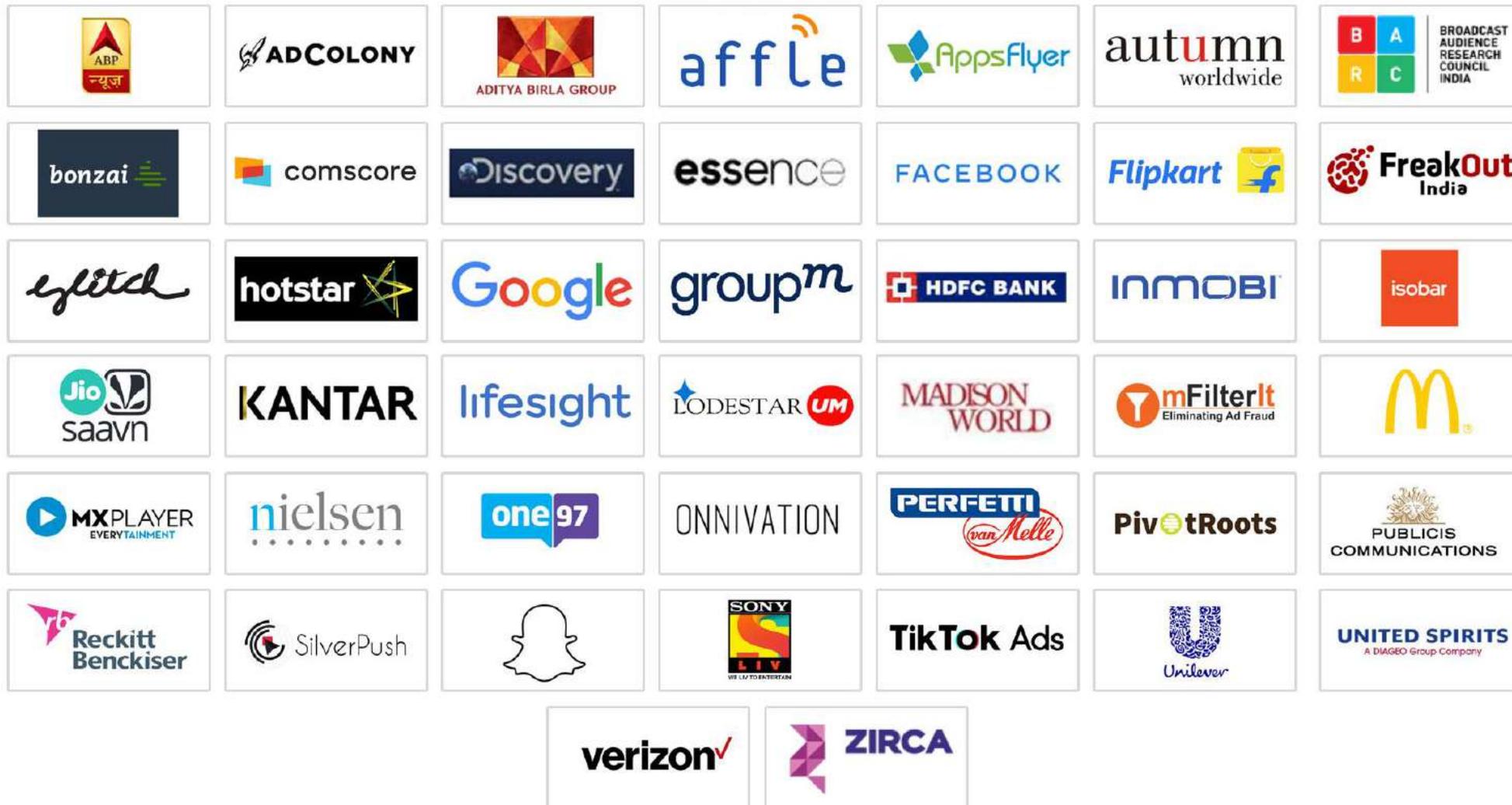


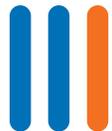
MMA IS 800+ MEMBERS STRONG GLOBALLY

MARKETERS, AGENCIES, MEDIA SELLERS, TECHNOLOGY & OPERATORS



MMA INDIA MEMBERS





MMA PURPOSE

WHO

The People We Serve

Prime Audience: *Chief Marketers*

By helping Marketers do Mobile better, everyone wins. MMA membership represents Marketers, Agency, Media and Technology Enablers from across the globe.

WHY

Our Reason for Being

Mission: To accelerate the transformation and innovation of marketing through mobile, driving business growth with closer and stronger consumer engagement.

WHAT

Our Strategic Priorities



Cultivating Inspiration

Aimed at the Chief Marketer; guiding best practices and driving innovation



Building Capability for Success

Fostering know-how and confidence within the Chief Marketer's organization



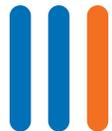
Demonstrating Measurement and Impact

Proving the effectiveness and impact of mobile through research providing tangible ROI measurement and other data



Advocacy

Working with partners and our members to protect the mobile marketing industry



MMA: RESHAPING THE FUTURE OF MOBILE MARKETING

 Mobile ROI Research	 Marketing Attribution Think Tank	 To Rethink Mrktg Org	 Marketer Brand Safety Council
Industry Working Groups Driving the Future of Marketing & Mobile	Guidelines & Best Practices Viewability, Location, Native	MM25 Marketer Peer Group Tackling Core Issues for Marketers	Shared Knowledge of 800+ Members Entire Mobile Ecosystem Worldwide
SMARTIES Awarding Best in Class Mobile Campaigns	CEO & CMO Summit Annual Mobile Think Tank	1,000+ Mobile Case Studies Inspiring Creative Innovation	30+ MMA Events Spread across 20 Countries



MMA COVID-19 Marketer Support Hub

#WeAreInItTogether



Select region: **Global** | [APAC](#) | [EMEA](#) | [LATAM](#) | [North America](#)

RECENT UPDATES

Best Of COVID-19 Ads
10 hours 40 min ago

COVID-19 Emails: Key Considerations And Tips
10 hours 54 min ago

What The Coronavirus (COVID-19) Means For Marketers
10 hours 59 min ago

How to Adapt Your Marketing During the Coronavirus (COVID-19)
11 hours 2 min ago

Search...

TRACKING COVID-19 AND ITS IMPACT AROUND THE WORLD

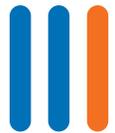
HUMAN RESOURCES, BUSINESS TOOLS AND TIPS

MARKETING AND ADVERTISING TODAY! & IN THE FUTURE

BUILDING OUR MARKETING

CONSUMER TRENDS AND

LIGHT-HEARTED



UPCOMING WEBINARS

- ≡ June 11 – Modern Marketing Era – Time to Reset & Reboot with MarTech
- ≡ June 12 – #ShapingTheFuture through Marketing & Technology...there is no Playbook for this
- ≡ June 15 – Decoding The Gaming Audience
- ≡ June 16 – BCG Report Insights with Facebook
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- ≡ July 3 - #Energizing Customer Experience & Communication

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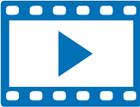




MMA PROGRAMS & INITIATIVES



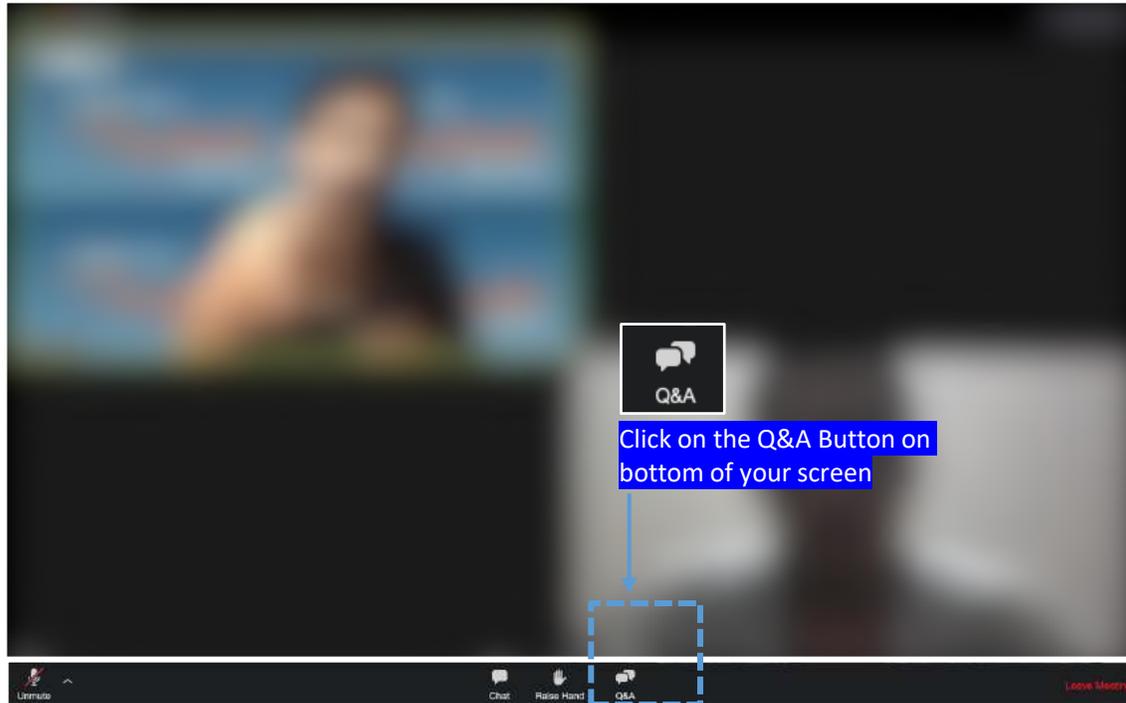
Our programs and working groups consist of executives who discuss key issues for a specific industry segment, technology or business issue. The programs and working groups meet on an ongoing basis to develop and execute industry initiatives that reflect the needs of their initiative area and membership.

 Currency Measurement	 Internet of Things	 Location	 Mobile Games	 Mobile Messaging
 Mobile Native Advertising	 Mobile Programmatic	 Mobile Shopper Marketing	 Mobile Video	 Privacy



Enroll by emailing committees@mmaglobal.com

MANAGING YOUR QUESTIONS



Share the Insights

#MMAWeb

- Please type in all your questions in Q&A section only.
- The question which has maximum **likes** may be addressed.
- Please mention - Your Name, Designation, Company while asking questions.
- Please mention the speaker you would like to answer.
- Please keep your questions **related to this webinar** discussions.



PANEL



Rajiv Lamba
Founder & CEO
SurveySensum



Vinay Bapna
Co-founder & CEO
Unomer

Moderator



Moneka Khurana
Country Head
MMA India



Arvind R P
Director of Marketing
& Communications
McDonald's



Gulshan Verma
SVP & Head, Advertising
Hotstar



Research Coverage - India

Online Consumer Survey - India

Method: Online Survey across India

Sample Size: 1200

Gender: Males (50%) : Females (50%)

Age: 15 to 24 (30%); 25 to 34 (51%); 35-64: 19%

Cities Covered:

- Delhi : 11%
- Mumbai: 11%
- Kolkata: 11%
- Bengaluru : 11%
- Hyderabad: 11%
- Chennai: 11%
- Ahmedabad : 11%
- Jaipur: 10%
- Pune: 10%
- Others: 3%

Monthly Household Income:

- Less than INR 20K: 31%
- INR 20k to 50k: 40%
- INR 50k to 1 lac: 20%
- More than Rs. 1 lac: 9%

FW Timeline: 10th May to 20th May

Data Collection Partners



Business Survey - India

Sample Size: 149 B2B Respondents

Sectors Covered: FMCG, Telcom, e commerce, Media, Auto, Insurance, Banking, Manufacturing

Roles: CEO, VP, Directors, Senior Managers & Junior Managers

Department: Marketing, Sales, Research, Media, Innovation, Finance & Product Development

FW Timeline: 1st – 20th April



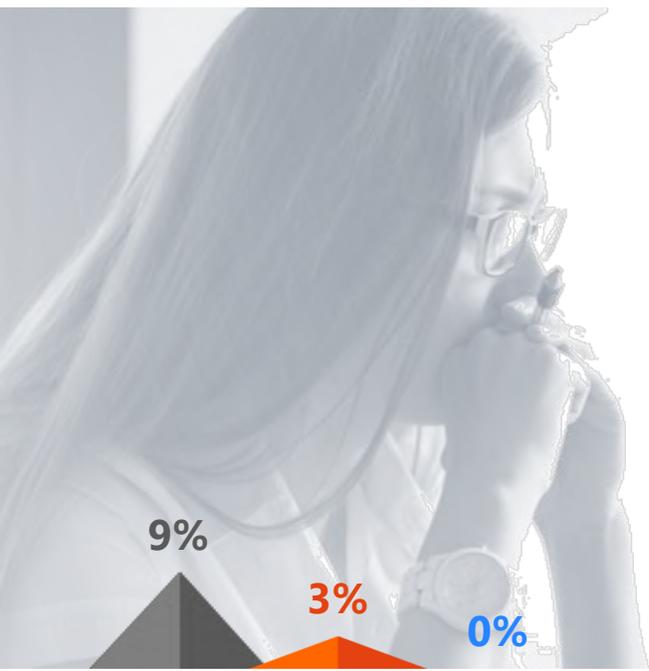


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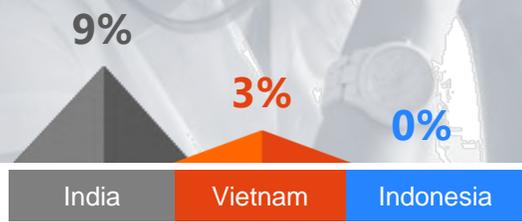
Changes in Consumer Sentiment in India



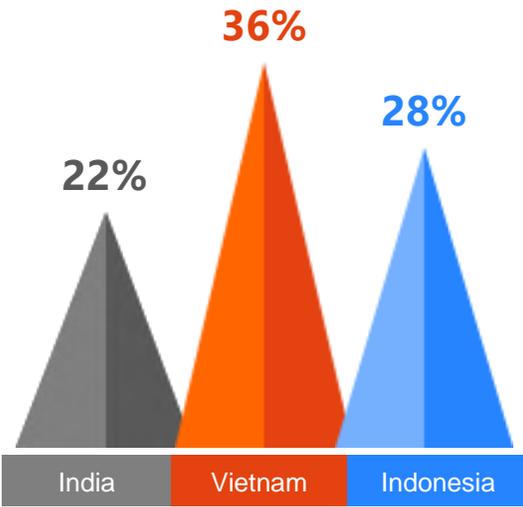
Consumers in India are more worried vis-à-vis rest of SEA countries



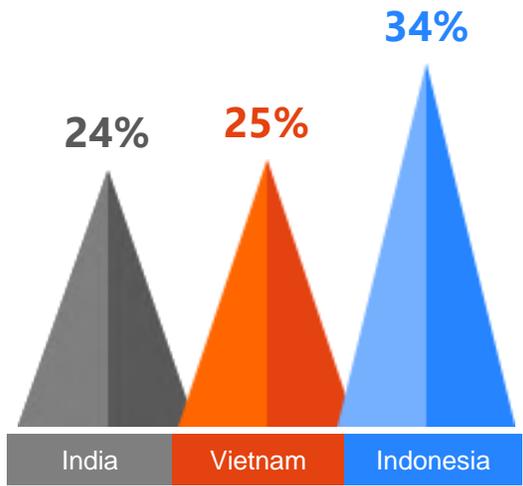
Somewhat worried+extremely worried :
India: 72% for Metros vs **65%** for Non-metros



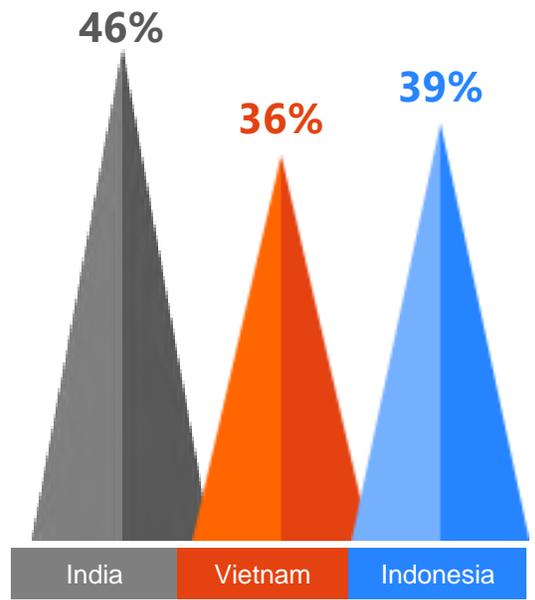
I am not worried at all



I am not worried but somewhat cautious



I am somewhat worried



I am extremely worried

Source: SurveySensum Internal Study : APAC



In Comparison to other SEA countries, consumers in India see longer road to recovery

Average Expected Time for things to get normal

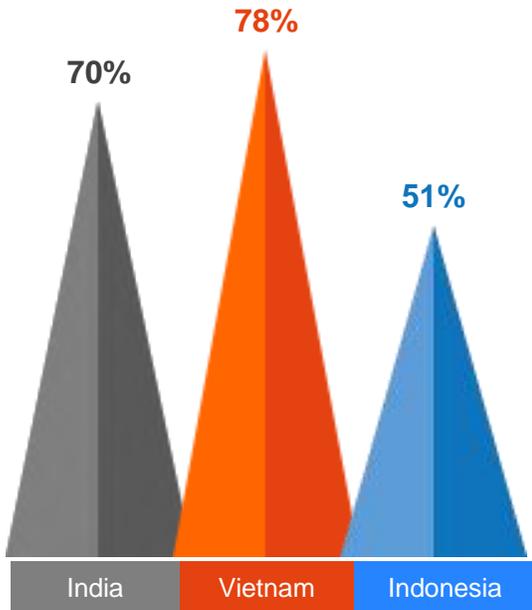


Metros more pessimistic
on return to Normal
Expected Time: 5 months

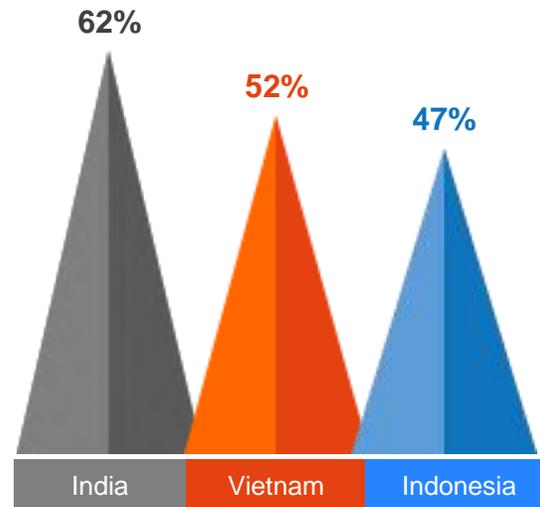
Source: SurveySensum Internal Study: APAC

Impact on Income & Spending is higher in India in comparison to other SEA countries

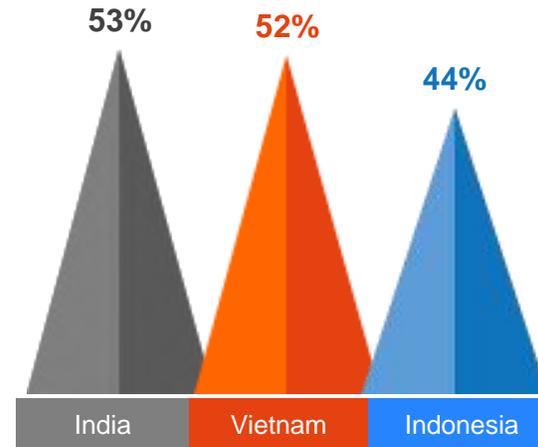
Impact to Economy



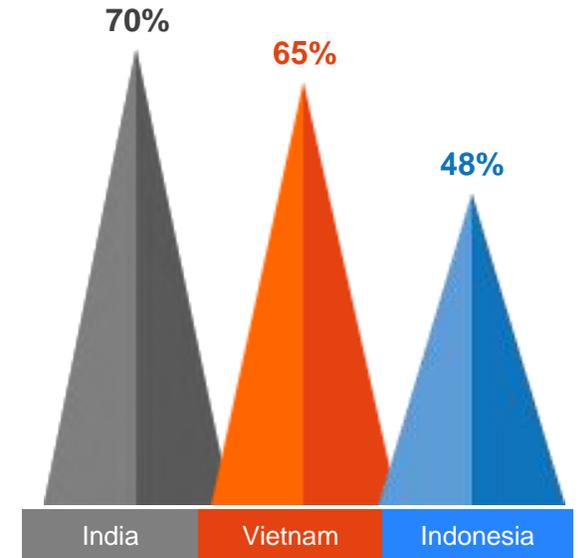
Impact on Job/Daily Income



Impact on Financial Security



Reduction in Spending

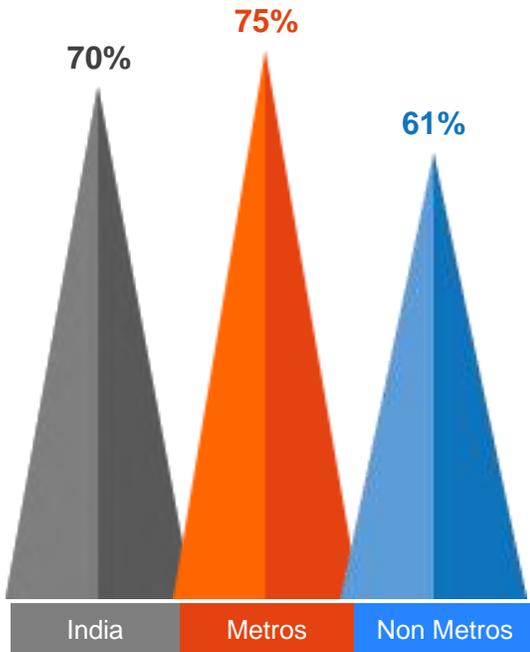


Source: SurveySensum Internal Study: APAC

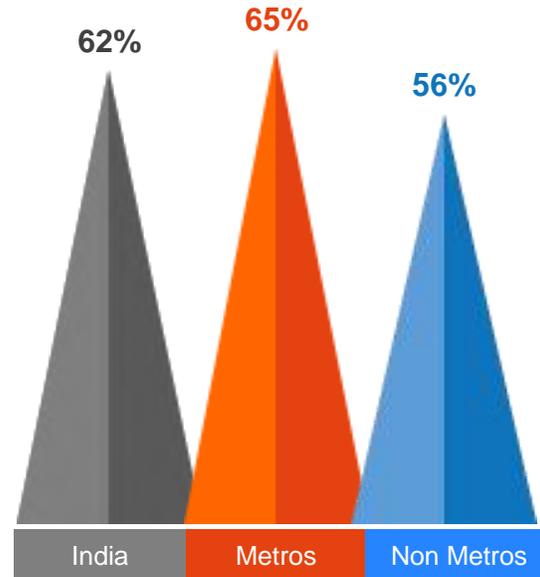


Impact on Income, Job & Spending is higher in Metros

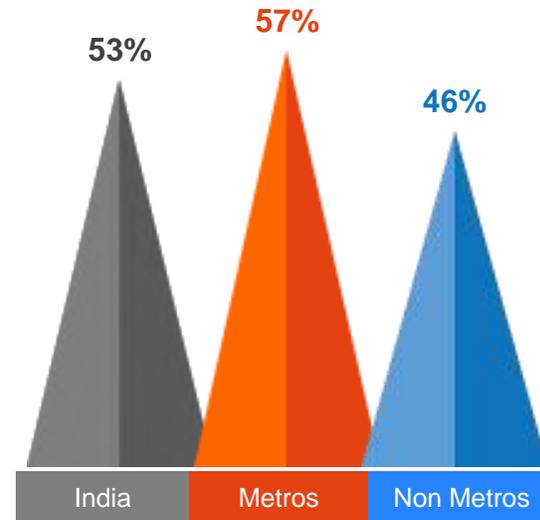
Impact to Economy



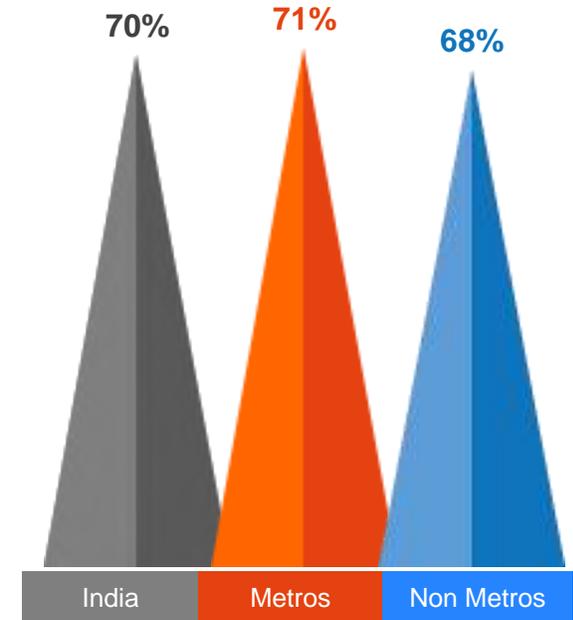
Impact on Job/ Daily Income



Impact on Financial Security



Reduction in Spending



India:
Highest Among Mid Career
Professional (35 to 44yo) :
71%





2

Changes in Consumer Behaviour in India



Consumers in India have become more price conscious

Much More price conscious than before

39%

Downgraded my usual brand

31%

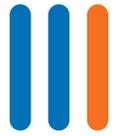
34% from **Younger** age group (18-34 years) **downgraded** their usual brand

Will Stick to downgraded choices post COVID

73%

Among the downgraders

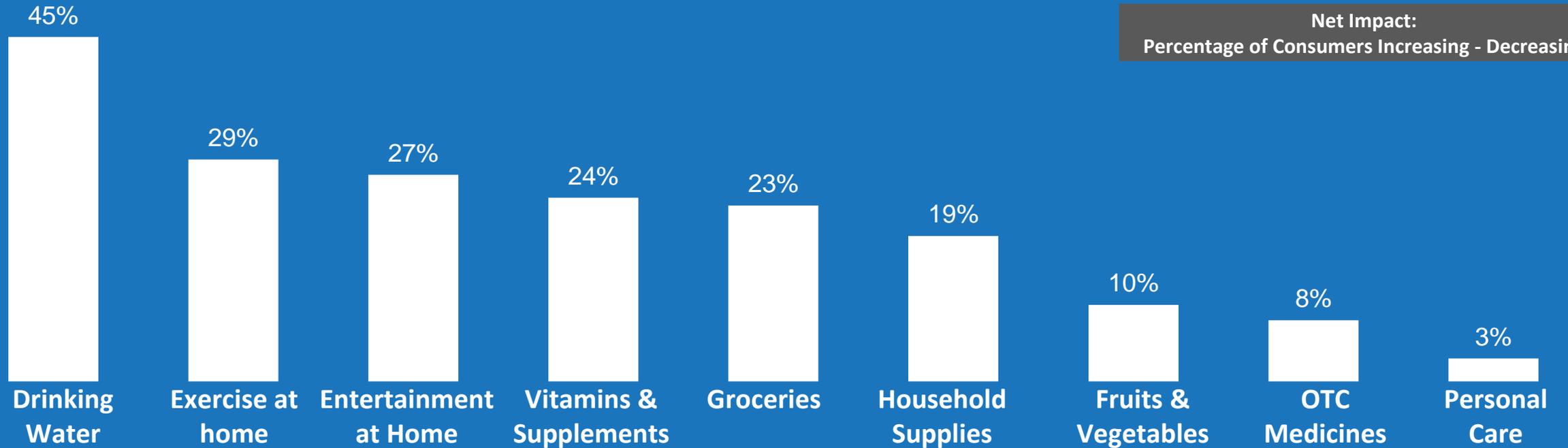
Source: SurveySensum Internal Study



Consumer are becoming more Health conscious



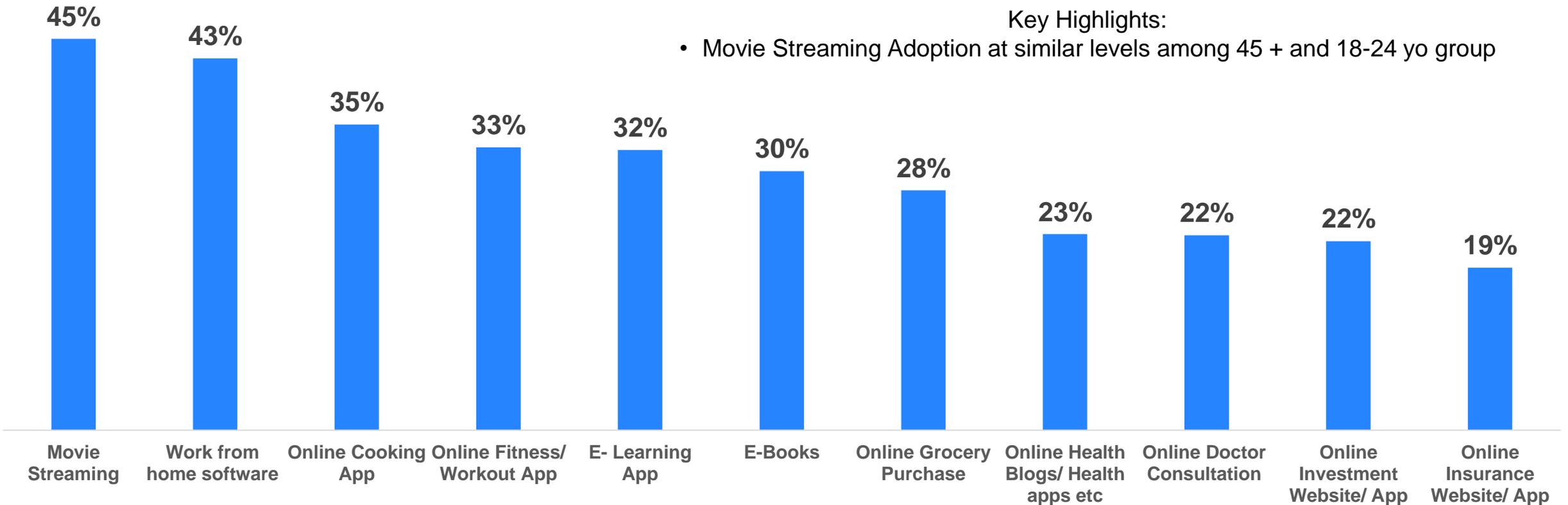
Key Consumption Habits Increasing due to COVID-19 (Percentage of Consumers)





Lockdown has given rise to new digital categories

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



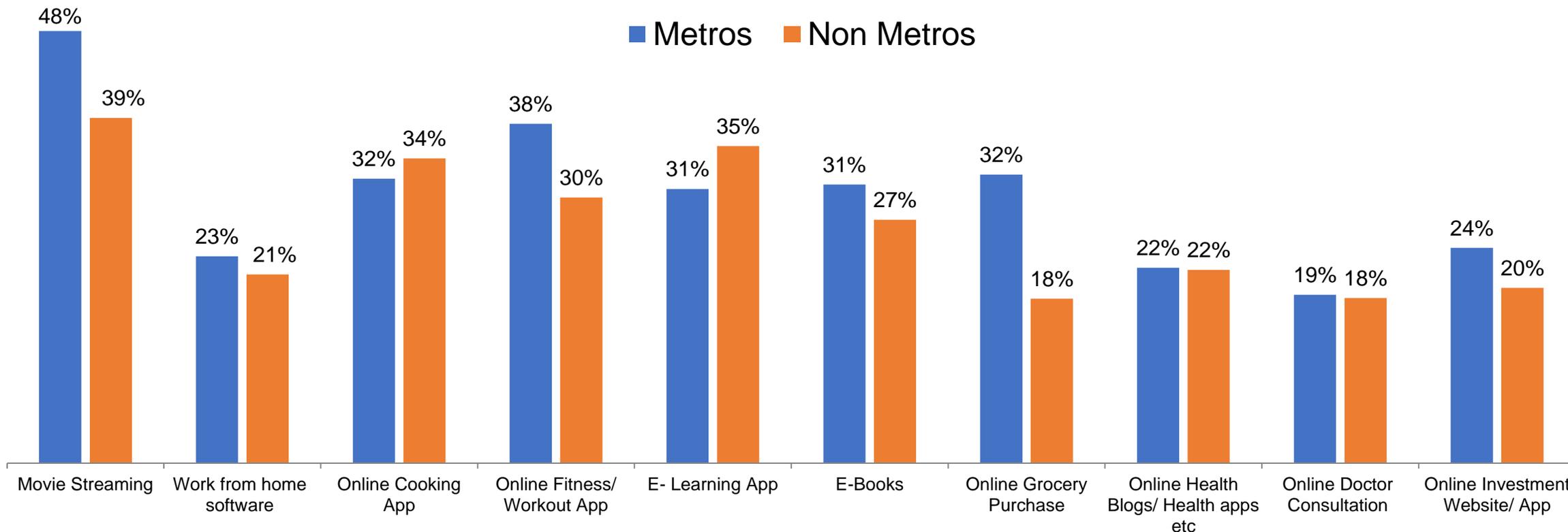
Key Highlights:

- Movie Streaming Adoption at similar levels among 45 + and 18-24 yo group

Source: SurveySensum Internal Study on Consumers

Metros expectedly higher on adoption of new categories, however non-metros are not far behind

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





Eating out, Travelling & Discretionary consumption have seen biggest decline due to COVID-19



KEY ACTIVITIES DECLINING

Net Impact:
Percentage of Consumers Increasing - Decreasing

Eating at Restaurants



-77%

Tourism & Travelling



-76%

Quick Service restaurants



-65%

OOH Entertainment



-58%

Clothing, Fashion & Accessories



-55%

Food Takeout & Delivery



-53%

Consumer Electronics



-48%

Online Shopping of Non Grocery Items



-23%

Snacks



-13%

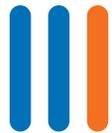
Source: SurveySensum, Mckinsey

Poll #1

Do you think COVID-19 impact will fade away and situation will normalize in 4 months?

- Yes
- No

Please use Poll Option on your screen to answer.



3

How Businesses are adapting?

**Businesses expect disruption to continue for a long period.
Indian businesses estimate normalization after 6 months**

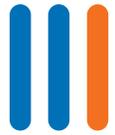
**Business Expected Time
to return to Normal
Situation**



**Consumer Expected Time
to return to Normal
Situation**

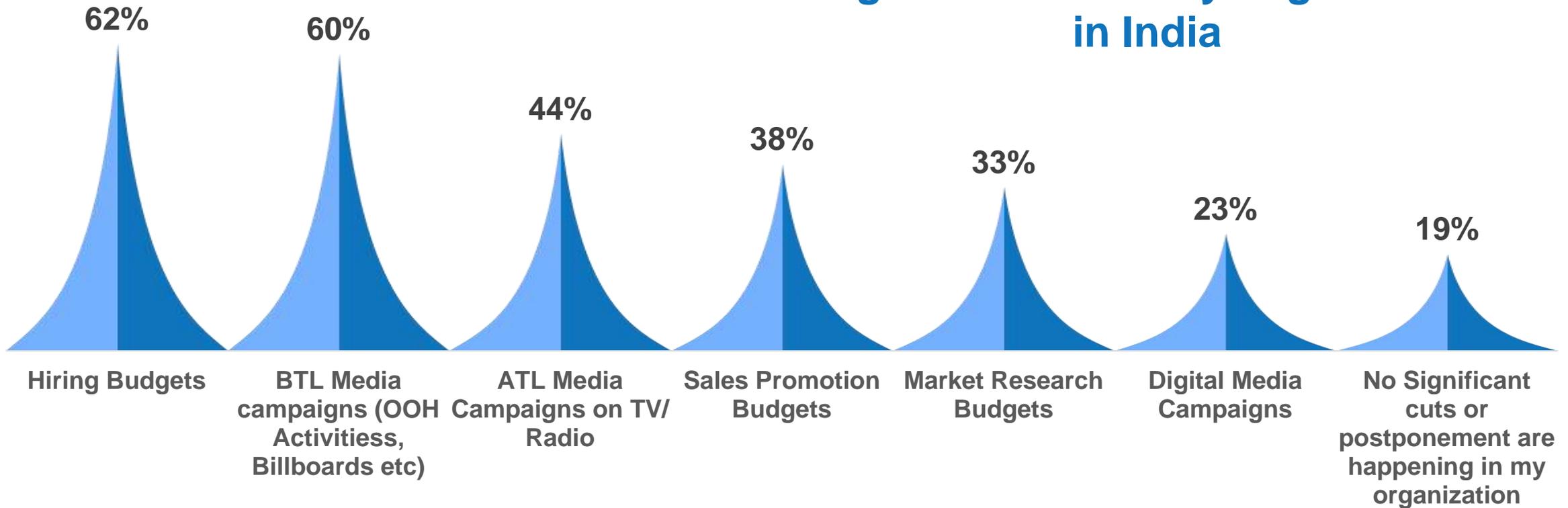


How many months do you think it will take to normalize business in terms of revenue and operations due to COVID-19?

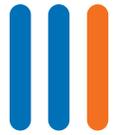


Hiring and BTL activities have been the most impacted

Budget Cuts Taken by Organizations in India

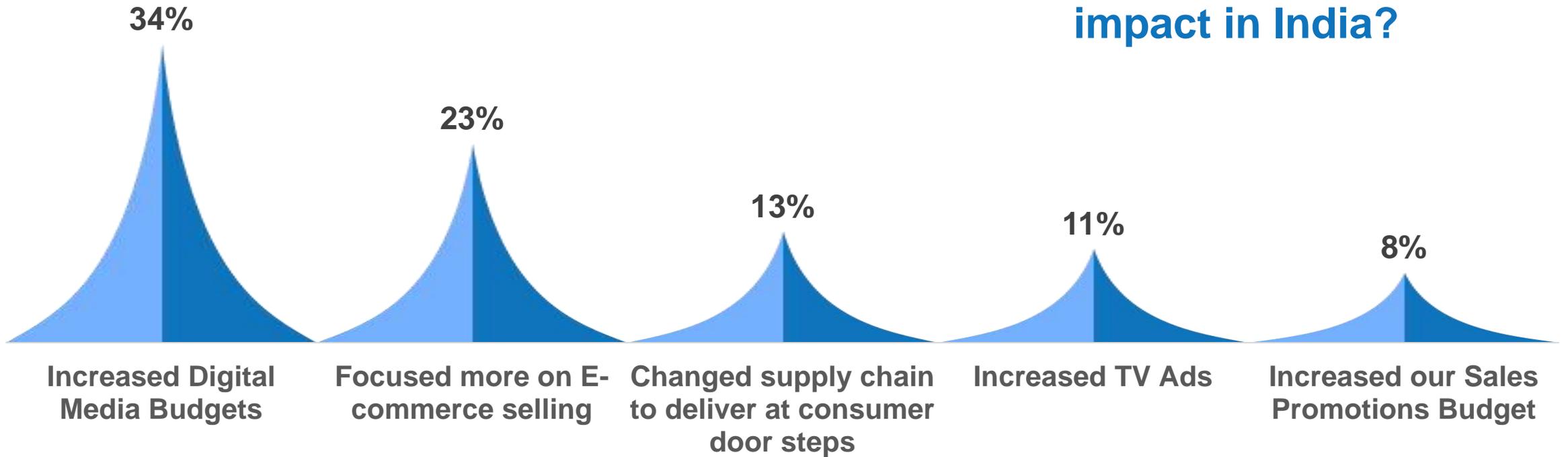


What kind of budget cuts or postponement have your organization taken due to COVID-19? (MA)



Businesses have taken digital route to counter COVID-19 impact

How businesses are countering impact in India?

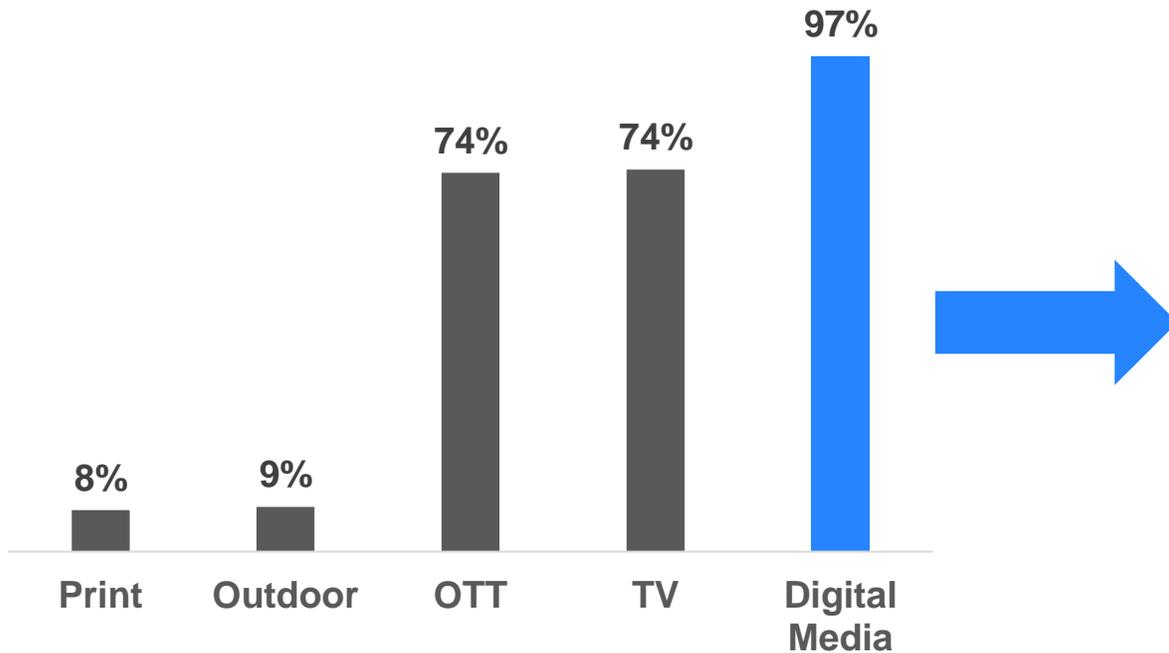


How your organization is coping with COVID-19 disruption to reach consumer in different ways? (MA)

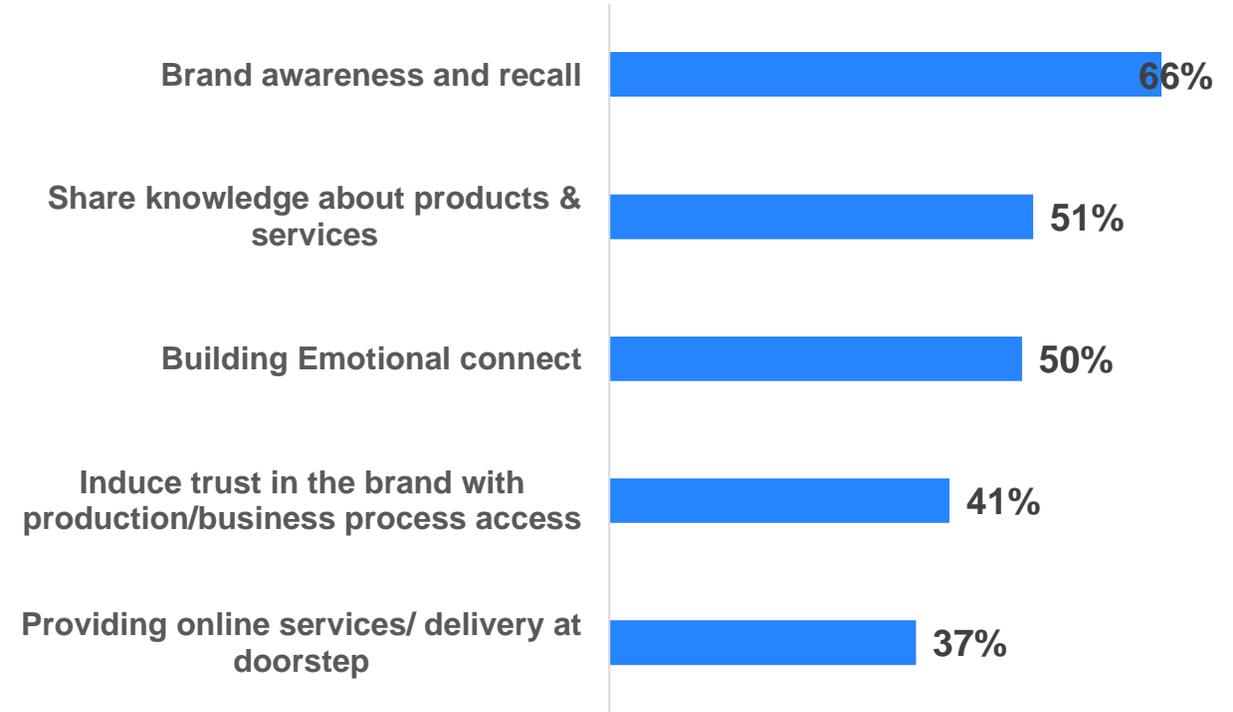


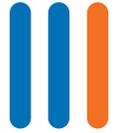
Digital Media is biggest channel being considered by brands & brands use it most for building awareness & sharing product/services knowledge with consumers

Top Media Channels being considered by Brands



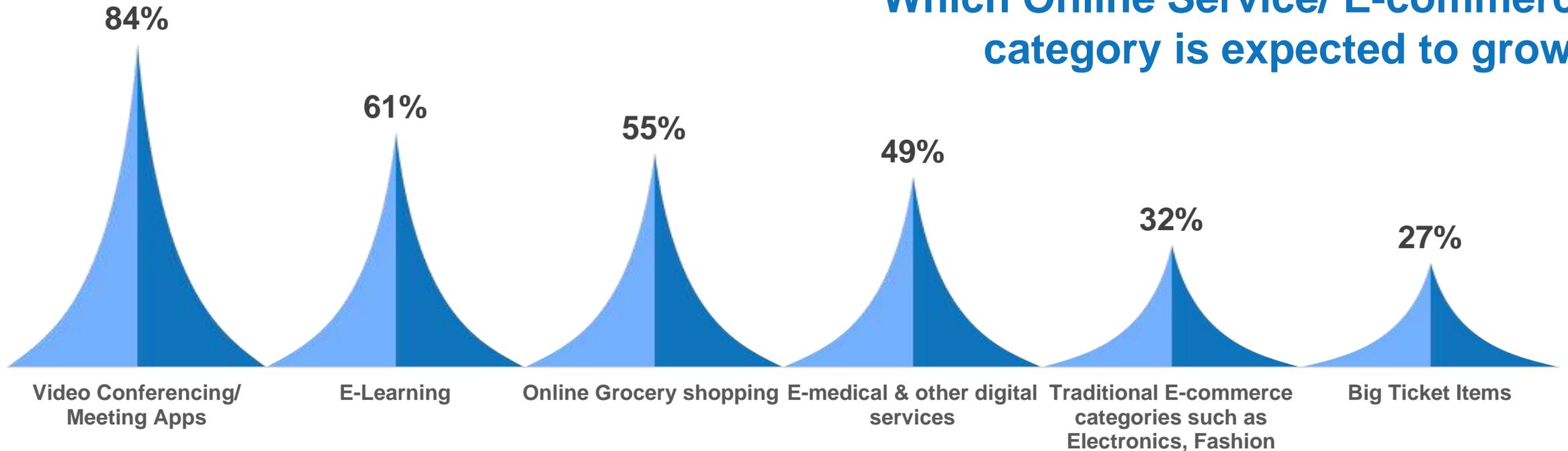
Role Played by Digital Media in Marketing Mix



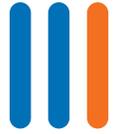


Businesses believe that Video Conferencing apps, E-learning and Online Grocery shopping will increase because of COVID-19

Which Online Service/ E-commerce category is expected to grow?

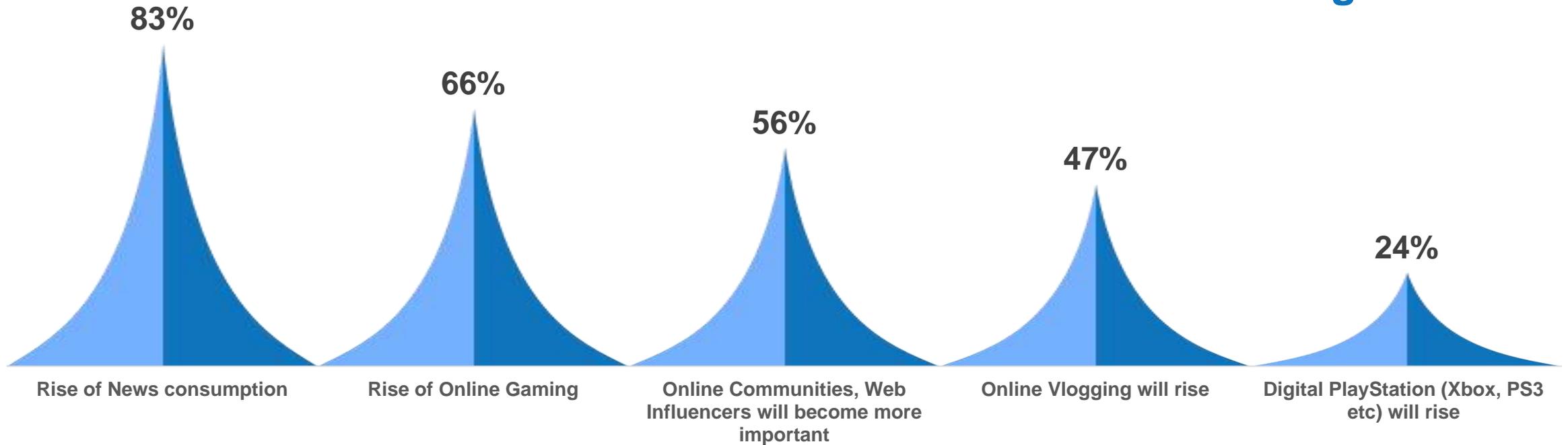


COVID-19 is shifting consumer behavior rapidly. Which of the following do you think best describes change in consumption/ use of online services or e-commerce? (MA)



Brand believe that due to COVID-19, consumption of News and Online Gaming will increase

Brand Owners' perception on change in consumer digital behavior

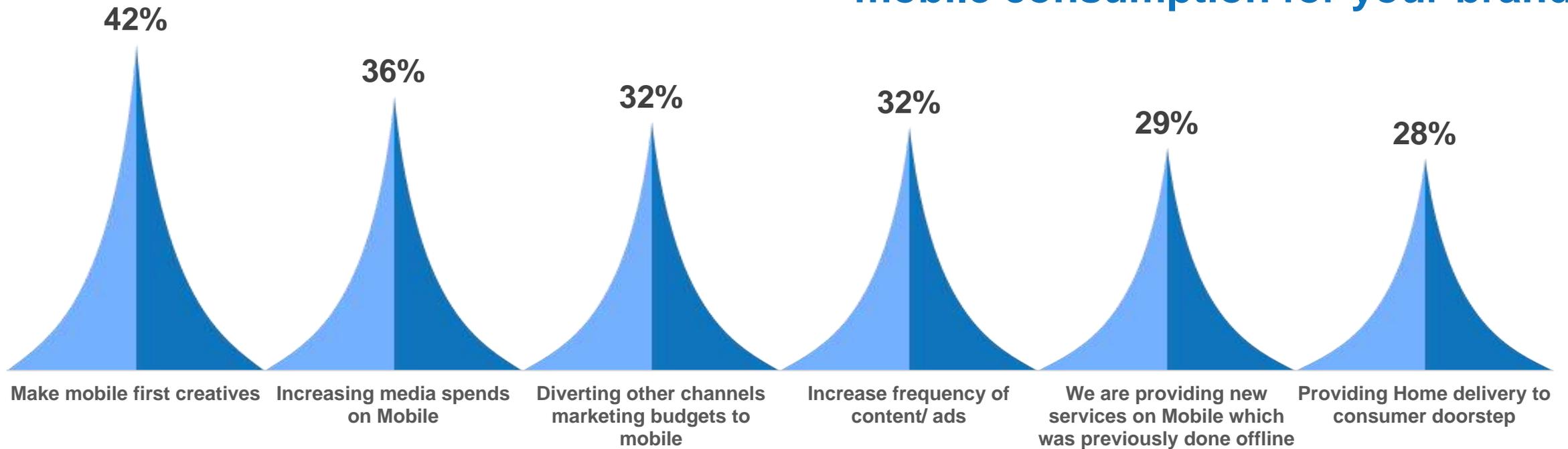


Which of the following is most expected change in consumers' digital behavior?



Mobile first creatives is top strategy used by brands to leverage on growing mobile consumption

How are you utilizing increasing mobile consumption for your brand?



How are you utilizing increasing mobile usage by consumers for your brands?

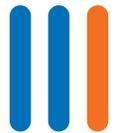


Poll #2

Do you think Digital Marketing spend will go up in your organization in future?

- Will increase 30%**
- Will increase 31% to 60%**
- Will Increase 61% or More**
- Digital Spends will remain the same**

QUESTIONS?

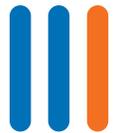


UPCOMING WEBINARS

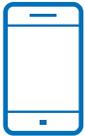
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- ≡ June 12 – #ShapingTheFuture through Marketing & Technology...there is no Playbook for this
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Thank You!