



The New Abnormal – Media Habits in Cathartic Times

MMA Webinar Series

April 16, 2020

In Partnership with:  **LODESTAR** 



MMA Purpose

WHO



The People We Serve

Prime Audience

Pioneering Chief Marketers



WHAT



Our Strategic Priorities

Measurement & Business Impact

Drive marketing effectiveness and the future of measurement for sustainable business growth

Marketer Org Development

Redefine marketing organization dynamics and future capabilities needed in a data

Inspiration

Lead marketing innovation and creative effectiveness/impact for mobile and emerging technologies

Advocacy

Establish standards and self-regulatory guidelines to improve consumer trust and confidence in marketing and connected devices

WHY



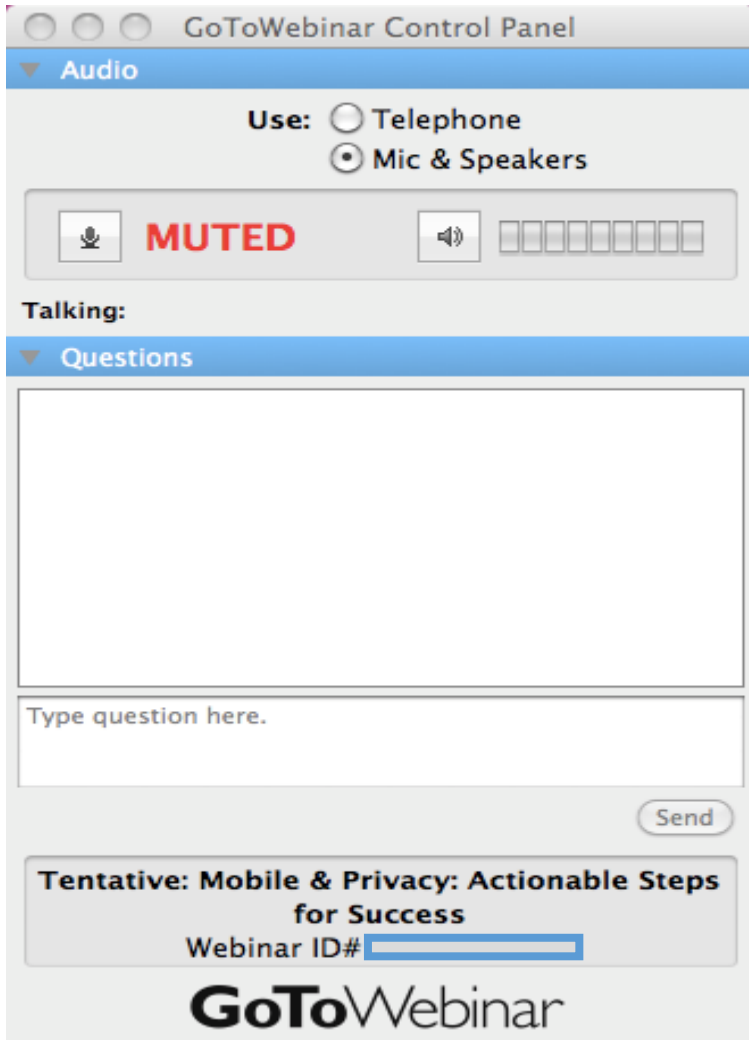
Our Reason for Being

Purpose

To enable marketers to drive innovation and enduring business value in an increasingly dynamic and connected-connected world.



Managing Your Questions



The screenshot shows the GoToWebinar Control Panel interface. At the top, there's a title bar with three window control buttons and the text "GoToWebinar Control Panel". Below this is a blue header for the "Audio" section. Under "Audio", there's a "Use:" label with two radio buttons: "Telephone" (unselected) and "Mic & Speakers" (selected). Below the radio buttons is a "MUTED" status indicator with a microphone icon, a speaker icon, and a volume level bar. A "Talking:" label is positioned above the "Questions" section header. The "Questions" section has a large text area for typing a question, a "Type question here." placeholder, and a "Send" button. At the bottom, there's a "Tentative: Mobile & Privacy: Actionable Steps for Success" title and a "Webinar ID#" field with a text input box. The GoToWebinar logo is at the very bottom.

Share the Insights

#MMAWeb

Presenters



Kasper Aakerlund
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UM APAC



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Chief Executive Officer
Lodestar UM India

Moderator/Host



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Mobile Marketing Association
APAC





THE NEW ABNORMAL

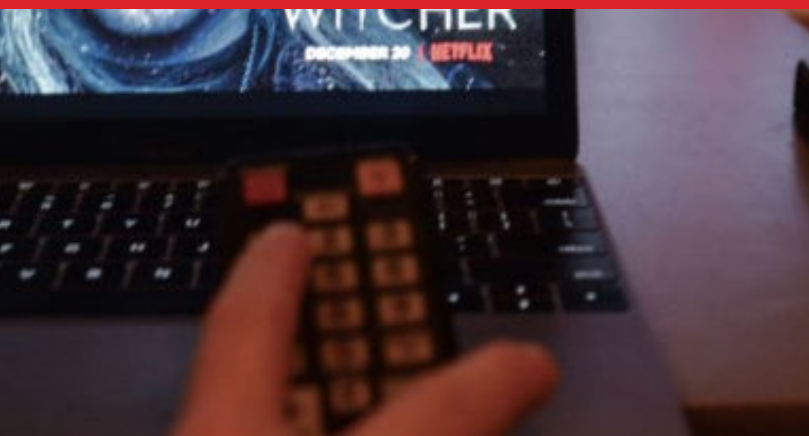
MEDIA HABITS IN CATHARTIC TIMES

16 APRIL 2020

TODAY'S CONTENT



FOUR KEY TRENDS IN MEDIA HABITS



KEY IMPLICATIONS TO BRANDS



KEY IMPLICATIONS TO THE AD MARKET



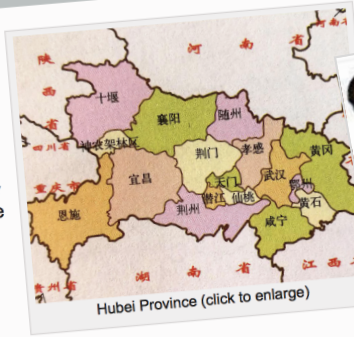
14 cities in HuBei province locked down as Coronavirus spreads in China

DMCA PROTECTED January 24th, 2020 | Author: Editorial

The authorities in China have announced further compulsory measures to curb the spread of the deadly Coronavirus, which has claimed the lives of 26 and infected 894 throughout the country. (updated 2359 hours on 24th Jan)

Of those infected, about 549 cases were reported in the HuBei province, where virus city Wuhan is located. There were 2 deaths outside HuBei province, in HeiLongJiang (黑龙江) and HeBei (河北) while 177 are reported to be "seriously ill".

The Coronavirus appears to be spreading throughout China, with an average of more than 100 new confirmed infections per day, possibly due to the massive human



'Liberation' as Wuhan's coronavirus lockdown ends after 76 days

Flights resume, families reunite, and traffic jams return to the streets where 11m people had been shut in

Coronavirus - latest updates
See all our coronavirus coverage

Singapore firms h resuming operati COVID-19 outbr

Coronavirus: Hong Kong's Rugby Sevens and Sonar Festival among events postponed

by Talek Harris

Coronavirus: Covid-19 could Indonesia long after world re

The country's remote, isolated islands offer a p to hide and fester if the Jokowi government fail
It needs to

Australian economic stimulus package: how much governments have committed to coronavirus crisis

Measures total \$213.6bn from the commonwe states and \$105bn in RBA-government lending

Japan approves nearly \$1 tril. package to cushion coronavirus impact

KYODO NEWS

Pawan Kalyan @PawanKalyan · 18h
We salute to all the Doctors, Nurses, health workers, sanitary workers, media and police for fighting against corona.



Coronavirus crisis: India Inc seeks economic package from centre

It also suggested the Centre to enhance credit limits for working capital across the board to all industries and additional reconstruction term loans to MSMEs (micro, small and medium enterprises) and stressed sectors with a government guarantee on default, up to 20 per cent.

Tokyo Olympics postponed to 2021 due to coronavirus pandemic

- Japan's prime minister and IOC president agree delay
- Fate essentially sealed when Canada and Australia pulled out
- Coronavirus - latest updates
- See all our coronavirus coverage



stockpile food, Bangkok malls to close from Sunday

Expanded shutdown to last until April 12, with pharmacies and take-out restaurants

Crowd-limiting measures at malls, public venues as new safe distancing rules kick in

Covid-19: Government advises public to stay home, avoid going to malls

Live from Wuhan: millions tune in to watch China build coronavirus hospitals

Streams from the construction sites of two new temporary medical facilities at the epicentre of the outbreak attract a supportive audience

What It Looks Like When 1.3 Billion People Stay Home

India's shutdown sent 18% of the world's population indoors.

Speaking Of Asia

S-E Asian economies better prepared this time

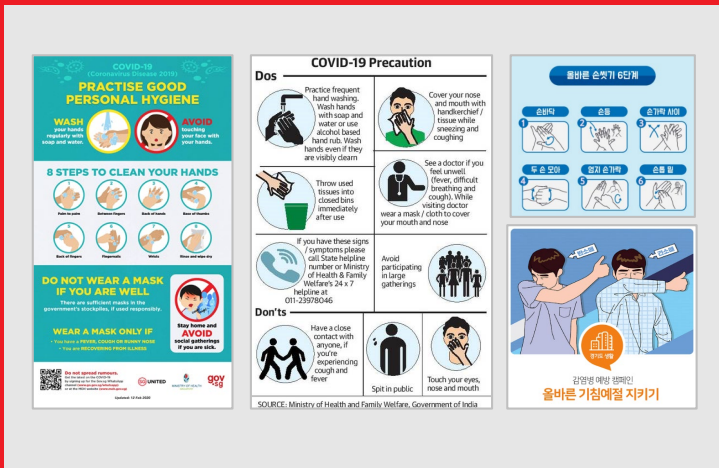
In Thailand, the COVID-19 outbreak is driving more consumers online



CONSUMER BEHAVIORS
HAVE CHANGED
SIGNIFICANTLY ...



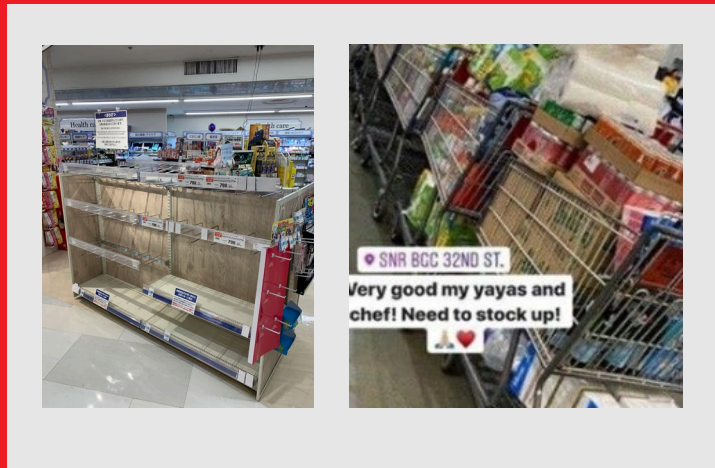
HEIGHTENED HEALTH AWARENESS



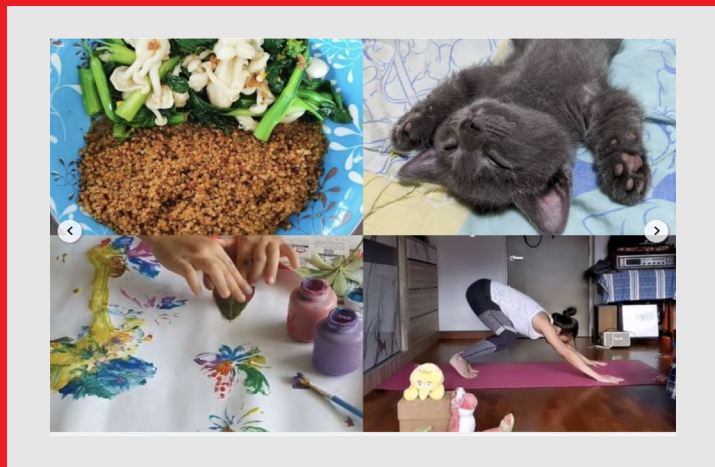
SHOPPING BEHAVIOURS CHANGE



PANIC BUYING AND HERD STOCKPILING



'COCOONING'; RETREAT TO THE HOME



WEATHERING THE STORM MODE

Coronavirus crisis: India Inc seeks economic package from centre

It also suggested the Centre to enhance credit limits for working capital across the board to all industries and additional reconstruction term loans to MSMEs (micro, small and medium enterprises) and stressed sectors with a government guarantee on default, up to 20 per cent.

Japan approves nearly \$1 tril. package to cushion coronavirus impact

TURNING TO NEWS AND 'QUARANTAINMENT'



IN THE CHINESE LANGUAGE, THE
WORD "CRISIS" IS COMPOSED OF
TWO CHARACTERS;
ONE REPRESENTING DANGER (危 WĒI)
AND THE OTHER, OPPORTUNITY (机 Jī)



FOR JD.COM AND ALIBABA, NOW CHINA'S
LARGEST E-COMMERCE COMPANIES,
SARS WAS THE TURNING POINT FOR THEM.



JD.COM 京东



4 KEY TRENDS

MEDIA HABITS IN CATHARTIC TIMES



THE RISE OF THE SCREENS

AS CONSUMERS RETREAT INTO THEIR HOMES, USAGE OF
AND TIME SPENT ON MULTIPLE SCREENS INCREASE.



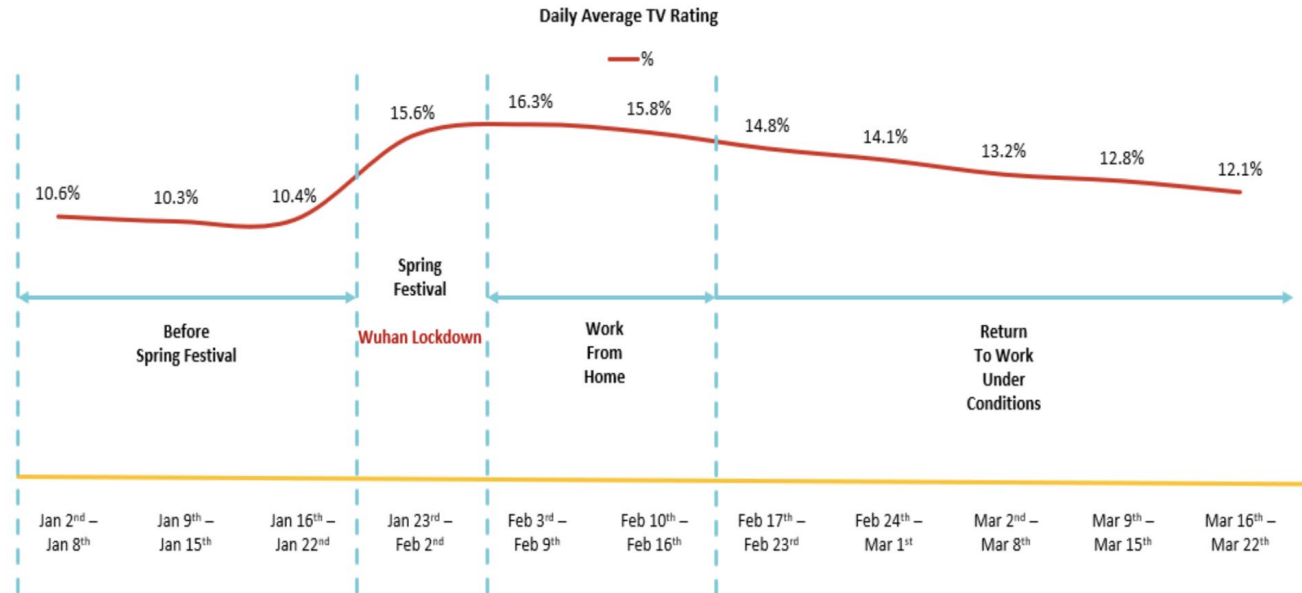
TURNING TO SCREENS TO SURVIVE;



‘QUARANTAINMENT’ ALSO HELPS
RE-ENERGIZE.

TV: SHORT-TERM RISE IN VIEWERSHIP AND RATINGS

TV is experiencing a rise in viewership and ratings – from +37% in India, to +55% in China and to more than +200% in Hong Kong.



 CHINA: TV ratings tracked from January to March 2020.

Ratings to normalize once consumers return to work, as seen in the gradual decline in China in recent weeks.



ON-DEMAND: VOD/OTT SHOULD EXPERIENCE PERMANENT GROWTH

HONG KONG

OTT platforms saw significant increases in the streaming of their content with Viu seeing a +39%, my TV Super +22% and Viu TV +12%.



KOREA

IPTV VOD consumption rose +81% with viewing hours also increased on most of the OTT platforms including btv, Watcha Play, tving and wavve.



INDIA

Users are spending +12% more time on online streaming platforms during the lockdown period (20 Mar to 3 Apr) than they did before (13 Jan to 2 Feb).

The logo for Netflix, featuring the word "NETFLIX" in red uppercase letters on a black background.

The logo for Amazon Prime, featuring the word "amazon" in black lowercase letters and "Prime" in blue lowercase letters with an orange arrow.



The logo for Hotstar, featuring the word "hotstar" in white lowercase letters and a yellow star icon on a black background.



**SCREENS: DOUBLE DOWN ON
MULTI SCREEN – TV/OLV/OTT, IF
PAID MEDIA IS ACTIVATED.**

E-COMMERCE IS NOW AN IMPERATIVE

THE OUTBREAK HAS FUNDAMENTALLY CHANGED
TRADITIONAL RETAIL AND E-COMMERCE.



TRANSCENDING GENERATIONS ...



... AND GIVING EASY ACCESS TO
'TREATS'.

E-COMMERCE: STRONG PENETRATION & GROWTH MOMENTUM BEFORE

Shoppers across the APAC region were already embracing e-commerce prior to COVID-19.

Top 10 Countries, Ranked by Retail Ecommerce Sales, 2018 & 2019

billions and % change

	2018	2019	% change
1. China*	\$1,520.10	\$1,934.78	27.3%
2. US	\$514.84	\$586.92	14.0%
3. UK	\$127.98	\$141.93	10.9%
4. Japan	\$110.96	\$115.40	4.0%
5. South Korea	\$87.60	\$103.48	18.1%
6. Germany	\$75.93	\$81.85	7.8%
7. France	\$62.27	\$69.43	11.5%
8. Canada	\$41.12	\$49.80	21.1%
9. India	\$34.91	\$46.05	31.9%
10. Russia	\$22.68	\$26.92	18.7%

Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets, payments such as bill pay, taxes or money transfers, food services and drinking place sales, gambling and other vice good sales;

**excludes Hong Kong*

Source: eMarketer, May 2019

T10308

www.eMarketer.com

Top 10 Countries, Ranked by Retail Ecommerce Sales Growth, 2019

% change

1. Mexico	35.0%
2. India	31.9%
3. Philippines	31.0%
4. China	27.3%
5. Malaysia	22.4%
6. Canada	21.1%
7. Indonesia	20.6%
8. Argentina	18.8%
9. Russia	18.7%
10. South Korea	18.1%

Worldwide 20.7%

Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets, payments such as bill pay, taxes or money transfers, food services and drinking place sales, gambling and other vice good sales

Source: eMarketer, May 2019

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www.eMarketer.com

China, Japan, South Korea and India are in the top 10 countries globally for retail e-commerce sales volume and growth, with many of the SEA markets also expected to grow exponentially.

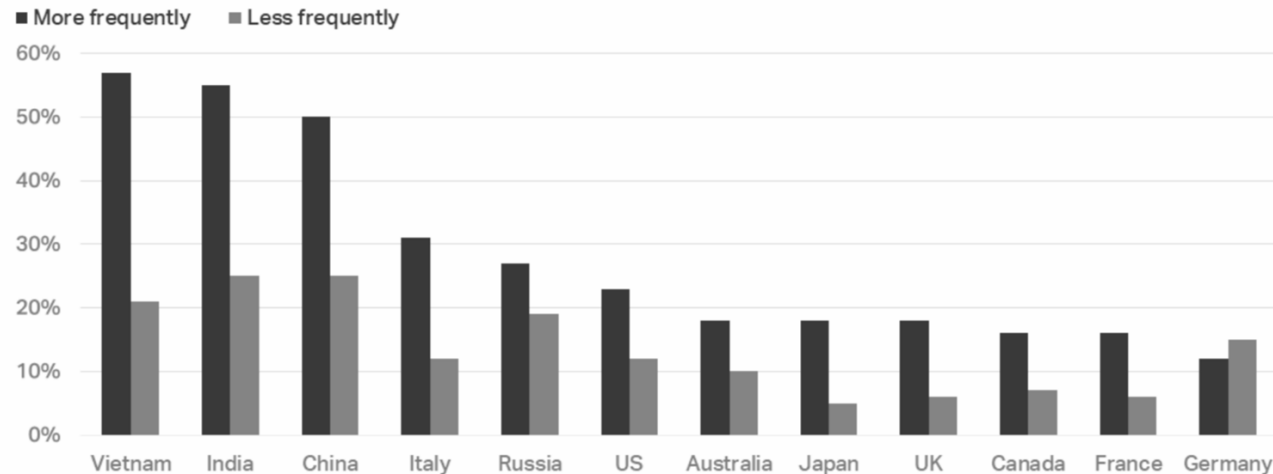


E-COMMERCE: ACCELERATED SHIFT IN BEHAVIOURS AND HABITS BY COVID-19

Just like how SARS was the turning point for the Chinese e-commerce market, COVID-19 will also be an inflection point for changes in shopping behaviours for the rest of Asia.

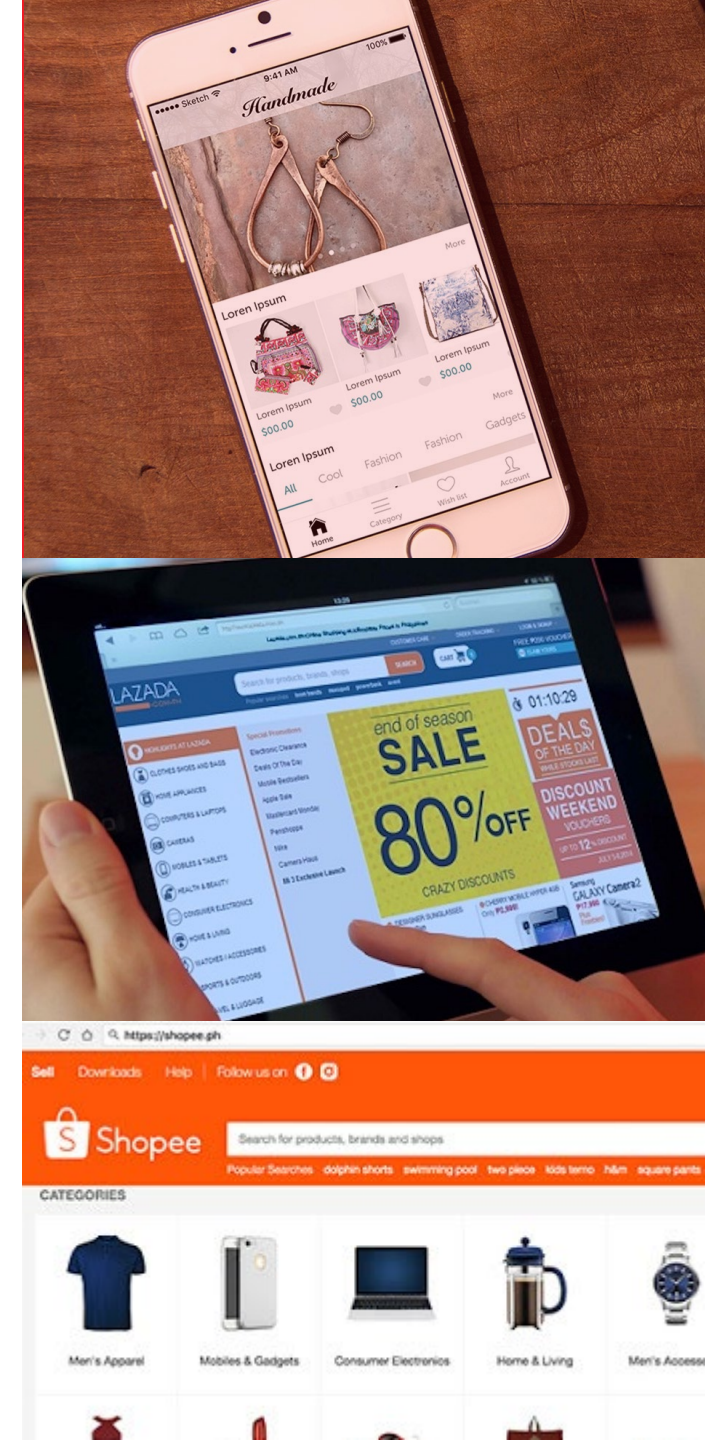
Global, COVID-19 and e-commerce

Purchasing products online that would normally buy in-store, compared to the previous month, % of consumers



Note: Representative survey of adults under the age of 75 (n=1,000 per market), 12th to 14th March, 2020. China, India, Russia and Vietnam samples are more urban, educated, affluent than general population.

SOURCE > Ipsos, *Tracking the Coronavirus*





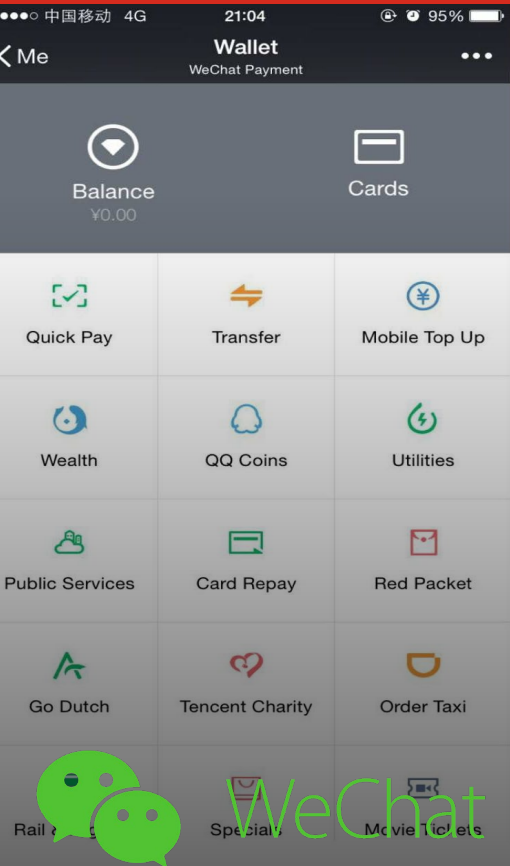
**E-COMMERCE: PRESENCE IS
CRUCIAL; PRODUCTS MUST BE
AVAILABLE AND CONSUMERS MUST
BE ABLE TO FIND THEM.**

SUPER APPS PREVAIL

CONSUMERS CONTINUE TO USE THEIR MOBILE PHONES AT HOME, ACCESSING A RANGE OF SERVICES VIA THEIR FAVORITE APPS.

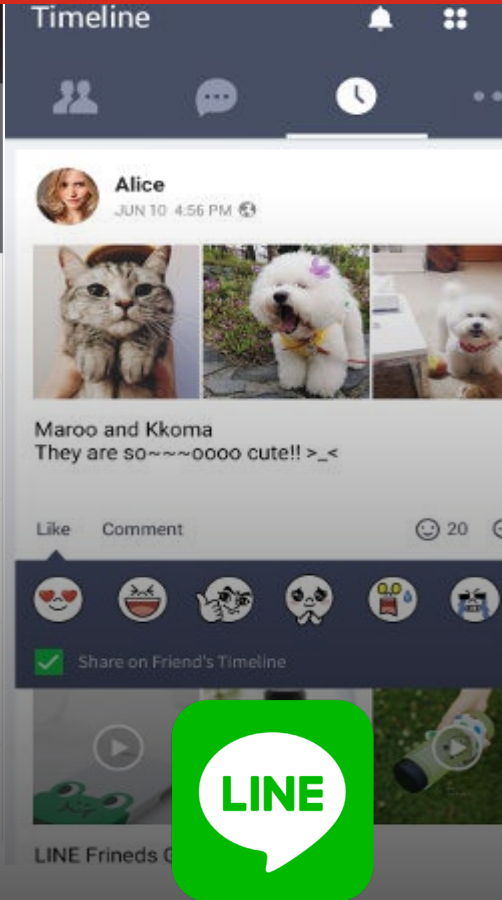


SUPER APPS: UNIQUE TO ASIA AND FAST RISING



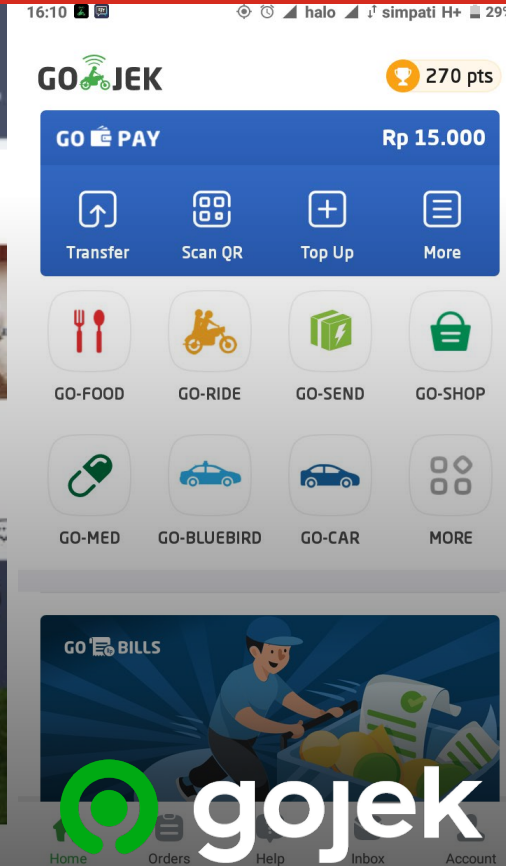
1.165B MAUs

This Chinese app reigns as king of super apps.



217M MAUs

Ubiquitous in Japan, Korea, and Thailand, the platform has also grown from a messaging app into a lifestyle ecosystem.



25M MAUs

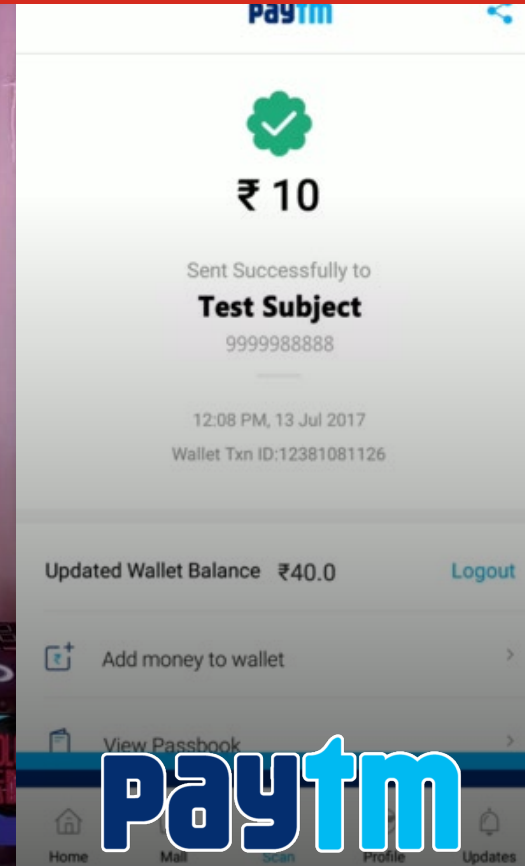
Indonesia's Go-Jek and Singapore's Grab are two of South East Asia's biggest startups that have developed into super apps.



500M

registered users

Also known as Douyin in China, it is one of the hottest apps now, used for creating and sharing short videos.

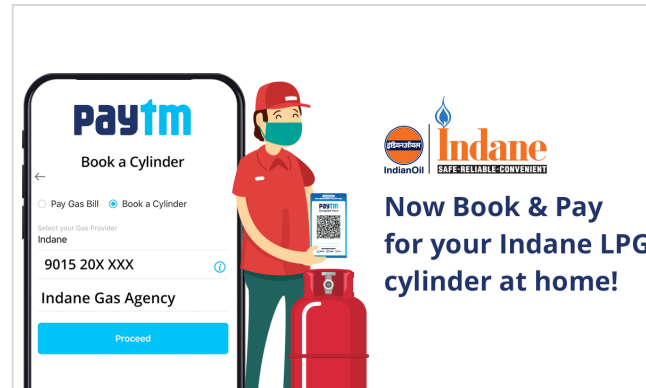
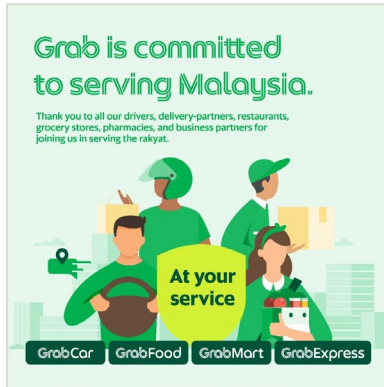


140M MAUs

India's largest mobile payments and commerce platform.

SUPER APPS: USAGE OF ITS RANGE OF SERVICES AND FUNCTIONS INCREASES DURING COVID-19

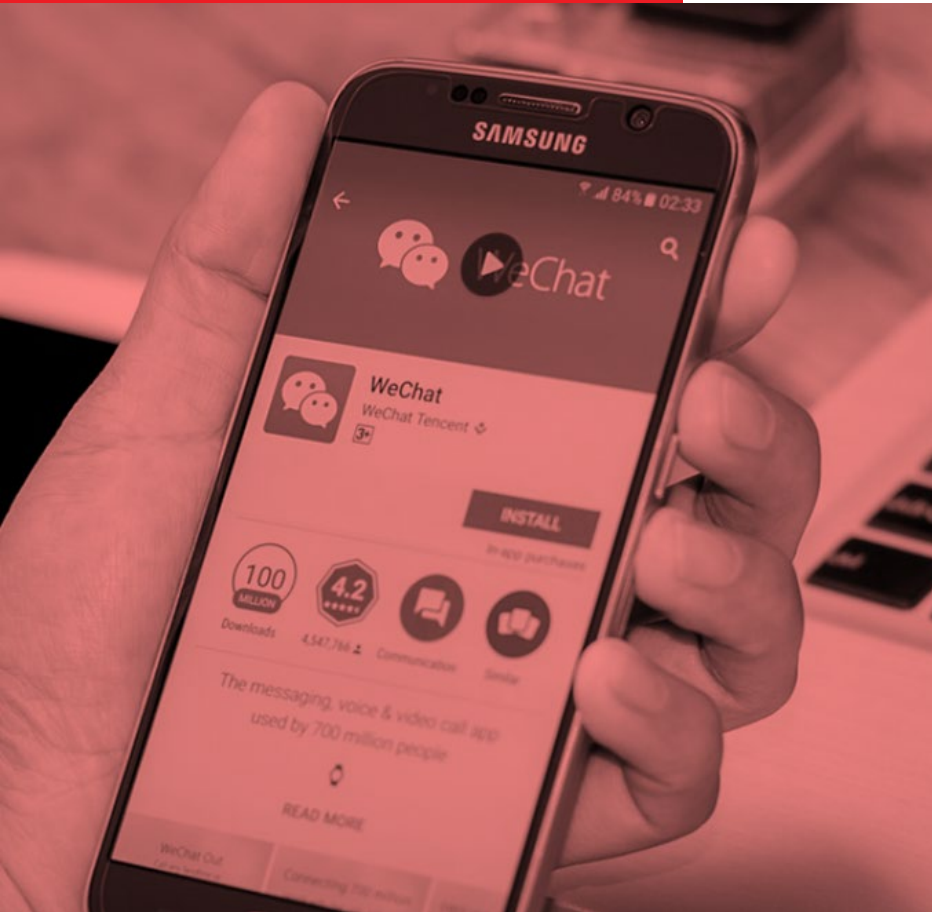
>100 Chinese municipal services used WeChat's mini programmes to share epidemic related information. Chinese citizens also turned to trackers on the app to avoid infected neighborhoods.



Whilst Grab had to temporarily suspend its GrabShare and GrabBike services, its other services continue to operate to serve the community.

Paytm has streamlined payments such as mobile and DTH recharge, electricity, water, gas, credit card, insurance premium, so that consumers can pay while at home and at the same time, go "contactless".





SUPER APPS: UNDERSTAND HOW CONSUMERS ARE ENGAGING WITH THESE APPS AND CUSTOMIZE ACCORDINGLY.



CONTENT INTERACTIONS AND PREFERENCES SHIFTS

WORK FROM HOME AND HOME BASED SCHOOLING HAS CHANGED THE WAY CONSUMERS INTERACT AND ENGAGE WITH CONTENT.



VIDEO AND WEB CONFERENCING ...



... THE NEW NORM FOR PARENTS
AND KIDS ALIKE.

BUSINESS APPS, ONLINE EDUCATION TOOLS AND DIGITAL HEALTH PLATFORMS REDEFINE THE WAY WE INTERACT

BUSINESS UTILITY APPS

In China, download of business apps increased dramatically; Alibaba's DingTalk download rate increased by 1,446%, Bytedance's Lark by 685%, and WeChat Work by 572%.



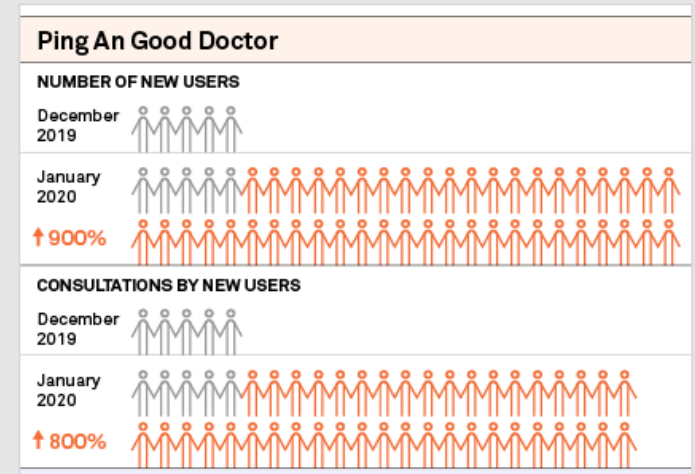
ONLINE E-LEARNING APPS

In Vietnam, ViettelStudy gained 41 million visits in a month, having been introduced in nearly 26,000 schools. VNPT E-Learning also witnessed an increase of 4X to reach 5 million visits.



DIGITAL HEALTH APPS

Ping An Good Doctor in China has seen visits hit 1.11B, newly registered users grow 9X, average daily consultations reaching 8X more.



SURGE IN DOWNLOADS AND USAGE OF VARIOUS UTILITY APPS AND PLATFORMS AMIDST THE STAY-AT-HOME MEASURES.

CONSUMER PREFERENCE FOR 'QUARANTAINMENT' CONTENT EMERGES

Content preferences in the Australian market has increased in the following categories.



EXERCISE
+40%
Video searches



PERSONAL MENTAL HEALTH
+38%
Video searches



ONLINE SHOPPING
+45%
FMCG Sales Growth



COOKING
+40%
Video searches



GAMING
+92%
Increase in new gamers



STREAMING MUSIC
+16%
Increase in listening time



CRISIS RELATED NEWS AND CONTENT HAS BEEN A MAINSTAY BUT NEW FORMATS HAVE EMERGED

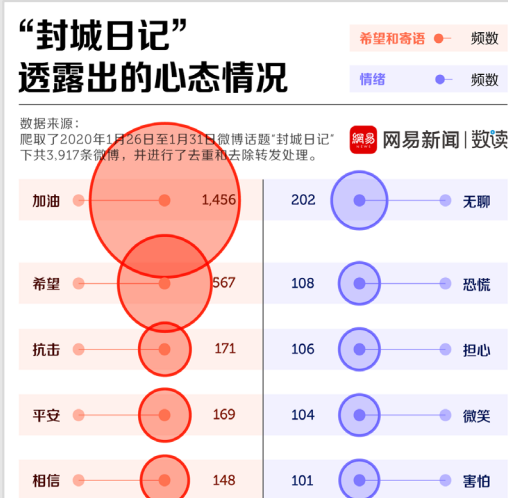
LIVESTREAMING

>41M people watched the livestream of the building of the hospitals in Wuhan.



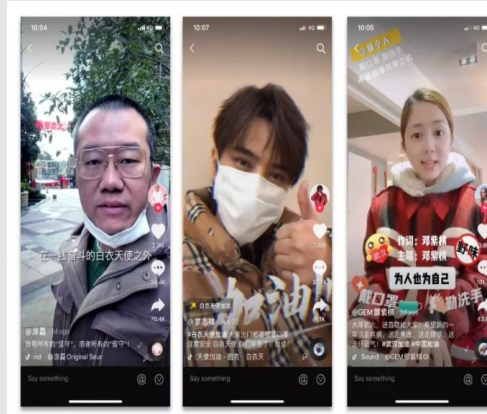
UGC JOURNALISING

Weibo “”封城日记” in China enabling people to record their daily lives during quarantines.



SHORT VIDEOS

Video platform TikTok has been used to create social and entertainment content



DIGITIZED DISTRIBUTION

The Times Of India has been distributing PDF versions of the paper during the lockdown.



PLATFORMS AND CONSUMERS GET CREATIVE WITH NEW FORMATS,
CONTENT CREATION AND DISTRIBUTION.



**CONTENT: CREATE AUTHENTIC
CONTENT ENSURING THAT
CONSUMER MOTIVATIONS ARE
CONSIDERED.**

POLL

Which of these key trends would have the biggest impact in your market?

The Rise of the Screens 46%

E-commerce is Now an Imperative 62%

The Super App Phenomenon Prevails 18%

Content Interactions and Preference Shifts 37%

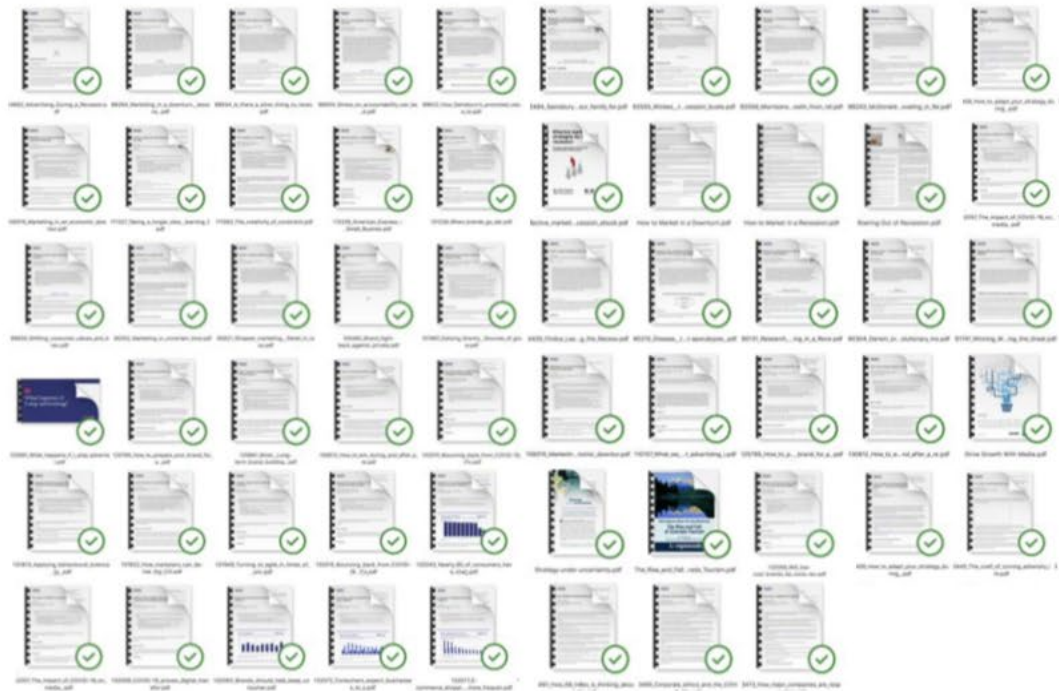


KEY IMPLICATIONS

BRAND RESPONSE IN CATHARTIC TIMES

75 REFERENCED ARTICLES AND SOURCES

Recession Marketing



Foundational Marketing Principles





- ❖ IN TIMES OF DURESS, BRANDS MUST ENGAGE IN RESPONSIBLE MARKETING AND BUILD TRUST.
- ❖ STAY IN THE CONVERSATION, BUT STAY SAFE.
- ❖ CONSIDER THE LONG AND SHORT OF IT – GOING DARK MAY BE COSTLY!
- ❖ ACCELERATE DIGITAL COMMERCE AND DIGITAL EXPERIENCE CAPABILITIES.
- ❖ PREPARE NOW FOR THE REBOUND AND GEAR UP FOR “THE NEW ABNORMAL”.

IN TIMES OF DURESS, BRANDS MUST ENGAGE IN RESPONSIBLE MARKETING AND BUILD TRUST

DO THE RIGHT THING

Consider consumers' feelings, needs and current realities and look for the opportunity to contribute to the greater good. Assess whether the brand can be altruistic or act as a utility.

BE AUTHENTICALLY YOU

Honesty and trust are the key consumer yardsticks in times of crisis. It is therefore critical to start with understanding and adhering to your brand DNA.



Coffee in time of COVID-19: How Dalgona became the comfort treat in isolation



HDFC Bank's Safety Grid campaign reiterates the importance of social distancing



In light of the Covid-19 pandemic, Google will not be doing any April Fools' Day gags tomorrow to avoid causing unnecessary confusion. — AFP

Google cancels traditional April Fool's Day gag



Lush offers public free hand washes

STAY IN THE CONVERSATION, BUT STAY SAFE

ADHERE TO EXPECTED BEHAVIORS

Ensure that all comms adhere to WHO regulations and the latest local government behavioral advice. Void creatives that exhibit incongruent behaviors.

Consider also attitudinal differences across culturally diverse audiences.

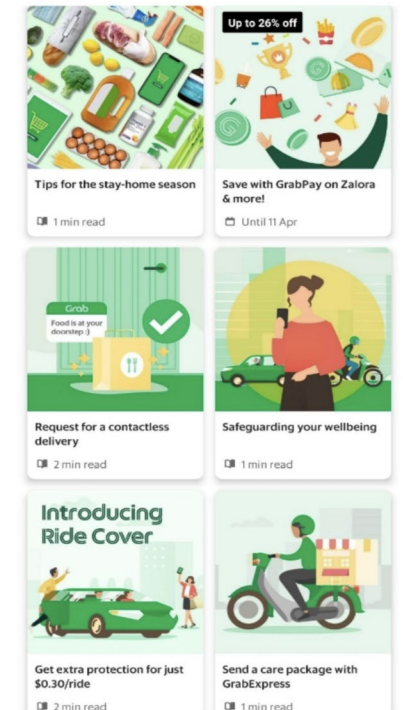
ENSURE PRODUCT LEVEL BRAND SAFETY AND BE VIGILANT ON DIGITAL QUALITY

Consider if appearing near COVID content will reflect negatively on your brand or product.

Ensure adherence to the highest standards of digital quality and fraud avoidance.



Whilst KFC has paused on a series of ads designed to spotlight the deeply satisfying post KFC finger lick, Nando's commented.



Grab updates its app with new guidelines given social distancing measures.

CONSIDER THE LONG AND SHORT OF IT – GOING DARK MAY BE COSTLY!

MAINTAIN MEDIA INVESTMENT

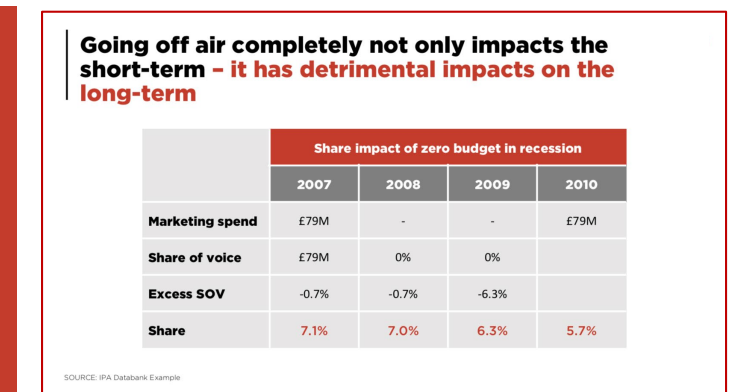
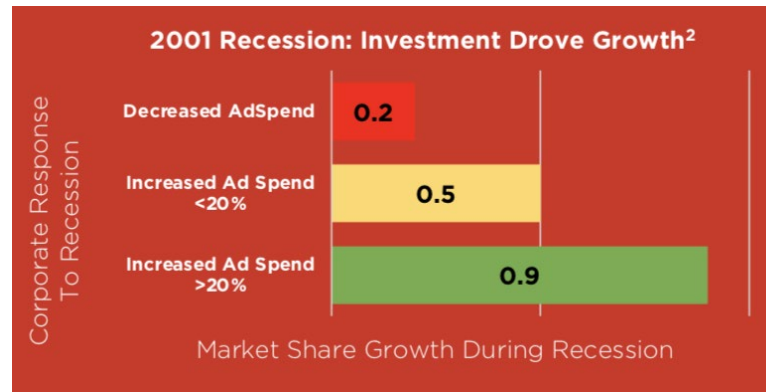
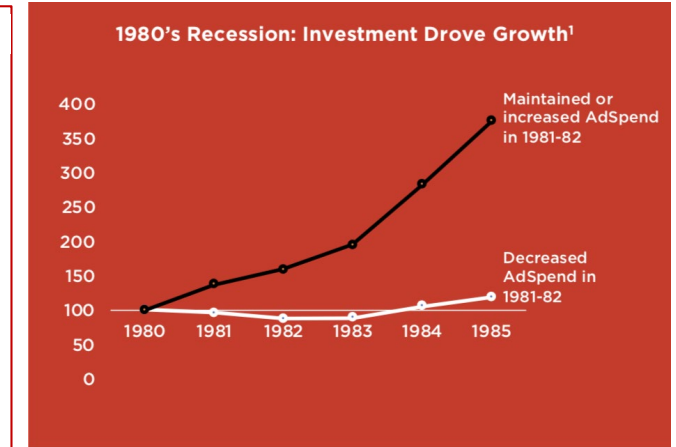
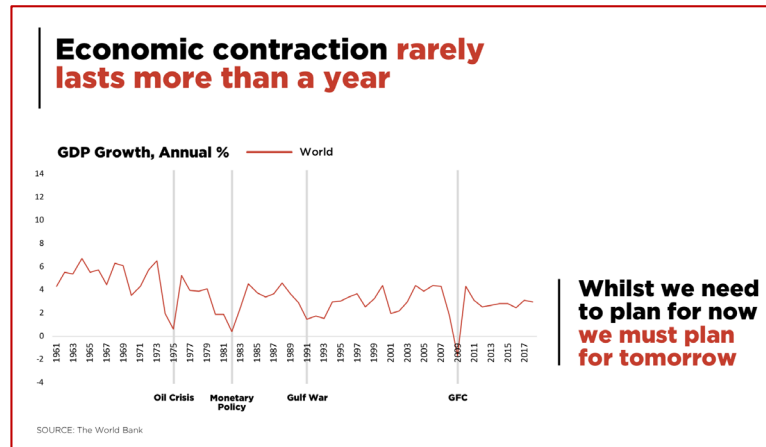
Evidence points to an investment strategy during recessionary times – reducing investments can exacerbate the negative impacts.

Going off air completely not only impacts the short term, it has detrimental effects on the long term.

FOCUS ON BRAND BUILDING

In all situations, brand building is the main driver of long term business growth.

Going dark has a rapid negative impact on brand metrics that correlate with long-term sales.



ACCELERATE DIGITAL COMMERCE AND DIGITAL EXPERIENCE CAPABILITIES

ENABLE STAYING IN

Leverage advertising and partnerships that help consumers get hold of the products they want.

If necessary, redesign your business model to meet the new behavioral norms.

BE FOUND EASILY

Ensure efficient digital consumer purchase experience in the online world including demand creation in digital, search optimization and digital shelf visibility.

BE READY AND RESPONSIVE

Ensure all owned media response systems are prioritized, updated and always available.



Footballers played their cancelled match in FIFA 20 (video game)



Flipkart and Tata Consumer Products partner to provide essential F&B products



Getty Museum: Don't just look at an artwork, be the artwork and make it yourself!



Westfield launched 'Westfield Direct' to create a platform to support food and takeaway retailers in its mall

PREPARE NOW FOR THE REBOUND AND GEAR UP FOR “THE NEW ABNORMAL”

PREPARE FOR THE NEW REALITY

Understand this is a watershed that will change the world moving forward and impact macro trends indefinitely.

Think big and bold, and demonstrate agility.

PLAN AHEAD

Consider the emerging trends that will become the ongoing trends post crisis and be ready to capture the resurgence of demand.

BUILD PRESENCE

Consider how to maintain physical and mental availability even whilst changing how your brand goes to market.



The fashion industry in India will have to reconsider new strategies to keep their business models agile: from e-tailing to creative ways of recycling of raw materials.



Working From Home?

Check out the new code of comfort

+ BROWSE & WISHLIST



WFH wear is a new category in India: enterprising Indian retailers are repurposing their spring/summer fashion collections as WFH-wear.

Banking
Education

WFH

Distribution, may be
changed forever

AMUL: THE TASTE OF INDIA

HOW AMUL IS RESPONDING DURING COVID-19

- ❖ **Maintained media investments**, leveraging market volatility to drive media value and SOV
- ❖ **Focused on brand building and enhancing trust** – message of family bonding and mother's love, and deploying credible media to assure that milk essentials are not affected
- ❖ **Enhanced brand authenticity**; sponsored programming that evoked nostalgia sparking conversations and UGC about better days
- ❖ **Enabled digital commerce and staying in** by starting a partnership with Zomato to ensure delivery of products



POLL

What are the key actions your business is taking in response to these cathartic times?

Engaging in responsible marketing and building trust	50%
Staying in conversation while ensuring brand safety	44%
Maintaining media investments focused on brand building	25%
Accelerating digital commerce and digital experience	45%
Planning and building brand presence for the “new normal”	44%

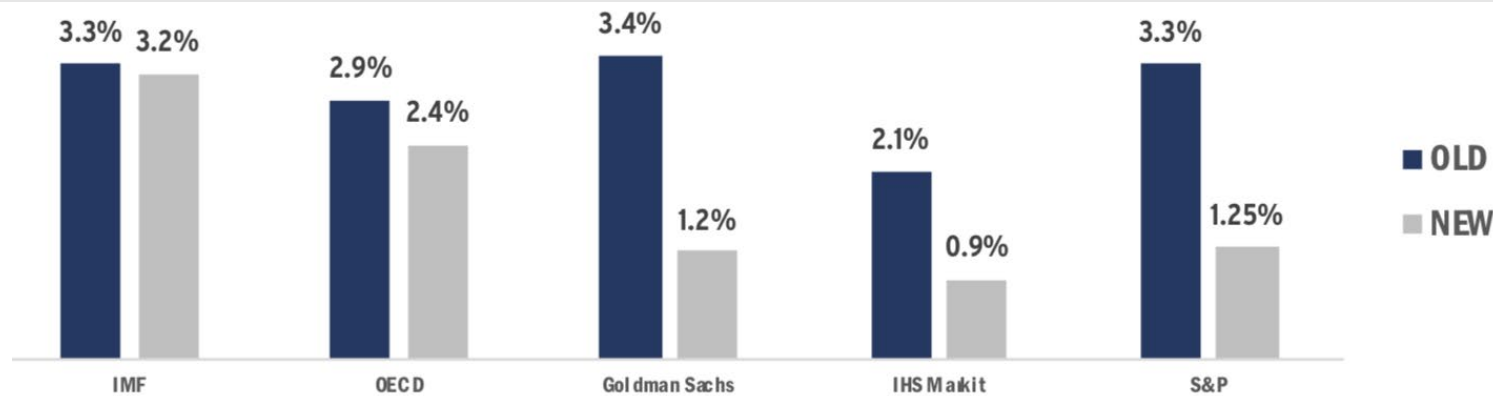


KEY IMPLICATIONS

THE AD MARKET IN CATHARTIC TIMES

IN VIEW OF A RECESSION, WHAT CAN WE EXPECT FROM KEY INDUSTRY VERTICALS?

Global economic outlook: 2020 GDP growth forecasts



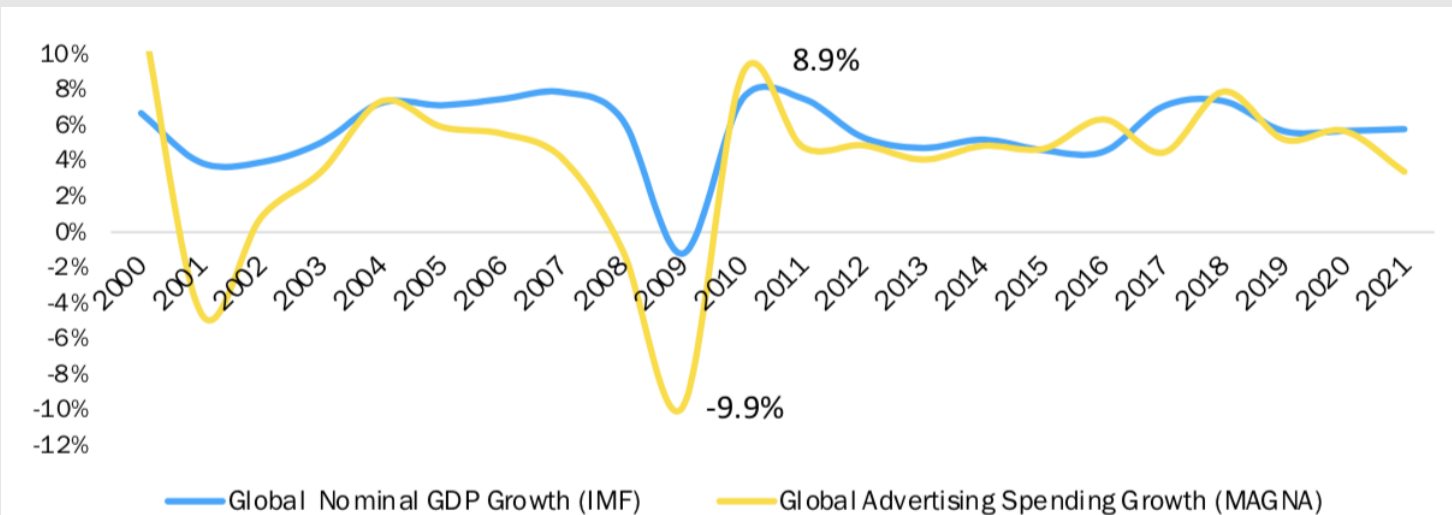
MAGNA-rated impact to business outlook and advertising spending

- ❖ **Severe:** travel, cinemas, restaurants, personal services
- ❖ **Significant:** retail (severe for departmental stores, mild for grocery shops, positive for e-commerce), automotive, beauty
- ❖ **Mild:** technology, telecoms, pharma, food, drinks, personal care, household goods (some toiletries having temporary surge)
- ❖ **Positive:** home entertainment, e-commerce, delivery services, cloud computing services



GLOBAL ADVERTISING SPEND IS PROJECTED TO DECLINE BY -6%

MAGNA's statistical model showing the relationship between economic growth and fluctuations of ad spending



- ❖ Assuming 0% economic growth for the full year 2020, the historical model suggests global ad spends could **shrink by -6%**
- ❖ Cyclical events – the US elections, typically add +1% to global ad spend growth
- ❖ Digital media – because the model is based on the last 20 years and cannot fully account for the current role of digital media in the marketplace, the decline in ad spends is therefore over projected and will likely be not as steep

A dramatic sunset over a beach. The sky is filled with dark, heavy clouds, with a bright orange and yellow glow from the setting sun breaking through near the horizon. The sun's reflection is visible on the wet sand in the foreground. The ocean waves are visible in the middle ground. The text is overlaid in the center of the image.

IF NOT NOW, WHEN?
IF NOT YOU, WHO?



THANK YOU

You may contact us at:

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Upcoming MMA Webinars

- **April 22** – Social Commerce: The Next Normal? (in Vietnamese)
- **April 28** - China Martech
- **April 29** - Navigating the Shift in Consumer Behavior in Asia during COVID-19
- China Advertising story: During and After Covid-19

Take a Seat at the Table

MMA 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.

Attribution
Analysis



Currency
Measurement



Internet of Things



Location



Mobile
Messaging



Mobile Native
Advertising



Mobile
Programmatic



Mobile Shopper
Marketing



Mobile Video



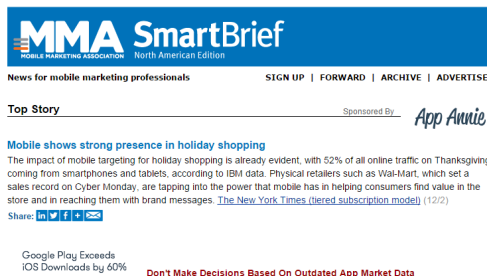
Privacy



To join a program, contact committees@mmaglobal.com.

Participate in the Conversation

MMA Smartbrief



Mobile Smart Fundamentals



MMA LinkedIn Group

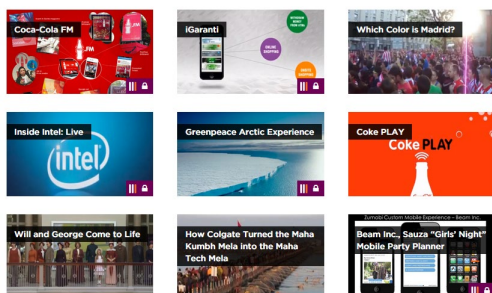


Get Social with MMA



Getting Great at Mobile

Case Study Hub



The Mobile Marketing Playbook



Guidance Reports and Benchmarks



Webinar Library





Thank You!