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MOBILE > DIGITAL

Mobile Marketing Ecosystem Report 2020

Going beyond the traditional realm of digital marketing

FOREWORD

There's been a significant rise in the number of individuals accessing the internet through their phones and today this number has grown to 99%. The mobile device has become a central part of our connected lives – right from controlling features in a car, streaming TV, connecting with friends on social media, to on-the-go entertainment. Globally, more than 5 billion people use a mobile phone, of which 4.54 billion are connected to the internet, while 3.80 billion are active social media users. India alone hosts 700 million unique mobile phone subscribers, comprising 451 million internet users.

Due to this, most brands have adopted a mobile-first approach while addressing all their digital marketing initiatives. But should the mobile-first approach be limited only to digital marketing? It is but obvious to note, that the mobile device has changed various aspects of our lives, be it in the way we consume news, the way we get entertained or the way we shop and as a result, it has raised multiple challenges and opportunities for marketers. In this report, we look at various trends impacting consumers and marketers and highlight reasons why it's necessary to go beyond the traditional realms of digital marketing to drive business and brand outcomes.

The Mobile Marketing Association India has been consistently striving to create a pool of resources that marketers can consult while building futuristic strategies, to stay abreast and adopt mobile advertising at scale. It also continues to build on its vision, 'Shape The Future' through breakthrough studies, thought leadership, setting standards and optimising current activities and constantly monitoring mobile marketing trends. Today, India has around 1.16 billion mobile phone users. Cheaper data tariffs and smarter features have further enhanced the usage of mobile. The integration of AI and technology in advertising will lead to a new revolution and it's imperative to be ahead of the curve.

Collaborating with WPP Agency – GroupM, this report is a true testament to the depth of insight that can be gained when a trade association and an agency come together. Based on combined learnings, local expertise and market insights, this report looks deeper into where mobile marketing stands today, what has led us here and what the future holds. For marketers to better leverage mobile as a platform, it is important to understand how the landscape is changing and offering increased scope for impactful advertising. From neuroscience-based consumer understanding to an acknowledgement of the fact that trends which die out can also resurface; from AI becoming more human to humans becoming wary of safety and security – this report touches upon a variety of topics to ultimately provide a holistic picture of mobile marketing. Marketing to a generation of mobile users in the most effective way is only possible with a true understanding of these users and the platforms they so ubiquitously utilise.

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Changing Landscape of Mobile Advertising

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Initiatives by MMA

Given the changing landscape, trends and growth in mobile, MMA and the MMA board is working towards enabling cutting edge solutions, guidelines and best practices to address need gaps in content, measurement and brand safety, identified as key industry gaps.

Content Charter focus areas: Establish Guidelines & best practices for short format advertising content

- From A Blink To An Imprint To A Heartbeat | MMA

- From A Blink To A Heartbeat | MMA And Facebook

Measurement Charter focus areas: Enable POV on cross media reach and effectiveness of mobile versus other media

- MMA Measurement Effectiveness Industry Survey
- POV On Metrics That Matter
- Smox Cross Media Case Studies: How Brands Can Make Smarter Decisions In Mobile Marketing.
- MMA Multi-Touch Attribution Journey Map

Brand Safety Charter focus areas: Build guidelines & best practices to enable brand marketing and performance marketing respectively

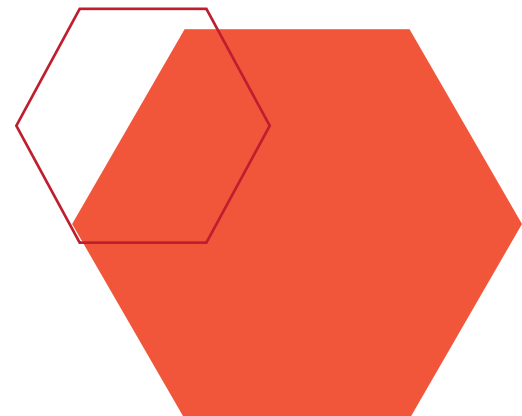- Mobile Ad-Fraud In India Report
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PART 1
MOBILE
LANDSCAPE

A lot is changing in the world of mobile, and with the increase in internet usage on the go, everything from subscriptions to the time spent on mobile is rising fast. Social media platforms are created with mobile as a platform in mind, and OTT providers have subscription plans and UI/UX strategies with mobile usage at the centre. The next few sections explore various aspects of the mobile landscape – what's growing, what's not, and what shows potential.

LARGE SHARE, LARGER POTENTIAL

As of 2018, Asia-Pacific represents the largest number of internet users, with 53% of the global share, and 48% internet penetration in the region. The most interesting aspect of these numbers is that the Asia-Pacific region also shows the highest potential for further internet growth. A developed region like North America has 89% internet penetration. Therefore, as Asia-Pacific moves towards further development, the internet users are bound to grow manifold.

INTERNET USERS BY REGION
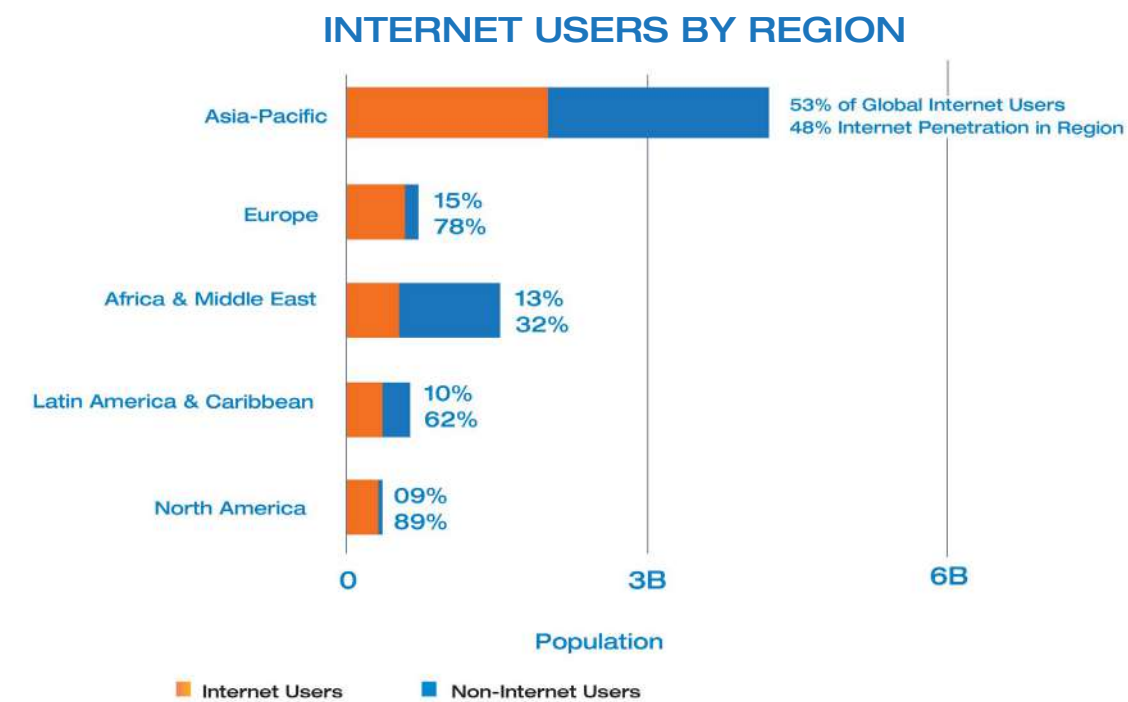
Internet users by region

Source: Mary Meeker Report Internet Trends 2019

As of mid 2018, India was second in internet usage, with 12% of the global internet user base. As of Q1 2019, India has an active user base of 451 million while the internet penetration hovers over 36%. The internet user base is forecasted to grow at a CAGR of 10% from 2019 to 2023. Rural India which is the largest population segment has low internet penetration. So, there is an immense scope for growth which will be driven primarily by cheap mobile handsets and low tarrif data.

INTERNET USERS IN INDIA
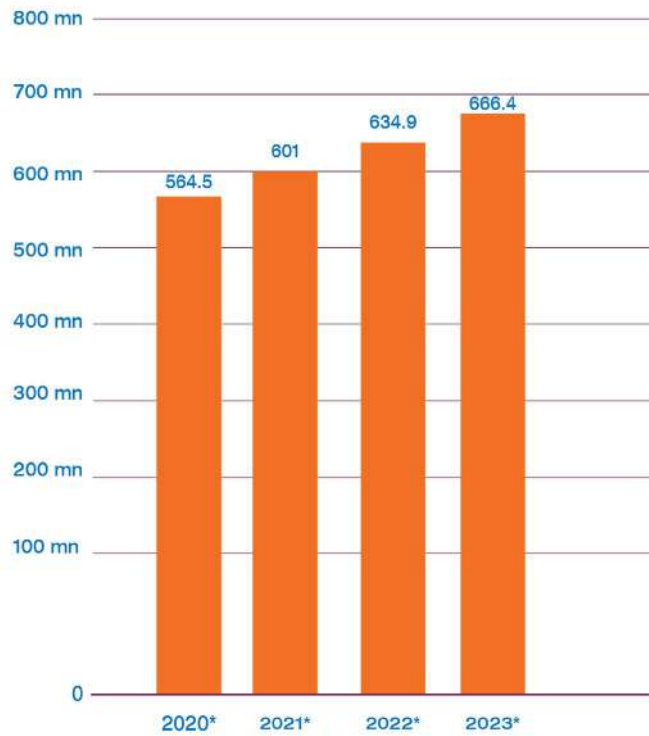
Source: India, Statista Digital Market Outlook

INTERNET USERS: TOP COUNTRIES

China - 21%

India- 12%

United States- 8%

% of Global Internet users

Source: Mary Meeker Report Internet Trends 2019

MOBILISING THE INTERNET

From the desktop to the laptop, tablet, and finally the mobile – the internet has become accessible on more and more devices alongside the consumer embracing new gadgets. Currently, across both rural and urban areas in India, 99% of users are using the internet on their mobile phones.
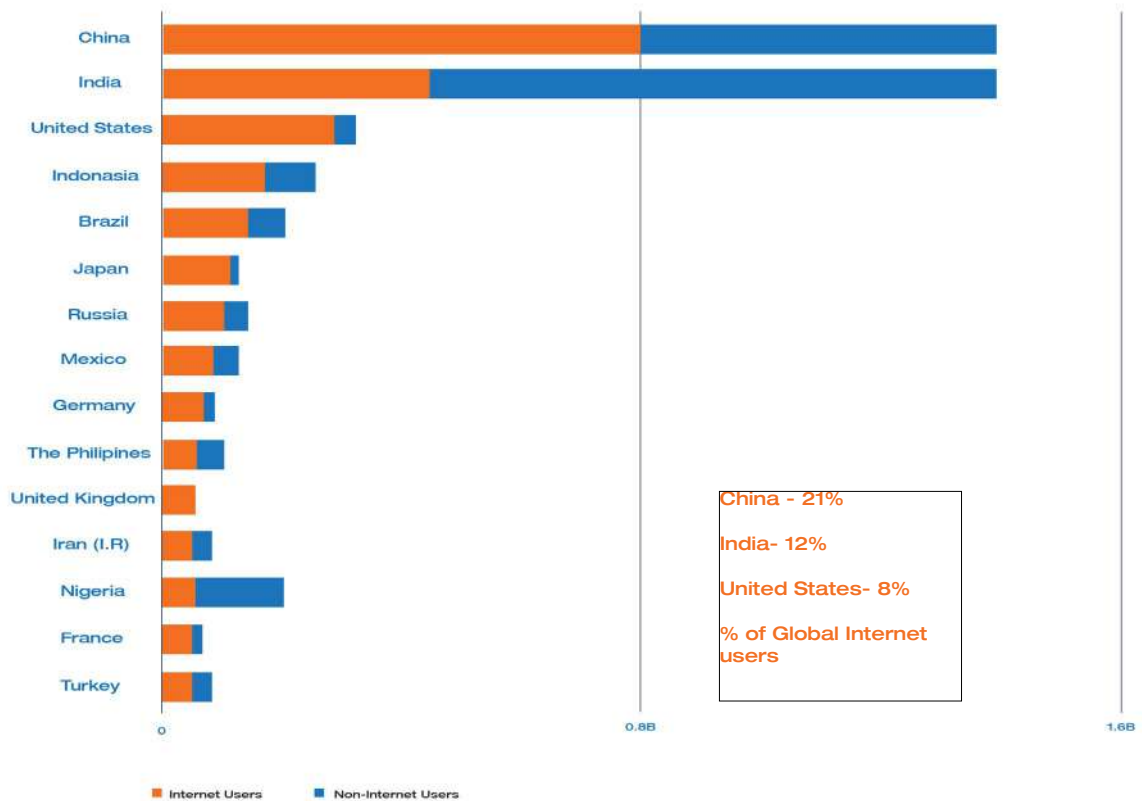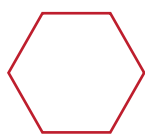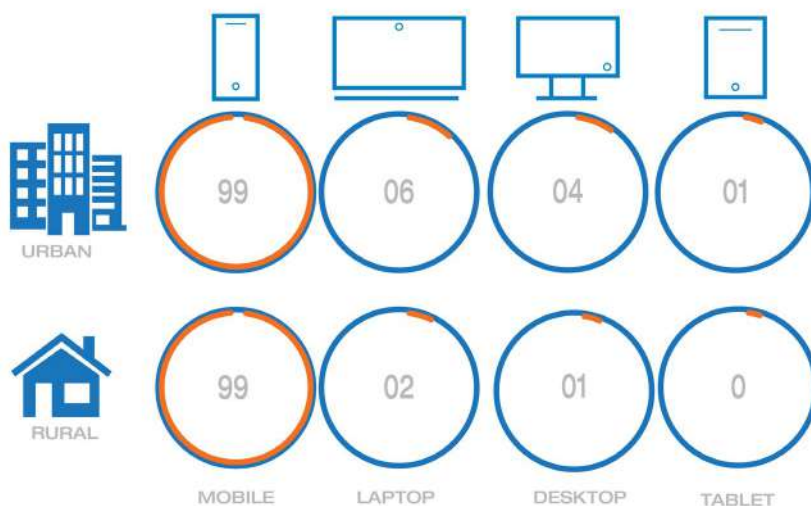
DEVICES USED TO ACCESS INTERNET

URBAN: 99, 06, 04, 01

RURAL: 99, 02, 01, 0

MOBILE LAPTOP DESKTOP TABLET

FIGURES IN %

Source: India Internet 2019 Report: IMAI
This report is powered by Indian Readership survey 2019. Sample coverage is pan India. Survey methodology is multi-stage stratified random sampling.

POINT OF INTERNET ACCESS

■ ALL INDIA   ■ URBAN   ■ RURAL

FIGURES IN %

	HOME	WORK	TRAVELING	STUDYING	INTERNET CAFE	OTHERS
ALL INDIA	92	28	25	9	2	10
URBAN	94	32	30	10	2	10
RURAL	90	25	20	7	1	10
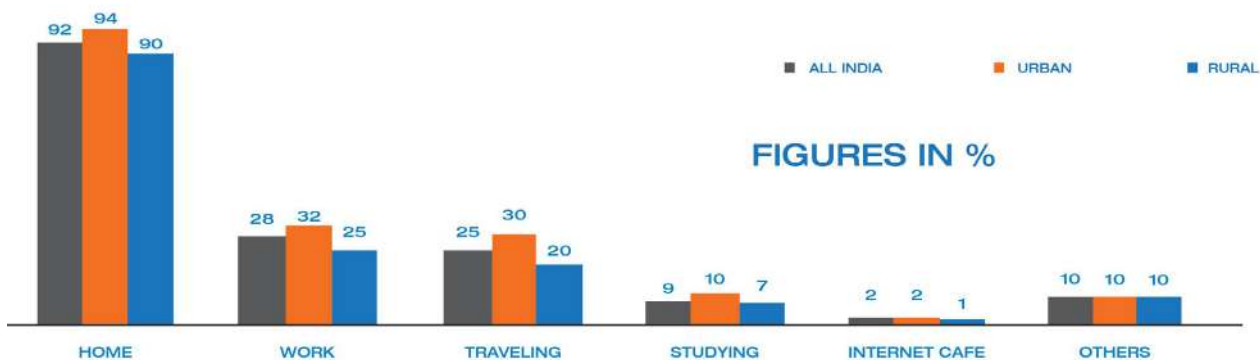
Points of internet access, India

Source: India Internet 2019 Report: IMAI

This is mostly because of the fact that along with cheaper data plans, smartphones have also become more affordable, allowing wider access. However, with connectivity and service quality still not at optimum levels in rural areas, on-the-go use for everyone is not yet possible, meaning that the number of people using the internet while traveling is still low.

Mobile Marketing Ecosystem Report 2020, India

GROWTH OF MOBILE USERS

Globally, more than 5 billion people use mobile phones, an increase of 2.5% as compared to the previous year. Out of a population of 1.3-1.4 billion, India has 1.16 billion mobile subscribers, comprising 700 million unique mobile subscribers. The growth has been gradual in the past few years, mainly fostered by an increase in consumer spending and entry of low-cost handsets, like Jio phone. Wit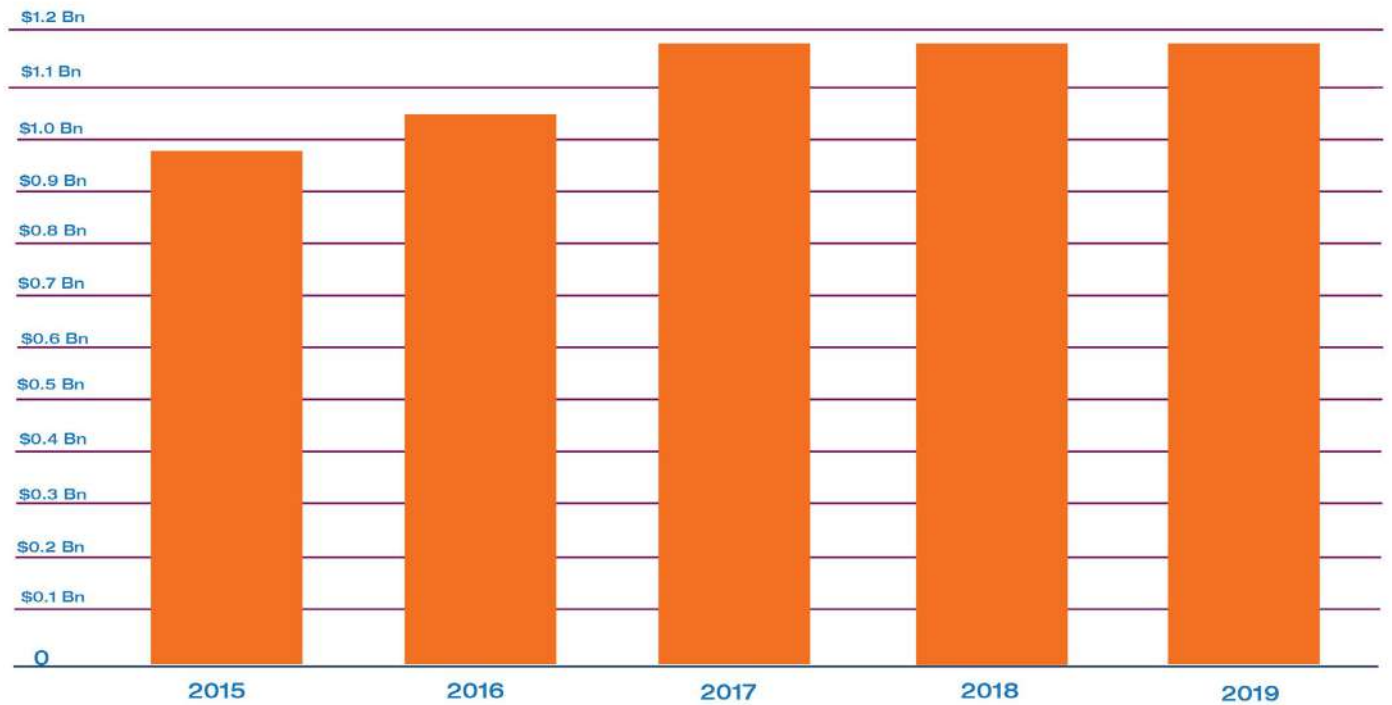h the increase in the number of mobile phones, the time spent on mobile also grew to 3.7 hours per day which is a 25% jump as compared to 2017 data.

TOTAL WIRELESS TELEPHONE SUBSCRIBERS IN INDIA 2015-2019

Source: Telecom Statistics India 2019

DATA TARIFFS – CHEAPER THAN THE CHEAPEST

With the entry of Reliance into the mobile telecom market, Jio came and revolutionised data in India, with the lowest prices in the world. Currently, data in India is priced at USD 0.26 for 1 GB, as compared to the global average of USD 8.53 per GB. Even the highest cost for data in India, i.e. USD 1.4 is well below the global average. The Indian smartphone and telecom markets are especially competitive in nature, resulting in these exceptionally low prices. Since Jio's launch in 2016, the brand has successfully amassed 280 million customers owing to its hugely affordable plans and services.
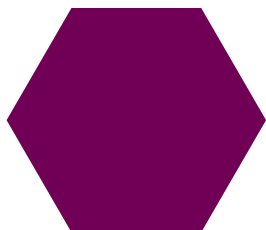
SMARTPHONES ARE PROLIFERATING WHILE FEATURE PHONES ARE BECOMING SMARTER

The global smartphone devices are estimated to be around 3.8 billion. While China has the most number of active smartphone users, India stands at 2nd position with 502 million smartphone users. Compared to 2018, the user base has increased by 15% and it is estimated to reach the 650 million - 700 million mark by 2023.

Alongside smartphones, the feature phone market too has seen a healthy growth in the past few years. This growth in feature phone market can be attributed to Jio which launched Lyf handset in early 2018. According to India Times, Jio phone is now one of the most popular feature phones in the world. Every year new feature phones are introduced in the market with increased capabilities, thus making the feature phone smarter.

UNIT SHIPMENTS (Million Users)	2015	2016	2017	2018	2019 Q1	2019 Q2	2019 Q3
Feature Phone	150	140	164	181	32	32	36
Smartphones	104	109	124	141	32	37	47

Source: IDC

THE JIO EXPERIENCE – SUPERLATIVE MOBILITY

Jio took the mobile network world by storm and continues to lead as of October 2019, with its 4G availability measurements growing up to 97.8% in the last six months. This means that Jio users are connected on a 4G network 97.8% of the time. This is an especially brilliant performance for the Indian market. In terms of the video viewing experience, while Airtel led the race, Jio came in close behind, offering a rated 'fair'- viewing experience. For voice-app experience as well, Jio lined up almost as well as the three leading brands, behind by just 2% age points. Overall, in the most challenging bracket of them all, i.e. 4G availability, Jio has come out strong.

4G AVAILABILITY (% OF TIME)

Vodafone	76.9
Airtel	89.2
Idea	77.4
Jio	97.8

Source: Mobile Network Experience Report I October 2019 I Opensignal Limited

XIAOMI – SHIPPING SMART, AND HOW

In the third quarter of 2019, the smartphone market in India shipped a whopping 46.6 million units, fueled by launches of new models, online sales and price corrections. Xiaomi led the shipment volumes by a significant margin and contributed to 27.1% of the market share, followed by Samsung and Vivo.

INDIA SMARTPHONE MARKET, TOP 5 COMPANIES, SHIPMENT IN MILLIONS, MARKET SHARE, YEAR-ON-YEAR GROWTH, 3Q19

Company	3Q19 Shipment Volumes	3Q19 Market Share	3Q18 Shipment Volumes	3Q18 Market Share	Year-Over-Year Unit Change (3Q19 over 3Q18)
1. Xiaomi	12.6	27.1%	11.7	27.3%	8.5%
2. Samsung	8.8	18.9%	9.6	22.6%	-8.5%
3. Vivo	7.1	15.2%	4.5	10.5%	58.7%
4. realme	6.7	14.3%	1.3	3.1%	401.3%
5. OPPO	5.5	11.8%	2.9	6.7%	92.3%
Others	5.9	12.7%	12.6	29.8%	-53.6%
Total	46.6	100.0%	42.6	100.0%	9.3%

Source: IDC Quarterly Mobile Phone Tracker, November 2019

Under Xiaomi, Redmi 7A and Redmi Note 7 Pro were the models that saw the highest shipping volumes. A major factor contributing to Xiaomi's success was the demand for phones in the price segment of INR 20k to 35k. Of the five top models, four were under Xiaomi.

INDIA TOP 5 SMARTPHONE COMAPNIES, UNIT MARKET SHARE 3Q19
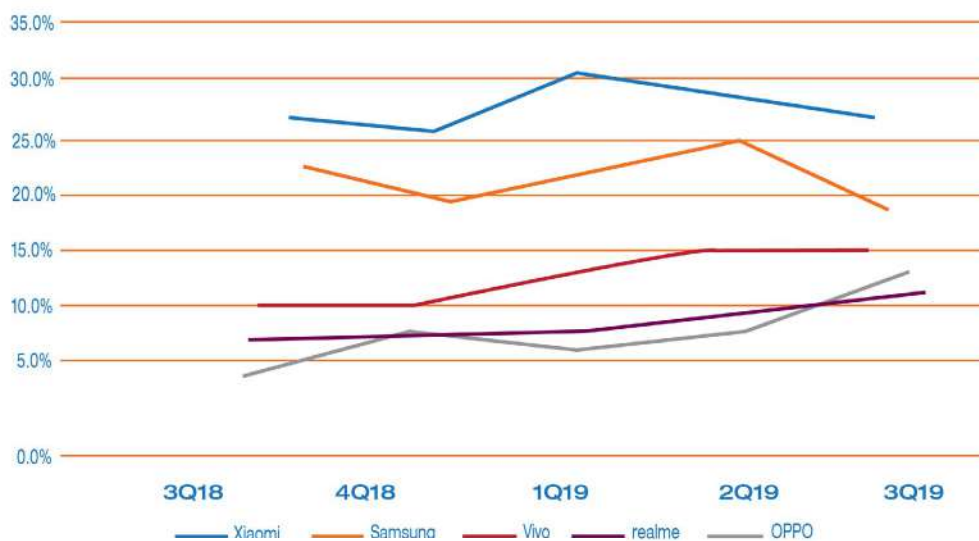
Source: IDC Quarterly Mobile Phone Tracker, November 2019

Mobile Marketing Ecosystem Report 2020, India

MOBILE APPS BECOMING AN INTEGRAL PART OF THE MOBILE ECOSYSTEM

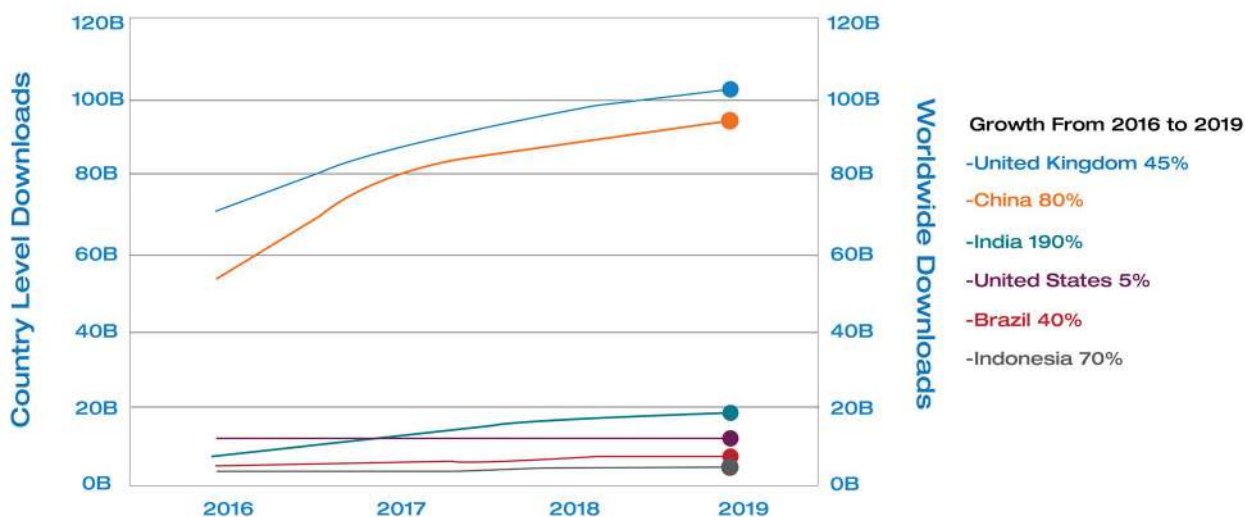In 2019, consumers downloaded a record of 204 billion apps worldwide, spending close to $120 billion which is 2x of 2016 spending. This growth was mainly fueled by emerging markets such as Brazil, India and Indonesia. While the global growth in app downloads has been 45% in last the three years, India witnessed a mindboggling growth of 190% since 2016 reaching around 40 billion app downloads by 2019. Mobile apps are touching every aspect of human life, right from managing finances, planning travel, maintaining fitness to even finding a life partner.

TOP COUNTRIES BY APP STORE DOWNLOADS

Growth From 2016 to 2019
- United Kingdom 45%
- China 80%
- India 190%
- United States 5%
- Brazil 40%
- Indonesia 70%

Source: App Annie – State of Mobile 2020

In the finance sector, fintech apps have topped traditional banking apps mainly enabled and accelerated by mobile devices. India tops the global entertainment market in terms of highest users of entertainment apps. India is also the 2nd largest market for YouTube Music. Social apps are becoming hyper-local and filling a niche as consumers look for smaller circles. These in turn will compete or complement existing social apps which have had a first mover advantage and have become a part of daily habits.

TOP APPS (Monthly Active Users in India, 2019)

#	App	Owner
1	Whatsapp Messenger	Facebook
2	Facebook	Facebook
3	Truecaller	Truecaller
4	Facebook Messenger	Facebook
5	SHAREit	SHAREit
6	Amazon	Amazon
7	MX Group	Times Group
8	Instagram	Facebook
9	Paytm	One97
10	Hotstar	Disney
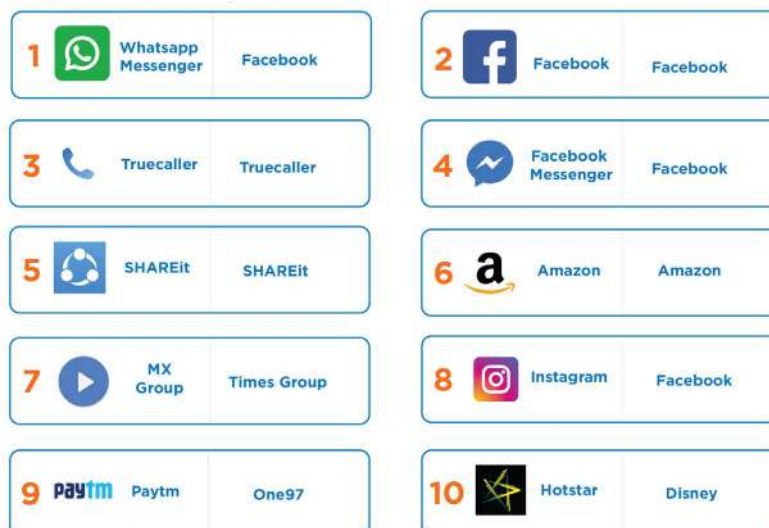
Source: App Annie – State of mobile 2020

WITH DATA USAGE HIGH, WE ASK WHY

Among all active mobile internet users in India, which stands at approximately 451 million, entertainment is the purpose for a whopping 84%. This is followed closely by communication at 79% and the use of social media at 67%. Net commerce and online shopping fall quite far behind in numbers at 40% and 23% respectively. This clearly indicates the need for digital video and OTT platforms to continue making the interface mobile-friendly, thereby ensuring a wide reach to all those actively consuming content on the go.

PURPOSE OF INTERNET USAGE
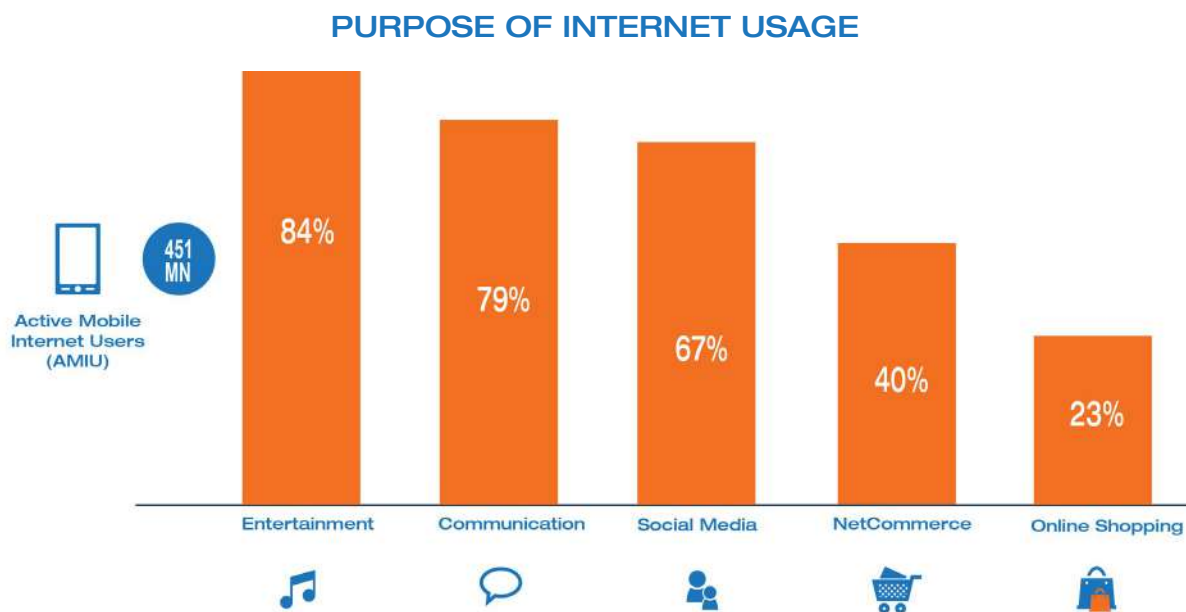
Source: Kantar ICUBE 2019

• *Entertainment : Active Internet user who is either an Online Video watcher or Online Music Listener or has been an Online Gamer in last one year.*

• *communication: Active internet user who have used services like voice chat, text chat , video call or email in last one year. (as discussed, WhatsApp is included in this category)*

• *Social Media : Active internet user who have used social media platform for posting/ blogging / uploading or sharing photos, videos, information etc./ playing games/ watching videos etc. in last one year.*

• *Netcommerce: Active Internet user who is has bought any product or services online in last one year.*

•*Online shopping: Active Internet user who is has bought any product online in last one year.*

PART 2
EMERGING
TRENDS

By 2023, close to 666 million people will be accessing the internet. Meanwhile, the number of smartphone users will stand in the range of 650 million to 700 million by 2023

As mobile devices become integral to the lives of consumers, it becomes critical to understand some of the reasons that fuel this growth. This section highlights related consumer trends and shines the spotlight on some of the changes that we can expect in times to come.

HOW VOICE AND AUDIO IS CHANGING THE WAY WE USE OUR DEVICE

The arrival of touch-enabled technology led to a complete overhaul of the digital market, and the massive response to touch-screen devices was instrumental in driving sales for up-scale technologies. Soon, voice technology entered the milieu and elicited customer enthusiasm. Voice assistants have evolved from text-to-speech enablers that helped a user seek information from devices that take care of routine functions around the house and daily errands that had to be earlier accomplished manually. Today, brands have begun to leverage audio technology to reach out to their audience. Additionally, as voice assistants take over a regional tone i.e. they are available in multiple languages, we have seen the widening of the customer base and the opening up of new markets.

According to Niraj Ruparel, National Head, Mobile and Voice, Mindshare India, voice is the next big trend in the digital world. He supplements this by sharing an example: On an internet enabled smartphone, a user can type close to 40 words but, can speak up to 150 words. This plays an instrumental role for brands seeking to position themselves as solution-oriented in front of their audience. Voice technology combined with Artificial Intelligence, Machine Learning and Augmented Reality is all set to bring about a make-over to the marketing landscape as we know it. This will in turn have a domino effect on verticals such as OTT, Online Gaming and Virtual Reality to name a few.

Rise of Conversational Living

India has witnessed enormous growth in the arena of voice searches. Be it seeking out automobile specifications, or aligning in-home security features with existing mobile apps, smart devices have penetrated the lives of every consumer, urban and rural alike, bringing about a new digital-age revolution. Apple's 'Siri' or Microsoft's 'Cortana', has led to the evolution of how consumers search for information. To put it simply, Voice Search has taken the Search Engine Optimization industry by storm.

Voice interactions are truly changing the way we search for information and it has also helped us in learning something new. The 'Bolo' app designed by Google that was launched in March 2019 with an open beta program, aids children in improving their reading skills.

Available in the Hindi language with in-built features that convert text-to-speech and a user-friendly interface with hi-tech speech recognition, it can also function offline without internet connectivity. Upgradation of the Kindle, 'Audible' by Amazon has allowed readers to listen to audiobooks based on voice commands.

**Listed below are a few examples of brands using voice-based solutions:**

- Talk To Godrej Hit: Godrej Hit integrated its Dengue Helpline and Platelet Donation Campaign with Alexa and Google Assistant helping consumers get real time information on donor availability and precautions for vector borne diseases.

- On World Oral Health Day, the 'Sensodyne' chatbot was introduced to consumers for providing an engaging means of being educated about tooth sensitivity and the importance of oral hygiene.

- Mindshare India has launched a new voice-driven platform called 'Audio Conferencing Bridge' - 'mSamvaad' which helps connect brands to the audience in media dark areas on the largest voice conferencing infrastructure with a capacity of 25,000 concurrent calls.

Conversational Commerce: Platform Thinking versus Campaign Thinking

By 2021 — 09 out of 10 — Every Internet using Indians will be Vernacular Language Speaker

Source: Year in Search-India: Insights for Brands

- Since voice assistants purely work based on user intent, they have now evolved into more than mere information touchpoints. Right from switching off the lights without having to move, to hassle-free shopping experiences, to issuing automated bill payments, it's all a matter of convenience and agility. All this data that captures user intent can then be a bedrock on which marketing campaigns can be built on.
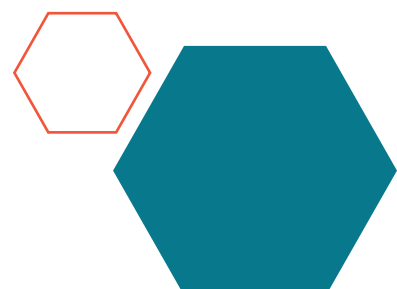
VOICE SEARCH HABITS
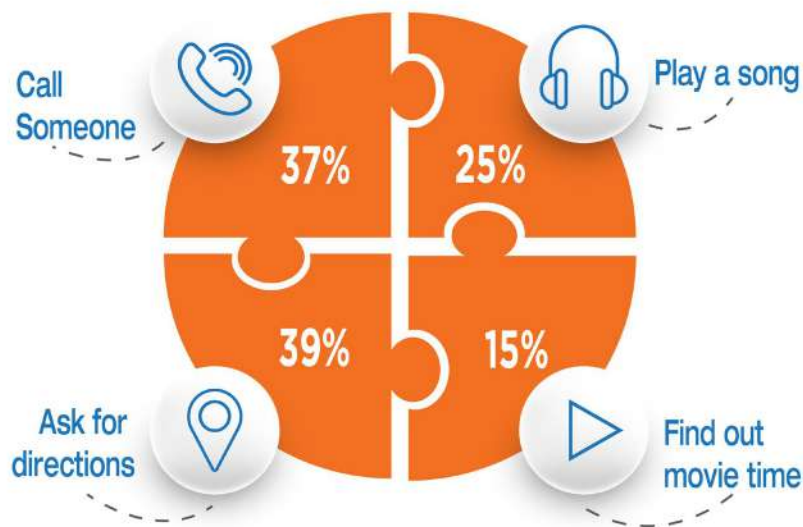
Source: A study conducted by Google in association with Northstar

Other than voice, the text also is playing a more significant role in conversational commerce today. Engaging via messaging platforms such as Messenger or WhatsApp can be a powerful way to connect with shoppers where they are and on their terms.

Transcending Language Barriers

Late in 2019, Amazon launched a multilingual mode in Alexa for users to access the voice assistant in Hindi. Google Assistant, on the other hand, already boasts of Hindi being the second-most utilised language for voice globally. Soon, these are bound to create a level playing field for the customer to initiate voice commands in vernacular languages. As of 2017, 68% of internet users preferred digital content to be in the local language, believing that it adds to its overall credibility. By 2021, in India, 75% of internet users would be comprised of vernacular content user base.

INTERNET USERS PREFERENCES IN DIGITAL CONTENT
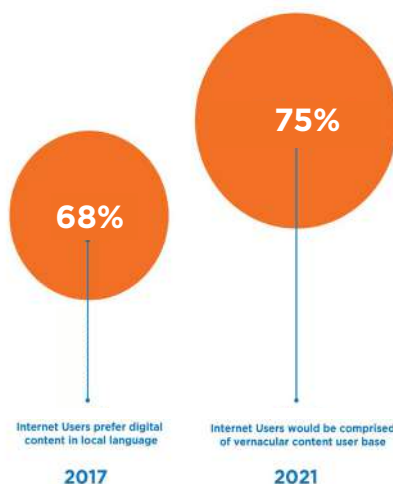
Source: Indian Languages- Defining India's Internet Study by KPMG and Google
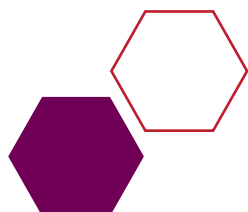
PERSPECTIVE ON VOICE AND AUDIO

Niraj Ruparel,
Head- Mobile, Mindshare

EMERGENCE OF VOICE AND AUDIO ON ADVERTISING

When devices powered by touch entered the market, they changed our lives as we know it. Today, this is being increasingly replaced by voice run technology, which has made its way into almost every aspect of functionality, from our cars and homes to our smart devices, white goods, ERPs and more.

Sensing the opportunity, brands have jumped onto this bandwagon, and are now including voice as a discipline under digital strategy when imagining customer interactions. Voice assistants are today more than just information touchpoints. They carry out functions like turning off lights, hailing a cab, managing navigation, making calls, automating bill payments, and adding items to shopping carts. As brands adopt this technology, they are now thinking about it on a macro level, moving away from mere campaign-based uses, to strategic platform thinking. The use for voice also extends to content marketing in an audio format, to create stickiness, engagement, and customer delight.

With Google Assistant available on even lower models of smartphones, and Alexa functioning in two languages, voice has transcended language barriers that even web and digital could not so far. It has created a level playing field for customers speaking a multitude of languages. Through ML and AI, it understands the customer's intent, and is able to respond meaningfully.

At home too, the conversion to smart living is a lifestyle that is quickly being adopted across the country. India observed an import of over 6.6 million Echo devices in the second quarter of 2019. Additionally, India being a country with multiple festivals and languages, no two houses are alike and each of them has a creative solution to use voice commands that sprouts from the age-old habit of 'Jugaad'.

Millennials, for example, are faster in adapting to newer technologies, and seek help from voice powered assistants during festivals which could range from understanding the process of the 'Pooja' or asking the device to play the 'Arti'. Interestingly, one of the highest played skills is Alexa's recognition of commands to play 'Hanuman Chalisa'.

Voice technology is one of the most disruptive technologies of our time, and for a time starved urban dweller, it becomes an ideal source to help in being more productive. Through Alexa, which has become synonymous with voice assistants, consumers spend less time on apps and websites, enjoy simplified experiences, and increased efficiency. What was once thought of as a futuristic technology, is now here, and will only grow bigger in time.

VOICE TECHNOLOGY PREDICTIONS FOR 2020 IN INDIA:

Increased functionality
Instead of staying within a specific environment of skill or AOG, developers will be able to create integrated solutions and source information from one to another giving users a more holistic and connected experience on voice.

Contextual voice solutions
With voice assistants reaching more devices, the penetration and overall occasions of humans interacting with machines through voice are increasing. This is going to lead to a rise in situational content. For example, the rise of smart earbuds with Alexa built-in could help the users with public transport navigation, replying to texts, listening to music and be a travel guide, all through voice.

Brand presence to become strong on voice
Earlier, brands were hesitant in joining the voice revolution but now, there's a growing awareness and understanding that voice is not just a viral trend, it is a necessity. Companies must now include voice in their annual budgets and explore engaging use-cases to explore the space.

Data collection and Privacy
As more services and brands make their presence known on voice, users will have increased questions around data and their privacy. Security would take the centre stage in 2020 and Service Providers would need to be clear in terms of what is required and how it is collected.

Inclusive shopping experience
The combination of voice technology, increasing user penetration and brands joining the voice revolution is guiding shoppers as they conduct their transactions through voice. From discovery to selection to checkout, users would expect the shopping journey to remain on Voice without having to access apps or other platforms.

Content
For the earbud generation, not only music but also podcasts as a source of audio entertainment would see a rise. A larger audience will consume content across genres in a language they love. It would be interesting for companies to explore telling their brand stories in this new format.

Arrival of NBU on the Internet
Voice is the most natural form of communication and as it surpasses barriers of literacy, Voice will adapt to more regional languages to welcome users on the internet. In a country like India which has 22 official languages, brands would have to build solutions in local languages that make technology useful for 'Bharat' as well.

Siri breaks the iOS boundaries
Siri, the first voice assistant, launched in 2011, has since been within a contained environment of iOS devices. As Apple seeks to relax the reigns on Siri, it is possible to see Apple's voice assistant powering devices in homes. This might bring in a significant impact on market dynamics.

EVERYDAY LIVING INFLUENCED BY AI AND CHANNELISED THROUGH MOBILE INTERACTIONS

A decade ago, if you wanted to watch a movie, or experiment by cooking a new dish, or indulge in a fine-dining experience, you would have to ask the respective enthusiasts for recommendations. However, with the entry of Siri, Alexa and Cortana, everyday life is made simpler with AI technology manifested in Voice Assistants to serve the end customer.

HERE'S WHAT A TYPICAL DAY LOOKS LIKE FOR TODAY'S NETIZEN

About 80% of large corporate giants have adopted some or the other form of machine learning in building new competent systems, complementing their core business.
This trend is spreading to smaller businesses, with about 30% of the new generation start-ups considering the integration of Machine Learning and Artificial Intelligence into their existing mobile applications. Apart from providing great scope for continuous improvement, it allows for faster search and more secure detection of online fraud.

E-WALLETS ENABLING INCREASED TRANSACTION

With a host of players in the digital payments space, such as the likes of Paytm, Google Tez, PhonePe, a recent report by Credit Suisse forecasts the digital payment market to quintuple up to $1 trillion by 2023. Google Tez in India has had a breakout year adding 26 million new downloads marking a 35% YoY growth.

DIGITAL PAYMENT SPACE

Digital Payment market to quintuplet to $1 trillion by 2023
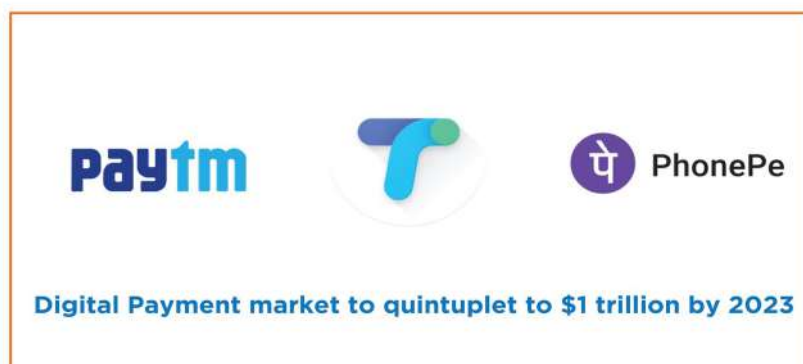
9.7GB per month
Average usage
of mobile data per subscriber

Source: TRAI Report 2019

246%
CAGR of online transactions
increased since 2016-17

Source: KPMG: Fintech In India

India's local UPI (Unified Payments Interface) platform crossed the 1000 million user mark in October 2019, making it one of the fastest adopted payment gateways in the world, leading to a massive rise in social commerce.

UPI
UNIFIED PAYMENTS INTERFACE

1,000+
Oct'19

Transactions in million

0.1
Aug'16
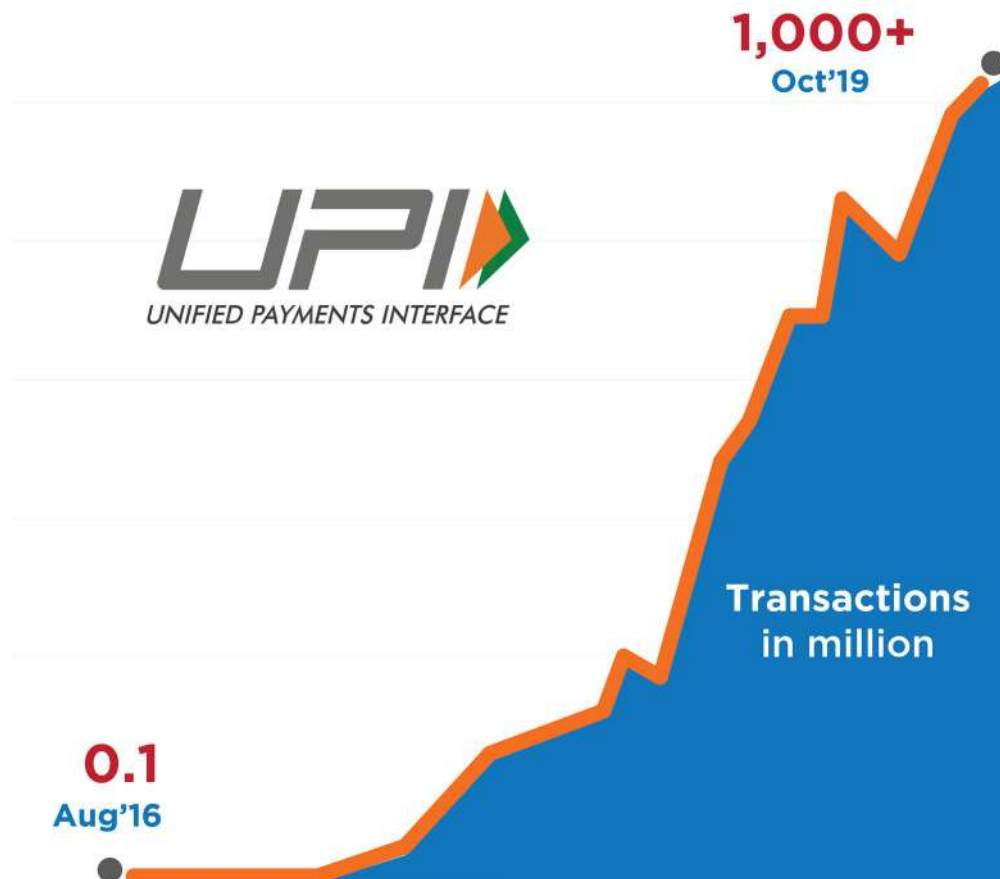
In recent years, the fintech industry has transformed the banking system. Globally, consumers are transferring their financial activities to mobile apps. A lot of banks are falling behind their fintech peers and the growth of fintech apps is a worldwide phenomenon. Monthly active users (MAU) of fintech app is expanding at 20% while that of banks is still growing at 15%. This is also one area which does not as yet have one single app worldwide like Facebook for social; Netflix for streaming etc.

The introduction of mobile banking has propelled a steady growth in digital transactions and the use of e-wallets has been on the rise. This fact can be inferred clearly through the Big Billion Days Sale conducted online by Flipkart, an e-commerce platform. According to the numbers, this year the sale saw two-times the growth on the opening day, compared to last year. Owing to the early-access feature, the growth in transactions conducted was thrice that of the last year.

Another example is Meesho.com which has proved to be a go-to reselling platform for sellers with zero-investments. This goes to show that in a mere couple of years, the number of retailers, vendors and small-time shopkeepers accepting digital payments through e-wallets has increased to over 10 million.

The World Advertising Research Centre forecasts that by 2025, for just over 1.3 billion consumers, mobile will become a primary device for accessing the internet, presenting a great scope for businesses to showcase and sell their products across a multitude of online platforms.

Categories of e-commerce such as personal care and beauty are witnessing a boom through online shopping. The diverse culture in India is further supplementing the growth of gifting, a transaction that can be initiated with a single click through any smartphone.

NEW DIMENSIONS OF GAMING DONE THROUGH MOBILE

With the growth in micropayments, low data costs, improved ratio of the pixel, rise in disposable income, and penetration of smartphones with bigger screens, India has exponentially witnessed an enormous rise in the number of online gamers in the last few years. Gaming proficiently continues to ace as one of the most preferred leisure activities online.

Global 7.11 (hours per week)

Time spent on gaming (hours per week)

India 6.92 (hours per week)

Source : The state of online gaming 2019 by Limelight networks
The report is based on responses from 4500 consumers across nine countries who play video games at least once a week.
Age: above 18
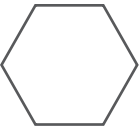
Mobile Gaming Landscape

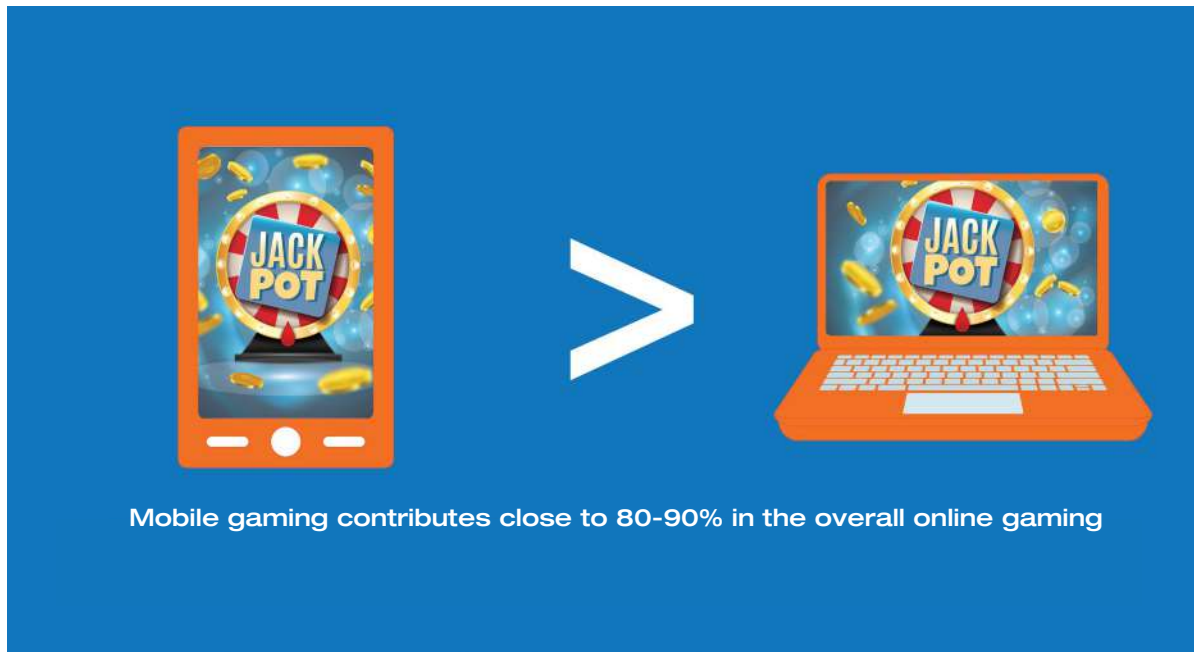Tier 2 and 3 cities display huge potential in terms of strengthening mobile gaming foothold with this platform surpassing PCs in its overall contribution to market revenues, increasing the share from 18% (2012) to 51% (2018).

Mobile gaming contributes close to 80-90% in the overall online gaming

In fact, according to the Kantar IMRB report there are approximately 250 million mobile gamers in India, spending about 60 minutes every day playing mobile games.

A Lens to the Sea-Changes of the Previous Year

India is the third-largest consumer market for mobile gaming, followed by the USA and China. The global gaming industry is rising fast, and a classic example of this encouraging rise is the popular mobile game, PUBG, with an active base of 100 million mobile users monthly. In this context, India is already ranked amongst the top five markets for mobile gaming.

250 Mn+ Mobile Games in India

3 out of 4 India gamers play mobile games more than twice a day

Amongst Top 5 gaming countries globally

60 mins+ Daily avg. time spent playing mobile games

Source: Kantar IMRB Report

MOBILE GAMING AND MARKETING

Rohit Sharma, Founder and CEO of Pokkt Mobile Ads

Over the last 12 months, mobile marketing has evolved into one of the hottest platforms to reach consumers. One particular mobile marketing approach stands out in terms of user experience and engagement: mobile gaming. Games are everywhere. By the end of 2021, there will be over 2.7 billion mobile gamers in the world.

Contrary to popular belief, gaming isn't the exclusive domain of young males. According to the 2018 MMA and Pokkt Market Study. 48% of Indian mobile gamers are female and over 40% are over the age of 25. A reach disparity exists between older, more TVC-oriented audiences and the younger, cord-cutting crowd. As a new marketing medium, gaming enables brands to circumvent the budget dilemma this creates. Mobile gaming is popular across age groups and gender. In POKKT's experience, mobile gaming has been found to be one of the most effective ways to connect with mothers and women in general. 45 % of mobile gamers are women, and 58 % of moms are gamers . It is, truly, a platform that transcends demographic groupings like no other. Brands have a plethora of options to engage different segments—from puzzle games to shooters, and everything in between. Mobile games allow brands to achieve high levels of engagement while also ensuring a positive, non-intrusive user experience.

Mobile gaming is a global phenomenon. However, the APAC region is especially conducive to users gaming on their smartphones. There are two key factors behind this: fewer alternative options for entertainment and longer commutes (only applicable in less-developed markets such as India). It is also important to note that overall, gaming holds fewer negative connotations in Asia than the West.

Across the world, brands struggle to reach Millennial and Gen Z audiences. These audiences are technologically adept and prefer to use their smartphones for media consumption over other platforms. Their widespread use of ad blockers on conventional forms of advertising (mainly web), presents a real challenge to brands trying to reach them. However, this challenge is also indicative of one of the largest opportunities for brands in APAC: Reaching these audiences on mobile gaming apps via rewarded video (also known as user-initiated video).

What kind of products can best be promoted through mobile gaming? POKKT finds that, over the past 2-3 years, FCMG brands in particular have been investing significantly in mobile game advertising.

MMA groupm

Mobile gamers love receiving rewarded video ads, where a gaming app grants an in-game incentive, such as currency or power-ups, in return for watching a video ad. 82% of APAC mobile gamers said that this is their preferred method of receiving ads.

Rewarded video allows users to have control over when and how they receive ads in a respectful and transparent manner. This, in turn, converts into a positive user experience with the brand.

Consumers in a gaming environment tend to engage with the advertising they receive. Research by TapJoy shows that gamers are more than twice as likely to pay attention to advertisements placed in mobile games (41%) than ads placed on the internet (17%), in magazines (15%), or on billboards (15%). A fondness for rewarded video and the willingness to engage with brands who play in this space hold true for different demographics - three in four millennials preferred opt-in rewarded ads, and 67% of parents said they are more likely to engage with a video ad in exchange for a reward.

Mobile gaming is also great from the marketer's perspective. Mobile games are an interactive experience where user input is essential. This means that key KPIs such as engagement, targeting, and completion rates can be identified and measured far more effectively than with passive modes of advertisement like TV ads and billboards.

RISE OF EPHEMERAL CONTENT

Ephemeral content is a rich media format that disappears after a short duration. Stories across apps such as Snapchat, Instagram, Tiktok, Facebook and Messenger are all ephemeral content. In fact Snapchat which has gained popularity among its niche audience is built entirely around this idea. Due to its temporal nature, ephemeral content forces the creator to be more spontaneous and thus increases the likelihood of the content being authentic. Ephemeral content has continuously evolved and has become more popular with large type of format such as gifs, polls and stickers. Stories also match how people are already interacting with their phones. People hold their phones vertically about 90% of the time and Stories are optimised for a vertical, full-screen view that feels natural and allows people to enjoy videos and photos quickly. There are one billion Stories shared every day across the Facebook family of apps while more than a half billion people use them every day.

Brands are able to command greater engagement and achieve focussed targeting with ephemeral content. Firms have been exploring different ways to define a brand and connect with the audience using ephemeral content. There are four million advertisers using Stories ads every month. Sony collaborated with Snapchat to promote the release of Venom using an interactive SnapAd which had an option to buy tickets. Sony was successful in creating a buzz around this story as well as in achieving incremental ticket purchases.

RISE OF OTT

Globally, video and audio content have been dominating internet consumption. Capitalising on this, Over-The-Top players (OTT) have created a stir in the market with original content across genres. Incorporating innovative business models to increase the network of distribution through retail, e-commerce, OEM partnerships, and much more, OTT players international and domestic alike, have imbibed product and service offerings that allow consumers to experience a premium value package of consuming content on the go with mobile device proliferation.

With more than 30 OTT players and 10 music streaming apps in existence catering to various entertainment and media demands, Indians are prone to consuming content across an array of digital formats and platforms. At this rate, soon, the focus is bound to shift towards the monetisation of content.
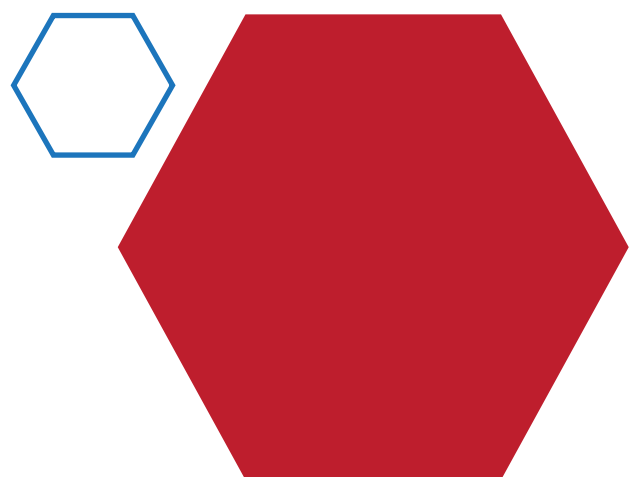
ORIGINAL CONTENT SEES THE LIGHT OF DAY

Identifying an immense potential for original content, OTT players are estimated to make hefty investments of approximately INR 2.5 billion for content creation as well as distribution.
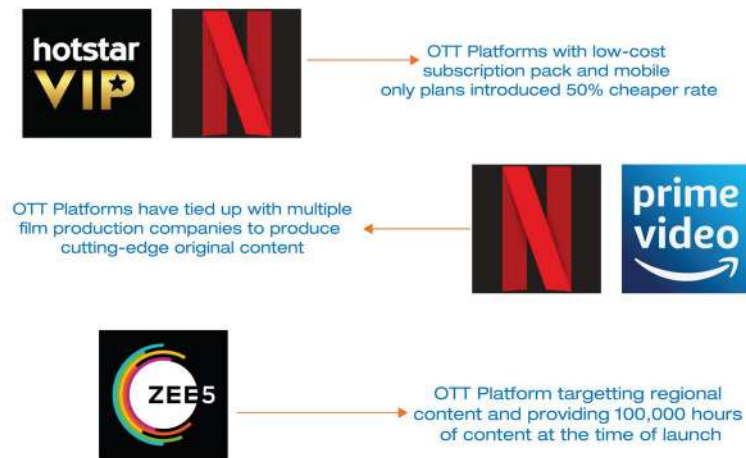
Pioneered by YouTube, original content creation and programming for the space of digital media has come a long way. The journey began with independent Youtubers engaging their followers with User Generated Content, further giving birth to large-scale content creators such as Dice Media and TVF that introduced original webisodes, specifically catering to the taste of the Indian consumer.

To balance out the above capital investments, OTT players have further strategically introduced basic affordable packs, for example the 'Hotstar VIP' low-cost subscription pack and Netflix powered 'mobile only' plans introduced at 50% cheaper rate. Amazon Prime and Netflix have even tied up with multiple renowned film production companies to produce cutting-edge original content. The latest entrant in the industry that has meticulously targeted regional content is ZEE5 by ZEE Entertainment – providing 100,000 hours of content at the time of launch.
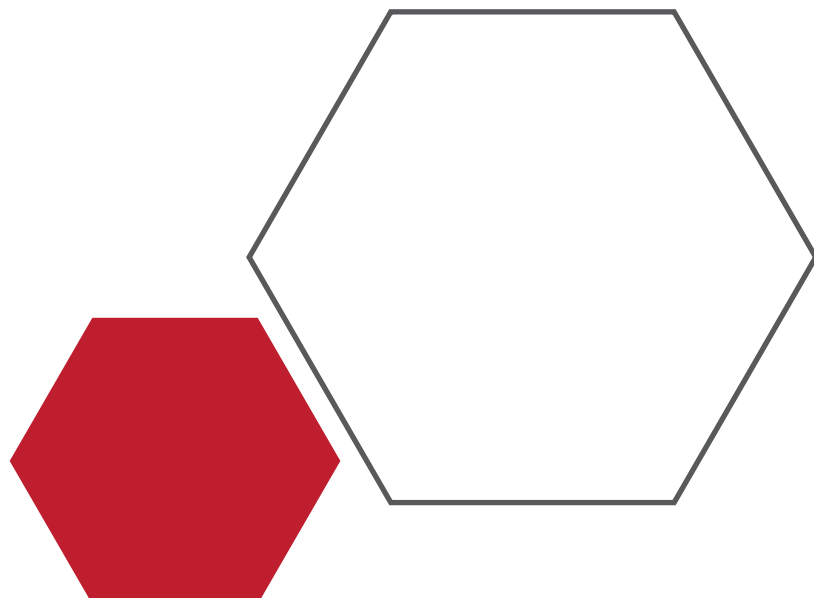
Entertainment on Mobile- the rise of "made-for-mobile" original content

Sameer Singh, Vice-President, Monetization, TikTok India

Market Opportunity

In a decade from now, the Indian consumer market will jump up a position to become the third largest after the US and China, as per Bain & Company report. The report also adds that the country's consumer spend is expected to grow four times. While continuing to be among the youngest nations in the world, India will also boast of over one billion internet users.

The market is also witnessing a steady increase in income levels at the bottom of the pyramid which is expanding the middle-class segment. In addition to the above, the consumption growth will come from rich and densely populated cities and thousands of developed rural towns. However, the consumption for India is driven by millennials and Gen Z. They are now highly accessible because of increasing mobile and internet penetration making it easier for brands to connect with. The prevalent market scenario presents a huge opportunity for companies to drive visibility.

How has Advertising changed

Over the years, video has changed the world of advertising and the format is no more restricted to just a television commercial (TVC). The shrinking attention span of consumers is forcing companies in the fast moving consumer goods (FMCG), banking, financial services and insurance (BFSI), pharma, fashion and cosmetics, entertainment and technology among other sectors, to move away from the one size fits all, cookie-cutter strategy and embrace newer ways and formats of advertising.

Short Format Video Gaining Traction

UGC platforms are gaining traction due to increased mobile penetration in Tier II and III cities as well as semi-rural and rural areas. This has opened up a massive market, which was earlier difficult to reach and hence called for a distinctive engagement strategy. These users are constantly watching, sharing and uploading video content via mobile phones across digital platforms. They have an inherent need to co-create giving brands an opportunity to connect with them. Using short, imaginative mobile videos can thus become a catalyst in not only building brand awareness but also engaging directly with this rapidly growing, immensely aspirational market.

A brand campaign that grabs attention of its target consumers, in a matter of few seconds, makes it valuable. The message not only leaves a long lasting impact but also gives the brand a 'game changer' status in the market. Short format video advertising, enables brands to achieve this and more. Marketers are now realising its potential for business growth.

Aiding them in this approach are mobile application platforms thriving on user generated content (UGC) thanks to their huge active user base. Given the huge potential offered by this format, industry players need to wake up to the reality. Advertising strategies need to ensure significant traction as well as higher levels of consumer engagement.

Some companies have taken to this medium for new product launches and enhancing visibility for existing ones and the results have been encouraging. Among recent examples are brands like ITC and PepsiCo India whereby the companies have optimised this format enabling content that goes viral thus creating a multiplier effect.

Strategy to Go Beyond

Short video platforms with a user base that is spread across the country thus becomes the most appropriate medium for companies and brands to engage with. Video advertising is not new. The sheer volume of videos available online, coupled with the consumers shrinking attention span, highlights the urgency for brands to create campaigns that communicate effectively in the shortest possible time. TikTok, pioneers in the short video format space, has successfully enabled advertisers reach and engage with their audiences in an effective and relatable manner. The platform has already witnessed multiple innovative and wildly successful campaigns based on this engagement format led by user generated content and experiences.

Short video platforms are beginning to play a meaningful role in the brand's journey. Short format videos will also be the way forward for companies seeking higher consumer   visibility   but also through increased sales.

With Mobiles, On-the- go Entertainment gets a move on

Gulshan Verma, SVP & Head, Client & Agency, Hotstar

We see them everywhere. People staring at their mobile phones, rarely looking away, seemingly mesmerised. They do this while walking to work, in trains or taxis, while eating their meals and even while another screen – the TV – is flickering right in front of them. So engrossed are we in our phones that we check them more than 100 times a day.

This is the new, connected consumerism practised by the 'mobile customer'. It isn't just that consumers are now always on; they are empowered and evolved.

Many businesses, however, stick to traditional marketing methods weighed down by years of legacy thinking. We often notice that marketers fail to apply personal preferences as consumers to their methods. Digital transformation requires not just a change in processes, but mindsets. Nowhere is this more important than in the entertainment content industry.

Entertainment and mobiles: Growing together

There is an unprecedented availability and consumption of mobile entertainment content: streaming media, video on demand, mobile TV, games. There is no doubt anymore whether the demand for such services exists. The only question is how fast entertainment on mobile will grow. In fact, the entertainment industry has understood not only the potential for going mobile-first to reach this growing audience but – and this is critical – also to re-engineer production and distribution for this new reality. One of the manifestations of this is entertainment as a social watching experience and the introduction of gamification into the mix.

Take the VIVO Indian Premier League (VIVO IPL) 2019. Hotstar elevated the broadcast to India's first social cricket viewing experience. The streaming app enabled viewers to invite friends and family to Hotstar, enabling them to watch matches and participate in the Watch N' Play game together. Fans could compete through a leaderboard and chat about the match with each other as well as with experts and celebrities.

Strategic partnerships ensured an even greater value add. Winners of Watch N' Play could redeem their points through a partnership with Amazon Pay. A partnership with food delivery app Swiggy meant viewers could order food from Hotstar itself, ensuring they didn't miss any of the action on the field and didn't have to leave the app.

Advertisers, meanwhile, were offered more efficiency than ever before – they could target 24 cohorts during the live streaming in addition to contextual branded cards showcasing offers, mini games and polls, which created a unique opportunity to engage viewers at scale.

The customer journey is now fully mobile

It is a mistake to believe that customers use phones only to buy things. It's a lot more sophisticated; customers use phones for research, to educate themselves and to make informed choices. This is creating a new marketing paradigm. Marketers understand that modern mobile use is also a quest to be more productive. It's a journey of discovery and also of convenience wherein app use saves time but technology allows us to also customise as per user behaviour, location and demographic, thus making content more relevant, cost-effective and likely to be consumed.

This is why we're pushing a new measurement paradigm. Marketers would focus on click-through rates but advertising units have moved beyond clicks. The range of ad formats today spans the gamut from branded cards to carousels, drive-to-store, native images, mid-rolls and even lead generation options.

Branded content is here to stay

With branded content, the key is to grab the audience's attention and drive engagement through content. We find that branded content entertains, teaches and results in better engagement than standard content.

A recent Quaker Oats campaign comes to mind. As the category leader, it wanted to be in tune with younger consumers. The brand understood that, as this audience moved away from TV towards digital, it needed an innovative and a non-intrusive approach. The research was the key – it indicated that consumers were actively searching for upcoming shows and binge watching them on their phones. They were also actively searching for healthy, quick and tasty breakfast recipes.

Partnering with Hotstar, Quaker Oats developed a show in which celebrity chef Vikas Khanna came up with delectable recipes featuring the product. The show also featured celebrities like Vicky Kaushal, Bhumi Pednekar and leading actors from the South like Vishu Vishal and Raiza Wilson.

The show leveraged multiple ad formats to target health enthusiasts identified from the apps they used, from mid-rolls and pre-rolls to billboards and display units, to drive awareness and purchase intent. Social media posts by celebrities made the show resonate with millennials.

The data was clear about the impact: there was a significant rise in key brand metrics, aiding awareness and purchase intent. The campaign reached over 22 million users and became Hotstar's No. 2 English show after 'Koffee with Karan'.

The new measurement paradigm

How should marketers measure on mobile? The answer lies in the leveraging of first-party data. Let's understand this through a CEAT campaign that ran during the last ICC Cricket World Cup. It aimed to establish CEAT as the preferred two- and four-wheeler tyre brand by delivering its core proposition of 'long-lasting tyres'.

The campaign used the medium wonderfully. The brand became synonymous with match highlights through the 'Highlights by CEAT' video that got more than 300 million views, cutting through the ad clutter and reaching audiences beyond the live match. The campaign drove local engagement through six language feeds and retargeted website visits to drive purchase intent.

Here's what CEAT's data said about the campaign: direct searches for the website rose threefold, resulting in a 10% increase in website sessions as well as a 40% growth in website leads.

As you can see, we need to go beyond click-throughs to actions that tie in more closely to business objectives.

Even as content creators and marketers put in place relevant measurement systems, there is a lot of work left in terms of content discovery and user interface. However, it is an unstoppable force. As devices and data access get cheaper, we will see greater mobile entertainment consumption and newer technologies – all of which will make our mobile viewing experience richer.

To summarise, I'll leave you with the following to consider:

· Mobile video is a key tool for brand-building now

· The creative must be more than a 30-second ad spot or impression. Without social, gamification and content-driven experiences, it's unlikely to work

· RoI measurement must link to core business and marketing goals – whether that's incremental sales to new footfalls or consumer perception changes
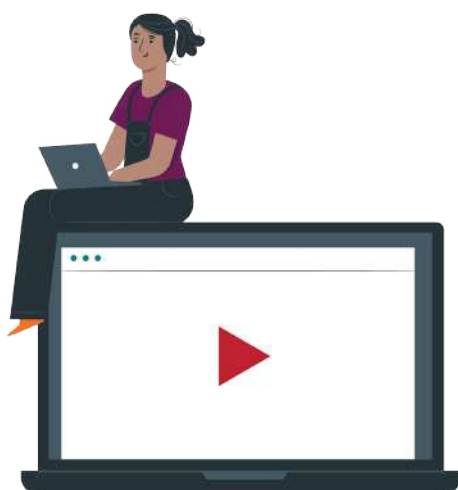
The Trends That Will Shape Mobile Internet in 2020 and Beyond

Sandeep Bhushan, Director and Head of Global Marketing Solutions, Facebook

The last decade was one of unimaginable innovation, social enterprise, and personal expression, and the driving force behind these changes was the mobile phone. If the first decade of the millennium brought the power of mobile into our lives, the second decade taught us how to harness this power for larger social, economic, and personal good. As we enter the new decade, the possibilities are limitless. Here are four key trends and insights that can help the marketer in the mobile-age navigate the next decade.

Build for the consumer who doesn't have time for you

Mobile has fundamentally changed the consumer. It is the most engaged-with device; it's where people turn to be inspired, entertained, and informed. Mobile has significantly contributed to the speed at which people process ideas and information, and there has been a massive shift towards mobile video consumption due to both data democratization and the ease mobile phones provide for video viewing - it can be on-the-go and viewed with sound-off. Marketers and creative agencies need to urgently understand and embrace this consumer-shift, and rethink advertising to consumers with short-form mobile video storytelling.

Create content that is built for mobile

The Mobile Marketing Association (MMA) and Facebook recently released a whitepaper on short-form video strategy titled 'From a Blink to a HeartBeat'. The most important insight from this study is that the cognitive process is faster than we thought, and that the human brain needs less than half-a-second to engage with mobile advertising and trigger a reaction, positive or negative. The main implication of these findings is that brands have less time than they thought they did to win consumers in a fast-paced advertising environment. This is the fundamental idea behind Facebook Thumbstoppers, an industry-wide capability building program launched in 2019 in partnership with leaders from the advertising and marketing industry to transform storytelling for mobile video ads.

The rise of visual and video content enables greater expression for the millennial consumer and has also contributed towards the meteoric rise of ephemeral communication - content that fades away after some time. At Facebook for instance, we are continuing to see fast adoption of ephemeral content and across the Facebook family of apps 1 billion 'Stories' are shared every day [2].

Mobile phones have also democratized the content space; Today everyone has the ability to express themselves, and influence their immediate social circles. Platforms such as Instagram are enabling people to unleash expression in ways that were unthinkable earlier. A Facebook-commissioned survey by IPSOS revealed that 64% percent of people on Instagram have interacted with influencers that matter to them, and that 40% end up learning about products through influencers. The tables have turned and brands are no longer the ones doing all the talking. The marketer in the mobile-age needs to figure out how to change things up to influence the Influencer.

We live in an era in which people are using their mobile phones for purchasing everything from electronics and clothes to groceries and services. This makes it important for businesses to think about making the consumer journey more seamless and personalized on mobile. At Facebook, we enable people to Click-to-WhatsApp and and Click-to-Messenger from an Ad on Facebook to help them have personalized conversations to answer queries, and receive guidance as well as a more customized experience.

Measure the right business outcomes to drive impact

As we embark on the next decade, it's imperative that brands focus on measuring the right business outcomes as much as they focus on building exciting campaigns. Since 2014 digital ad spends in India have consistently grown, yet the industry lacks robust measurement standards. Nielsen India has been the torchbearer when it comes to bridging this gap in particular for the FMCG industry. In 2019, Nielsen launched Custom Mix Modeling (CMM) in India, which is a traditional-trade heavy market. This solution will help FMCG advertisers measure sales ROIs of individual digital publishers using the same method as for TV and Print. The solution was piloted by Facebook, successfully deployed by Mondelez, and is now being adopted by other FMCG organisations.

Empower the consumer by giving greater control and transparency

As we navigate the new rules of mobile Internet, we need to also become more committed to setting new standards of transparency to empower the consumer. Brand safety is at the heart of Facebook apps and technologies. With the aim of giving people more transparency and control over their data, Facebook recently rolled-out the Off-Facebook Activity tool, which enables users to see and control the data that other apps and websites share with Facebook.

The next decade is going to play a crucial role in shaping the future of the internet, and as the world's largest democracy with a burgeoning mobile-internet population, India has a unique opportunity to influence the new rules that will shape the evolving mobile internet ecosystem. This should be the spirit in which we should work together to take the industry towards the next phase of innovation, entrepreneurship, and growth.

PART 3
CHANGING LANDSCAPE OF MOBILE ADVERTISING
(AN ADVERTISER'S PERSPECTIVE)

We live in a world where change is the only constant. This environment of volatility and change is largely influenced by the rapid advancement in technology. Even in the ad tech world technology is being used to find more effective ways in which advertisers can connect with consumers. However, this can only be possible when we are able to navigate the complexity that's born out of a continuously evolving ecosystem of content formats and audiences. Even with this complexity, if we were to look at the growth of ad spends on digital media the picture looks quite promising. According to the This Year Next Year (TYNY) Report, 2019, published by GroupM with ad revenue of $294 billion in 2019, internet-related advertising is the foremost medium across the globe. Even in India, we have seen a 30% growth and internet media spends command close to 22% of the share which is expected to grow to 26% of the share by 2020 with mobile commanding the largest part of the pie.

The significant shift in the way consumers consume content today has opened multiple windows of opportunity for advertisers. Most Indians today access the Internet through their mobile phones. 80% of the web traffic is traced back to mobile devices and it is observed, users spend approximately 3.7 hours on mobiles per day. The number of smartphone users in India is expected to reach 650 to 700 million by 2023, and this number is not restricted to tier-1 or urban areas. Smartphone users in rural areas, mini metros and tier-2 cities do not lag behind in usage of online applications and browsing in comparison to their metro counterparts. Given this context and the expected upsurge in mobile and internet usage in the country, it is necessary to understand the mobile advertising ecosystem and the changes we expect in times to come. This part of the report explores various aspects of how the mobile landscape in India is steadily evolving.


CONTENT

WITH ATTENTION SPANS OF CONSUMERS BEING SHORT, SHORT FORMAT ADVERTISING CONTENT IS KEY

The MMA 1st Sec. Strategy Cognition Research studied two key metrics of how consumers process advertising on mobile:

1. Attention: Percentage of Ads seen
    What percentage of ads are consumers seeing?

2. Cognitive Processing: Cognitive Load (CL)
    Are consumers processing the information given? Are they experience information overload and stress?
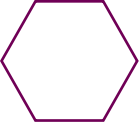
Motivation/Emotional Response (FAI)

Do consumers display interest and desire? Are they motivated to approach or avoid?

The human brain needs less than second to engage with mobile advertising & trigger a reaction, positive or negative. A testament to the huge impact that short videos can have are Facebook's Thumb-stopper videos, a concept built on multiple meta-analyses of thousands of campaigns. MMA's First Second Strategy Checklist and Facebook's Thumb-stopper Creative Best Practices are both path-breaking studies to win with short video ads.

The purpose

1. It aims to help marketers and agencies develop the right short video creative for mobile

2. The recommendations are supported by MMA Cognition study and Facebook's understanding of successful short videos.

3. The playbook is useful for both marketers and creative agencies and is designed to help in creating a Thumb-stopper or evaluate one.

Five creative best practices for Thumb-stopper videos:

MMA in partnership with Facebook recommends the following considerations for effective short video creatives on mobile. They are based on MMA's Cognition research and Facebook's understanding of Thumb-stopper videos.

**DURATION:** Short video ads under 10 seconds work better

BRANDING: Showcase your brand early and often

VISUALS: Use striking visuals, colour and contrast to catch attention and move hearts

SOUND: Design for sound off, but delight with sound on

OPENING: Make the first frames of a video count

What is the human behaviour we want to change with this Thumb-stopper?
In India, sons receive preferential treatment v/s daughters in the same household by parents because the former is seen as a future breadwinner & the latter a liability.
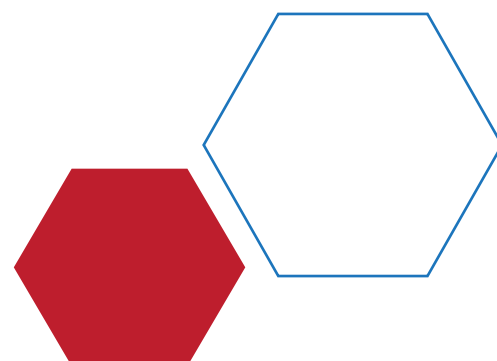
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Thumbstopper Case Study 1:

In early 2019, Facebook gave filmmaker Kiran Rao a brief to change a big cultural behaviour using a thumbstopper video. Filmmaker Kiran Rao tells a charming yet deep story in just ten seconds. She manages to do this by choosing to focus on the right moment. The close-up of the milk being shared acts as a visual concept, a sticky image, that quickly and memorably conveys a huge cultural tension.
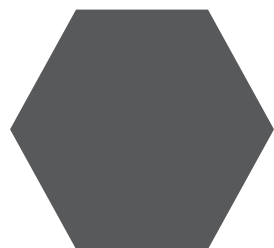
Thumbstopper Case Study 2:
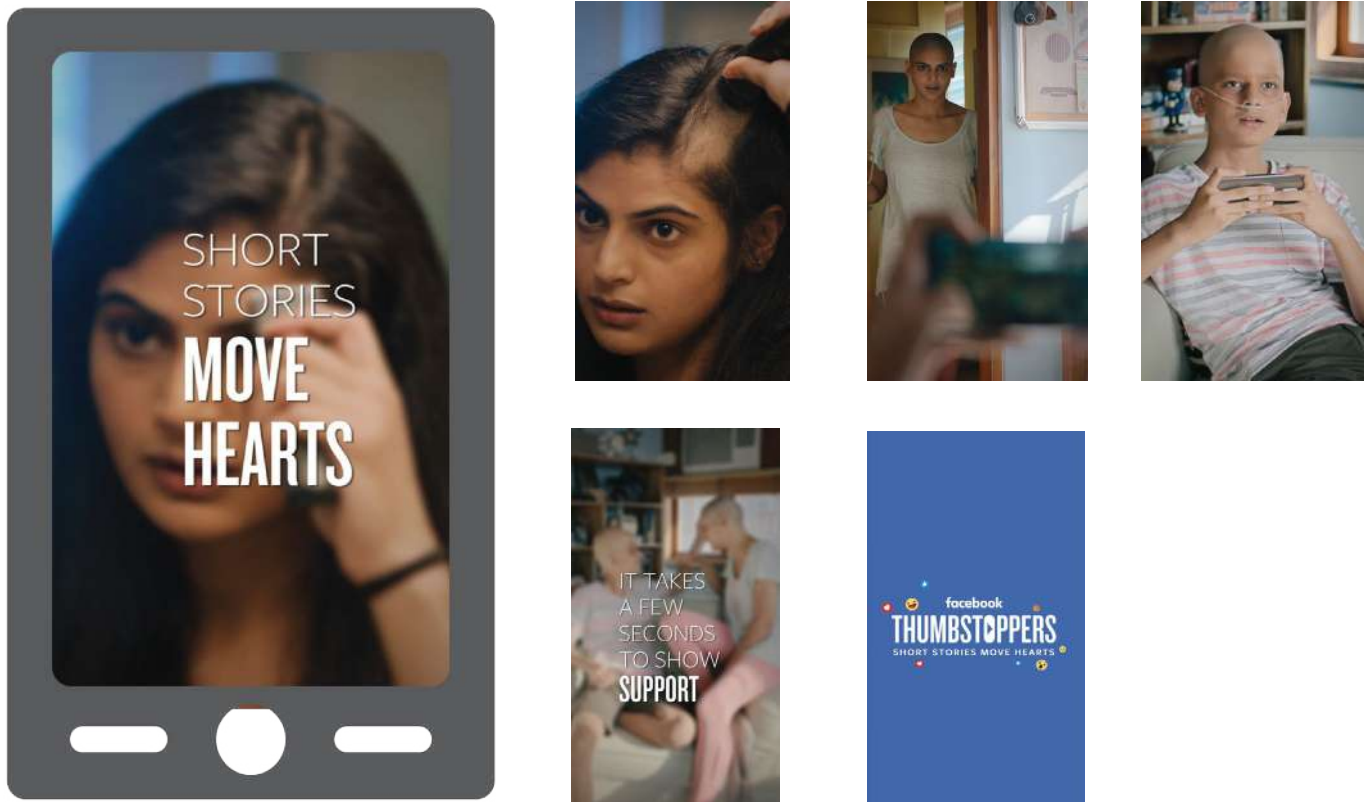
In life, resilience comes from deep within us and from support outside us. It is our duty to support the ailing. Facebook's challenge to Wunderman Thompson was to tell a moving story and show a big life moment in under 10 seconds. In this 10 second film conceptualised by Wunderman Thompson, an arresting face in a dramatic opening moment makes it Thumbstopping
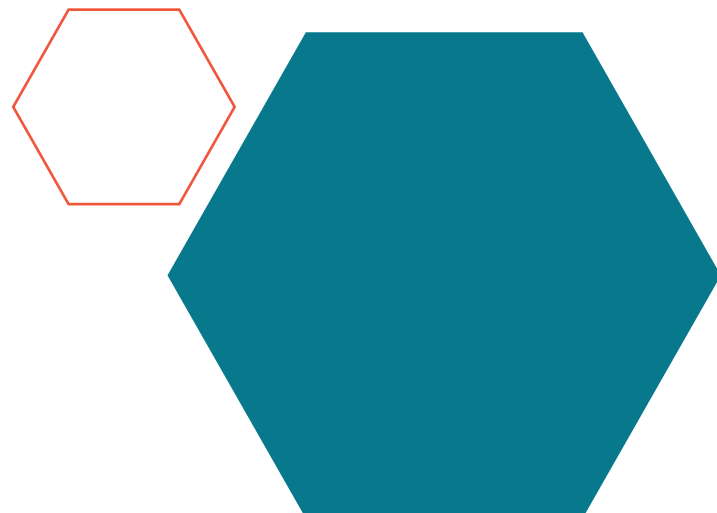
INFLUENCER DRIVEN CONTENT ON THE RISE

Platforms like Instagram and TikTok are gaining popularity specially among the millennial generation. These platforms are homes to many influencers with consumers engaging with them actively to know more about their passion. The reason for the rise of influencer, is mainly fostered by the young, more expressive generation of today.

Influencer marketing isn't restricted to celebrities anymore. Mobile has spurred user -generated content to become the hero, thus empowering people from every corner of the world to present their talent and put forth their opinions. This has led to the rise of influencers from remote regions of India who previously had low visibility on social platforms. Celebrities too prefer to interact with their fans directly through these platforms as the interaction is more personal and authentic. With Instagram's latest declaration of IGTV allowing the smartphone user to create personal web series, local content creators can now rejoice for yet another social platform to engage with their followers.

The influencer marketing industry is flourishing and would continue to grow in the future as marketers are spending more on influencer marketing to promote their products. In a survey conducted by Buzzoka, 18% of the brand custodians informed that they spend more than $1 million annually on influencer marketing. Marketers believe that influencer marketing helps them engage with customers in an interactive way and thus 80% of them would increase ad spend next year. In terms of platform preference, marketers preferred Instagram as the primary choice followed by Youtube and Tiktok.

PREFERRED INFLUENCER MARKETING PLATFORMS

Platform	
Instagram	82%
Youtube	41%
Tiktok	23%
Twitter	23%
Quora	17%
Blogging	11%
Facebook	5%
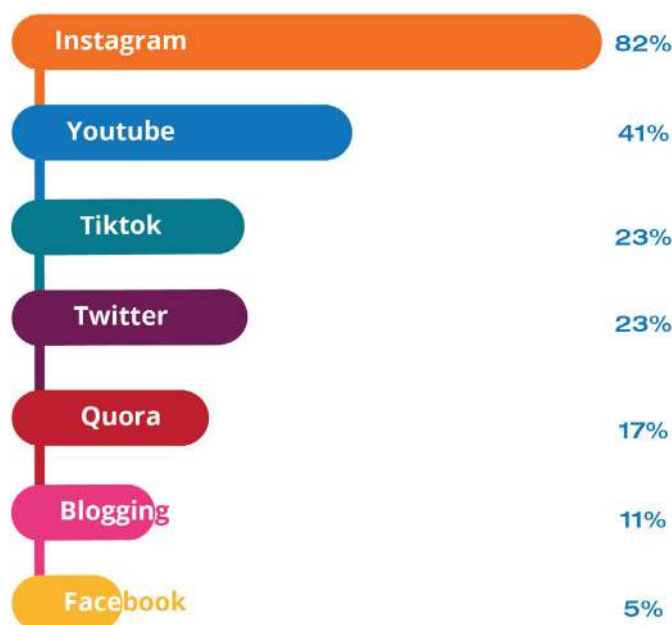
Source: Influencer Marketing outlook – Buzzoka

A case in point is the digital-first L'Oreal Paris makeup campaign in collaboration with Sabyasachi who is a fashion designer known for his festive collection. L'Oreal Paris had previously launched campaigns with international designers, but this was the first time when L'Oreal Paris associated with an Indian designer. The entire campaign was launched on Sabyasachi's Instagram handle featuring a variety of L'Oreal Paris limited edition products. This campaign was a huge success and helped L'Oreal gain traction in the Indian market reaching over 10 million people in India and abroad.

IN THE AREAS OF CONTENT AND AD FORMATS

Video Leads the Way

In 2019 we have seen all key platforms introducing new formats across all forms, be it voice, static or video. These format innovations are being done to drive better relevance and consumer engagement leading to better returns for ad spends. For instance, in 2019, we saw Google introducing discovery ads and gallery ads to make the user experience far more relevant while Facebook introduced Instagram explore, FB search ads and placement ads to drive better user interactions.

Video is the most popular ad format globally and in India. Currently, India is the sixth largest market in the consumption of video ads. As per Jio, their video consumption was almost 460 crore hours per month. Native video ads have already found themselves layered within different social media apps, engaging users in non-intrusive, short-video formats. Investing in new types of video formats like vertical videos, 360-degree immersive videos (YouTube, Facebook and Twitter) and VR enabled videos will result in higher revenue and engagement from users.

India is the sixth largest market in consumption of video ads

Along with video, several social media platforms have new features to keep the users engaged. Since the average span of attention of a consumer is decreasing day-by-day, 'stories' have proven to be a perfect format for brands to communicate their message. The interactive avenues provided by stories like quizzes, polls, etc help in understanding consumer behaviour and need of the hour. Millennials prefer snackable content which doesn't require much efforts and allows them to share updates instantly.

Brands can leverage this format to showcase behind the scenes activities at their workplace, humanise their brand and establish a connection with their target audience. One in three of the highest viewed stories are from brands and businesses and sponsored videos receive three times more comments than sponsored photos. Not only is Instagram a choice place for marketers and advertisers, but Instagram videos are the go-to format. In a survey conducted by Instagram, 38% of the participants said that Instagram had Ads relevant to them and 87% of the respondent said that they took actions such as visiting the brand website, following a brand or making a purchase online

With each and every platform having its unique format combined with the fact that all platforms have their own sizeable number of users, the challenge for advertisers is that independent strategies need to be developed for each ad campaign. Added to this is the need for customisation of creatives to fit each format and adapt to various vernacular languages to ensure maximum reach.

Compounding these challenges is the fact that 90% of new internet users over the next five years are expected to prefer regional languages to access the internet, according to the INMOBI Mobile Marketing Handbook, 2019. Content needs to be customised accordingly for easy understanding and access in multiple different languages. Additionally, with the rise of local influencers on platforms like Instagram and Tiktok, their impact and potential needs to be taken into consideration as well.

The Opportunities On Voice

Today, the concept of a smart home is no more a novelty. With a single voice command, one can control everything within those four walls and enjoy the luxury provided by an array of voice assistants available like Amazon's Alexa, Apple's Siri, Microsoft's Cortana and Google Assistant. Google states that of the next set of Internet users, over one billion users will be through voice as it eliminates the literacy barrier. Indian users in particular have taken a special interest in this comfortable medium of communication as India is one of the fastest-growing markets in this area with 52% of Indian smartphone users making use of these voice assistants every single day.

In a survey it came to light that 49% of respondents preferred Google Assistant, 24% chose Google Home, 17% opted Alexa and 10% went for Siri on iPhone. Amazon's range of Echo speakers in the country in February 2018 has launched a huge opportunity for Indian consumers to make the most of voice technology. This has led to India becoming the second fastest-growing market for Amazon. And this is not surprising as 25% of search queries in India are through voice commands.

38% of consumers who have engaged with voice ads find it less interfering as compared to other forms of advertising. The ease with which a message can be conveyed through speech and the pace at which technology is advancing to understand customer speech with more precision has led to this major technological revolution.

PREFERRED VOICE ASSISTANTS IN INDIA
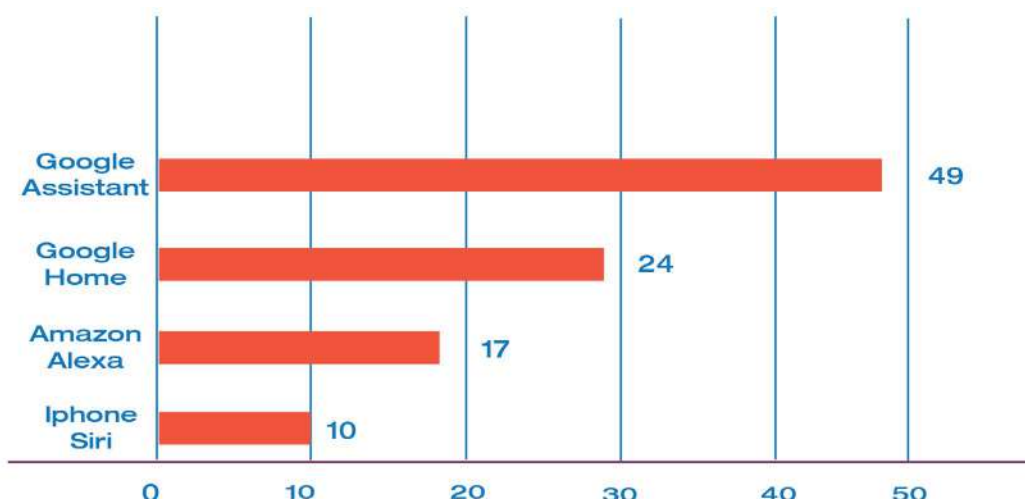
Source: Entertainment Infomation gathering tops voice use in India: Isobar

Apparently, India is the only country where Uber has the provision of a call center, thereby reinforcing our country's state as one that is heavily dependent on voice. Understanding this increased demand in voice-enabled searches, Indian marketers are incorporating voice into their marketing strategies either by direct integration with these voice assistants or infusing them into their products. India being a country with diverse culture and languages, voice can be used for personalised communication to cater to regional customers. Alexa is being designed in a manner which understands multiple pronunciations of a single word and as per the makers, they are making it as Indian as possible. This becomes convenient for users in rural areas who have recently onboarded the bandwagon of internet facilities and are not comfortable with text-based online searches. In a country like India, this becomes essential, as it is expected that not more than 3% of YouTube videos here will be in English by the year 2020.

270% YoY growth in voice queries is reported by Google and this is majorly from non-metro cities. Like Idea 4G's #IndiaKaLiveNetwork which launched a video chatbot, a combination of voice and video, majorly targeting the rural audience. With over 7.2 million users responding to their campaign, the launch was a huge success.

Customer engagement becomes a cakewalk when voice is involved in your marketing strategy as customers need to make only minimal efforts to connect with your brand. In a recent marketing campaign, Royal Enfield commenced a 'Guess The Price' contest on Google Assistant before the launch of their Royal Field Interceptor 650 and Continental GT 650. Not only did this help them reinforce their conviction about their products, but also garner huge traction and experience an engagement rate, 3X of their average. Personal interaction with customers paves the way for improved customer experience.

The interactive way of ordering food initiated by KFC saw interactions up to 4000 since the launch of Alexa and is expected to grow in the upcoming years. SBI Life Insurance has their insurance concepts explained on both, Alexa and Google Assistant so that customers can acquire knowledge about them anywhere, anytime without having to rely on their staff who will be available for a stipulated period of time only. Reliance Jio boasts an average voice consumption around 794 minutes, on a per user basis.

To be a part of this technological wave, brands need to understand the changes they need to introduce in their strategies to leverage the benefits of marketing through voice. To attain the 'zero position' on SERP, early adopters have started to rely on innovative methods. Conduct an in-depth analysis of your competitors and the nature of information available for their products online. Accordingly, prepare content for your brand's voice.

While optimising content, ensure it is aligned with technical aspects like, enabling HTML H2 headings to questions, marking the origin using HTML mark up and enhancing your content through sitemap optimisation and technical SEO.

While voice has the capability to be an integral part of consumers' daily lives and brands are actively looking for ways to accomplish this, there are certain challenges that are yet to be overcome. For instance, the difficulty in developing an efficient voice conversation given the various language barriers and the various dialects and accents prevalent in different parts of our country. Given that there are quite a few companies already trying to address some of these challenges, it won't be surprising if 2020 turns out to be the year where we move from touch to voice.

MEASUREMENT

MOBILE DEVICES CRITICAL IN ATTRIBUTING ONLINE TO OFFLINE SALES – MMA POV

For the FMCG players especially those who have been big spenders overall, traditional media has been holistically evaluated, but robust sales ROI measurement for digital spends has been lacking. Nielsen, India along with Facebook, India have devised an India-first Custom Mix Modeling (CMM) solution.

What is a CMM solution
With the growing digital consumer base and rapidly changing preferences, platforms are jumping on the band-wagon to make the most of the favourable trend. In recent years, Media viewing time has increased many folds and so has the number of publishers - for which there are no proven outcomes.

The advertisers are spending heavily on Digital but investments are attributed amongst multiple platforms with campaigns barely lasting for a shorter duration, so the measurement requires more granular data points for robust evaluation. Nielsen's marquee Marketing Mix Modeling solution has been solving for optimisation questions within the marketing mix. However, retail sales data for FMCG in traditional trade heavy markets like India is available only at a monthly cadence. The lack of weekly retail sales data for building MMMs leads to missing out a comparable (with traditional media) and robust evaluation of the more nascent and discontinuous digital investments.

The solution to this challenge is Nielsen's Custom Mix Modeling – launched with a retail panel of traditional trade outlets to collect sales data from sampled stores on a weekly basis and integrates with Mix Modeling to evaluate the impact of Digital Advertising on the sales of selected FMCG brands.

Top 8 Metros	1200+ T.T. Stores	Weekly Data for more granularity	Robustness of data and modelling

Key insights enabled

How does Digital compare with Other Media channels?

Within Digital, which platforms provide a better 'bang for the buck'?

Which Digital formats can be prioritized for future planning?

Are long duration ads really more effective than shorter ads?

Is there a headroom to increase in a particular platform without saturating?

How it works

Weekly retail sales trends from custom panel + monthly retail sales from nielsen's rms services + nielsen's gold standard modeling techniques & experience = robust & granular digital insights

Benefits & usage

Granular insights: dive deeper into digital execution at a platform, format, assets and duration level to identify what works and what can be prioritized for future planning

Robust & quick turn around: find the confidence to make tactical changes with robust recommendations being delivered in under four weeks from data sign off

Maximise testing abilities: before deploying heavy investments on creatives and placement decisions that are untested, advertisers can now test them at a small scale for brief periods with quick results to gauge their impact

Best in class analytics: we are recognised as a leader in analytic best practices and we use these learning to continuously improve the precision and speed of our models. We dedicate significant resources for innovation to ensure we keep our clients on the cutting edge.

Source: Nielsen launches India-First ROI Measurement Solution

Custom Mix Modeling vs Marketing Mix Modeling

In India, and globally too, Nielsen's Marketing Mix Modeling (MMM) is prevalent in helping brands estimate the impact of marketing tactics on their sales and formulating optimal media plans. But MMM typically needs past data over a period 24 to 36 months, and unless a brand has a huge amount digital spends over a long period of time, it can only provide digital data as a chunk, without individual publisher-related insights. Whereas, CMM basically looks at the impact of media platforms on sales, and provides digital ROI insights. It also enables quick tests that can evaluate sales impacts of different creatives, ad formats and placement decisions vis-a-vis sales ROI. CMM focuses on outcomes that marketers want, instead of an endless list of input metrics.
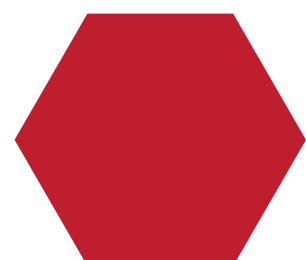
BUSINESS IMPACT OF MOBILE ADVERTISING

The role played by a mobile device to influence a consumer to purchase in a physical store has become significant today. Researching a product for most consumers starts on their mobile phones and the platform they choose to make the purchase depends on their convenience. More than half of modern consumers discover a product online and multiple studies have shown that content discovered online plays a critical role in their purchase decision. This makes it important for advertisers and marketers to analyse the revenue generated through their mobile campaigns which is often difficult as compared to offline campaigns.

Limiting your results to 'clicks' received online will not give you a true picture of your sales. In fact, according to Google, a single makeup purchase is a result of 40 organic searches and 125 touch points digitally. The final step was finding a nearby location suitable for the consumer to complete the buying process. Online to offline attribution is no more restricted to large enterprises with retail presence as the consumer journey is not linear anymore.

Measuring walk-ins as a result of mobile-driven campaigns has always been a challenge. However in 2019 many retail brands have tried adopting various solutions to try and get approximations in the number of walk-ins and incremental sales driven by mobile campaigns. Some of the solutions adopted are as follows,

• Geo-targeting can be used by stores to ensure that people walking into their stores are due to the mobile ads targeted to individuals within a particular radius of the store.

• Solutions provided by Google analytics and Lifesight can be used to drive an approximation on the number of walk-ins attributed to campaigns done on mobile.

• Assigning specific codes to vouchers obtained from mobile ads so that brands receive an exact number of customers who are present in the store because of their mobile marketing campaign.

• Some brands especially in the auto category prefer to use the traditional approach of matching PI data with web data. This happens when a store manager requests for PI data at the counter or store and sends that feed to the common customer database where details are mapped on given parameters.
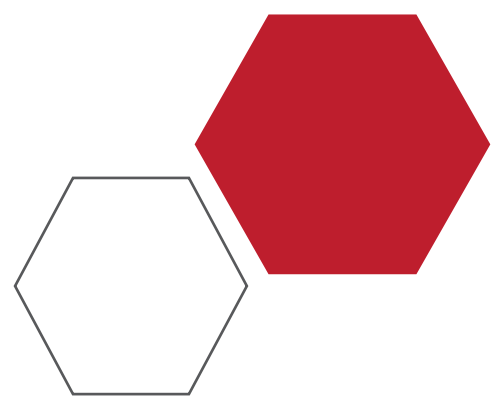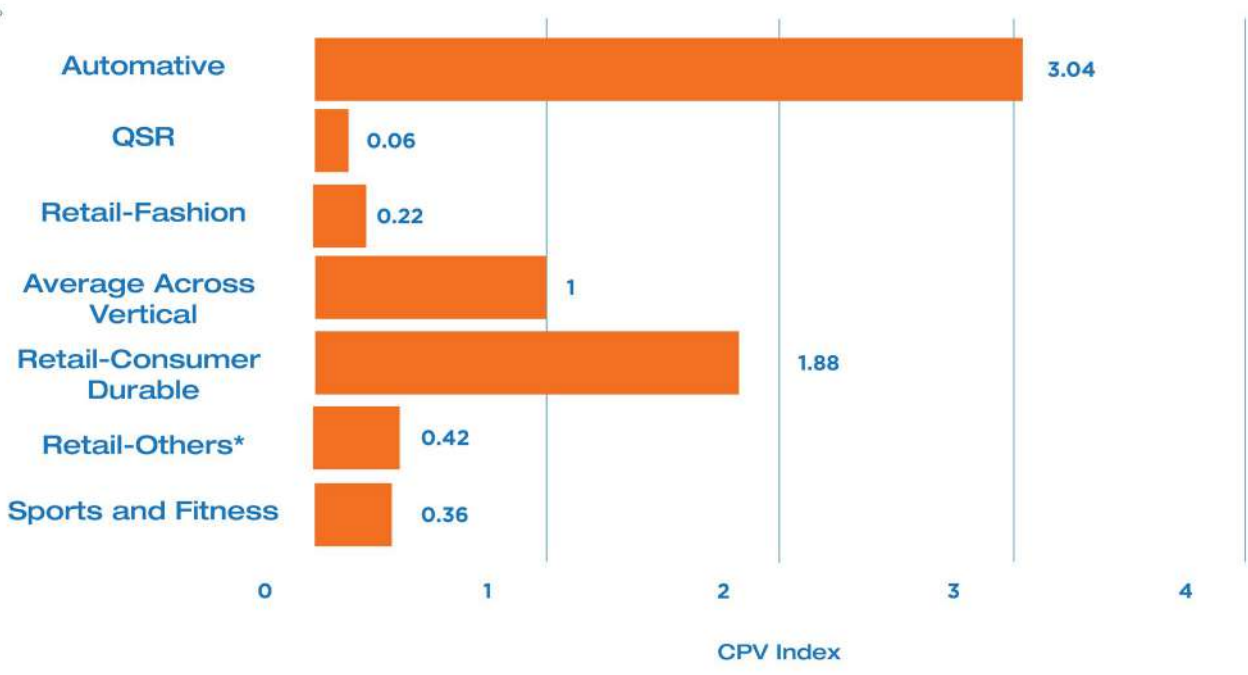
- Foot traffic can be measured through beacon technology, which allows your attribution partner to capture IDs of mobile devices and trace it back to your campaign.

- Point-of-Sale Data method solely depends on the credit card purchases and the association of your credit card company with a data company.

- Panel Data relies on the location data entered by customers and then is matched with your campaign.

Different brands adopt different means to measure outcomes. A recent study 'Online to offline attribution playbook' by GroupM and Lifesight, found that costs needed to drive footfalls to stores differ from category to category.

For example, the average cost incurred to drive consumer footfall is the highest for consumer durables and automobiles, and the least for quick service restaurants and fashion outlets. The Retail Sector takes only 2-3 days to experience walk-ins from an exposure. On the other hand, the fashion industry requires the most number of exposures to expect a considerable number of walk-ins.

AVERAGE INDEXED COST PER VISIT (CPV) ACROSS THE CAMPAIGNS THAT LIFESIGHT HAS SPLIT BY VERTICAL

Vertical	CPV Index
Automative	3.04
QSR	0.06
Retail-Fashion	0.22
Average Across Vertical	1
Retail-Consumer Durable	1.88
Retail-Others*	0.42
Sports and Fitness	0.36

CPV Index

Evaluating of Online Media on Offline Metrics

Madhubanti Banerjee, Director, Marketing Effectiveness, Nielsen Media, South Asia

The most popular story in the media and advertising scene in the past couple of years has been the rise and rise of digital. This encompasses increase in internet penetration as well as increase in time spent on smartphones. Understandably, the highly competitive race for the consumer's mind space and basket space has got a nitro-boost. Digital ad spends have seen the highest increase in the media mix. Added to that is the fact that the increase in digital hasn't been only off the back of the usual suspects selling the usual ware of format and asset types. The ever growing digital user base has inspired digital marketers to be creative about their creatives, not only within the creatives, but also on newer ways of serving the ads – new formats, new assets. Think of Facebook's Thumbstoppers or Google's Home Feed. While ad monies too have been increasing year-on-year, the fragmentation of the media fabric is only enhancing the advertiser's dilemma – "where would you put your money?"

The key to answering this question is a thorough evaluation of the attribution of the advertiser's KPI to these media channels. When we're looking at this attribution from an online media to an online KPI, we find that tech advancement has provided us with quite a few optimal and sub-optimal options. However, when we focus on the attribution of offline KPIs to online media, we mostly depend on rigorous modelling options. The important point on the latter is that, in order to fetch us the best results, the data used to build our models have to be extremely granular – be it the media input, or the KPI. This granularity has to exist in both a cross-sectional, as well as time series level. Both are easy to do with the right expertise in this field. For sectors like auto, ecommerce, BFSI, etc., at times the data availability is so high that modeling through that can be quite the task. However, the data challenge often rises for specific sectors like FMCG when we hunt for a time-series granularity in Sales, in traditional-retail heavy markets like India. The sales offtake data in these markets are usually available at a monthly cadence. On the other hand, digital activations are often shorter, weekly, and are also too many at the same time. Putting these two data together can often lead to a less than desired outcome in terms of smaller online channels getting missed out, shorter campaigns not rendering a robust result, etc. Nielsen found a way out of this a couple of years back by launching a retail panel which would sample stores from top metros and provide a weekly sales index for a bunch of brands. We leveraged this and our industry vetted mix modelling approach to provide advertisers with the digital results that might not have been possible earlier.

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Some of the ways we could utilize this for the advertisers' benefits are:
• Understanding the impact of 2 different creative formats and helping decide which one truly works better in driving sales
• Doing a deep dive into a digital publisher to assess how the different asset types were working for the particular brand
• Proving robust ROIs for each publisher separately for an advertiser who had recently started investing in digital

Since the digital explosion in India is nowhere near saturation, there will be research and studies to assess how the consumer's consumption of media is changing. However, we should not lose focus on the true and robust attribution of these media channels to end KPIs, that impact business directly.
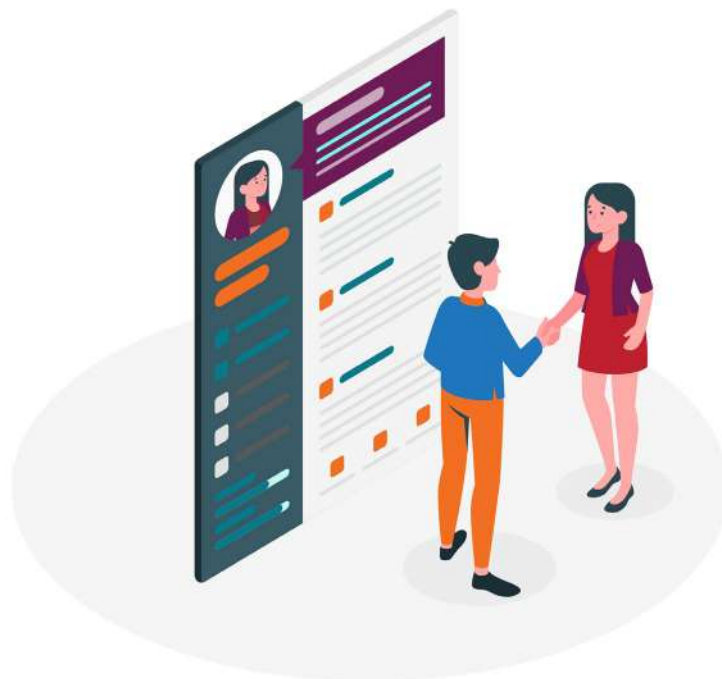
BRAND SAFETY

ABOVE AND BEYOND AD EXPOSURES FOR EFFECTIVENESS VALIDATION IN MOBILE ADVERTISING

The overarching realm of Brand safety, Ad fraud and Viewability, includes multiple risks and security issues that advertisers face in the digital supply chain. These include the financial risks of viewability and fraud, as well as the reputational risks of content appearing in the wrong or inappropriate environment, thereby adversely affecting the user experience. When such risks are averted, it results in a quality impression, i.e. one that is viewable, devoid of invalid traffic and in a secure environment.

Because of the large risks run by advertisers in terms of their ads appearing alongside inappropriate or aggressive content, there is an increasing trend towards creating original branded content. Others are still identifying the true definition of viewability and understanding the need for a common metric for digital video.

The Challenges Around Effectiveness

While mobile advertising is being adopted by several brands, it comes it with its own set of challenges. Along with lack of efficient technology to measure the viewability acquired through mobiles, factors like ad load speeds, distraction for users while browsing through other content and absence of a global standard to measure results decrease the benefits of mobile advertising. With India at the forefront of mobile ad fraud in Asia, with a rate of 62%, marketers are spending increasing amount of resources on the prevention of the same. This is a result of the instant rise in smartphone users and illegal methods opted by fraudsters to meet their demands and grow quickly.
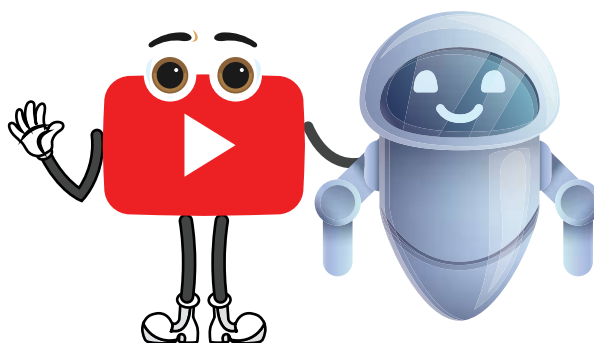
According to the Ad Fraud Benchmark Report, 95% of the respondents to their survey, felt that a lack of effective penalties and measures was the reason for sustained increases in ad fraud incidences. Experts have said that the use of Blockchain technology could be a measure to counter this problem.

BAV isn't just about Tools, but also about Measures

*   **Tech and Tech Experts:** According to YouTube's transparency report from December 2018, the platform removed 8 million inappropriate videos in the fourth quarter, of which 81% were detected by machines. This clearly indicates that the use of AI in the elimination of controversial or suggestive content, can be a strong solution. And considering Google's collaboration with the Media Research Council, YouTube sees 95% viewability in multiple markets.

- **Third-Party Verification:** Adding to the measures of inclusion and exclusion lists and avoidance categories, 2019 has brought with it sentiment analysis tools which classify content on the basis of whether the topic falls into a negative, neutral or positive sentiment. Currently, there is a need for sophisticated technology such as image recognition and computer vision to be easily and openly available to all.

- **Ensuring Ad Space is from Reputed Publishers:** Though this often means increased expenditure because of the expensive deals from premium, reputed publishers such as Google, it is an investment that several advertisers are making because cheaper, longtail inventory-based deals often carry risk with them.

- **Brand Safety Awareness:** With the trigger of ads appearing alongside extremist and terrorism-based videos, 2017 started the wave of awareness on Brand Safety. However, as the scale of digital advertising is increasing, the concept of brand safety is expanding to include public safety and supply chain integrity. With the increased utilisation of user data for targeting, it has also become important to consider their privacy and data protection. Under bodies such as the Global Alliance for Responsible Media, collaboration across industries is also being encouraged, which will ultimately result in more holistic and systemic solutions.

- **The Accountability of Social Platforms:** While harmful, often illegal content is introduced to viewers and readers via artificial intelligence that is ignorant or even trained to do so, these technologies are now flipping to include trust indicators built by conscientious and legitimate media. Social platforms that wisely choose to incorporate these measures are trusted more and therefore patronised more by advertisers and buyers who are actively protecting their brands. Facebook has significantly improved BAV benchmarks through its brand safety controls such as Block lists, inventory filters etc. These controls allow you to block certain URLs or sensitive content on in-stream video, Instant Articles and Audience Network. Facebook also ensures that only apps, websites and Facebook Pages that comply with Facebook policies can be part of Audience Network.

Driving Mobile Effectiveness, and How

Apart from adopting BAV tools, brands are also looking at several other initiatives that can be executed to bring forth mobile effectiveness. These include:

- Incorporating a 360-degree view of the customer's journey. Being aware of the sales generated is not enough, understanding the 'how' part of it is equally important.
- Working only with MRC-certified partners, have a SDK integrated inventory and make payment for properly measured impressions only.
- Ensuring that hygiene metrics are in place and no frauds such as click spamming and ad stacking occur.
- Demanding for complete transparency in every stage while working with AdTech partners, right from reporting to pricing.
- Acquiring a comprehensive understanding of multiple attribution models to gain a complete understanding of ROI of the mobile campaign.
- Placing your ads in mobile apps in a manner, which is visually appealing and does not obstruct the user's attention.
- Partnering with third-party vendors to eliminate clicks or installs which are done by you.
- Encouraging users to view your content and ensure it is personalized and relevant as 47% of the consumers worldwide have installed ad blockers.
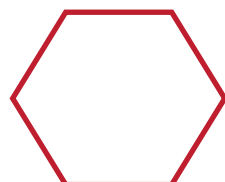
TECHNOLOGY

Header Bidding Spurring Further Mobile Ad Monetisation

Until recently, a sequential or waterfall model was being used by publishers to offer ad spaces to advertisers. They used to pay a certain amount for a particular number of impressions and when this number was exhausted, visitors were made to enter a real-time auction scenario and advertisers used to bid their ads to visitors. Ad spaces used to be auctioned once the ad placements start loading on a webpage. The overall revenue generated from this system was less for publishers.

With the introduction of header bidding, an advanced programming technique, now publishers can make their inventory available to a huge number of ad exchanges simultaneously, thereby increasing their monetary benefits. Along with this, they also obtain complete control of the system, aware of whom they are selling it to. Advertisers also get access to complete transparency of the inventory and can analyse the price of each ad space.

Publishers have witnessed an increase in their revenue by 70% when header bidding was implemented within their Fuse platform. To make things easier for publishers, header bidding wrappers are available, to assist them in having an organised procedure for bidding in place like rules for auction, the buyers list, triggers for each auction, etc. Exchange Bidding is a product by Google which depends on server-to-server connections in order to reduce the page latency experienced with page tags and also to increase views and yield.

As we move today to a mobile-only future, header bidding has found its space among mobile apps and revolutionised mobile ad monetisation. Technological barriers earlier faced due to header bidding in apps have been reduced and a bidding model for mobile applications has been developed. Considering the fact that on average, a person has over 80 apps installed on their phone, mobile in-app advertising is a competitive space. Mobile header bidding has increased by 41% and the amount of money spent on mobile ads in line with header bidding in APAC has increased by 26% in Q3. This has garnered attention from advertisers as they are now able to auction in real-time instead of following a hierarchy even in mobile applications. Also, publishers are able to see individual bids for each impression and understand the actual highest bidder for an impression, resulting in greater revenue.

The Role and Potential of Marketing Technology

With AI and ML being among the Top 10 Strategic Technology Trends of 2019. Data-driven professionals, in particular, use technology for fraud prevention, customer acquisition and lead generation, personalisation and programmatic buying. AI and ML also give unique insights into what customers need and expect. AI algorithms ensure that the consumer experience is specially tailored to their needs. Together with machine learning, systems learn the various kinds of personalisation in a context-dependent manner. Nuanced and quick analyses of the customer journey can also act as predictors for future consumers and their needs.

This also helps to determine what strategies and tactics worked in the past and might work in the future. From CRM to Programmatic Ad Buying, automation and artificial intelligence are already making the advertising process more efficient and also more insightful. Going a step forward in terms of customer satisfaction and user experience,

Zero UI essentially means the absence of any clicking or typing, and instead resorting to voice, gestures and touch to input information. One primary goal of Zero UI is to ensure that machines understand humans' natural behaviours. Marketing technology is slowly but steadily taking us in this direction, where the user-device interaction is utterly seamless.

Altogether, the correct implementation of technology in marketing and advertising ensures that every decision in terms of strategy and execution is made with the customer at the centre, and is derived from accurate and precise consumer insights, rather than hits and misses or the results of painstaking, manually collected and possibly biased user information.

Brand Safety is Taking Ad-Fraud to Boardrooms

Amit Relan, Co-Founder & Director, mFilterIt

The issues emanating out of ad-fraud are changing the outlook of C-Suite with increased realization of how damaging bad placements can impact the reputation of the brand.

Over the past 2 years there has been a phenomenal rise in the stature of Ad-Fraud where earlier Ad-Fraud was being seen as a tactical level challenge primarily focused around optimizing the marketing spends. Now Ad-Fraud and Brand Safety is at the centre stage of organisations where C-Suite is trying to resolve by prioritizing in terms of Trust and Safety framework and embedding within digital transformation charter.

mFilterIt has held several C-level workshops with clients to empirically establish the relationship between Ad-Fraud and Brand Safety. This has completely changed the perspective of the respective managements who have been since developing a charter around keeping Brands Safe.

Campaign Quality Assessment: There is a need to have a holistic proactive assessment of campaigns. Rather than being reactive where Brand Safety issues would already have tarnished the reputation of the brand, thorough assessment of campaigns prior to them being activated can not only eliminate Ad-Fraud to a greater extent but also ensure any of the Brand Safety issues does not creep up.

Standardisation and Code of Ethics: It is frustrating at times for brands to do an equitable objective measurement and assessment of campaigns. Every publisher would have subtle nuances in their terms and conditions. Also, the levels of tolerance for IVT (invalid traffic), etc., would differ. Advertisers would be much relieved to have a standard measuring framework as well as code of ethics to evaluate a publisher against. These inputs would give them a lot of insights to identify the best partner. At the same time, publishers doing a great job, would be able to leverage from their track record.

Specialised Skillset: Holistic Ad-Fraud and Brand Safety can be effectively steered only by specialists having an in-depth view of the niche domain. They need to have a view of the strategic implications as well as an understanding of the tools and techniques used in deciphering the issues. The ecosystem has to build platforms for domain-specific education to devise effective strategies as well as empower the operational managers with the requisite tools and techniques.

With the digital space getting as excited as it could be, and some transformational disruptions around, Ad-Fraud and Brand Safety is only gaining in the priority index of CXOs. Brands are increasingly becoming Direct to Consumer and that is pushing them for 'delightful' and 'intelligent' Digital Transformation.

Brand Safety and Ad-Fraud cannot be addressed by one single partner of the ecosystem. It has to be a collective effort of advertisers, agencies , publishers, enablers and influencers. While advertisers and publishers would many a times fall at the opposite side of the equation for their genuine business interests, it is the job of enablers and influencers to create such platforms where these priorities are curated resulting in neutral, unbiased and structured framework reaping benefits for all to cherish.
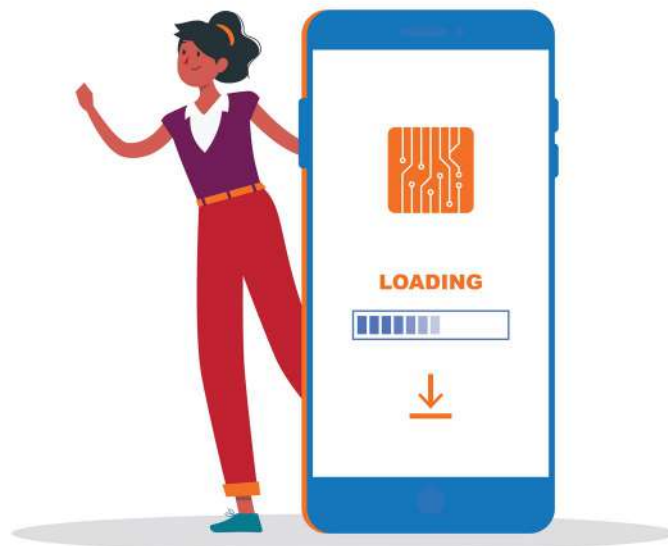
PART 4
INITIATIVES BY MMA

MMA WORKING COUNCILS

The MMA has enabled council formation on the MMA board with a mission to shape the future for modern marketing and adopt it at scale. With this goal in mind, the councils in 2019 focussed on driving change and enabling POV in areas of content, measurement and brand safety and building guidelines, standards and best practices in mobile marketing

CONTENT CHARTER

The creative committee continues to strive to build guidelines and best practices for effective short format advertising content-a primary focus area. MMA's What's your First Second Strategy based on Cognition Study: From a Blink to an Imprint to a Heartbeat and the From a Blink to a Heartbeat – Playbook by MMA & Facebook formed the bulk of the initiatives under this charter.

MMA's What's your First Second Strategy based on Cognition Study: From a Blink to an Imprint to a Heartbeat

Using neuroscience to really understand the human brain's reaction to advertising (actual cognitive process) is a relatively new technique applied to advertising that pushes our knowledge boundaries beyond what previous eye tracking studies allowed. This study is focused on the 'opportunity to see' both in mobile and desktop. The research builds on the MMA´s commitment to science and truth in marketing for brands. Additionally, this is the first project the Advertising Research Foundation (ARF) has reviewed as part of their drive for 'radical transparency' and truth in advertising research.

One of the world's first and most extensive neuroscience-based studies on consumer response to mobile ads – Cognitive Processing of Advertising in a Mobile Environment by the Mobile Marketing Association, has brought to light the fact that consumers now take less than half a second to process the message of an ad viewed on their mobile phones

The Questions Being:

Attention: What % of ads are consumers seeing?

A simple, straightforward question, this is compounded by the numerous questions asked and answered with regards to cognition.

Cognition: Are consumers processing the information? Are they experiencing information overload and stress? Is there interest and desire? Are consumers motivated to approach or avoid?

The Takeaways:

With the human brain requiring less than half a second to process the information in an ad, the trigger is quick but the reaction could be positive or negative. In the case of mobile feed environment, attention and cognition are significantly faster than on desktop feeds.

In terms of the disproportionality, attention does not differ for aspects such as: well-known brands vs lesser known brands, and video ads vs static ads. In fact, even low performing ads get attention at roughly the same time as high performing ads.

The defining factor then is the differences in cognitive load, and thus the impact this has on emotional responses, recall value and persuasion power. Colours, handles, visual elements and complexity, all decide how impactful a mobile ad is. This research by MMA covers all these key points, providing insights into the kind of research that should go into building an effective mobile ad strategy.

Source: From a Blink to an Imprint to a Heartbeat

From a Blink to a Heartbeat – Playbook by MMA & Facebook
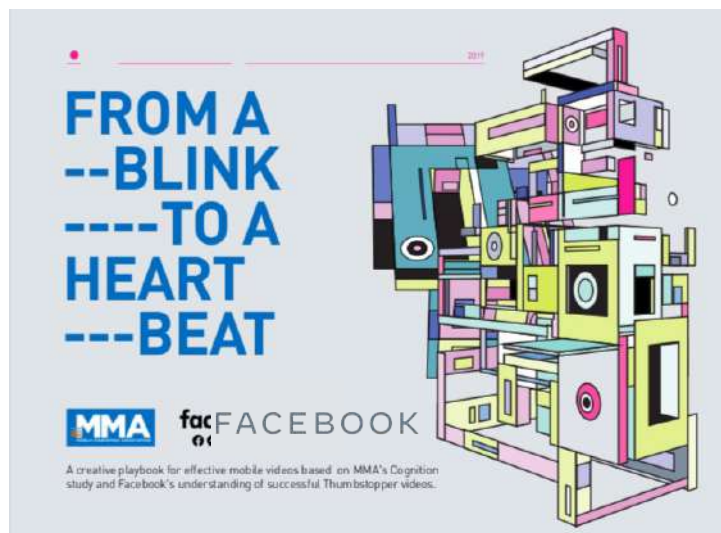
As you finish reading the first word of this sentence, mobile users have already processed the overall sentiment of the latest video ad to pop up on their social media feeds. One of the world's first and most extensive neuroscience-based studies on consumer response to mobile ads – Cognitive Processing of Advertising in a Mobile Environment by the Mobile Marketing Association, has brought to light the fact that consumers now take less than half a second to process the message of an ad viewed on their mobile phones. The reaction that is triggered can be either positive or negative, and for ads that show poor performance, negative emotions from viewers have already decided the brand's fate in the first second itself. Testament to the huge impact that short videos can have, are Facebook's Thumbstopper videos, a concept built on multiple meta-analyses of thousands of campaigns.

Five creative best practices for Thumbstopper videos:

MMA in partnership with Facebook recommends the following considerations for effective short video creatives on mobile. They are based on MMA's Cognition research and Facebook's understanding of Thumbstopper videos.

DURATION: Short video ads under 10 seconds work better

BRANDING: Showcase your brand early and often

VISUALS: Use striking visuals, colour and contrast to catch attention and move hearts

SOUND: Design for sound off, but delight with sound on

OPENING: Make the first frames of a video count

Together, the MMA's First Second Checklist and Facebook's Thumbstopper Creative Best Practises, form a detailed and insightful guideline of sorts for marketers and creative agencies to ace the game of the short video ad. From colour and contrast to the need of designing for sound-off modes, while still incorporating impactful audio for sound-on viewers – these two sets of recommendations provide an effective breakdown of the do's and don'ts of short ad video making, all backed by scientific research and deep consumer insights.

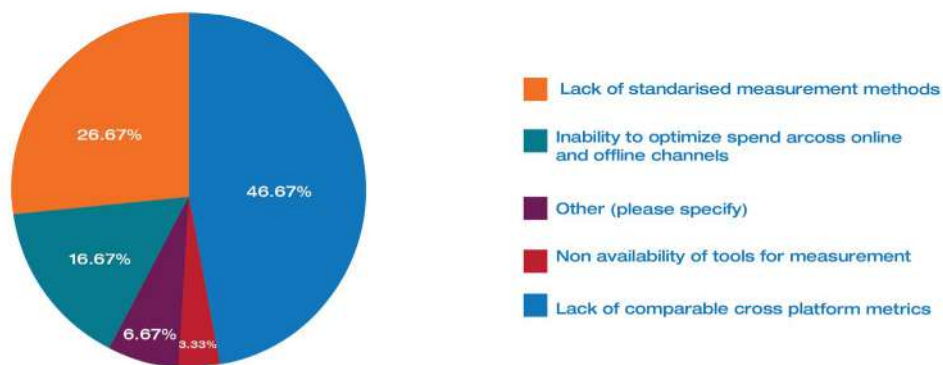**Source: From a Blink to a Heartbeat**

MEASUREMENT CHARTER

The measurement committee has been working extensively to enable POV on cross-media reach and effectiveness of mobile versus other media and assess the impact of new media on business outcomes.

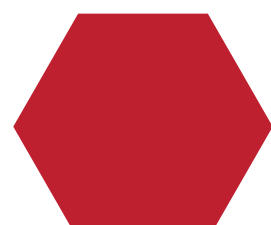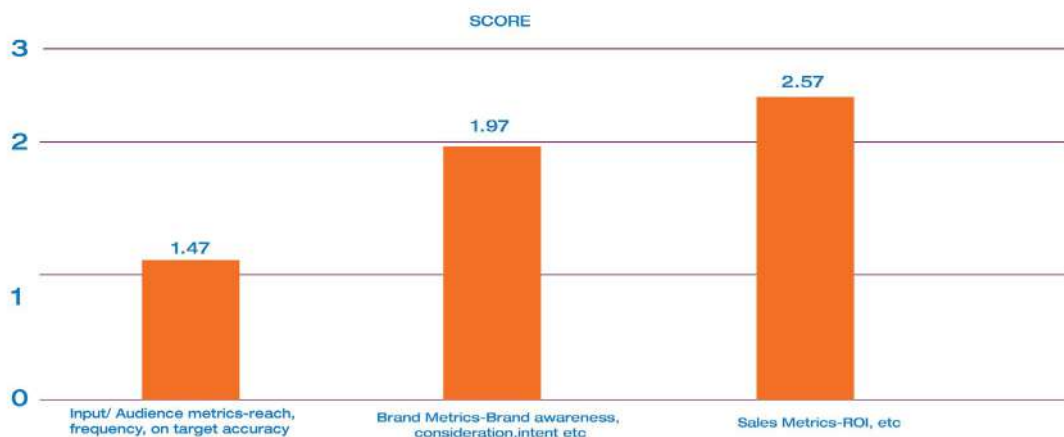### MMA measurement effectiveness industry survey

To gauge the industry view and pattern of how marketers measure impact, MMA along with board members carried out a survey on effectiveness measurement. The survey which had 30 respondents in all including PepsiCo India, HUL, Maruti Suzuki India Ltd, ICICI Bank, Vodafone Idea Ltd, Godrej Consumer, Marico, L'Oreal, Tanishq, GCPL, BMW, TATA Motors Limited, Johnson and Johnson and VIP Industries, to name a few, helped in understanding the gaps in media metrics and the current measurement methods being used to measure effectiveness.

When these organisations were asked about the biggest challenges / gaps in marketing measurement today, this is what they had to say:

THE BIGGEST CHALLENGE/ GAPS IN MARKETING MEASUREMENT TODAY

- 26.67%
- 46.67%
- 16.67%
- 6.67%
- 3.33%

Legend:
- Lack of standarised measurement methods
- Inability to optimize spend arcoss online and offline channels
- Other (please specify)
- Non availability of tools for measurement
- Lack of comparable cross platform metrics

MEASURES RANKED IN ORDER OF IMPORTANCE FOR BUSINESS

SCORE

- Input/ Audience metrics-reach, frequency, on target accuracy: 1.47
- Brand Metrics-Brand awareness, consideration, intent etc: 1.97
- Sales Metrics-ROI, etc: 2.57

Mobile Marketing Ecosystem Report 2020, India

POV on metrics that matter

The results of the survey enabled in initiating a POV with regard to Cross-Media and Cross-Platform measurement. Two key concerns that were often heard were 'What are the metrics that matter and must be measured?' and 'How do we measure the cross-media impact of advertising in a comparable way across all digital and non-digital media?'

Hence the measurement effectiveness council set out to focus on the following metrics that matter:
1. Brand Metrics
2. Sales Metrics

This is true for both brand advertisers and performance advertisers, regardless of industry verticals. For example, e-commerce clients as well as CPG advertisers run brand advertisements across media channels, with the objective of improving mind measures via-a-vis their brand or positioning in the market. Similarly, CPG advertisers expect that such brand advertising will have an impact on actual sales and expect a meaningful return through incremental sales from their brand spends. Likewise, e-commerce companies and banks rely on digital performance ads and expect higher traffic on their web assets and apps, in addition, they expect higher sales online sales conversions or offline conversions (account opening etc. for banks).

Output Vs Input metrics

The key metrics that matter to business are output metrics, the Brand and Sales metric described above. Very often, advertisers measure input metrics (such as TV GRPs, Click on ads, etc.) as a way to quantify or metricize their advertising efforts. While these metrics are important to ensure hygiene and efficiency of campaign input, these are not output metrics that ultimately matter to business growth.

Output metrics are quite hard to measure. Mind measures are subtle and changing, and sales is influenced by a variety of factors; throw in the reality of an ever-changing multimedia environment and shifting consumer behavior – and it becomes clear that isolating and measuring the impact that advertising alone had can be a challenging task.

Key Brand outcomes that matter to businesses are listed below:
• Ad Recall (did the consumer recall seeing an ad for the brand?)
• Brand Awareness (is the consumer aware of the brand?)
• Message/Campaign Awareness (did the intended communication register in the consumer's mind?)
• Consideration and Purchase Intent (did the advertisement improve consumer intention to purchase the product?)

Type	Methodology	Robustness	Ease of Deployment	Limitation
Control/Exposed	Pre Post	Low	Easy to Execute	Aggregate campaign impact measured, not impact of each media
Control/Exposed	Geo Tests/ Region based	Medium	Requires changes to media plan	TV is very hard to control by Region
Control/Exposed	Lift studies audience based	High	Easy for digital channels with "Lift" measurement capability	TV is very hard to control by Region
Regression based	Market Mix Models	High	Intensive data collection effort	Long history (uoto 3 years required when only montly sales data is available

SmoX Cross Media case studies: How Brands Can Make Smarter Decisions in Mobile Marketing.

An extensive global study called SMOX carried out by MMA to understand cross media reach and effectiveness has irrefutably proven that mobile is 1.9 times more effective than other media It helps to learn how Brands Can Make Smarter Decisions in Mobile Marketing

It highlights results from 11 case studies the MMA conducted for top brands, including Allstate, Unilever, AT&T and the Coca-Cola Company. Each of the 11 studies in the report determines the effectiveness of a real cross-marketing campaign against its own marketing-associated goals. The details for it have been published by ARF and can be viewed on the below link:

Source: SmoX- Case Studies, How brands can make Smarter Decision in Mobile Marketing

The larger challenge in this context is to carry out accurate attribution across all marketing channels. With all these insight gaps in mind, MMA's research provides some perspective on better decision-making in marketing. Other observations highlighted in the study include:

Produce Creative Content Specifically for Mobile: The current research validates that marketers can maximize the impact of their advertising when they align creative concept, format, advertising unit, data, and delivery to communicate a brand message that is relevant in the specific moment in the customer journey.

Target More Deeply: Most of the data targeting approaches assessed in the current case-study series more than justified their premium (cost) and significantly improved the impact of mobile advertising per dollar spent. This validates the theory that marketers can find great value in understanding the customer journey and operationalizing planning insights to target "moments of relevance" across the customer journey.

Adapt to Continuous Optimisation: This research, therefore, has implications for how a marketer organizes teams and agencies around continuous optimization, as opposed to an annual planning cycle.

Over and above this, MMA has launched a guidebook to delineate a MTA (Multi-Touch Attribution) solution to maximise marketing impact

For marketing efforts to be successful in a data-driven, real-time attribution age, it's crucial to use an MTA solution. About 80% of the marketers agree that MTA (multi-touch attribution) is important for maximum marketing impact but the adoption has been slow with only 40% of the marketers actually implementing MTA till the first half of 2019.

MMA Multi-Touch Attribution Journey Map

MATT

MARKETING ATTRIBUTION THINK TANK

MTA can be simple, straightforward to apply as well and can maximise the return on advertising. To apply it's required to follow a process through five different stages, each having five common components. Along the way, things to do and not do, previously released MATT tools and documents have been included to help in the deployment and success of MTA.

Stage 1: focuses on understanding how MTA will benefit your organisation and what is required to successfully apply it.

Stage 2: one has assess whether the necessary data is available to create MTA models.

Stage 3: focuses on setting up the first MTA project.

Stage 4: the first MTA project will be implemented.

Stage 5: The final stage requires one to maintain and expand the value of MTA to the organisation. Instead of conventional marketing, marketers can deploy multichannel marketing strategy to engage users in impactful ways. This makes way for a smoother experience along multiple checkpoints which can effectively be measured by MTA (multi-touch attribution) which is used to measure user data across channels, while linking the mobile phones to a single point of reference.

Source: MTA Journey Mapping
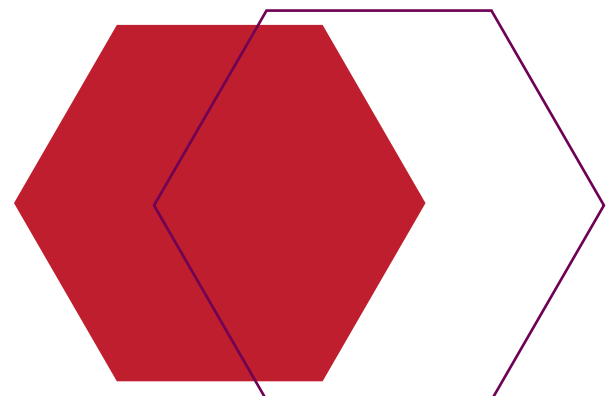
BRAND SAFETY CHARTER

The Brand Safety Committee has been working extensively on enabling best practices, standards and guidelines for brand marketing and performance marketing by driving compliance at various levels in the ecosystem amongst stakeholders to deter ad-fraud. The aim was to provide guidance and learnings to brands and performance marketers. Global and local councils are working closely to enable a brand safety guide.

Mobile Ad-Fraud India Report

MMA has also released Mobile Ad-Fraud in India Report in 2019 to enable insight and learnings on marketer challenges on ad fraud, most common frauds and barriers to investing in robust solutions.

The top challenge faced by marketers is Mobile Ad Fraud, which will continue or even magnify in the future. An absence of a clear system to penalise the perpetrators and a lack of transparency have contributed to the rise of mobile fraud.

The three highly unsafe categories of frauds are:
• Traffic Fraud
• Misrepresentation Fraud
• Attribution Fraud

Out of which traffic fraud poses the highest risk followed by misrepresentation and attribution fraud respectively. Marketers have resorted to outsourcing the task of tackling the issue to external parties.

The most popular vendors which provide solutions for preventing and tackling frauds are Mfilterit and Appsflyer and Moat and IAS from an overall brand safety standpoint

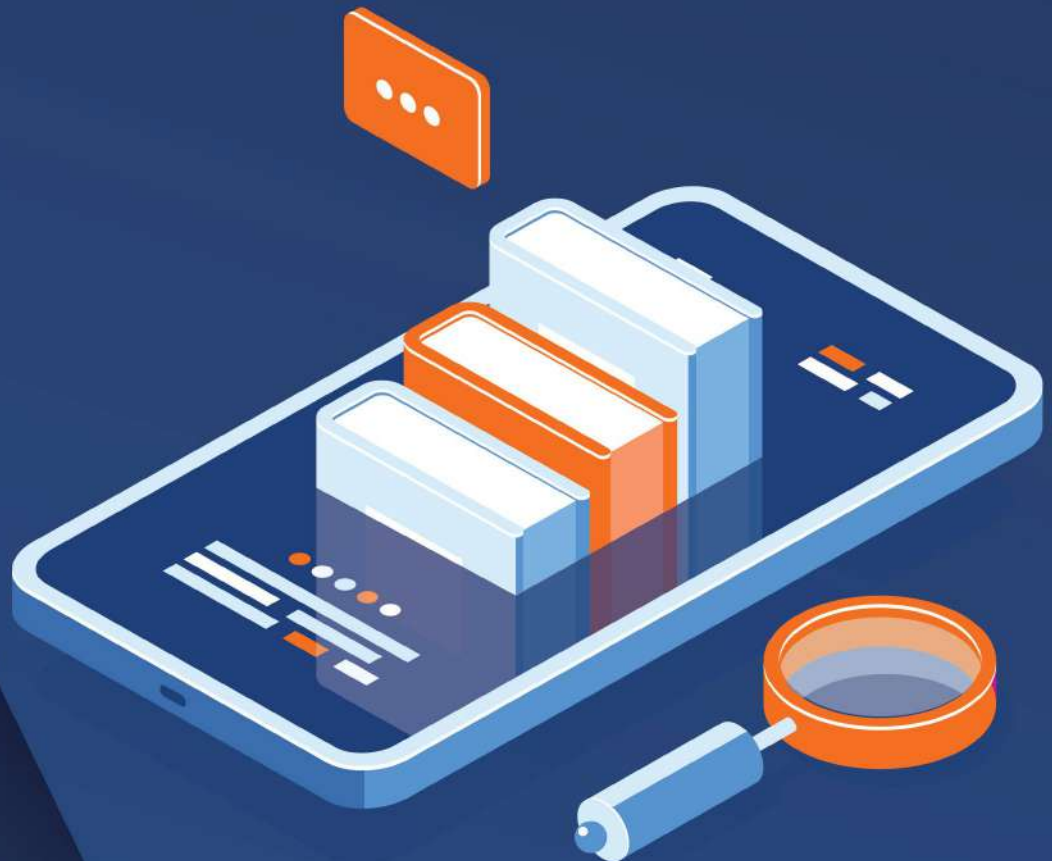**Source: Mobile Ad-Fraud in India**

Mobile Ad-Fraud Roadshow

Thought leadership and collaborative learning enabled by MMA by bringing experts and marketers under one roof from Mumbai, Delhi and Bangalore. 5 most impacted verticals being travel, e-commerce, finance, gaming and foodtech.

Source: Mobile Ad-Fraud Roadshow 2019

PART 5

ANNEXURE

About MMA

The MMA's mission is to enable marketers to drive innovation and enduring business value in an increasingly dynamic and mobile connected world. Comprised of over 800-member companies globally and 14 regional offices, the MMA is the only marketing trade association that brings together the full ecosystem of marketers, tech providers and sellers working collaboratively to architect the future of marketing, while relentlessly delivering growth today.

Anchoring the MMA's mission are four core pillars; to cultivate inspiration by driving innovation for the Chief Marketing Officer; to build the mobile marketing capabilities for marketing organizations through fostering know-how and confidence; to champion the effectiveness and impact of mobile through research providing tangible ROI; and to advocate for mobile marketers.

MMA India Board Members

MMA 2019 POV

Perspectives on Mobile Marketing

The author of this article is Moneka Khurana, Country Head – MMA, India.

Spamming leads to making the consumer immune or even hostile to the brand'

'Over the years, the mobile marketing ecosystem has become a fertile playground for marketers and brands for targeted advertising. Keeping pace with the seismic changes, in terms of technology, knowhow and best practices, requires agencies and publishers collaborating with brands, to constantly adapt to the changing milieu. Professionals who are at the highest rung of the ladder need to come together to deliberated over innumerable challenges and innovative solutions to create an environment that thrives on creativity and knowledge sharing.

Applying a digital filter to every single value chain in a business is a must

In any business today, it is imperative for brands to have a purpose which transcends the financial matrix or the market share matrix. What's even more significant is not just that brands should have a purpose which is revalidated, redefined or even created, but it's also important to apply a digital filter to every single node of the value chain. Since age, size, reputation, current sales and equity don't guarantee the existence of even a well-established brand of the future, what marketers need to pay heed to is to be self-disruptors. Supplying benefit and additionally creating demand by reducing the cost and not adding to the cost is a mantra that needs to be adopted across the board by all business units.

What mobile marketers need to acknowledge while navigating this environment

One of the burning questions when it comes to mobile marketing rests on how to leverage the medium to provide maximum mileage for the brand while ensuring that malpractices are kept at bay. A key point that is being discussed is how mobile works very well as a support to TV in supplementing reach. While the reach at a higher frequency might still be a deterring factor that mobile marketers are grappling with, spamming leads to making the consumer immune or even hostile to the brand. One of the most effective ways to communicate on mobile is through creating authentic content with the help of relevant targeting. But, using artificial intelligence to think for the consumer might be dystopian.

Leveraging content platforms

Video and audio streaming platforms are rich avenues for brands to advertise on. While video streaming platforms are dealing with the challenges in the current milieu and trying to figure out ways and means to deliver maximum ROI through mobile advertising, what's also essential for marketers is to be future ready. While homogenous content dominates television today, content on streaming platforms is heterogeneous in nature. Platforms where content is essentially user generated by Gen Z, brands before leveraging these avenues must realise that this is probably the first generation that is native born small screen users. They are multi-taskers, using, on an average, at least five apps at the same time. However, their attention spans are that of a goldfish (about eight seconds) and are almost dismissive of formats which are longer in length. They are the generation that is fuelling the growth of short-format video content.

The recent shift of consumers towards ephemerality where the content lives for 24 hours and fades away, hence brands need to gear up for ephemeral assets such as stories.   While audio streaming platforms are still at a nascent stage, there is a fair degree of promise which marketers believe that the medium holds. However, what has not been taken to them is empirical evidence and that's where the task really lies in order to establish the power of this medium.   As for the OTT platforms, marketers and brands are increasingly looking at the OTT medium to tell their brand stories, engage with their consumers and develop long-term sustainable relationships. In the evolution of the consumers, the brand challenges and goals are also evolving. Digital offers all brand owners myriad ways of engaging with consumers. It can no longer be the standard approach that they used to adopt, whether it is in terms of creative strategies or media mix strategies.

Innovative tools that aid mobile marketing

While advertising on mobile, there are various tools which aid marketers to tell their stories and target the consumer who is eventually the one aiding purchase, completing the cycle. Precision marketing is leveraged by brands to communicate with their consumer. Talking of targeting, the sweet spot is somewhere in between a very precise audience definition to extremely broad definitions. The data being generated by consumers with the time that they spend on a mobile device, is a signal to the world about what they want to do more of. It's a great opportunity to target that intent.   With precision marketing, there is some amount of data out there giving signals. So, this is the time to leverage it. Either there is too much information, or we are not able to go cross platform. So, it is important to invest in capabilities like a tech-backend, capabilities of brand managers knowing how to read data, analyse it and feed that back into campaigns. Also, use that data to course correct campaigns midway.

Meanwhile, customising videos for digital will require re-framing, re-thinking and re-shooting. Videos are a large chunk of what consumers end up seeing and how you can really make those videos better. Whether they are 15 second videos which are going up and down on a screen or they are square videos, the fundamentals of film craft for digital remain the same. A few tweaks will be required for every platform.

The features which determine a thumbstopper video include duration, branding, visuals, sound and opening. What's even more essential is to keep in mind how marketers only have the quarter of a second to generate a positive or negative influence in the user when it comes to short-format video content.

Lastly, mobile voice is a tool which is going take the industry by storm in the future. There are various ways in which marketers can prepare for the mobile evolution. Voice cannot be a standalone gimmick and has to be integrated in the larger marketing plan. While designing content for the audio-visual medium has been learned and unlearned, the need to learn how content is designed for voice is of utmost significance. One of the biggest challenged when it comes to marketing through mobile voice is optimisation of answer box during search. The current design only throws up the top search result which is not fruitful in the long run. Also, what needs to change is the keyword strategy because when it comes to voice, the focus shifts from just words to a conversation. Lastly, the UI and UX of the interface has to be conversation friendly.

Better safe than sorry

Data suggests that 60% of marketers think that brand safety poses a serious risk. Earlier this year, the World Federation of Advertisers did a research which said that 70% of marketers are more worried about brand safety this year than they were in the last year. Consumers are hearing about fake news, disinformation and data breaches. The consumer's trust in media has never been lower. While technology and knowhow are being developed to help marketers practise brand safety, a lot more work needs to be done. While marketers the world over are taking significant efforts, tools and technologies are developing to address billions of dollars of questionable consumer reach that we are talking about. But India is still low on the curve.
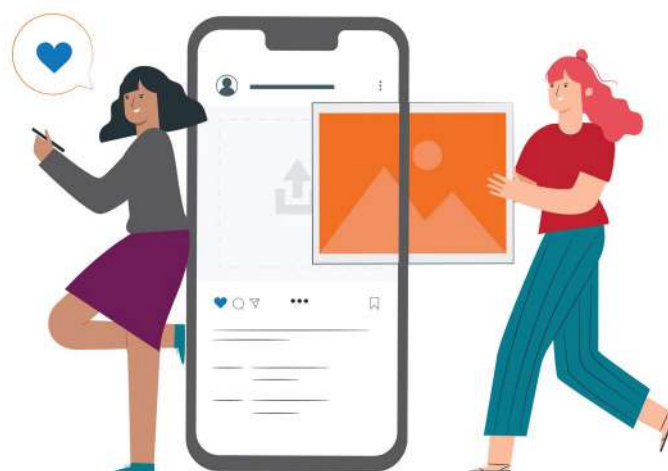
How Lack of Transparency and Industry Regulations are contributing to Mobile Ad-Fraud

The author of this article is Moneka Khurana, Country Head – MMA, India.

Surveys on state of ad fraud in India have revealed that the growing lack of transparency amongst various stakeholders that are a part of today's mobile ad publishing chain, coupled with the absence of standardised regulatory practices, are two of the leading menaces that allow the existence of fraudulent activities in mobile advertising. Although marketers are adopting several methods, including both in-house prevention measures and external partnerships to help detect and prevent ad fraud, 90 per cent feel that they aren't doing enough. For marketers, it is essential to understand how data transparency and regulatory practices in the mobile marketing space can help them reduce their vulnerability to mobile ad fraud.

Marketers around the world have been battling the evil of ad fraud across various platforms for a few years now, but the success rate hasn't improved much. According to a report on the state of mobile ad fraud in India, over 50 per cent of Indian marketers feel that mobile ad fraud will either increase or remain the same in 2019. Evidently, ad fraud has become a glaring issue that needs to be addressed immediately, and to do so, it is important to identify the various factors that contribute to its growth.

The need for transparency

Digitisation has made consumers more accessible in a hyper-personalised manner through one single device, but it has simultaneously given rise to a complicated web of 'middle-men' involved in getting a marketer's message across to a consumer. The emergence of different types of platforms like demand/supply side platforms, data management platforms, ad networks, etc. has created a chain of sorts through which an ad travels before it finally reaches the consumer, making it highly vulnerable to fraudulent activities at any given point in this supply chain from the marketer to the consumer.

Earlier, the process of sending out an ad was fairly simple; there was a fixed process for every media outlet – and each had a fixed price, fixed placement and fixed measurements of the advertising space. Marketers were completely aware of what they were paying a certain amount for, and what return on investment they could expect from a particular ad campaign.

While the emergence of personalised, data-driven mobile advertising has definitely made it easier for marketers to know where, when and why a consumer is available on a certain platform, it has taken away their ability to know whether or not their targeted audience even saw their advertisement.

The placement and positioning of any advertisement contributes greatly to how it is received by the intended audience. If an ad is placed next to inappropriate content, a user is likely to either ignore or develop a negative impression of not only the advertisement itself but also the brand, in turn harming the relationship between a brand and its target audience. Meanwhile, the marketer is completely unaware of this, and is therefore unable to understand the lack of returns from a seemingly successful mobile ad campaign.

The placement and positioning of any advertisement contributes greatly to how it is received by the intended audience. If an ad is placed next to inappropriate content, a user is likely to either ignore or develop a negative impression of not only the advertisement itself but also the brand, in turn harming the relationship between a brand and its target audience. Meanwhile, the marketer is completely unaware of this, and is therefore unable to understand the lack of returns from a seemingly successful mobile ad campaign.

Standardised industry regulations

Results from surveys conducted with Indian marketers have also revealed that the lack of industry regulations is one of the major factors that contribute to the rise of ad fraud. The global ad fraud spend is said to hit a value of USD 26 billion by 2020. Regulatory practices must be put into place because that value is just too high to be left unattended. The reason behind the absence of such measures is the rapid advancement of technology. Marketers have just begun to get a grip on digital marketing, whereas fraudsters have already found several loopholes to exploit the online ad space being used by marketers for their campaigns. Although some brands are working towards taking legal action against such fraudulent activities, fraudsters are much too fast to be held back by litigatory actions that take years to process.

Standardised industry regulations designed keeping the digital age in mind are required for the basic safety of not only marketers looking to save their ad expenditure, but also for publishers of online content, and consumers as well. Rules that protect every aspect and every stakeholder in the new advertising chain between a brand and a consumer will help protect the privacy and data generated by consumers, along with helping marketers reduce their costs on ad fraud.

In a world that is connected 24x7, consumers create opportunities for both, marketers and fraudsters, with every scroll and click on their screens. In order to maintain authenticity and trust between a brand and its users, transparent and open communication channels must be established between the various stakeholders involved in a digital ad chain. This will help in not only reducing the money wasted in ad fraud, but will also help brands create a stronger, deeper relationship with their users as well. Industry regulations that are made for the digital age will help both brands and consumers better understand how to protect their data from fraudulent platforms, hence creating a safer advertising space where even the smallest of brands can be protected from fraudulent activities.

Stuff that Award Winning Campaigns are made of

The author of this article is Moneka Khurana, Country Head – MMA, India.

Digital and mobile are now pretty much synonymous. Number of mobile users as well as the time being spent on handsets is also significantly increasing. What's more, India is a country with the lowest cost of accessing data on the mobile phone. All these factors have made for a plush opportunity for mobile advertising and we are seeing a deluge of them. But how does a mobile ad cut through the clutter; how does it leave an impression…how does it become the 'utterly butterly Amul' of print ads. Here are some suggestions:

Ads need to get the context down pat

Two-thirds of mobile ad campaigns that win awards exhibit one thing in common - they all use multimedia to communicate with their consumer. These campaigns also ensured that the context was correctly understood. Context essentially means the media environment in which the digital ad is placed. Along with context, marketers need to take into consideration the mood and the mindset of the consumer when he or she is interacting with the ad.

While looking for videos, consumers are in a lean forward environment and they are looking for entertainment. On social media, the marketer is competing with the consumer's friends and family. As a result, they are in a lean back environment. They are looking for distraction to spend time. Therefore, content needs to be tailored according to the platform to reap maximum benefit. Advertising on category relevant sites becomes important for a brand if the objective is to achieve purchase intent. On the other hand, if it is awareness that the brand seeks to achieve then it can be category agnostic. Campaigns that use native content to interact with their consumers and also spoke to the consumer in their vernacular, have seen more success that those who don't.

Synergy between media and content is a must

Multimedia campaigns work well when they have synergy between various media platforms. If a campaign is made for television, then it can be customized for online as well as social media usage, helping marketers to control marketing spends.

Synergy between the media and the content becomes an important factor in setting a winning campaign apart from the others. To put it simply, winning entries usually use the full power of devices.

Consumer engagement and experience rank high

Based on the objective of the ad, there is an exchange that the brand can have with consumers by providing something back to them. It can be achieved by providing tangible value, by being interactive with them and by respecting them. More than half of the winning entries use interactive campaigns and a fair number also use mobile location targeting apps as a means of reaching consumers and providing them relevant experiences.

Measuring the impact of campaigns adds value

However, while we need technology to put together winning ads, the most memorable ones are those that hit the right chord at an emotional level Designing a mobile marketing campaign is an opportunity to widen your reach as much as possible by looking beyond your own offerings and taking inventiveness from the ecosystem around you. There are too many variables to really pinpoint a winning strategy. But, it never hurts to try.

SMARTIES JURY 2019

Mobile Marketing Ecosystem Report 2020, India

SMARTIES WINNERS 2019

GOLD

| S. No.	Category	Entry Name	Advertiser Brand	Submittor Agency	Lead/Additional Agency
1.	Brand Awareness	Kerala is Open	Samsonite India	Autumn Grey	
2.	Lead Generation/ Direct Response/ Conversion	Mind your Language	Racold	WATConsult	
3.	Product/Service lunch	When Women Join hands to Break Social Shackels	Meesho	Affle	
4.	Promotion	The "Big Billion Days" powered by Master Card	Mastercard	Flipkart Ads	
5.	Social Impact/ Not for Profit	The Adaptive Data Lighthouse 2.0	Lifebuoy	Mindshare India	
6.	Cross Media	The Missing 'I'	Tata Chemicals	Madison Media	
7.	Cross Media Integration	Mobilising Young India to take an Informed Decision in 2019 election.	Google Search	Essenence Global	
8.	Mobile Gaming, Gamification & E-sports	Chota Bheem Ready for Mosquitoes	Goodknight	Mindshare India	
9.	Mobile App Advertising	When Women Joined ands to Break Social Shackels	Meesho	Affle	
10.	Programmatic	Grofers Housefull Sale	Grofers	Pivotroots	
11.	Mobile Social	#JumpforHealth III	Aditya Birla Health Insurance	Mindshare India	
12.	Best Use of Branded Content in OTT originals	Where the Heart is	Asian Paints Corporate	Madison Media	
13.	Best Use of Branded Content in OTT originals	Quacker Oats Insight to Impact	Quaker Oats	Mindshare India	
14.	Best Use of Vernacular Language in Mobile Advertising	Engagement in a Media Dark Market-81% delivered	Horlicks	Mindshare India	
15.	Location based Services or Targeting	Voice Enabled Banner to search for your Style	Amazon India	Interactive Avenues	
16.	Innovation	Say Hello to Virtual Beauty Consultent	Bobbi Brown	Affle	Isobar (Lead)
17.	Mobile Video	Breaking the Internet with Swag and How!	Pepsi	Mindshare India	
18.	Mobile Audio	Engagement in a Media Duck Market-81% delivered	Horlicks	Mindshare India	
19.	Best Brand experiences in Mobile Rich Media	Tanishq goes Real to Virtual to woo Consumers	Tanishq	Ventes Avenues	22 Feet Tribal Worlwide (Additional Agency)
20.	Most Engaging Mobile Creative	Sprite-Summer ka Best Idea!	Sprite	Interactive Avenues	
21.	Internet of Things- Products in Market & incubation/ innovation stage	Kuch Apna sa	Godrej Nest	Madison Media	

SILVER

S. No.	Category	Entry Name	Advertiser Brand	Submittor Agency	Lead/Additional Agency
1.	Brand Awareness	The Adaptive Data Lighthouse 2.0	Lifebuoy	Mindshare world	
2.	Lead Generation/ Direct Respose/ Conversion	When Women Joined Hands to Break Social Shackles	Meesho	Affle	
3.	Product/ Services Launch	Clean The Air	Asian Paints Royale Atmos	Madison Media	
4.	Promotion	India Opens The bottle of refreshment with Sprite	Sprite	Affle	Interactive Avenues (Lead)
5.	Social impact/ Not for Profit	Saving lives with Platelet Donation	Godrej Hit	Mindshare India	
6.	Cross Media	When you save a photo, you save a story	Google Photos	Essence Global	
7.	Cross Mobile Integration	HDFC Bank - happy hours	HDFC bank	Public media - Performics India	
8.	Mobile App Advertisng	AirtelThanks - a unique thanks to Airtel user	Airtel	Essence Global	
9.	Programmatic	Cold and flu predictor	Otrivin	Mindshare	
10.	Innovation	Thumbs Up Campaign	Thumbs Up	SilverPush	Interactive Avenues (Lead)
11.	Location Based Services or Targeting	Saving lives with Platelet Donation	Godrej Hit	Mindshare India	
12.	Mobile Video	With great pranks comes great responsibility	Kingfisher	Mindshare India	JWT (Additional)
13.	Mobile Audio	The Adaptive Data Lighthouse 2.0	LifeBuoy	Mindshare India	
14.	Best Brand Experiences in Mobile Rich Media	LG gets mobile consumers ThinQTM-ing with augmented reality	LG	InMobi	

BRONZE

S. No.	Category	Entry Name	Advertiser Brand	Submittor Agency	Lead/Additional Agency
1.	Brand Awareness	Too yumm! Takes over the IPL with a simple message of eat baked	Too yumm!	Interactive avenues	
2.	Lead Generation/ Direct Response/ Conversion	The 'Big Billion days' powered by Mastercard	Mastercard	Flipkart Ads	
3.	Product/Service Launch	Bas phoonk hi toh marni hai	MTV India	Madison Media	
4.	Promotion	Godrej Properties	Godrej Properties	POKKT	
5.	Social Impact/Not for Profit	Awakening the parents towards Compassion not Comparison	Mirinda	Mindshare India	
6.	Cross Media	Breaking the internet with Swag and How!	Pepsi	Mindshare India	
7.	Cross Mobile Integration	The missing 'I'	Tata Chemicals	Madison Media	
8.	Mobile Gaming, Gamification & E-Sports	Bas phoonk hi toh marni hai	MTV India	Madison Media	
9.	Mobile Gaming, Gamification & E-Sports	Too yumm! Introduces a new league of cricketers for with Karare strikers	Too Yumm!	Interactive Avenues	
10.	Mobile App Advertising	Phone se loan 3mins mein	Indiabulls	Madison Media	
11.	Programmatic	HDFC Bank - Easy EMI	HDFC Bank	Publicis Media - Performics India	
12.	Mobile Social	Amercian Tourister goes all the way on social media to become hard to let go	Amercian Tourister	Interactive Avenues	
13.	Location Based Services or Targeting	Clean the air	Asian Paints Royale Atmos	Madison Media	
14.	Mobile Video	Idea 4G - power of Live Video	Vodafone Idea Limited	Mindshare India	mCanvas
15.	Mobile Audio	JioSaavan: Kahaani express	HDFC Life	JioSaavan	
16.	Mobile Audio	JioSaavan: Calling the shots	Amazon Prime	JioSaavan	
17.	Most Engaging Mobile Creative	Idea 4G - power of Live Video	Vodafone Idea Limited	Mindshare India	mCanvas

INDUSTRY AWARDS

S. No.	Category	Entry Name
1.	Best in Show	When Women Joined Hands To Break Social Shackles
2.	Marketer of the Year	Hindustan Unilever Limited
3.	Agency of the Year	Mindshare India
4.	Enabling Technology Company of the Year	Affle
5.	Brand of the Year	Meesho
6.	Publisher of the Year	Hotstar
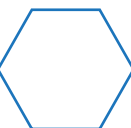
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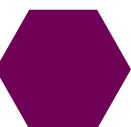
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Entertainment On Mobile-The Rise Of "Made-For-Mobile" Original Content
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Amit Relan, Co-Founder & Director, mFilterIt

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Sandeep Bhushan, Director & Head of Global Marketing Solutions, Facebook

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