

HERE FOR NOW V/S HERE TO STAY: PERSPECTIVES ON CHANGING CONSUMER BEHAVIOUR

- MMA Webinar Series
- May 8, 2020

In Partnership with:



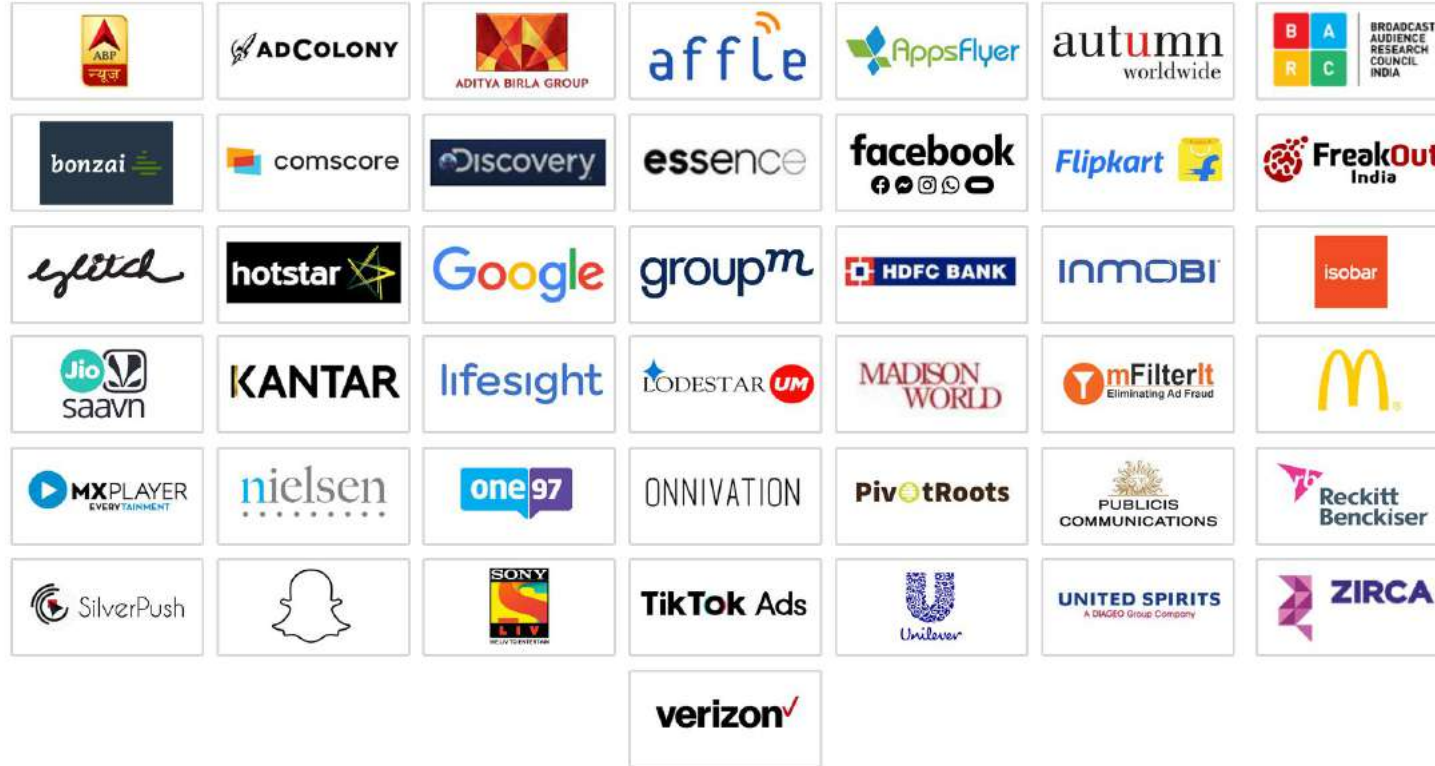


MMA IS 800+ MEMBERS STRONG GLOBALLY
MARKETERS, AGENCIES, MEDIA SELLERS, TECHNOLOGY & OPERATORS





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



[ABOUT](#) [MEMBER CENTER](#) [PROGRAMS](#) [EVENTS](#) [EDUCATION](#) [RESEARCH & INSIGHTS](#) [MATT / MOSTT / SAVE](#) [SMARTIES](#) [JOIN MMA](#) [Q](#)

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



**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

<https://www.mmaglobal.com/marketersupporthub/weareinitttogether>





UPCOMING WEBINARS

- **May 11** – COVID-19 Impact On APAC Industry Sentiment
- **May 14** – Healthy, Happy and Productive during Covid-19 Times
- **May 15** – In conversation with Rohit Dadwal ... **There Is No Playbook For This.....**
- **May 19** – Social Commerce: The Next Normal?
- **May 21** – MarTech: Powering Digital Transformation in China
- **May 29**- China's Road to Recovery



Scan me

<https://www.mmaglobal.com/webinars>















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

GoToWebinar Control Panel

Audio

Use: ☐ Telephone
☒ Mic & Speakers

MUTED

Talking:

Questions

Type question here.

Tentative: Mobile & Privacy: Actionable Steps for Success

Webinar ID#

GoToWebinar

Share the Insights

#MMAWeb



PRESENTER



Sapna Chadha
Senior Country Marketing Director
Google India & Southeast Asia



Sukhleen Aneja
CMO, Hygiene Home For South Asia
Reckitt Benckiser

Moderator/Host



Moneka Khurana
Country Head
MMA India



Here for now v/s Here to stay

Perspectives on changing
consumer behaviours



Sapna Chadha

Senior Country Marketing Director,
Google India and Southeast Asia



People want
brands to help
bring back
a sense of
normalcy, and
move forward
with reassurance



Talk to me

77% of consumers say
brands should talk about
how the brand is helpful
in the new everyday life

Act for we

75% of consumers say
brands should inform about
their efforts
to face the situation








Family activities



Changing consumer behaviours

Differentiate between

shock, 
step-change 
& speed up 

consumer behaviours



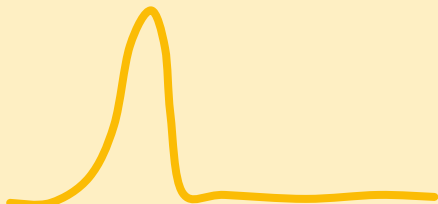
While we don't yet have a good sense of when or how this situation will resolve itself,

we have early insights into how people's needs and behaviors might evolve as they seek to regain a sense of balance

Shock

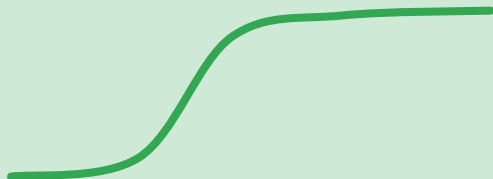
Sudden change in behavior,
unlikely to sustain

Google



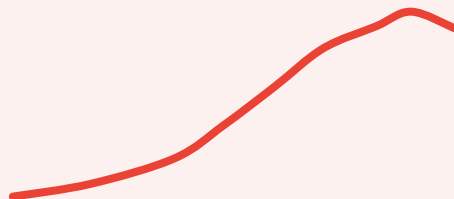
Step-change

Sudden change in behavior,
may sustain



Speed up

Acceleration of existing
behavior, may sustain



⚡ Shock

Sudden change in behavior,
unlikely to sustain

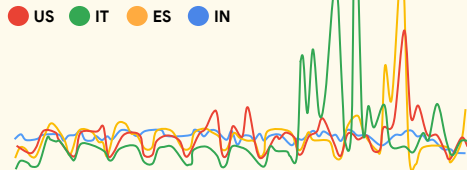
▶ Step-change

Sudden change in behavior,
may sustain

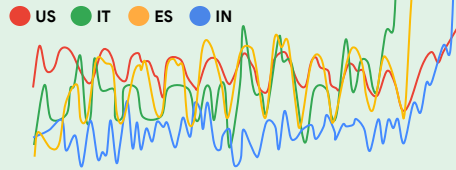
▶▶ Speed up

Acceleration of existing
behavior, may sustain

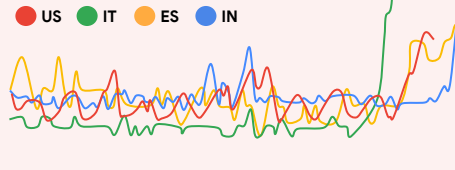
Quick rise and fall in
school-related searches
as quarantine orders
went into effect



Quick rise in
exercise-related searches
showing signs of stabilization
at elevated levels



Quick rise and fall in
delivery-related searches
as lockdowns
went into effect



TOP SEARCHES

US 100th day of school ideas school districts closing schools closing	IT scuole chiuse coronavirus chiusura scuole coronavirus riapertura scuole
ES cierre colegios coronavirus cierre colegios andalucia cierre colegios madrid	IN noida school closed bangalore schools closed up school closed news today

US at home shoulder workout at home back workout resistance band workouts	IT total body workout a casa street workout 7 minuti workout
ES ejercicios para mayores en casa ejercicios para hacer en casa con niños ejercicios para hacer en casa mujeres	

Compound Annual Growth Rate (2017-19)

US 7.24%	IT 19.40%
ES 7.69%	IN 0.88%

Anxiety around health and hygiene leads to a
dramatic increase
in searches around
"cleaning" ⚡

Masks¹ saw a **380%**
surge in demand,
sanitizer² by **440%** but
demand seems to have
been stabilized now

● Mask ● Sanitizer ● Disinfect



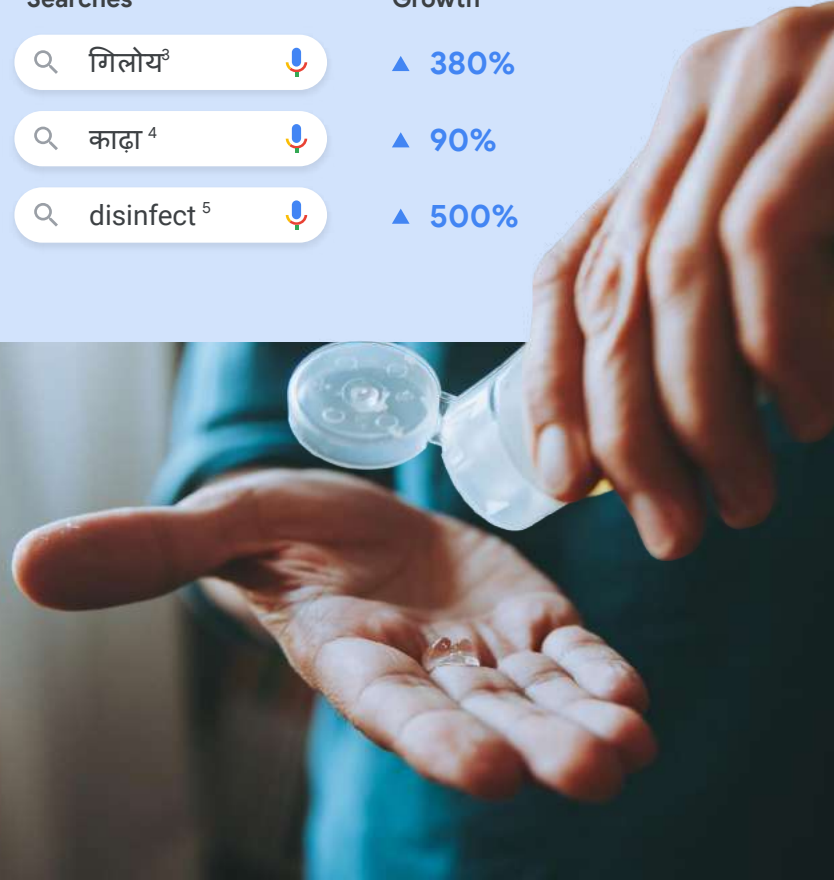
Source: 1,2. Google Trends Data, DAV for Feb - May 2020;
3, 4. Google Trends Data, India, Immunity Related Searches, DAV for Jan - Feb 2020 vs Mar 2020;
5. Google Trends Data, DAV for Feb 2020 vs Apr 2020

Overall **immunity related**
searches up by **500%**

Searches

Growth

🔍 गिलोय ³	🔊	▲ 380%
🔍 काढ़ा ⁴	🔊	▲ 90%
🔍 disinfect ⁵	🔊	▲ 500%



Content consumption

has seen an accelerated pace of growth with video streaming and app downloads at an all time high



Consumers are spending
~3 hrs 41 mins
on their smartphones
every day



30% growth in
mobile app
downloads in
March '20 vs the
previous two
months



Search interest
in video streaming
platforms
**grew between
40 - 120%**
in 2020

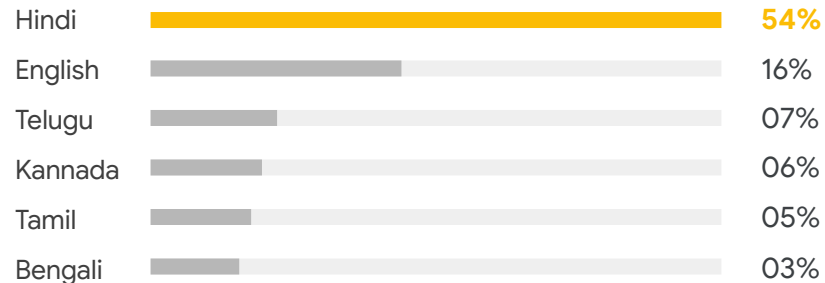


TV viewership
grew by 31%
in April,
compared to
January 2020

A woman wearing a vibrant orange and purple sari with a yellow border is looking down at a white smartphone she is holding in her hands. She has a bindi on her forehead and is smiling slightly. The background is a bright yellow wall.

India is consuming content in local languages

Local languages are most preferred when watching online videos



Online gaming sees increased interest

with a surge in searches for "old world" games



Classic
Poker Game
Classic Games



Install

Game Searches

Growth

 rummy⁶ 



▲ 134%

 poker⁷ 

▲ 55%

 ludo⁸ 

▲ 70%

 लूडो⁹ 

▲ 200%

Gaming **“with friends”** queries saw a 11x jump¹⁰

Searches for **“gaming computers”** grew by 52%¹¹

E-learning has seen a boom

across demand and supply

334% growth
in searches for
classes online¹²

179% growth
in searches for
teach online¹³

179% increase in
searches for **online
certification**¹⁴

69% increase in
coding for kids¹⁵

3x growth in
**Data Science
& Machine
Learning**¹⁶
related
courses
across
2019-20



Source: 12. Google Trends Data, India, DAV for Jan - Feb 2020 vs Mar 2020; 13. Google Trends Data, India, DAV for Jan -Feb 2020 vs Mar 2020;
14. Google Trends Data, India, Jan - Apr 2020; 15. Google Trends Data, India, Feb - May 2020;
16. Google Internal Data, India, Jan to Nov 2019 vs Jan to Nov 2018





Google

Source: 17. Google Trends Data, India, Dec 2019 - Apr 2020;
18. Google Trends Data, India, Jan 2020 - Apr 2020;
19,20. Google Trends Data, India, DAV, Feb 2020 vs Mar - Apr (until Apr 6) 2020

As individual responsibilities rise,

consumers are looking for faster and easier ways to cook



Cake is the most searched for food in India



baking¹⁷



▲ 4X

Dec 2019

Apr 2020

1400% growth in searches for **cake banana sikhao**¹⁸

270% growth in **easy**¹⁹ in the Food and Beverages category

200% growth in searches with **without**²⁰

Interest in beauty shifted

from cosmetics to home remedies and DIY ⚡



Searches for
overall **beauty &
personal care**²¹
have declined by
12% WoW



DIY “How-to”
searches in
**beauty and
fitness**²² surged
by **37%**



53% of
**beauty
mavens** last
month were
men



how to make face scrub



homemade essential oil





Grocery sees a demand rise across online and offline

while health sees a shift to online

1 out of 2 consumers wanted to find out **how brands are responding to the situation** with respect to closing of stores, changing hours, etc.²⁴

Searches

 online grocery delivery²⁵ 

 ration dukaan²⁵ 

 grocery delivery near me²⁵ 

 consult doctor online²⁵ 

Growth

▲ 350%

▲ 300%

▲ 550%

▲ 60%

Convenience leads to accelerated adoption of online payments

Searches

🔍 how to pay electric bill online²⁶ 

🔍 बिजली बिल चेक²⁷ 

Growth

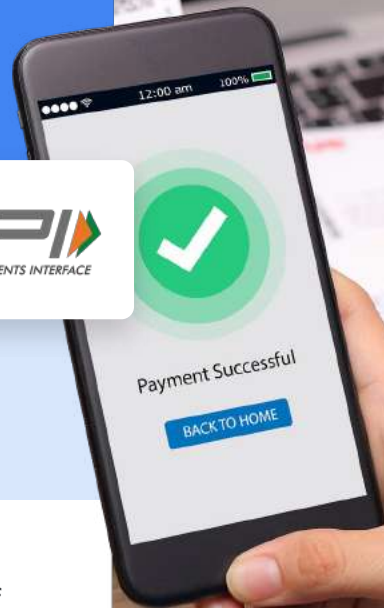
▲ 180%

▲ 80%

“UPI” had **3x** more search interest than “IMPS” and **1.5x** more than “NEFT” in 2019²⁸

Searches about UPI from non-metros grew faster at **79%** compared to metros at **28%**²⁸

UPI transactions **exceeded** those of debit and credit cards in both **value** & **volume**²⁸



Increased consumer appetite for news ⚡

manifested across surges in Search, YouTube & TV

लाइव न्यूज़



+200%

growth in **News**
& लाइव न्यूज़²⁹
on Search



+100%

growth in **News**
searches on YouTube
across March v/s
Jan & Feb



+251%

growth in **TV news**
consumption across
March v/s Jan



Shock

Sudden change in behavior,
unlikely to sustain

Step-change

Sudden change in behavior,
may sustain

Speed up

Acceleration of existing
behavior, may sustain

Anxiety around health and hygiene
leads to a dramatic increase in
searches around **cleaning**

Online gaming sees increased
interest with a surge in searches
for "old world" games

Content consumption has seen an
accelerated pace of growth with
video streaming and app
downloads at an all time high

Increased consumer appetite for
news manifested across surges
in Search, YouTube & TV

Grocery sees a demand rise
across online and offline while
health sees a shift to online

India is asking questions
in **local languages**

Consumers are turning to **cooking
hacks**, **DIY** beauty and home
remedies

Convenience leads to a rapid
shift to **online transactions**

[Click here](#) to download the full report
What is India Searching for? Insights for Brands

Thank you



PARTICIPATE WITH MMA



MMA
Smartbrief



Smart
Fundamentals



Case Study
Hub



Mobile Marketing
Playbook



Guidance
Reports



MMA LinkedIn
Group



MMA on Social
Media



Webinar
Library



FAQ



Benchmarks &
Standards



UPCOMING WEBINARS

May 11 – COVID-19 Impact On APAC Industry Sentiment

May 14 – Healthy, Happy and Productive during Covid-19 Times

May 15 – In conversation with Rohit Dadwal ... **There Is No Playbook For This.....**

May 19 – Social Commerce: The Next Normal?

May 21 – MarTech: Powering Digital Transformation in China

May 29 – China's Road to Recovery



Scan me

<https://www.mmaglobal.com/webinars>



Thank You!