

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

- MMA Webinar Series
- May 8, 2020

In Partnership with:

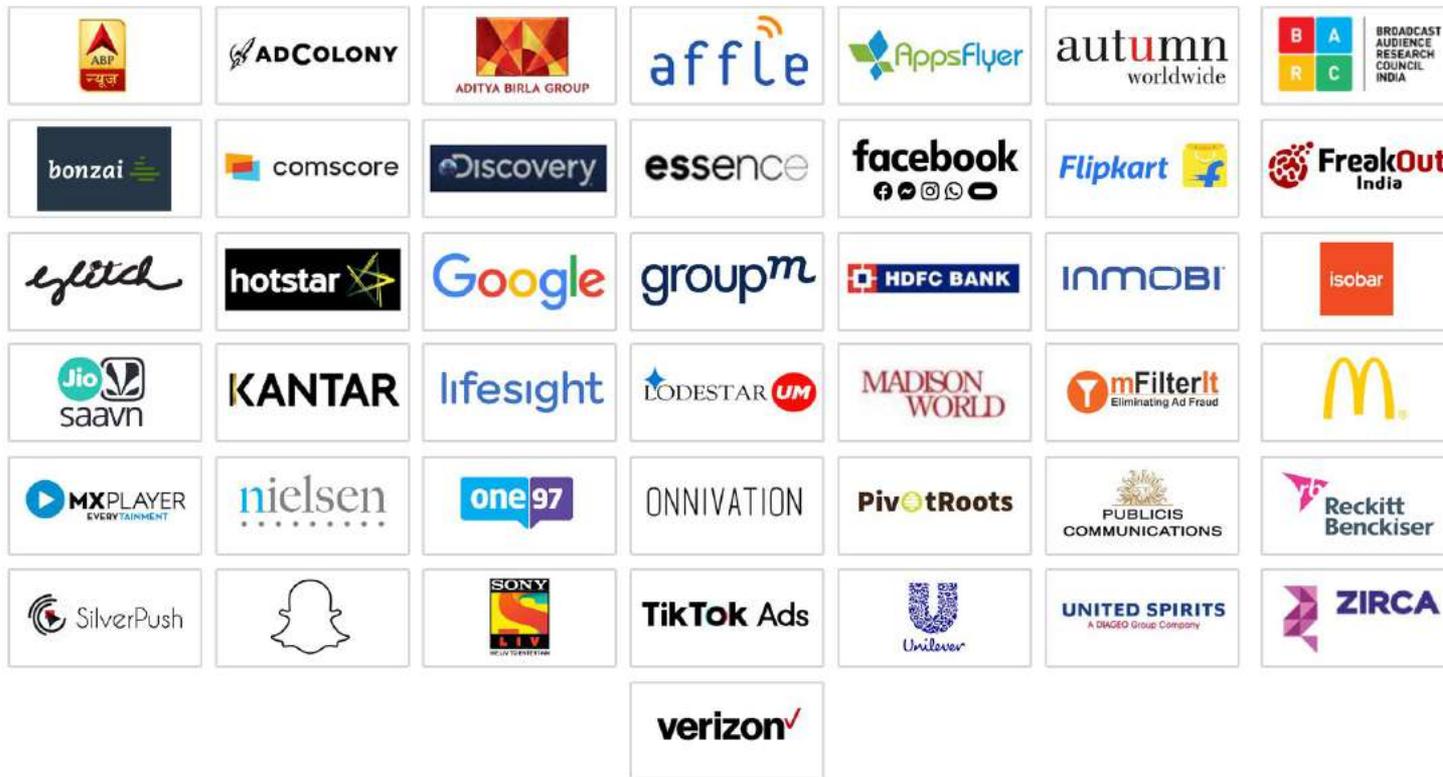




MMA IS 800+ MEMBERS STRONG GLOBALLY
MARKETERS, AGENCIES, MEDIA SELLERS, TECHNOLOGY & OPERATORS



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



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

- **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



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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.

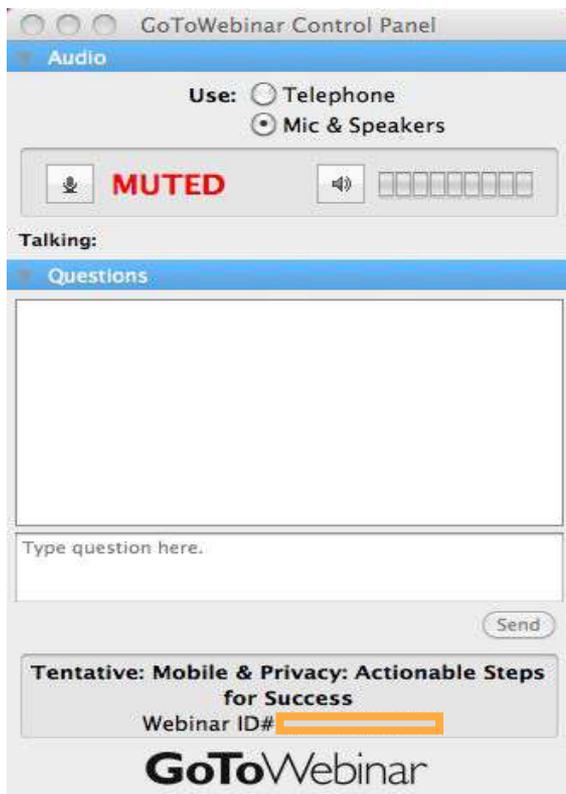
 Currency Measurement	 Internet of Things	 Location	 Mobile Games	 Mobile Messaging
 Mobile Native Advertising	 Mobile Programmatic	 Mobile Shopper Marketing	 Mobile Video	 Privacy



Enroll by emailing committees@mmaglobal.com



MANAGING YOUR QUESTIONS



Share the Insights

#MMAWeb





PRESENTER



Sapna Chadha
Senior Country Marketing Director
Google India & Southeast Asia

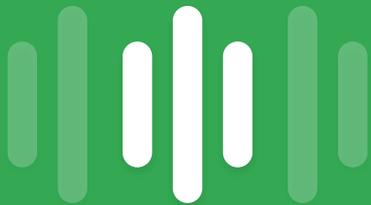


Sukhleen Aneja
CMO, Hygiene Home For South Asia
Reckitt Benckiser

Moderator/Host



Moneka Khurana
Country Head
MMA India



Here for now v/s Here to stay

Perspectives on changing
consumer behaviours

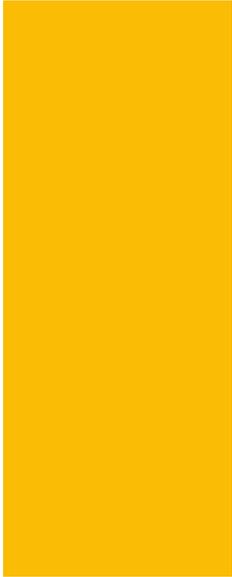


Sapna Chadha

Senior Country Marketing Director,
Google India and Southeast Asia



THINK
ABOUT
THINGS
DIFFERENTLY



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



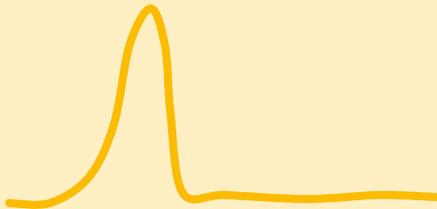
While we don't yet have a good sense of when or how this situation will resolve itself,

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

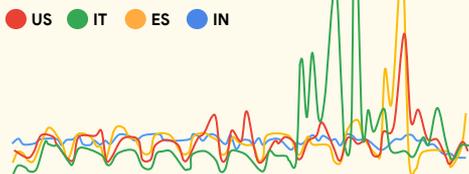
▶ Step-change

Sudden change in behavior,
may sustain

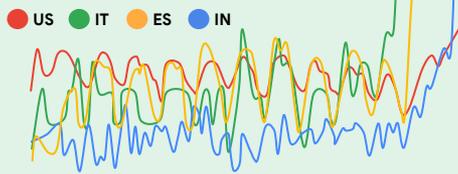
▶▶ Speed up

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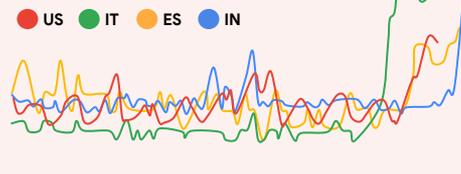
Quick rise and fall in
school-related searches
as quarantine orders
went into effect



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**

ES

cierre colegios coronavirus
cierre colegios andalucia
cierre colegios madrid

IT

scuole **chiuse** coronavirus
chiusura scuole coronavirus
riapertura scuole

IN

noida school **closed**
bangalore schools **closed**
up school **closed** news today

TOP SEARCHES

US

at home shoulder workout
at home back workout
resistance band workouts

ES

ejercicios para mayores **en casa**
ejercicios para hacer **en casa** con niños
ejercicios para hacer **en casa** mujeres

IT

total body workout a **casa**
street workout
7 minuti workout

Compound Annual Growth Rate (2017-19)

US

7.24%

ES

7.69%

IT

19.40%

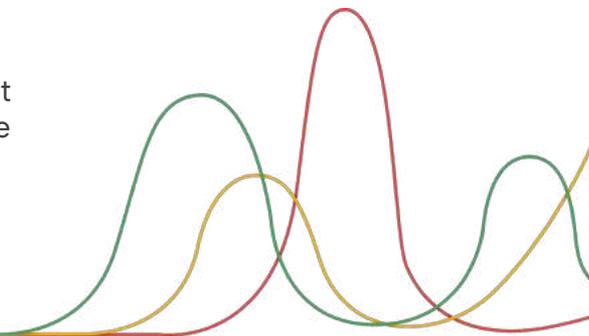
IN

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

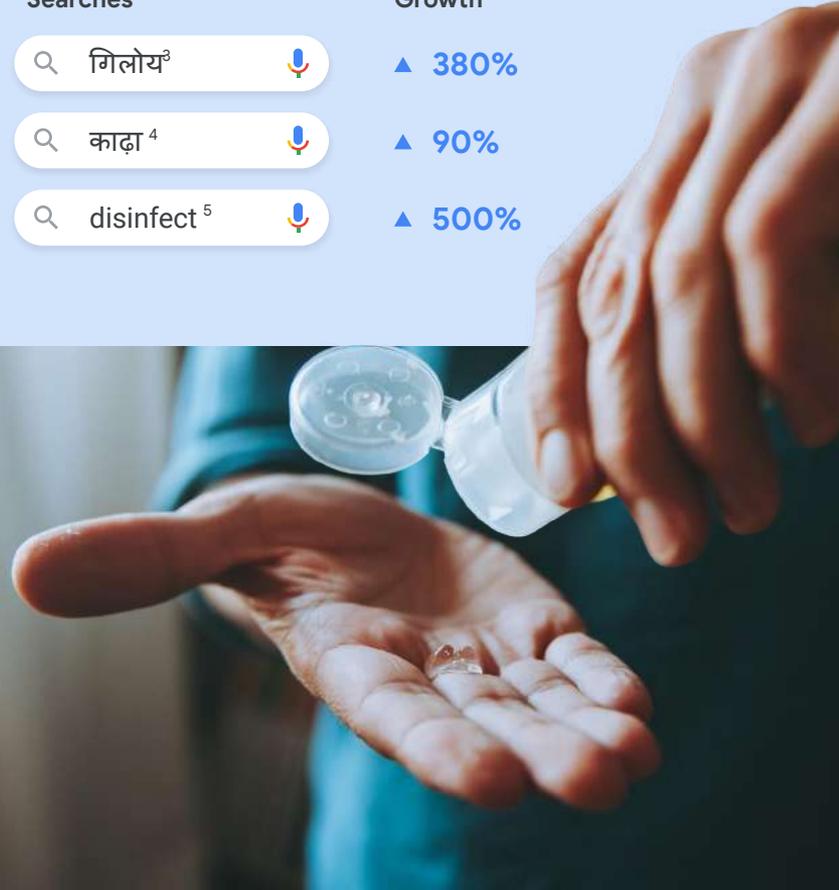


Overall immunity related searches up by 500%

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

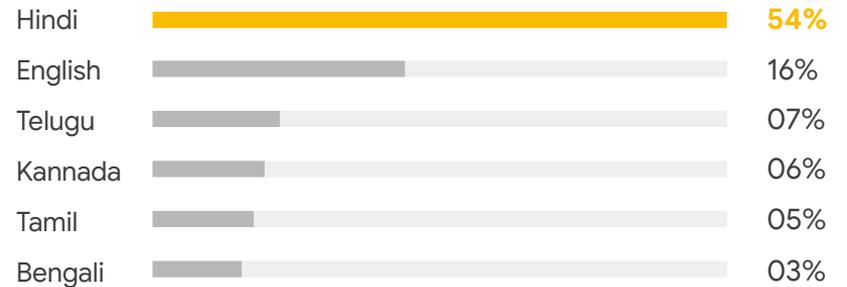


TV viewership **grew by 31%** in April, compared to January 2020



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 

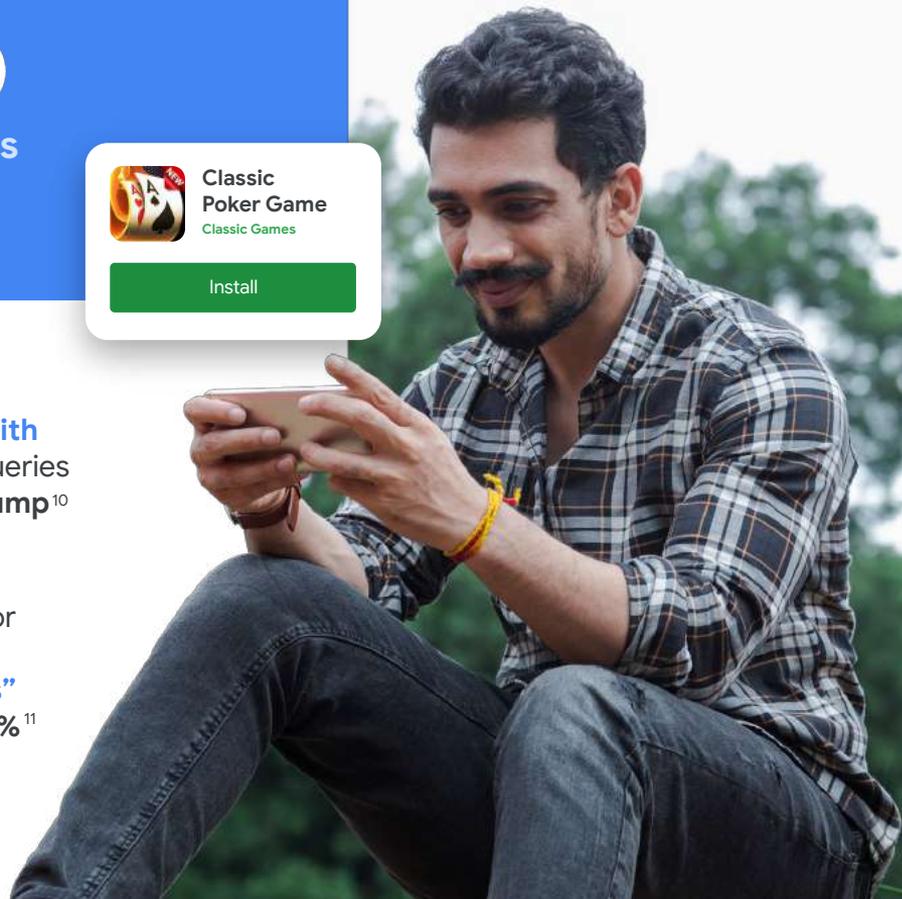
▲ 70%

 लूडो⁹ 

▲ 200%

Gaming **“with friends”** queries saw a **11x jump**¹⁰

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



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
easy¹⁹ in the Food and
Beverages category

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

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

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 

Growth

 **350%**

 ration dukaan²⁵ 

 **300%**

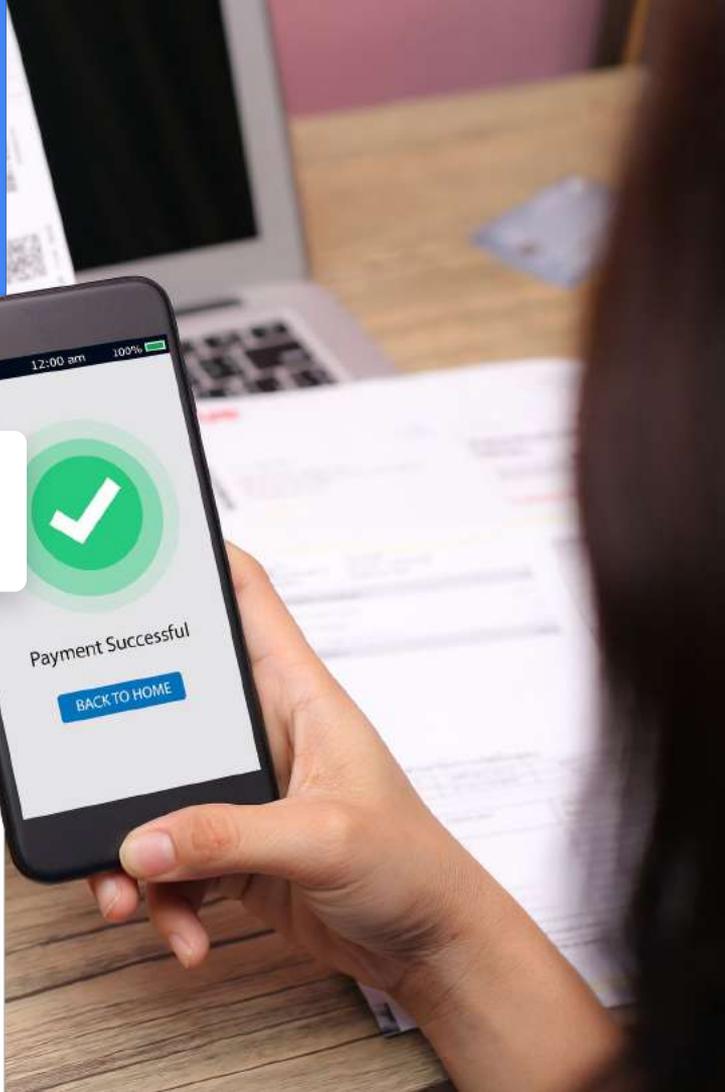
 grocery delivery near me²⁵ 

 **550%**

 consult doctor online²⁵ 

 **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



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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



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Benchmarks &
Standards



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Thank You!