



COVID-19 Impact on Business Sentiment

MMA Webinar Series

May 11, 2020

In Partnership with  surveySENSUM



MMA IS 800+ MEMBERS STRONG GLOBALLY

MARKETERS, AGENCIES, MEDIA SELLERS, TECHNOLOGY & OPERATORS





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

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

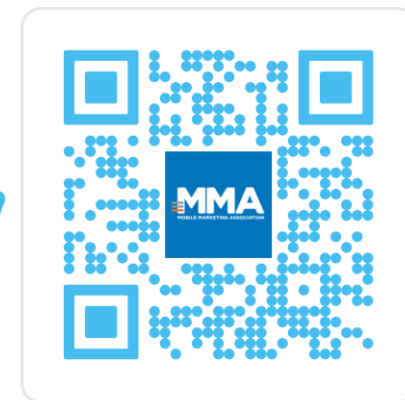
CONSUMER TRENDS AND

LIGHT-HEARTED



UPCOMING WEBINARS

- ≡ **May 14 – Healthy, Happy and Productive during Covid-19 Times**
- ≡ **May 15 – In conversation with Rohit Dadwal ... There Is No Playbook For This.....**
- ≡ **May 19 – How to Build a Winning Case Study for MMA SMARTIES Awards**
- ≡ **May 21 – MarTech: Powering Digital Transformation in China**
- ≡ **May 26 – Social Commerce: The Next Normal?**



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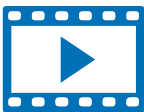





MMA PROGRAMS & INITIATIVES



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



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PRESENTER



Rajiv Lamba
Founder and CEO
Neurosensum &
SurveySensum

MODERATOR/HOST



Shanti Tolani
Country Manager
Mobile Marketing Association
Indonesia

Our Coverage



Countries Covered

India



Indonesia



Singapore



Vietnam



Sample Size: 433

Industries: FMCG, IT, Tourism, Transport, Media & Advertising, Financials, E-commerce, Retail, Manufacturing

Role: Mid Manager, Senior Managers, Directors

Size: Large & Mid Size Companies



Our Agenda

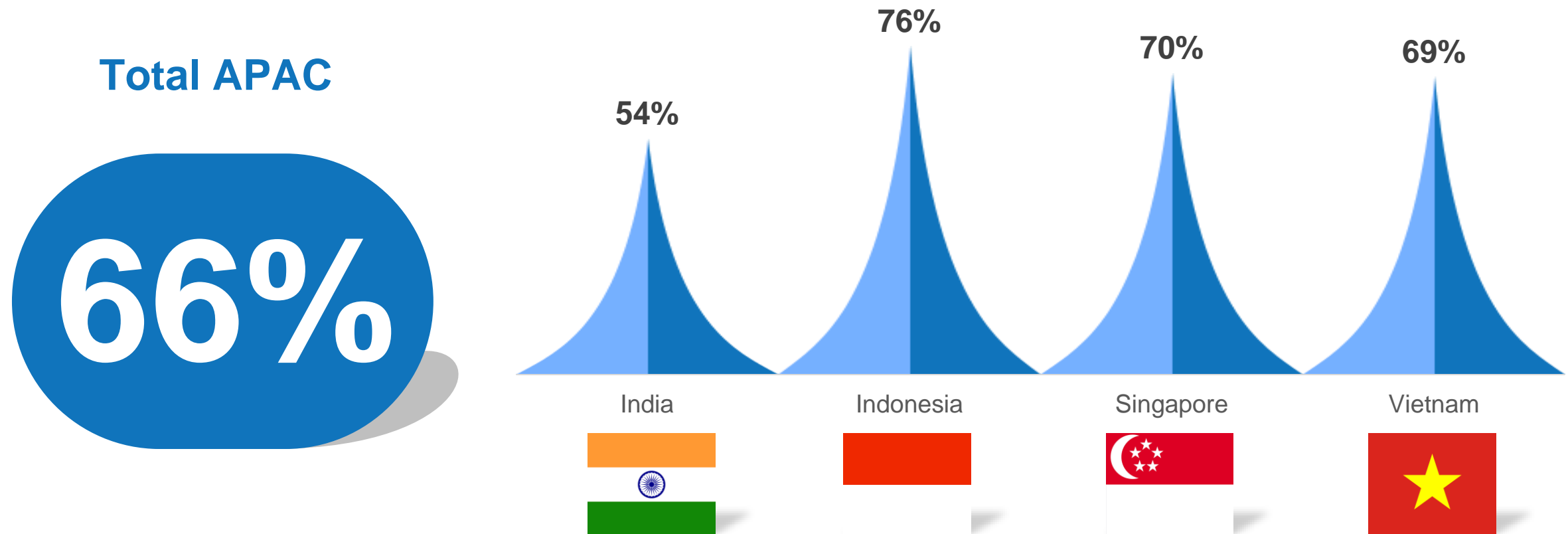
1. COVID-19 Impact on Businesses
2. Impact on Business Budgets
3. Perception on Consumer Behavior Shift
4. Digital the new Normal
5. How Brands are responding
6. Becoming future ready



1

COVID Impact on Businesses

Majority of businesses have been impacted by COVID-19.



Q. How has COVID-19 disrupted your organization's day to day activities? Scale (1-5) : T2B

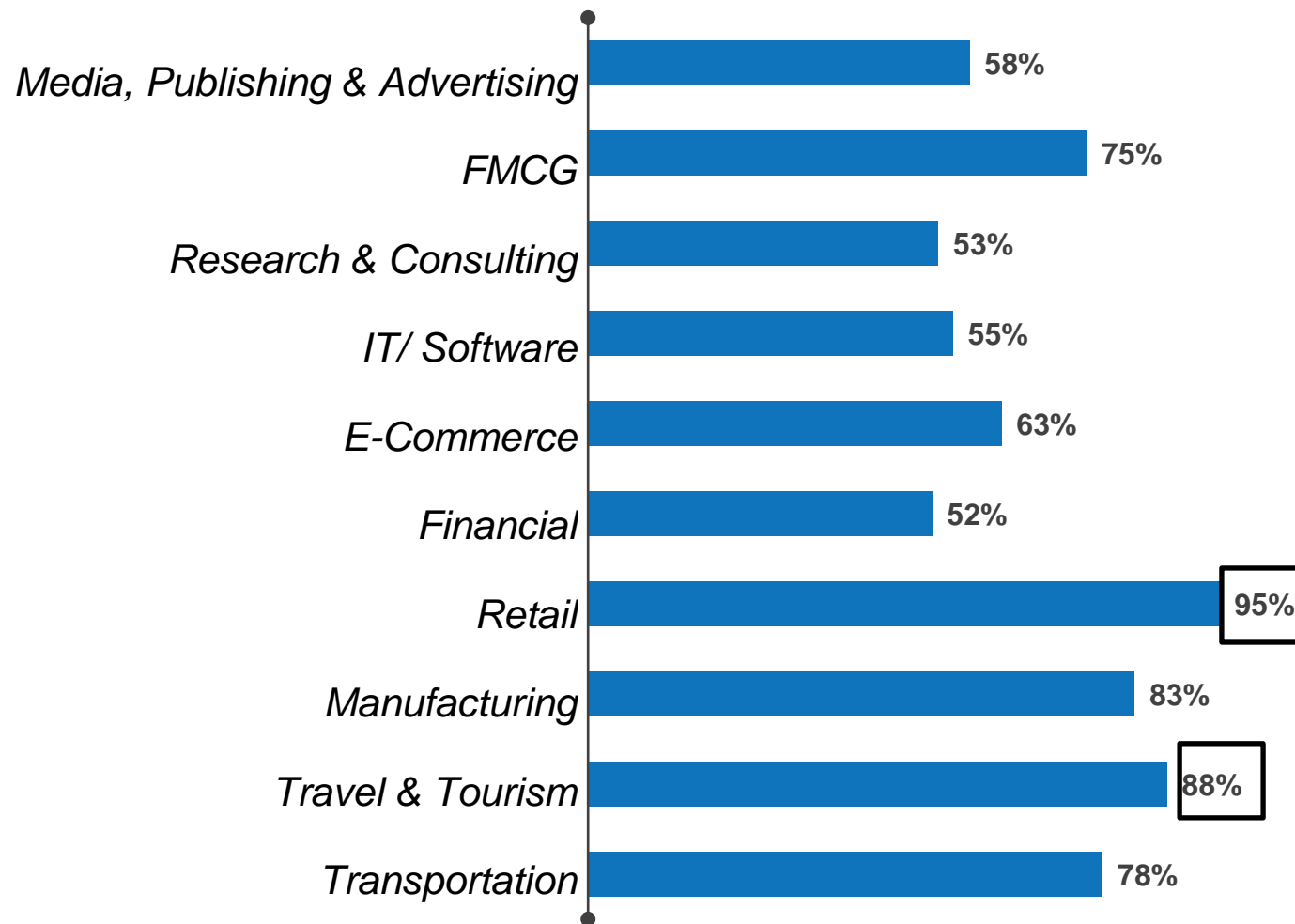
Source: SurveySensum Internal Study on Business Respondents : APAC



Retail, Travel & Tourism are the hardest hit.

Total APAC

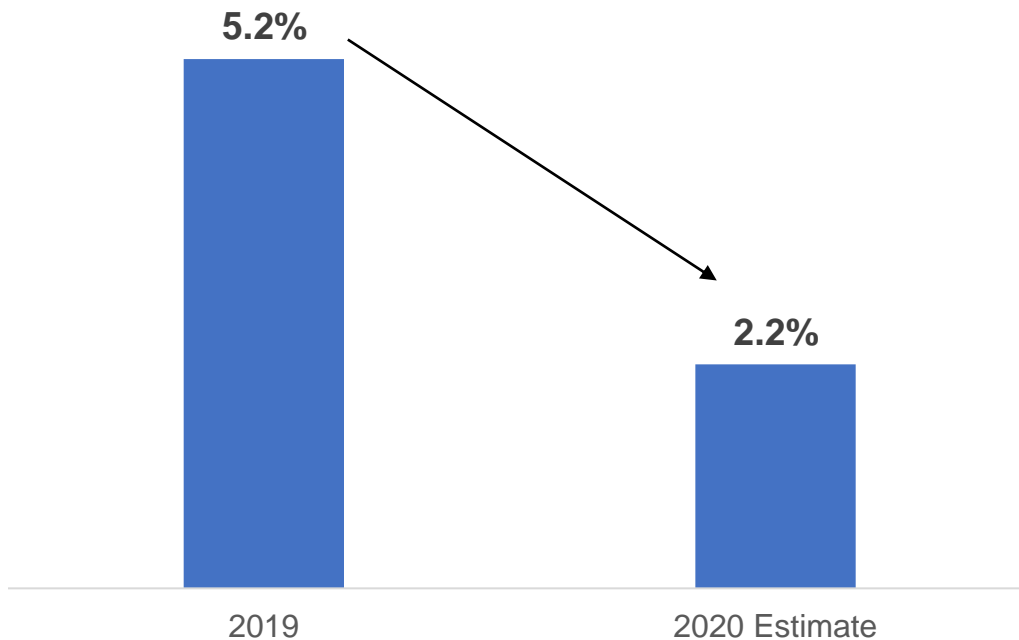
66%



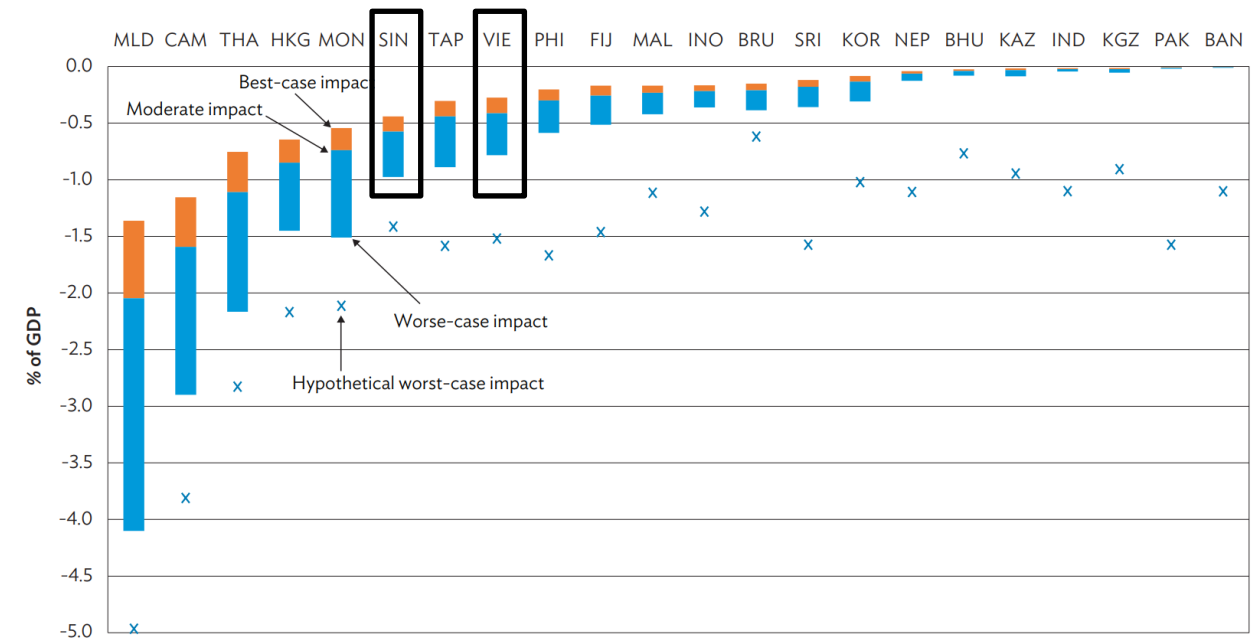
Q. How has COVID-19 disrupted your organization's day to day activities? Scale (1-5) T2B

Economic forecast paints a grim picture of days coming ahead

ASIA GDP GROWTH FORECAST
By Asian Development Bank



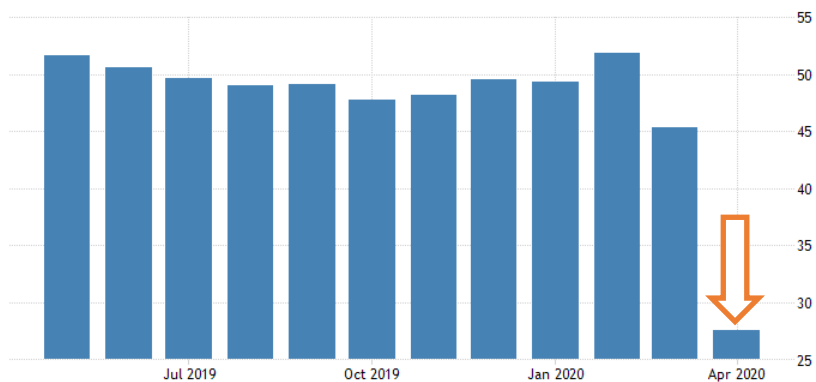
Impact of COVID-19 as a % of GDP of Asian Economies
By Asian Development Bank



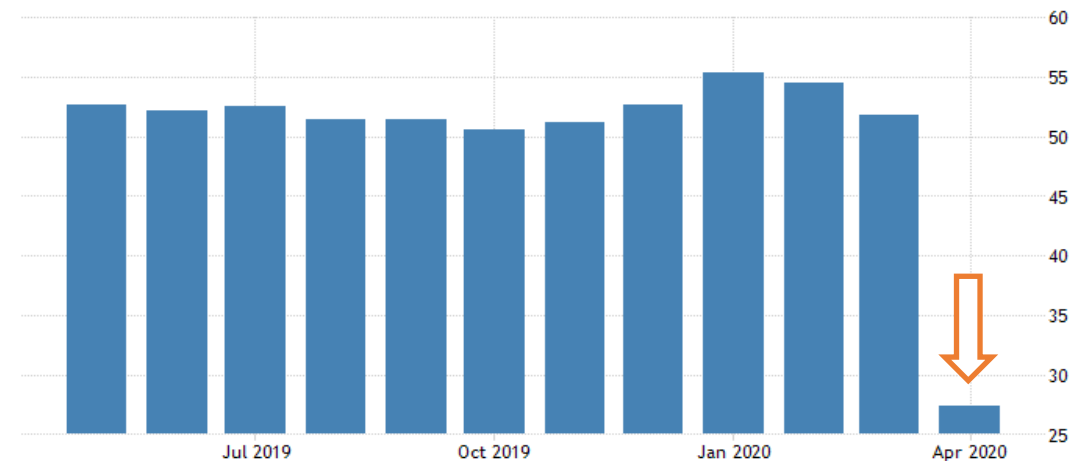
BAN = Bangladesh; BHU = Bhutan; BRU = Brunei Darussalam; CAM = Cambodia; FIJ = Fiji; HKG = Hong Kong, China; IND = India; INO = Indonesia; KAZ = Kazakhstan; KGZ = Kyrgyz Republic; LAO = Lao People's Democratic Republic; MAL = Malaysia; MLD = Maldives; MON = Mongolia; NEP = Nepal; PAK = Pakistan; PHI = Philippines; ROK = Republic of Korea; SIN = Singapore; SRI = Sri Lanka; TAP = Taipei, China; THA = Thailand; VIE = Viet Nam.

Purchasing Managers Index paint a bleak scenario for businesses

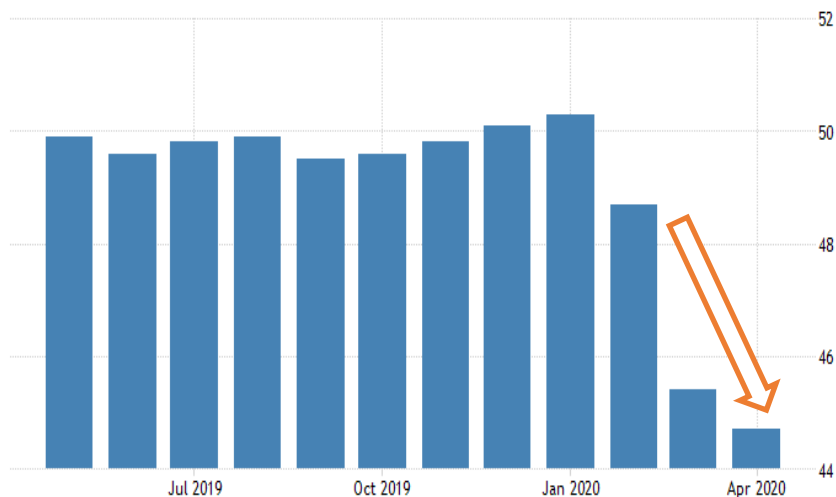
Purchasing Managers Index (PMI) - Indonesia



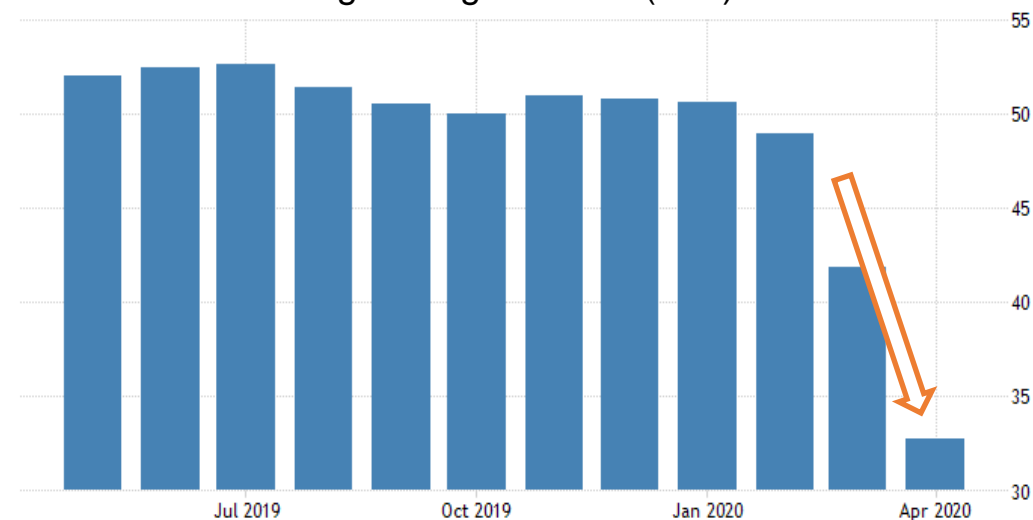
Purchasing Managers Index (PMI) - India



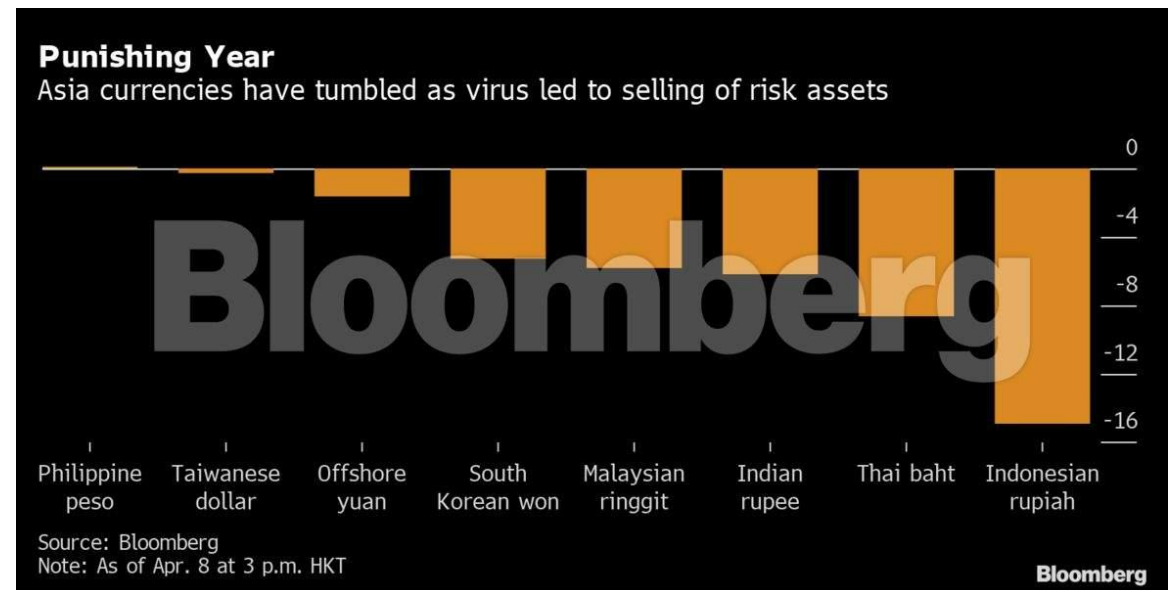
Purchasing Managers Index (PMI) - Singapore



Purchasing Managers Index (PMI) - Vietnam



Though Stock Market has rebounded but its not in line with economic fundamentals

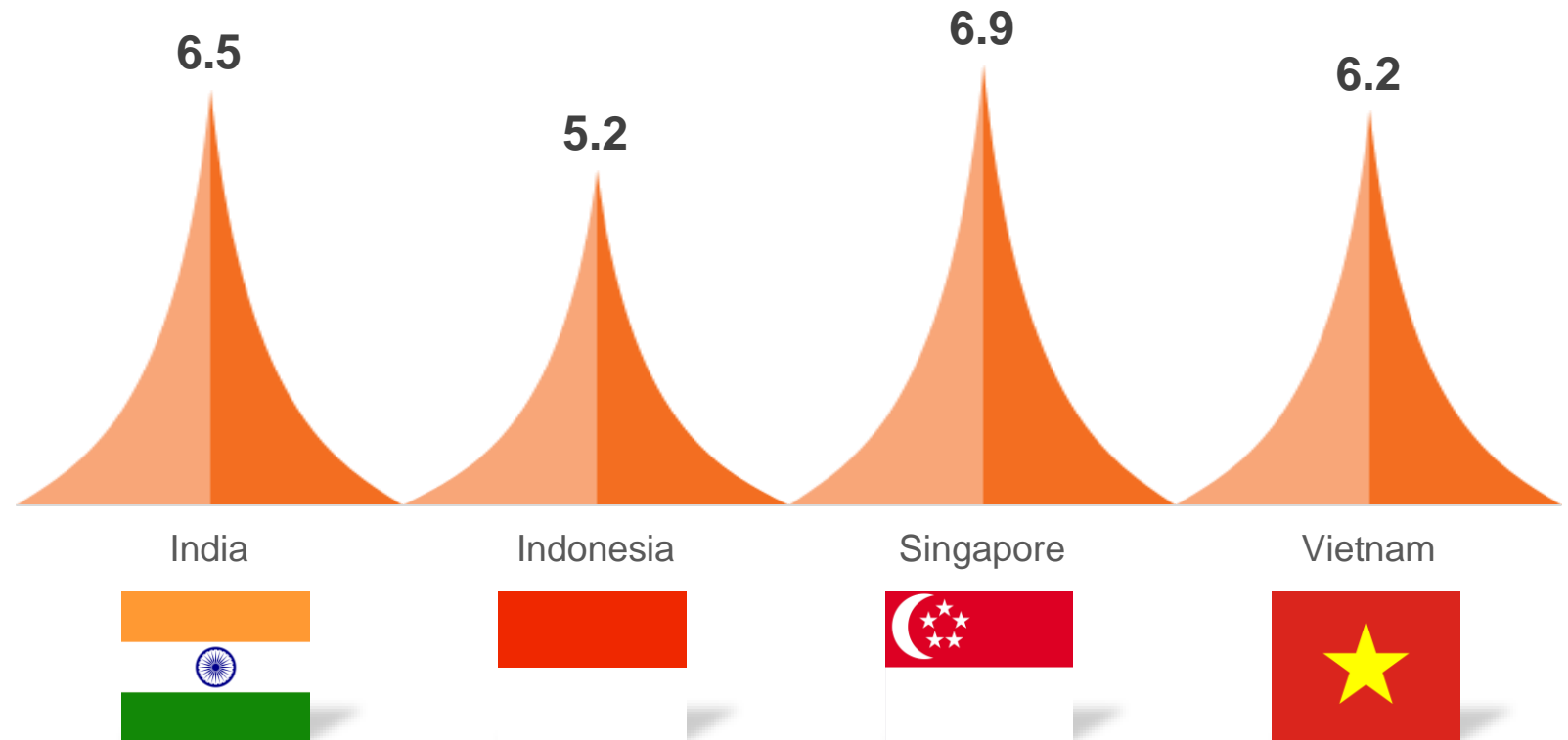


Businesses expect disruption to continue for a long period.
Indonesian businesses are the most optimistic

*Expected time for Situation
to Normalize*

Total
APAC

6.2
Months

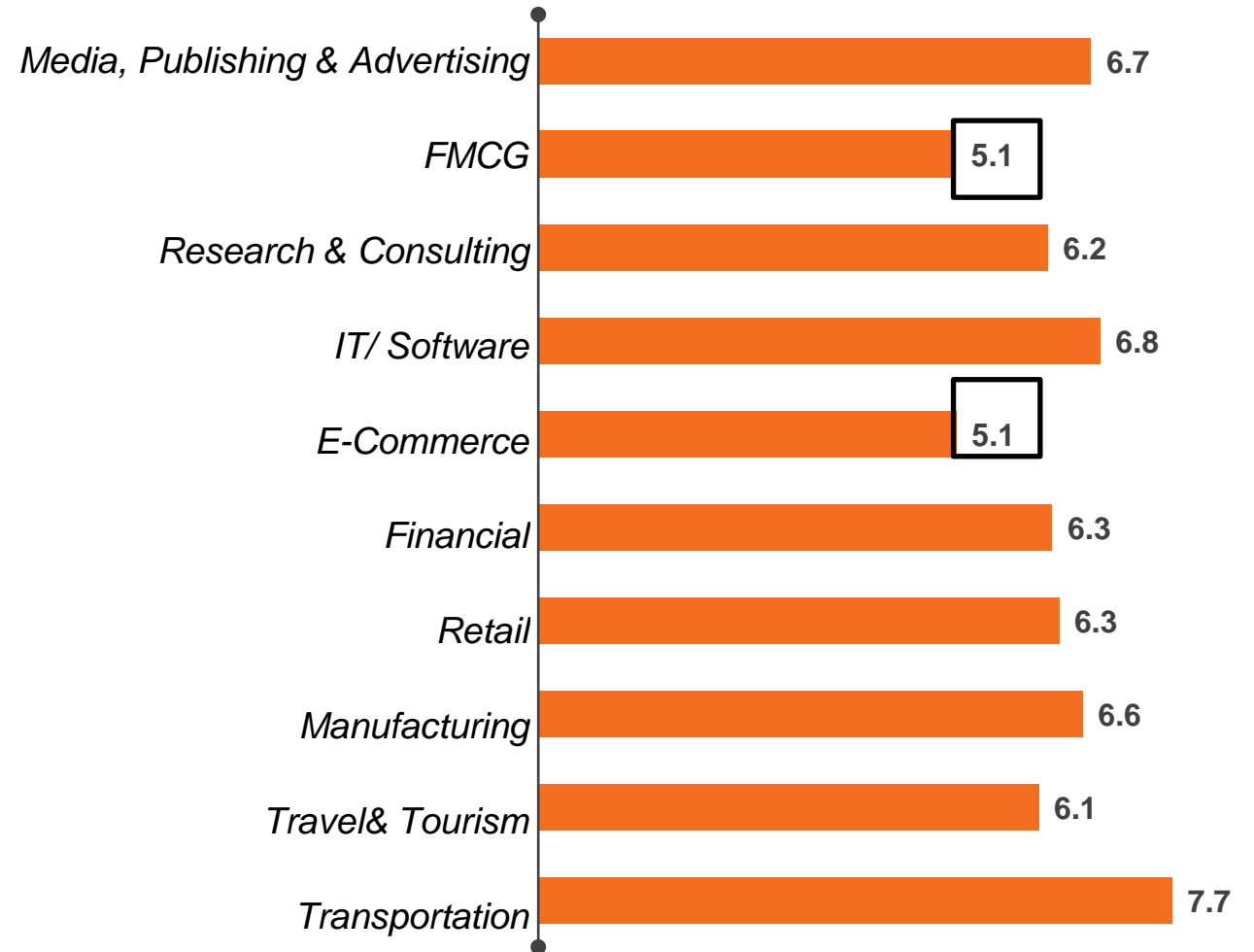


E-Commerce & FMCG are the most optimistic for speedy recovery

Expected time for Situation to Normalize

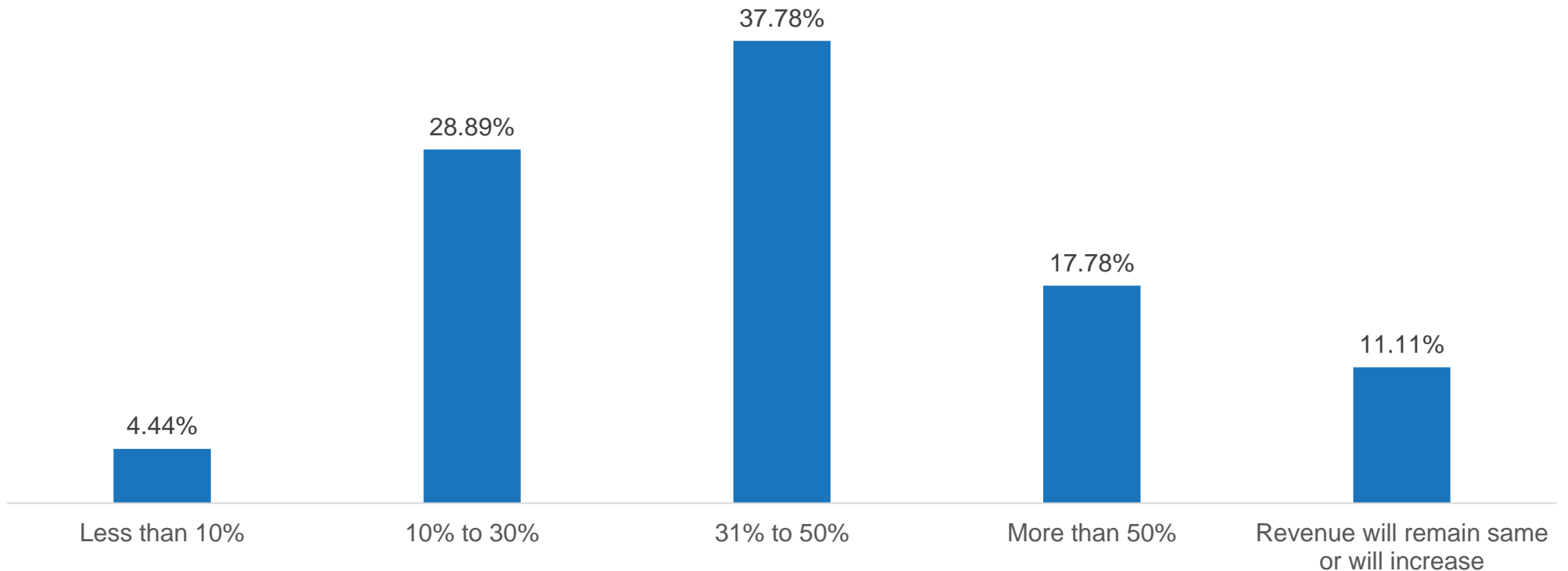
Total
APAC

6.2
Months



Poll 1 – Audience results

Due to COVID-19, how much revenue drop are you expecting for your organization in Q2 2020?



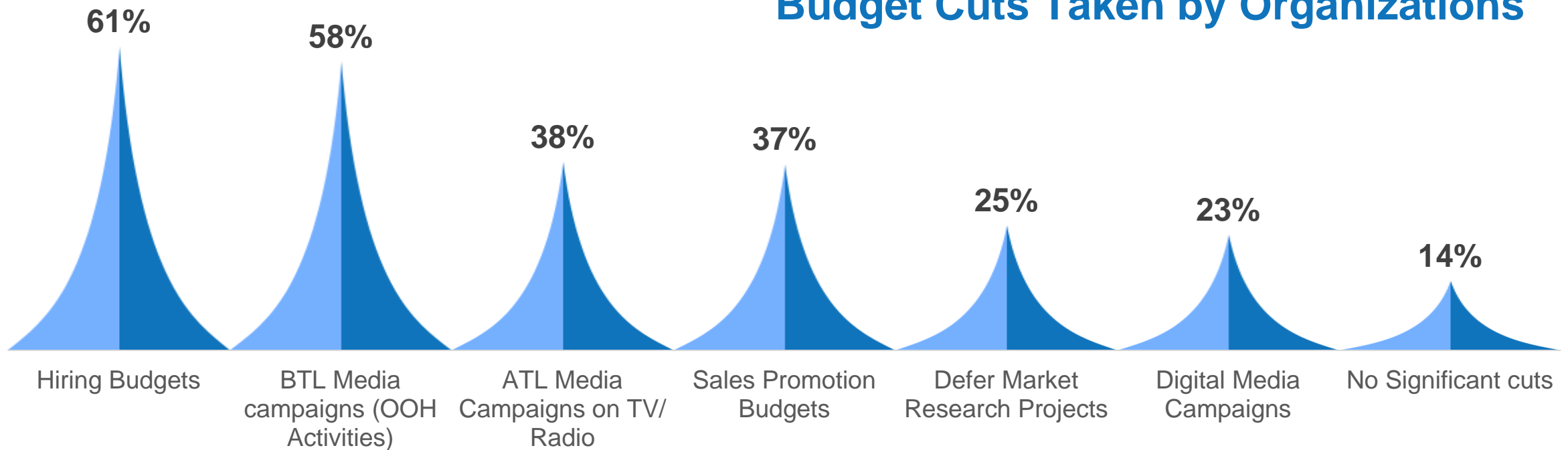


2

COVID Impact on Business Budgets

Hiring and BTL activities have been the most impacted

Budget Cuts Taken by Organizations



Q9. What kind of budget cuts or postponement have your organization taken due to COVID-19? (MA)

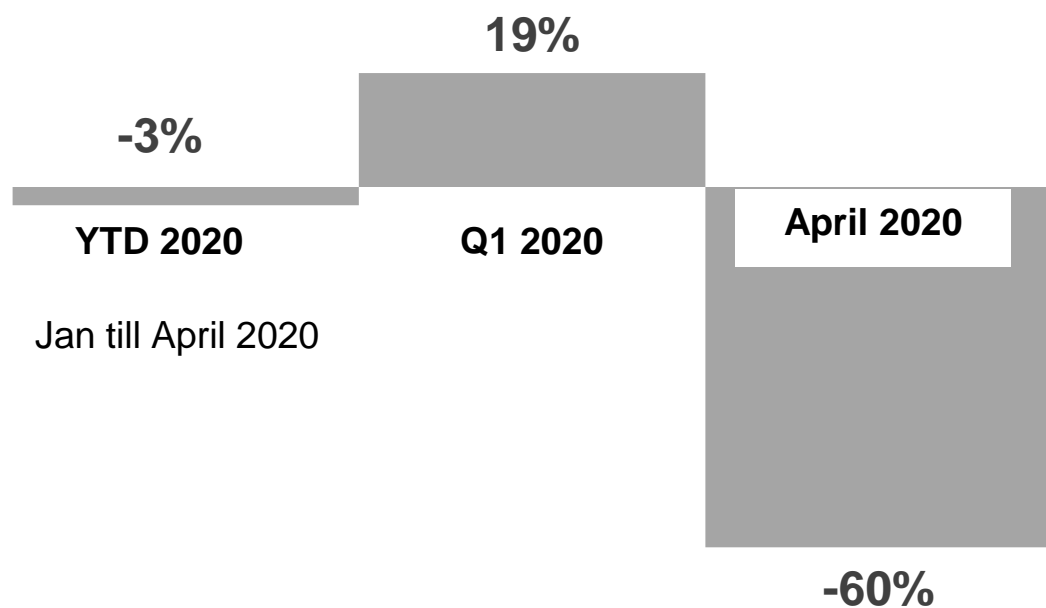
Businesses in Singapore have been the most aggressive in cutting Hiring Budgets & BTL campaigns



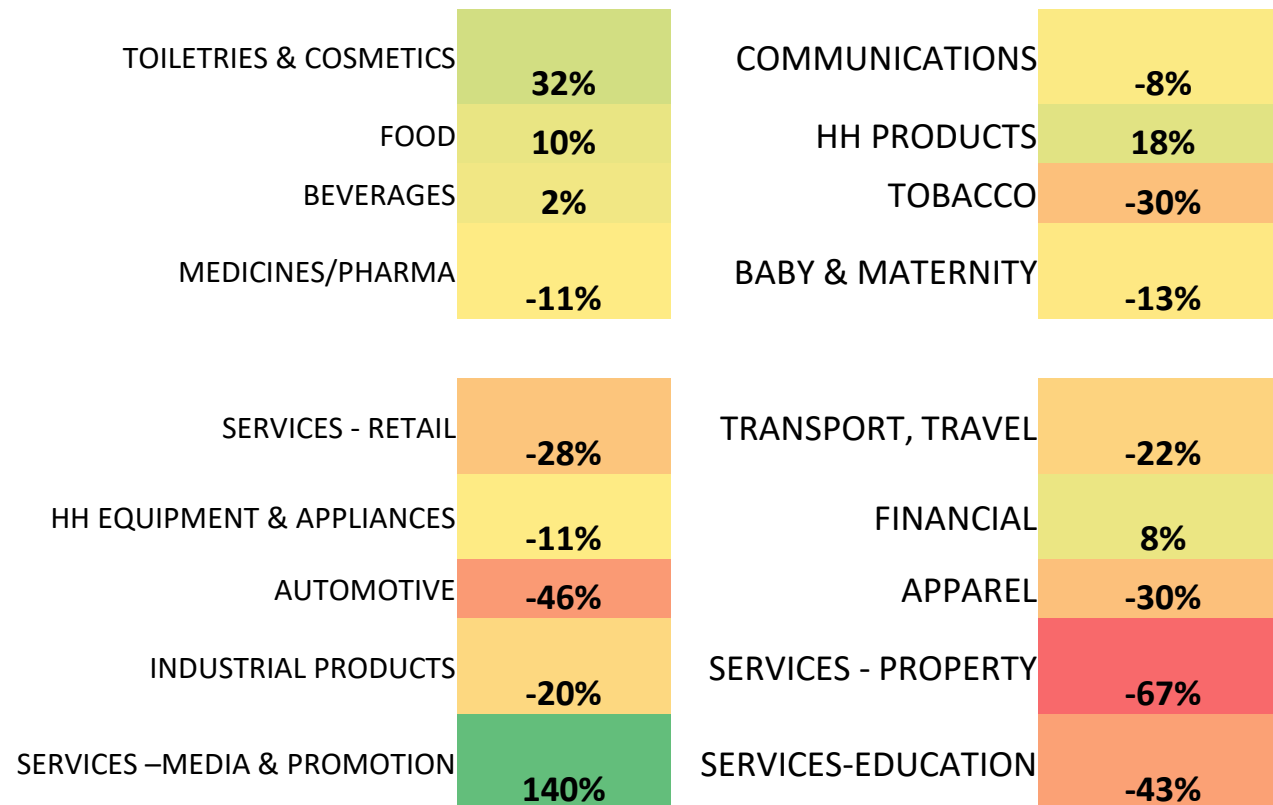
Budget Cuts Taken	Total APAC	India	Indonesia	Singapore	Vietnam
Hiring Budgets	61%	62%	58%	70%	53%
BTL Media campaigns (OOH Activities)	58%	60%	54%	70%	48%
ATL Media Campaigns on TV/ Radio	38%	44%	33%	37%	30%
Sales Promotion Budgets	37%	38%	39%	35%	25%
Defer Market Research Projects	25%	27%	24%	28%	25%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

Aggressive reduction in TV Spends in Indonesia in April

TV Spends Y-ON-Y Growth



Sector wise growth YTD



Source: GroupM COVID Impact Indonesia

FMCG Companies have reduced sale promotions, and should consider increasing it

Number of SKUs' Doing Promo during COVID-19 down by

 **61%**

Compared to Pre COVID-19

Pre COVID
Jan – Feb 2020

130,881
SKUs

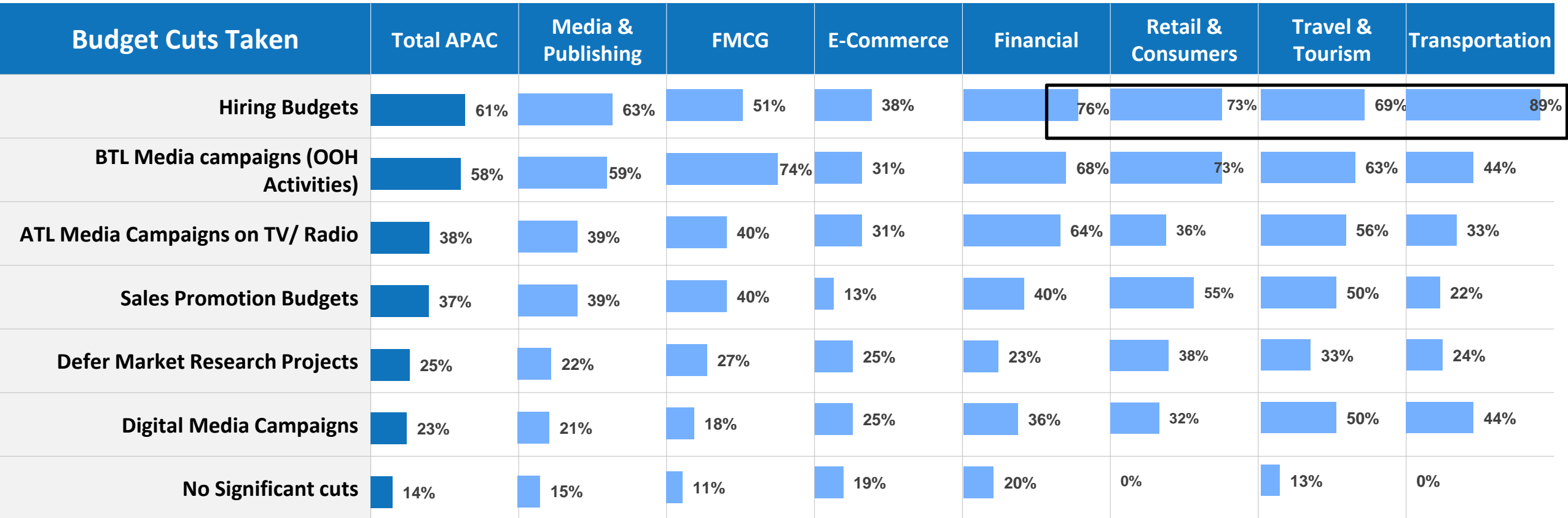
During COVID
March – April 2020

50,948
SKUs

- With Financial Worries at high level and a big dent on consumer wallets, brands should start focusing on Promos to win in Short Term

Source: Aisensum, HappyFresh Indonesia Jan - April 2020 data

Financial companies, Retail, Tourism and Transport sector have taken high budget cuts

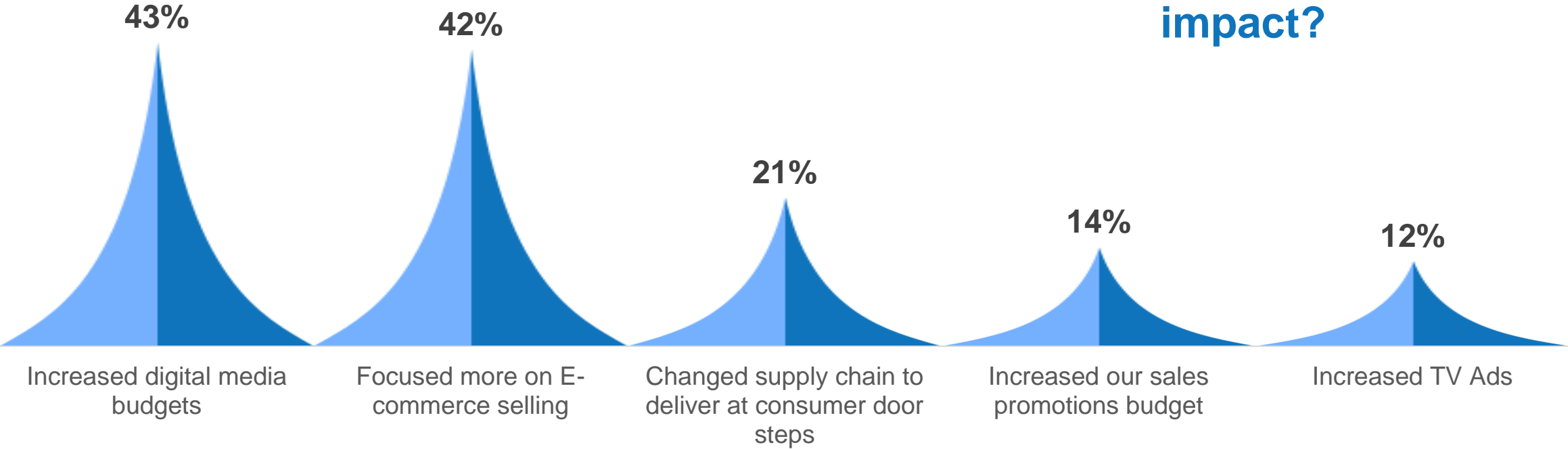




Businesses have taken digital route to counter COVID-19 impact



How businesses are countering impact?








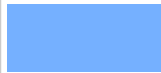
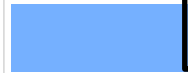
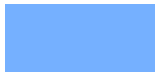

















Q10. How your organization is coping with COVID-19 disruption to reach consumer in different ways? (MA)



Singapore & Indonesia are skewed towards digital focus.
Businesses in Vietnam have been aggressive on Promos as well

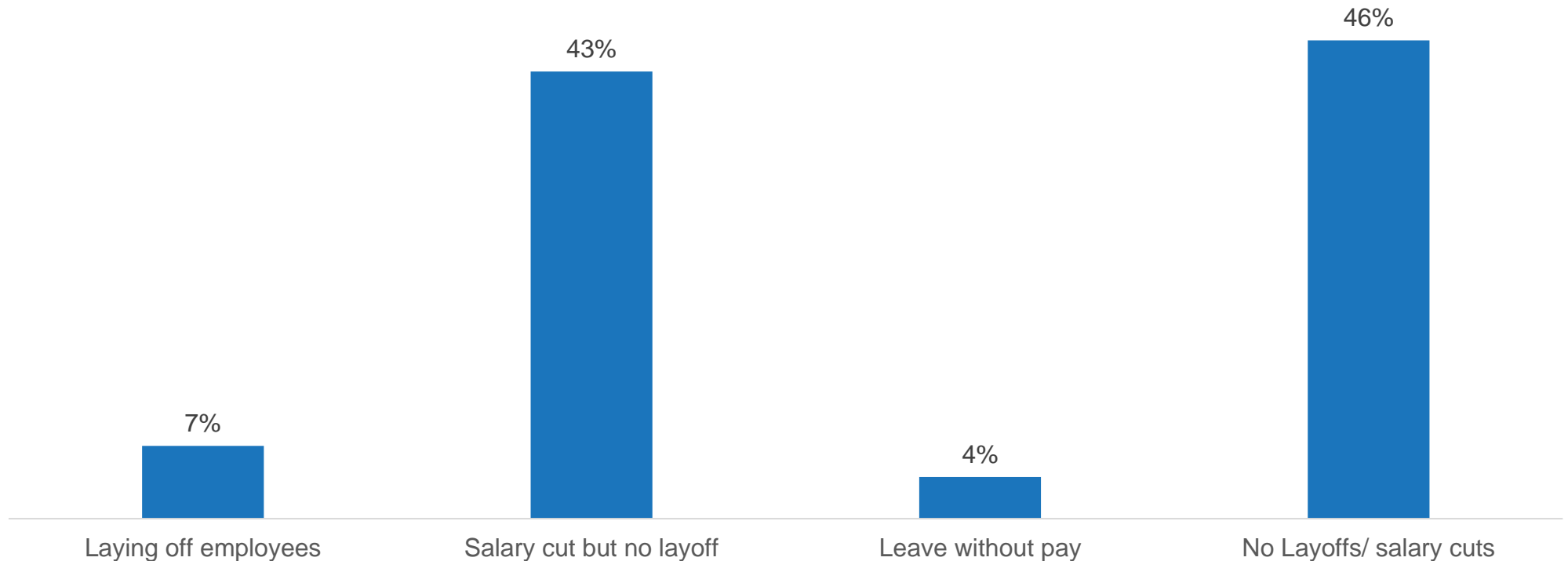


Change in Strategy	Total APAC	India	Indonesia	Singapore	Vietnam
Increased digital media budgets	 43%	 34%	 48%	 57%	 47%
Focused more on E-commerce selling	 42%	 23%	 55%	 57%	 48%
Changed supply chain to deliver at consumer door steps	 21%	 13%	 30%	 17%	 25%
Increased our sales promotions budget	 14%	 8%	 12%	 11%	 31%
Increased TV Ads	 12%	 11%	 20%	 4%	 5%

Q10. How your organization is coping with COVID-19 disruption to reach consumer in different ways? (MA)

Poll 2 – Audience results

As a measure to control cost, which of the following measures your organization plans to implement /has implemented ?





3

Perception of Businesses regarding Consumer Behavior Shift

Businesses believe consumers will shift to digital channels in future, especially Video calls

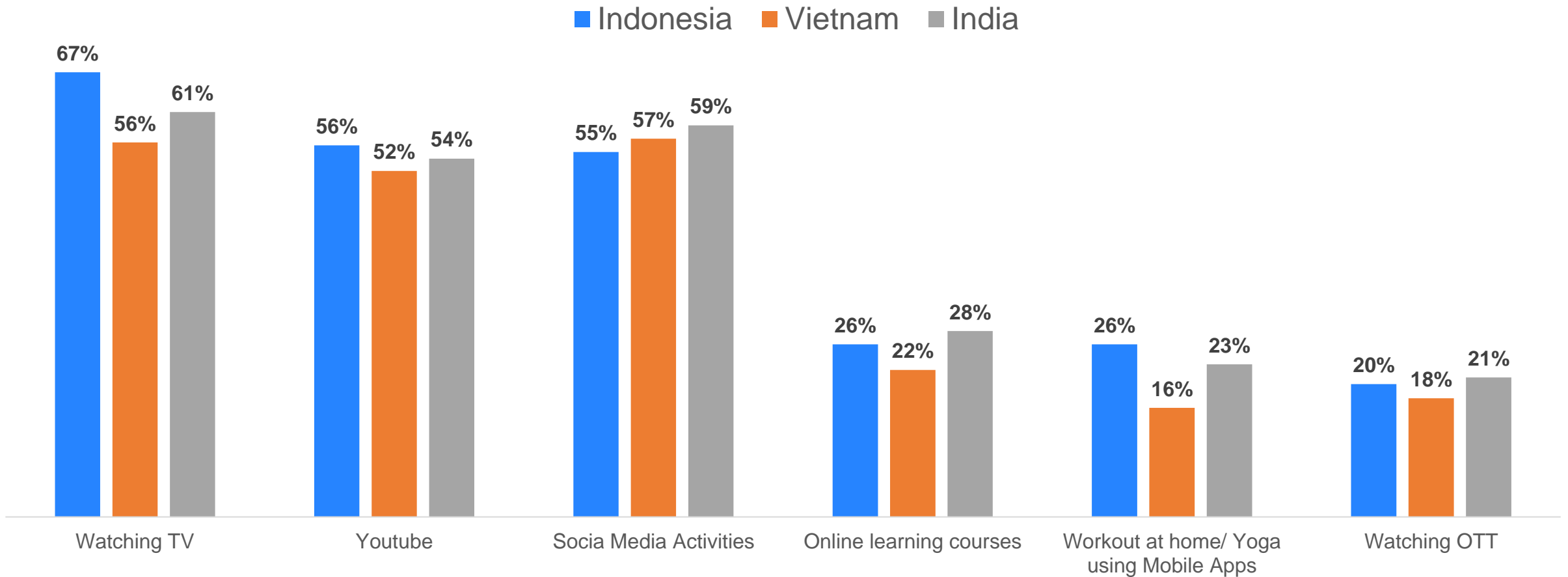


Countries	Total APAC	India	Indonesia	Singapore	Vietnam
Rise of Video meeting apps	80%	84%	56%	85%	67%
E- learning will be a new normal for education	62%	61%	44%	63%	61%
Consumers will shift major part of their grocery shopping to digital	57%	55%	28%	83%	41%
Online services such as Online Doctor Consultation 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%

Q3. 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)

With consumers restricted at home, both TV & digital media viewership set to gain

Activities being done more by consumers due to COVID-19

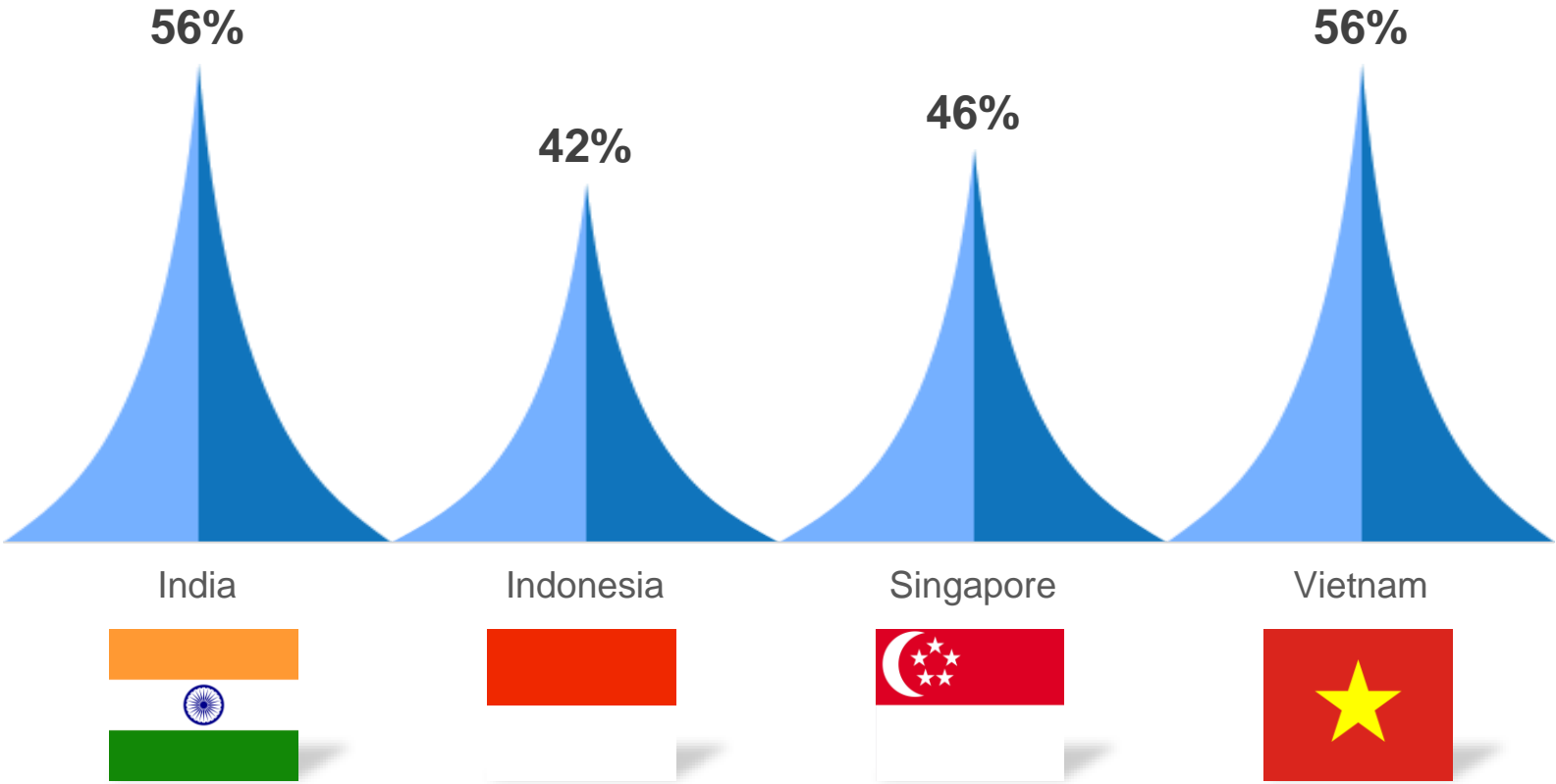




Businesses believe in importance of Online Community & Web influencers

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

Total APAC



Businesses believe in rise of digital products & services

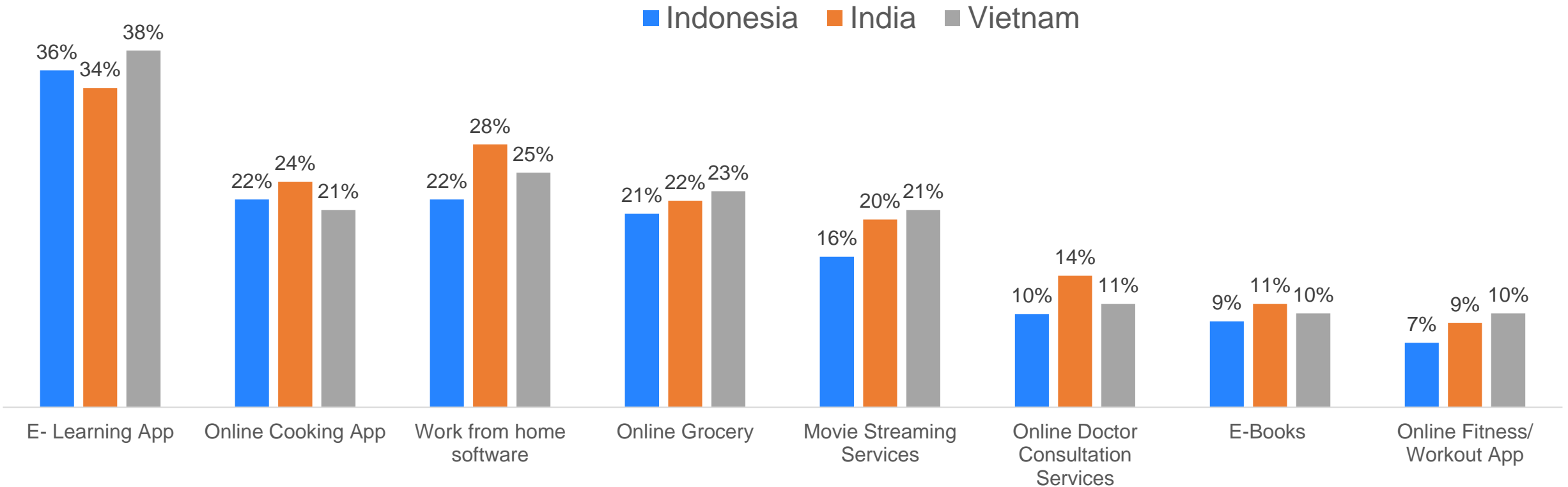


Countries	Total APAC	India	Indonesia	Singapore	Vietnam
News consumption on TV/ digital media will rise due to COVID-19	80%	83%	79%	89%	66%
Consumers will play more online games due to COVID-19	64%	66%	32%	76%	47%
Online Vlogging will get a boost too as social life remain disrupted due to COVID-19	47%	47%	37%	41%	38%
Sales of Digital PlayStation (Xbox, PS3 etc) will rise as consumers will look for entertainment inside home	31%	24%	26%	35%	36%

Q5. COVID-19 is shifting consumer behavior rapidly. Which of the following do you think best describes change in digital behavior of consumers? (MA)

Lockdown has given rise to new digital categories

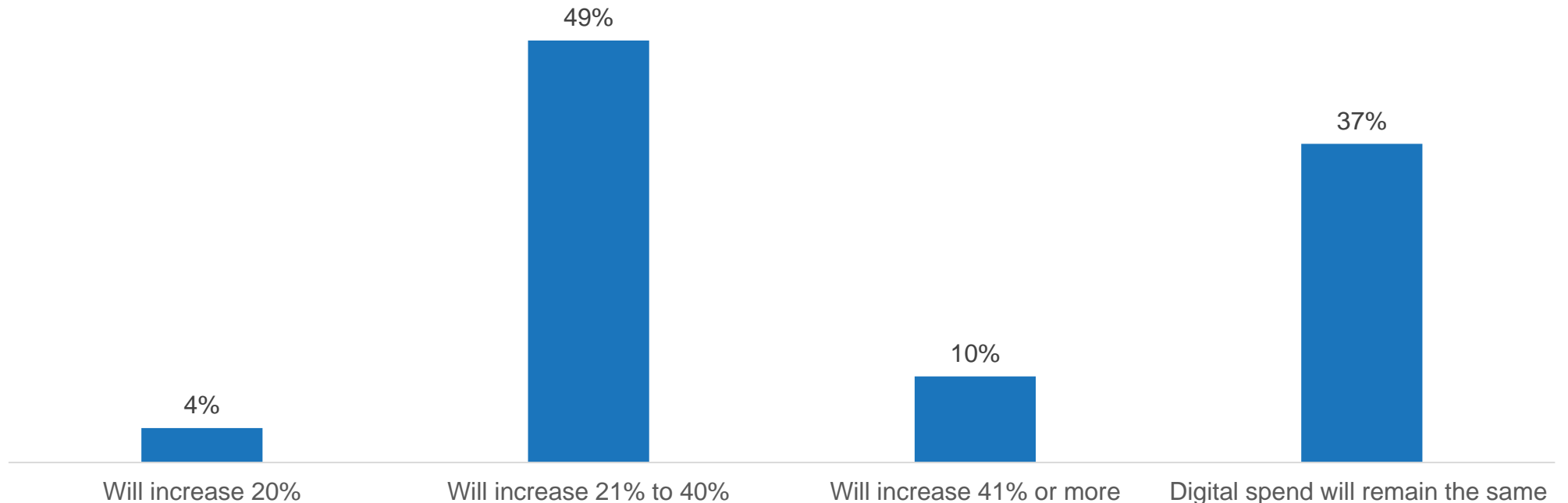
% Consumers Trying Category for 1st time in Past one month



Source: SurveySensum Internal Study on Consumers

Poll 3 – Audience results

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





4

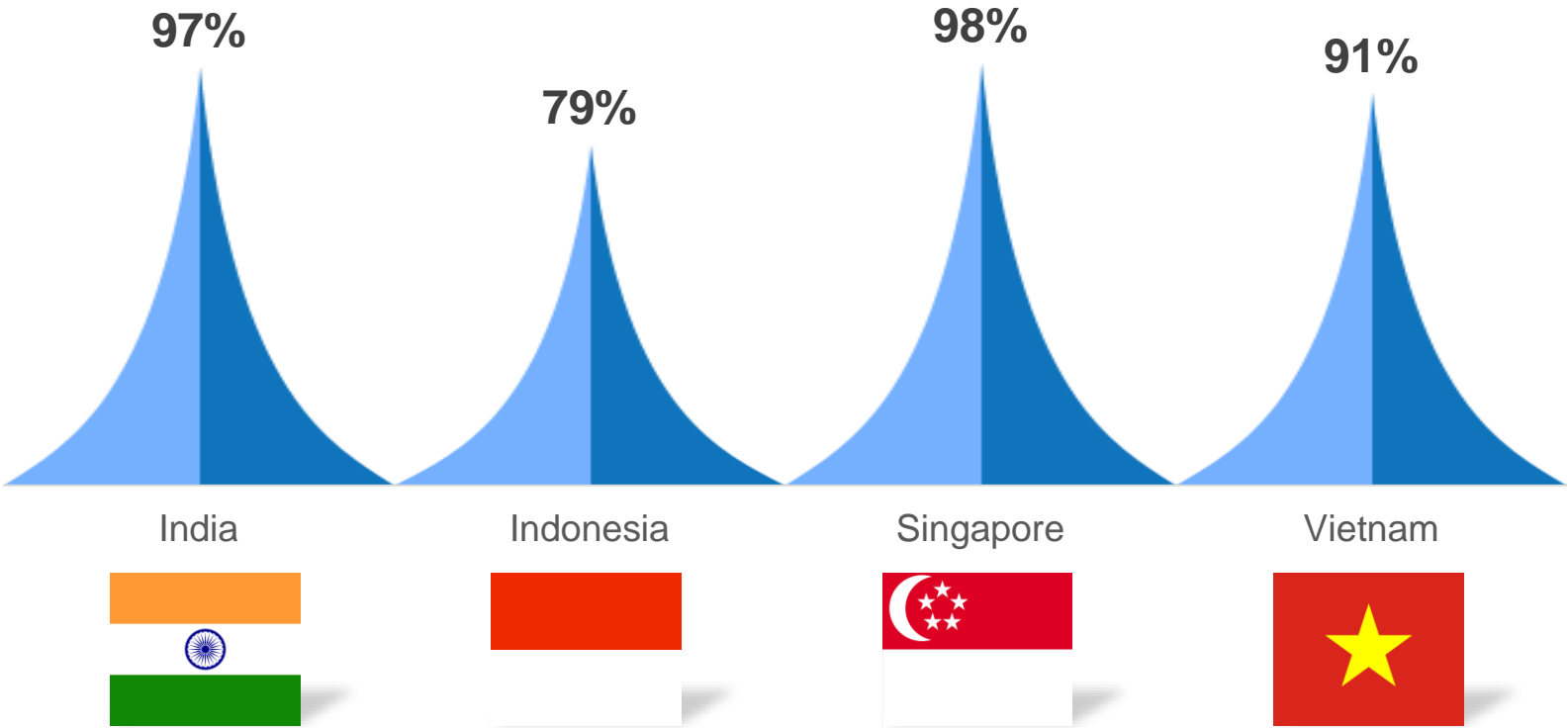
Is Digital the new Normal?



Majority of businesses are using Digital marketing as Top Channel for reaching out to consumers

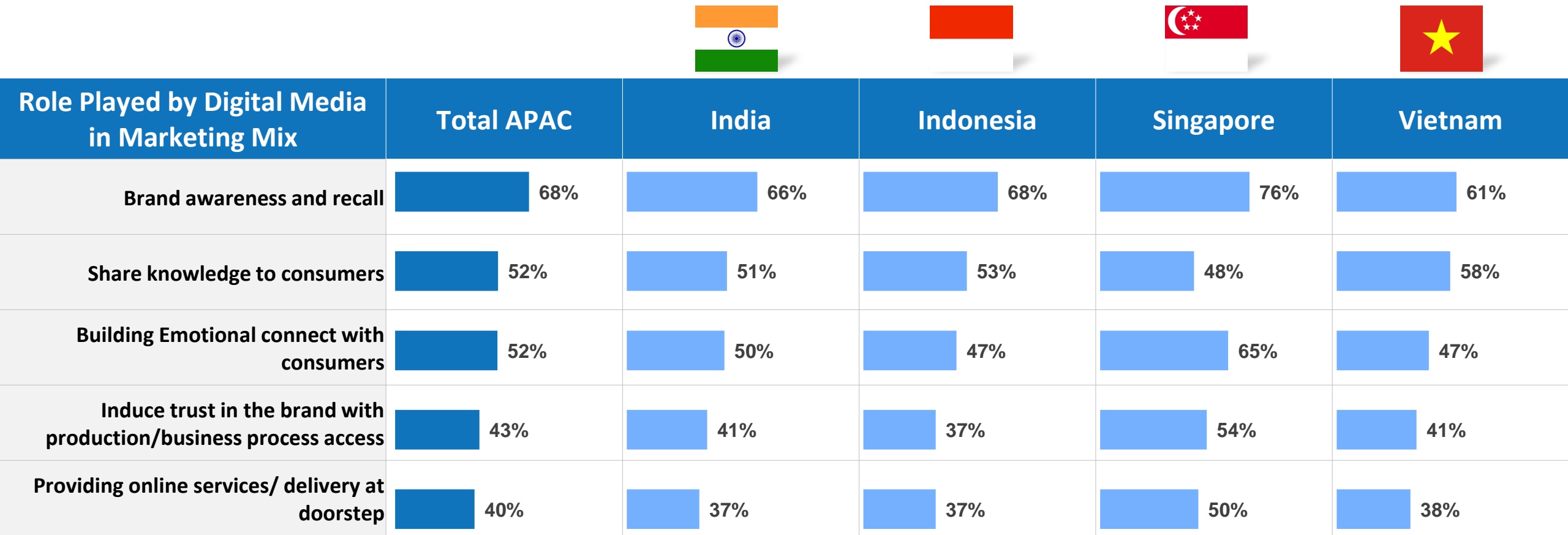
Use Digital Marketing as a Top channel

Total APAC



Top 3 channels considered for marketing mix?

Businesses are using digital channels to build awareness and recall



Q7. Which of the following best describes role played by Digital Media in your marketing mix? (MA)



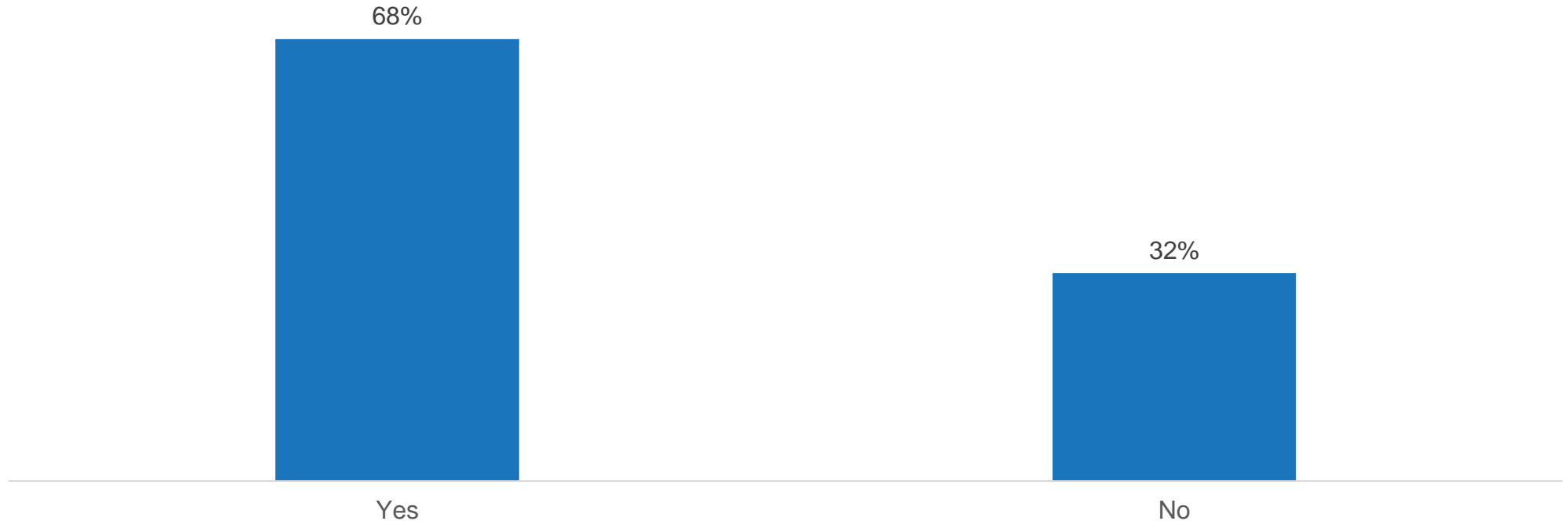
While FMCG & Retail businesses are focused on home deliveries, financial businesses are more focused on building trust using digital media

Role Played by Digital Media	Total APAC	FMCG	Financials	Retail
Brand awareness and recall	68%	78%	72%	69%
Share knowledge/vital information without deep product integration	52%	52%	50%	44%
Building Emotional connect with consumers	52%	70%	56%	75%
Induce trust in the brand with production/business process access	43%	41%	67%	44%
Providing online services/ delivery at doorstep	40%	63%	44%	69%

Q7. Which of the following best describes role played by Digital Media in your marketing mix? (MA)

Poll 4 – Audience results

Do you think your company has the necessary infrastructure and technology for e-commerce?

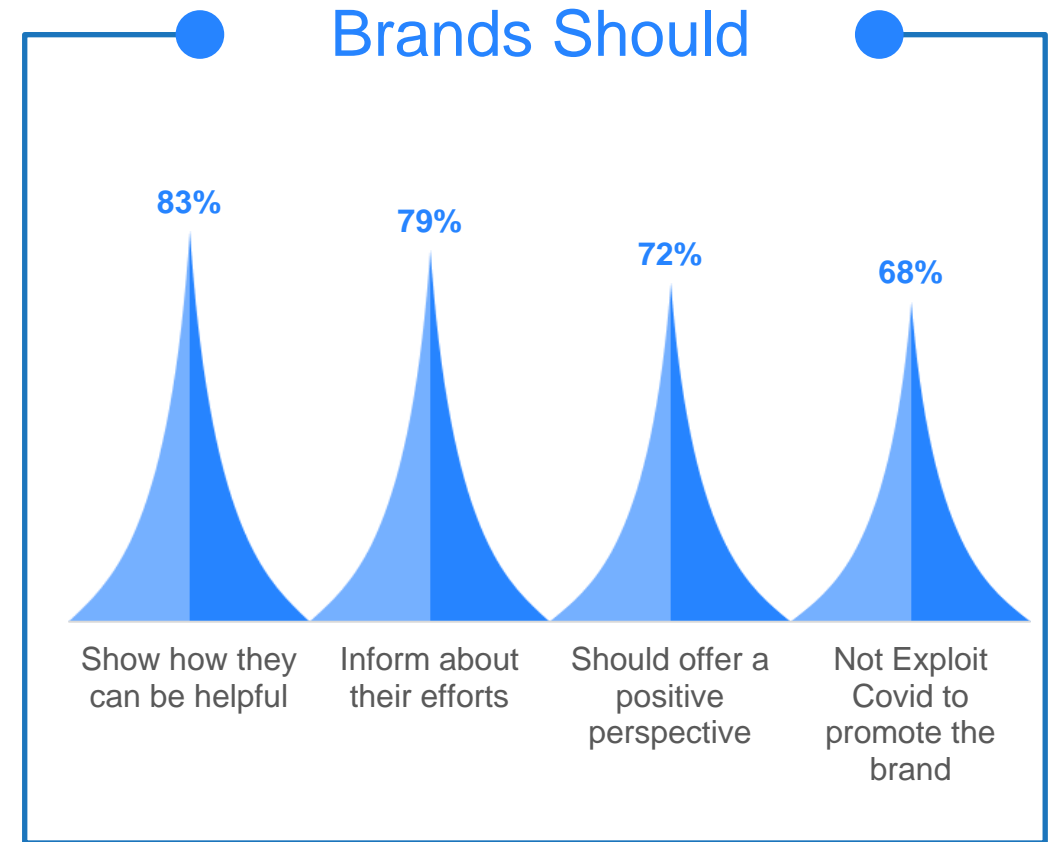
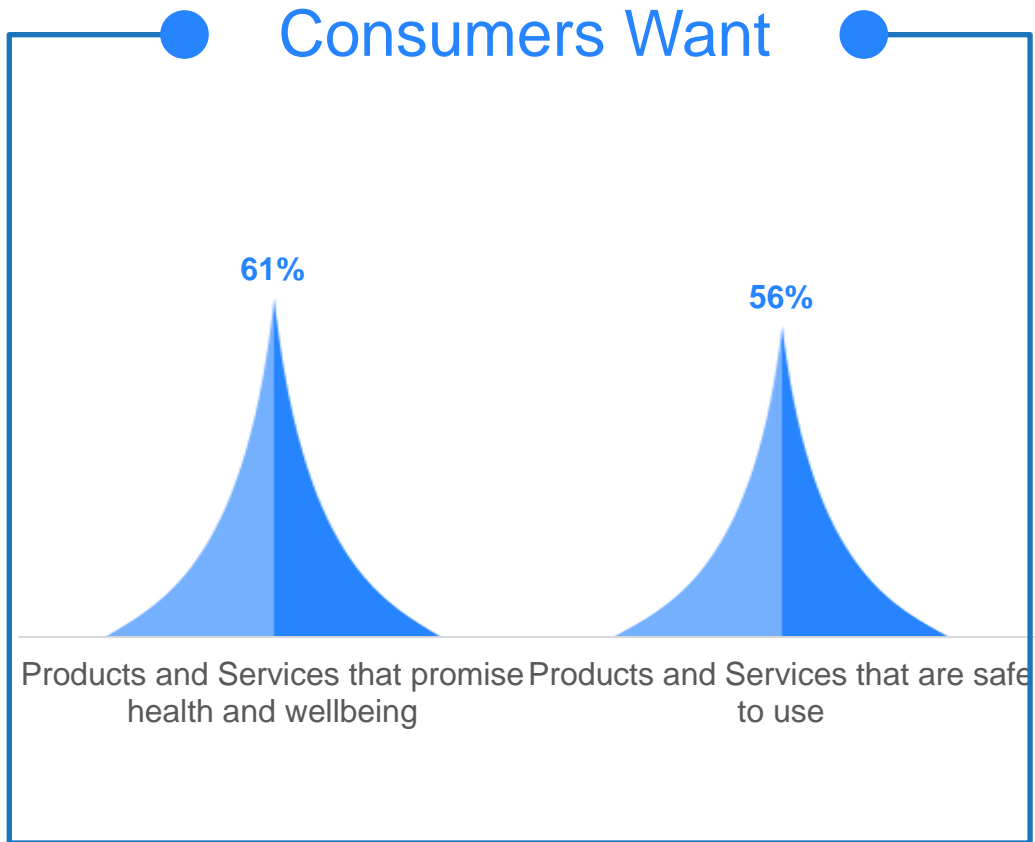




5

HOW BRANDS ARE RESPONDING

What consumers want from Brands?





Using Digital channel to reach consumers



**Recreating recreation:
Virtual Sentosa debuts in the
popular Nintendo Switch game
Animal Crossing**

**YOUR PHONE =
YOUR FITNESS CENTRE**

Introducing cult.live
Workout with free LIVE
classes anywhere.

**A Popular Fitness Centre
used digital strategy to
reach consumers at home**



**Dettol Handwash
Challenge getting 50 bn+
views**

CSR during Crisis



Xiaomi Distributing Masks in Singapore



Nestlé Vietnam donates more than US\$515,000 in products and cash



Western Union has donated funds for COVID-19.

Preparing for Contactless Future



Dominos Zero Contact Delivery



Zomato Contactless delivery



Zomato Contactless Dining



Spreading Positivity



**Cadbury Replacing Logos to thank
Corona Warriors in India
for 1st time in 70 years**



**FORD campaign showing
how it helped in nation
building during past crisis**



6

How Brands should be Future Ready



01

Embrace Digital

- Enhance Digital marketing Capabilities
- Build Deep partnerships & Eco System for data sharing, joint marketing campaigns

02

Explore New Channels

- Improve Omnichannel Touchpoints & improve coordination across channels
- Build Strong CRM & Social/ Conversational Commerce Strategy

03

Product & Range Innovations

- Monitor consumer trends and develop products and services which focus on consumer health and wellbeing
- New packaging for catering to new needs



04

Supply Chain Enhancement

- Diversified Supply origins
- Diversified sales channel mix
- Agile Supply chain to absorb demand & supply shocks

05

Responsive & Responsible Marketing

- Focus PR / CSR activities, and build a reliable brand image
- Plan bounce back consumer campaigns in advance

QUESTIONS?



Thank You!