



inmobi

# Marketing in the Era of Mobile

2021 India Mobile  
Marketing Handbook



# Content

## **I. Foreword**

### **01. A New World Order, Indeed!**

- a. A Digital, Hyperconnected Global Village
- b. The Curious Case of Mobile Gaming
- c. Short Attention Spans, Shorter Videos!
- d. M-commerce: Mobile to Learn, Mobile to Explore, and Mobile to Buy

### **02. The Era of Mobile Marketing Maturity**

- a. Achieving Digital Marketing Maturity:  
The Struggle is Real
- b. The Future of Mobile Advertising –  
Programmatic
- 10. Playing to the Gallery with Mobile Video
- 11. The Rise and Rise of the Growth Marketer
- 12. Steering Intent – Making Search work  
from Awareness to Conversions
- 13. The Quest for Mobile-first Consumer  
Intelligence

## **II. Conclusion**

# Building Resilient Brands: Thriving in the Era of Mobile

Undeniably 2020 has been a cataclysmic year for individuals, organizations and humanity as a whole across the globe. Several of these changes were simmering undercurrents over the last few years but have finally catapulted on to the main stage due to the pandemic. As marketers across India go back to the drawing board, one truth has emerged: mobile is the anchor for both consumers and brands in this sea of unknown. Several brands have pivoted admirably to meet their consumers where they are – be it embracing m-commerce, building click to mortar capabilities, or creating custom mobile experiences, brands have prioritized the needs of their consumers above all.

In this year's Mobile Marketing Handbook, we examine the year that was and discuss key trends that will influence marketing strategies for years to come. We are truly living in a mobile-first world order with India now accounting for 639 million global internet users. Consumer behavior has remarkably and distinctly evolved as they spent more time indoors. Regardless of age and gender, Indians have taken to gaming with great gusto, with India now accounting for 1 out of 10 gamers in the world. Short form video continues to rage on in popularity, recording nearly an hour spent per user on average while e-commerce has become an essential service with a 20% increase in number of first-time shoppers. This clear demand for mobile-first services from consumers has laid the way for India's super-app race, with several of India's largest legacy brands wagering on the power of the always-on medium, to win the connected consumer.

This rapid shift in consumer behavior has not gone unnoticed by marketers across the region, with several brands now focusing on their Mobile Marketing Maturity (3M). Marketers are setting higher bars for themselves by closely measuring the impact of each marketing activity, as they move from being aspirational to actionable with their mobile marketing strategies.

While this may be a tough time for marketers not only in the region but across the globe, true innovation is born from adversity. We have observed this from close quarters as resilient brands have pioneered innovations that enable them to pivot, strategize and execute in the new normal.

We discuss all this and more, in detail in this year's edition of the Mobile Marketing Handbook. As always, we hope you find the data and insights useful as we together march into the next decade of advertising and marketing innovation.



**Vasuta Agarwal**  
**Managing Director, Asia Pacific,**  
**InMobi**



A man in profile, looking down at a smartphone he is holding with both hands. The background is dark with several glowing, horizontal, wavy blue lines that create a sense of motion and technology. The overall mood is futuristic and focused.

## Chapter 1

# A New World Order, Indeed!

### **What can you expect in this chapter?**

We share the top mobile statistics and consumption patterns that have shaped 2020. We deep dive into rising consumer trends including gaming, short form video, and India's burgeoning super-app ecosystem.



## Chapter 1.1

# A Digital, Hyperconnected Global Village

*The following article details the far-reaching and lasting implications of the pandemic on the mobile economy and the developments that will dominate consumer experiences in the 'new normal'.*

Over the past decade, increasing globalization, better connectivity, and technological advancements have brought the world closer to a digital and hyperconnected global village. And even during the epoch-shifting pandemic, this hyperconnected global village was in it, together! COVID-19 dramatically reshaped life as we know it and permanently moved the consumer landscape to a mobile-first world. Sheltering at a place, always on the hunt for new information (and distractions), and longing to stay connected with near and dear ones; consumers relied on their one constant companion – mobile.

## Welcoming the Mobile-First World Order

All around the globe, there has been a significant increase in app downloads, the time spent on mobile, and consumer spending on mobile.<sup>1</sup> COVID-19 catalyzed several trends but most importantly the transition to a mobile-first world at a pace that was equivalent to the last few years combined stands out specifically.



New internet users worldwide<sup>13</sup>



Worldwide **Downloads**  
Growth in Peak Month  
H1 2020 vs H2 2019



Worldwide App Store  
**Consumer Spend** in  
2020



**Per day** spent in  
mobile by the average  
user in 2020



**Spent on Mobile**  
**Worldwide** in  
H1 2020



**Mobile Ad**  
**Spend** in 2020

## 'Non-ducor, duco' – India Leads the Mobile-first Economy

India is a country with one of the largest internet user bases in the world and it is only set to increase rapidly in the coming years. The pandemic has accelerated the growth of the country towards digital equality.



### Internet Users

As of 2019, India's monthly active internet user base was 574 million. This is estimated to reach 734 million by the end of 2020, registering an annual growth of 29%.



### Data Consumption

According to a survey by EY in June 2020, during the lockdown period due to the COVID-19 pandemic, India witnessed northwards of 11 GB data consumption per user per month, which is a 30 percent spike in usage, advancing data consumption stats forward by two to three years.<sup>10</sup> According to Frankfurt-based internet exchange, DE-CIX, India's data consumption on OTT platforms surged by over 900% between March and July.<sup>11</sup>

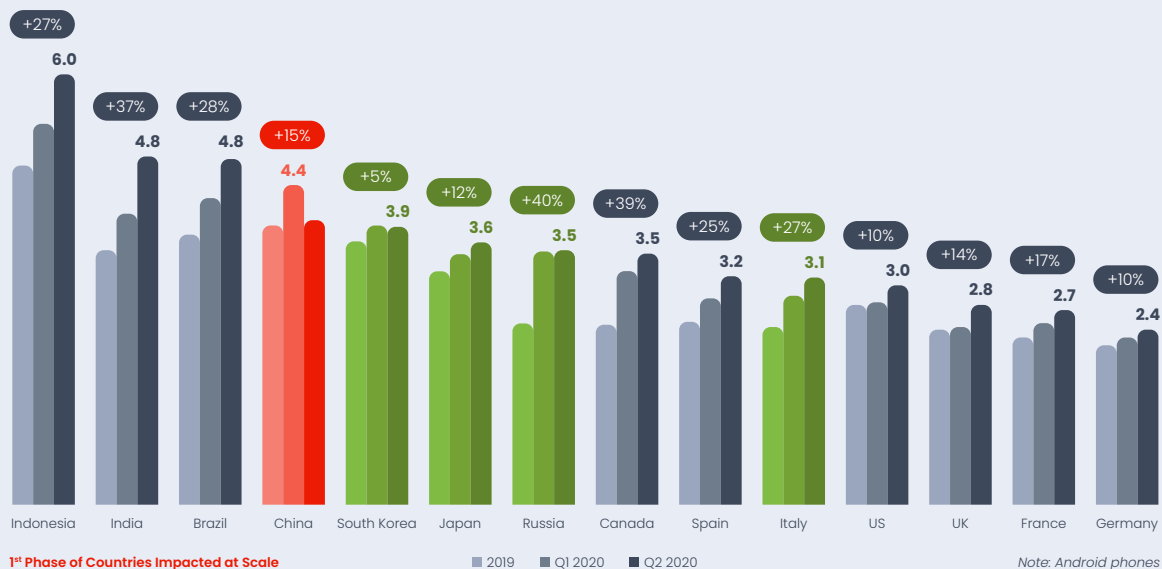


### Time spent online

In April, Indians collectively spent 11% more time online than in the month of March<sup>4</sup> as COVID-19 kept people indoors. In India, the average daily hours spent per device grew by 37% between 2019 and Q2 of 2020 and 20% between Q1 and Q2 of 2020.

#### Average Daily Hours Spent Per Device on Mobile

During COVID-19 Pandemic



### Usage Patterns

According to Kantar, there has been a 60% growth in daily Internet users in the last year with almost 9 out of 10 active Internet users accessing the Internet for entertainment and communication needs.

#### In Home and Media consumption changes due to COVID-19



### App Downloads

India has emerged as the leader in app downloads, after China, accounting for 14% of the world's installs in Q3 2020.<sup>6</sup> Since the pandemic, app downloads in India have grown by 31% between Q1 and Q3 2020, 300% higher than the global growth in app downloads.<sup>6</sup>



## The Evolution of the Mobile App Economy in India



## All in the App: At Your Door in a Tap



### Gaming

Indians generated 1.8 billion game app downloads in Q1 of 2020, which rose by 50% in Q2 of 2020 to 2.7 billion.<sup>7</sup> The country also recorded the highest growth of 35% Y-o-Y, in the number of games played each month by the average user.<sup>1</sup>



### Entertainment

From Jan to Apr 2020, the time spent on entertainment apps in India grew by 22%, digital subscription of OTT players grew by 47%, and revenues grew by 26%.<sup>8</sup>



### Digital Payments

From the first wave of lockdown between March to mid-April, 42% of Indians have used digital payment modes multiple times as compared to the pre-lockdown period.<sup>9</sup>



### E-Commerce and Hyperlocal Delivery

Indians increased their search for grocery e-commerce by 161% between April-July 2020 when compared to the same period last year. Online food delivery searches spiked by over 600% while even online pharmacy delivery searches surged by 570% during the same period.<sup>12</sup>



### You are building a resilient brand if:

1. You recognise the digital revolution in India: The country accounts for 639 million active internet users in 2020
2. You are reaching users in-app: India accounts for the greatest number of total downloads globally at 14%
3. You understand evolving consumer trends: Gaming, Payments, Retail and Entertainment are now mobile-first





## Chapter 1.2

# The Curious Case of Mobile Gaming

As online games emerge as the new entertainment phenomenon among Indians, we take a deeper look into the curious case of mobile gaming with insights from the InMobi Audience Intelligence platform.

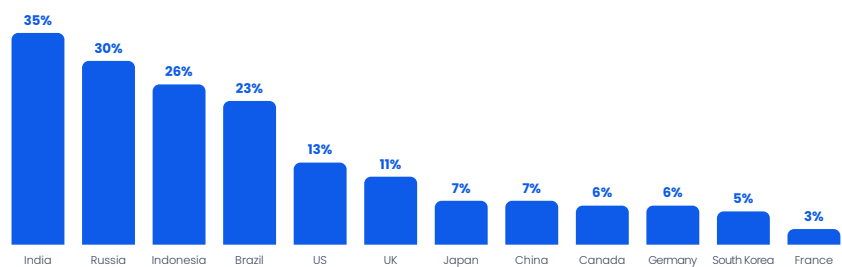
In 2020, the gaming industry is at the forefront of entertainment, growing a lightening pace, with 2.7 billion gamers across the world. Gaming has witnessed a great revolution with the advent of smartphones, mobile gaming now accounts for over 48% of overall

revenues, quashing both console and PC gaming. In the first week of Q2 of 2020, weekly mobile game downloads broke records at over 1.2 billion, and weekly download levels remained at 1 billion on an average throughout the quarter, going up by 20% Y-o-Y.<sup>5</sup>

## Gaming FTW! Indians Have their Game Face on

India is home to 1 out of 10 of the world's gamers and is poised to become one of the top mobile gaming markets in APAC. Smartphones have proven to be a low barrier to start with, 89% of India's gamers are on mobile with a 20.3% growth year on year. As consumers took to gaming during the pandemic, when more people spent time indoors, India recorded the highest growth in the number of games played each month<sup>1</sup> by the average user. Gaming app usage has surged across metropolitan, tier I, II, and III cities in India with a minimum of 80% growth seen across

**Increase in Number of Games played Each Month by the Average user**  
During COVID-19 Pandemic — Peak Month in 2020 vs Monthly 2019 Avg



Note: Android phones

India between April and May 2020. While the Arcade games have witnessed a whopping 368% growth since the onset

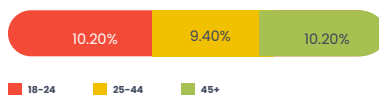
of COVID-19, Casual games see a 198% growth followed by the Casino games with 160% growth.

## Who has Skin in the Game? India Sees a Diverse Mix Embracing Gaming

**Top Gaming Audiences** (Age or Gender is Not a Barrier for Gaming)



Female Gamers



Male Gamers



All Gamers



Gaming is not only popular among Gen Z but is equally popular among consumers between 45 to 54 years of age. The gaming audience in India comprises of 10% female Gen Z gamers, 26% male Gen Z gamers, and 11% women, and 28.5% men between 45 to 54 years of age.

However, each generation has a slightly nuanced way of gaming. Gen Z prefers Casual, Arcade, and Board games, Millennials prefer Casual, Action, and Board games, and Gen X extensively indulges in Arcade, Card, and Board games.

The popularity of mobile gaming in India is varied across regions with 34% of the gamers hailing from the South and 33% from North India. East and West follow with 26% and 8% gamers respectively.

## The Many Lives of the Indian Gamer

Mobile gamers can be seen hopping across several apps including Social Networking, Music, Photo and Video, Entertainment, and Sports Apps. Interestingly, several gaming app

categories have witnessed increasing popularity among advertisers as they reach far and wide in search of the right audience via the safest inventory. Additionally, the Indian Gamer audience

is found to invariably personify a retail store visitor, dining out enthusiast, a mom, and even sports enthusiasts.

## The Apps That a Woman Mobile Gamer Indulges In

Indian female gamers come from different generations and prefer using a variety of apps outside of mobile gaming. A female mobile gamer can be found across a multitude of app categories including social networking, music, photo and video, productivity, and entertainment apps.

### The Indian Woman Mobile Gamer

The Apps that Women Gamers Use



Gaming is a burgeoning category that is democratized and propelled by mobile. The typical profile of an Indian gamer has shifted over the years to represent people from diverse backgrounds and hold a variety of interests. If things continue to play out the way they are, gaming will soon be as mainstream as video streaming.



You are building a resilient brand if:

1. You recognise the gaming revolution in India: 1 out of 10 gamers in the world are from India, this has been powered by mobile
2. You think beyond clichés: Age and gender are no bar when it comes to the gaming revolution
3. You understand where your audience is: The gaming revolution provides brands the opportunity to reach consumers with a variety of interests in the offline and online world



## Chapter 1.3

# Short Attention Spans, Shorter Videos!

*This article is an excerpt from an exclusive interview with Mayank Bhangadia, Co-founder, Roposo about the latest consumer trend that is here to stay – short attention spans and shorter videos!*

Gen Z and millennial consumers are finding innovative ways to cope and unwind during the new normal. However, the effort required to imbibe long-winded information, in this era of information overload, coupled with wavering focus is often draining. Short or bite-sized video is emerging as the connected consumer's go-to solution, more so when it complements their interests. Short videos are the new source of news, entertainment, and respite for the always-on, connected Indian. Short form content apps such as Roposo, Tik Tok, Snap, and Reels capture the pulse of the new age, connected consumers, and offers a personalized feed for users to enjoy videos by genre and interest. On Roposo, viewers escape into bite-sized moments of joy by engaging with short-form video content throughout the day. With an average of 40 viewing minutes per day, the engagement peaks interestingly during the conventional primetime of television – between 8-10 PM. These multiple micro-moments, while lasting just a few seconds, create compelling impact in the minds of viewers.

## Join

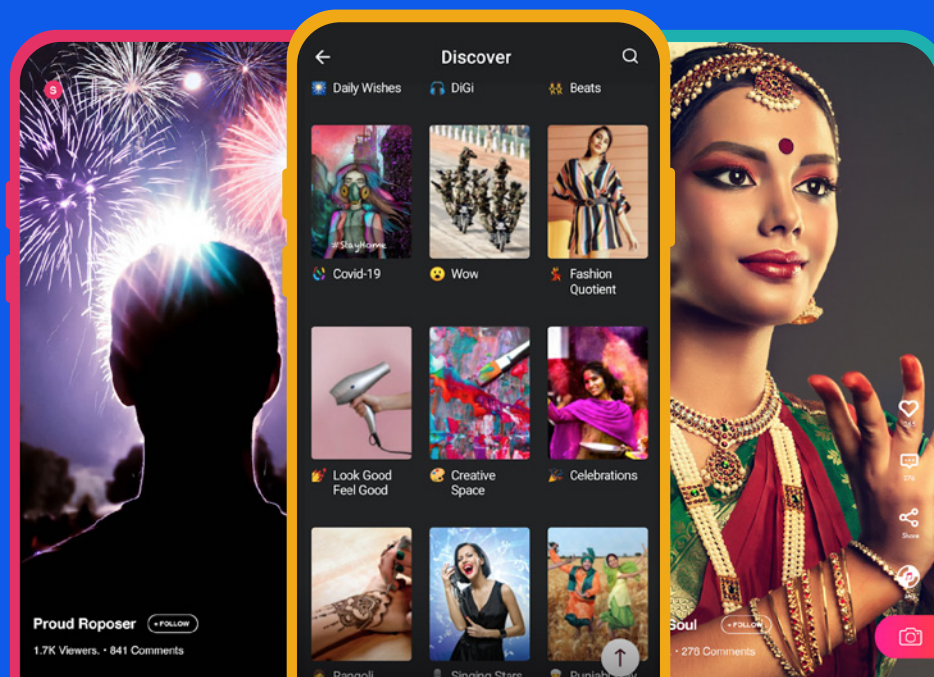
India's most downloaded app with 100 mn+ downloads.

## Enjoy

viral videos across 25+ categories.

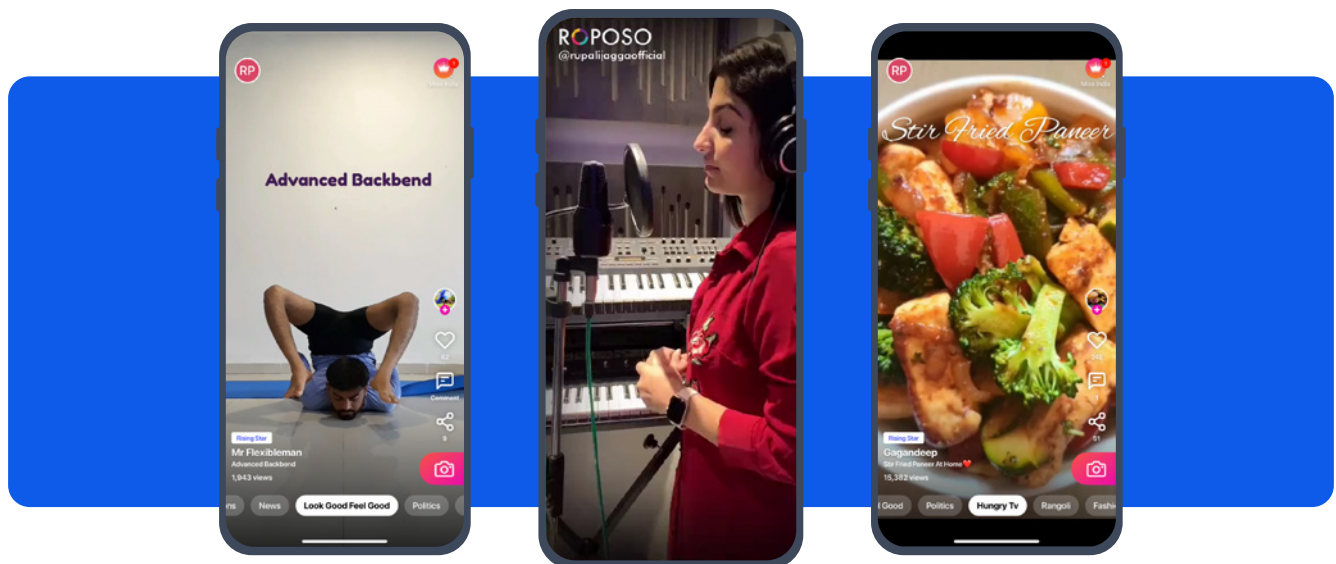
## Connect

with community of your interest.



## Roti, Makaan, Wi-Fi aur Short Video!

Locked in their houses during the pandemic – with a looming sense of doom, an avalanche of misinformation, and a yearning for informational content that offers optimism and positivity, millions of Indians took to **News on Roposo** where creators shared responsible content on the current state of the pandemic in a positive and fun manner. Additionally, the fear of ordering out during the pandemic created ample opportunities for millions of home chefs to showcase their culinary skills in visually appealing and creative forms to a much wider audience that resonated with it. People also resorted to seeking an outlet in humor-based content for entertainment as these provided a familiar feeling of comfort in this unfamiliar reality. Health and fitness-related content saw increased subscriptions as fitness hubs were closed or seen as risky. The pandemic drove a stick-shift growth in the overall time spent and the number of videos created and consumed on Roposo.



## Short and Sweet – Videos About you, by you, and for you!

India is a land of diversity with more than 70 percent of the population hailing from rural, and non-metro cities where the dominant language is not English. The two-sided network effect of short form video apps is leading to increased discovery and consumption of hyper-local content. While the Hindi-speaking audience watches their favorite creators' groove to Bollywood songs and dub smash popular movie dialogues, the various regional audiences consume vernacular videos of devotional content, state politics, and home-gardening.

Short videos give every individual a chance to showcase their uniqueness that is powerfully packed in snackable nuggets. With almost half the population having access to a smartphone, it has never been easier to become a content creator for anyone with potential and talent. This revolution has brought in a significant shift in content consumption among Indians as they are more inclined to believe real stories by real people that they can relate to. The short video platforms are empowering content creators with a powerful set of video creation tools that allows them to engage with multiple collaborators and create quality content. With a network of 60% women content creators, Roposo is pioneering the creation of responsible content while simultaneously safeguarding data and user privacy.

**Roposo is a part of the InMobi Group and owned by Glance. The app offers a TV-like browsing experience with user-generated content on its channels for consumers while creators can use editing tools on the platform to create and upload their content.**



### You are building a resilient brand if:

1. You recognize that short form content leads to long term consumption: The average consumer spends 40+ minutes on short form video apps
2. You have a hyperlocal content strategy: Vernacular language content has played a critical role in empowering both content creators and consumers
3. You can gauge the democratization of short video: Users are consuming content across a wide variety of genres be it news, food, health and fitness or entertainment



## Chapter 1.4

# M-commerce: Mobile to Learn, Mobile to Explore, and Mobile to Buy

*This article showcases the evolution of shopping preferences of consumers across online and offline channels, especially in the new normal. The insights are based on a consumer survey conducted among 1600+ Indians during Aug and September 2020.*

India's internet economy is expected to double from USD 125 billion as of April 2017 to USD 250 billion by 2020, backed primarily by online commerce. And

India's e-commerce revenue is expected to jump from US\$ 39 billion in 2017 to US\$ 120 billion in 2020, growing at the highest annual rate of 51% in the world. By 2020, India's e-commerce revenue will contribute to almost 50% of the internet economy.

According to BCG, e-commerce transactions in India in 2020 grew by 17% as compared to the pre-lockdown order volume and around 20% of new users were added to the category of

online shoppers during the lockdown. Not only did more people start shopping online, but existing customers increased their online spending by 45%. This also meant an increase in the average number of categories bought online – increasing from 4 to 6 – per user. Some categories such as fresh food and staples witnessed an uptick in new users as high as 40-50%. But how has shopping behavior evolved in this new world order?

## A Mobile-first and Nonlinear Shopping Journey

The connected consumer is constantly discovering new brands, browsing online for product information, exploring the product in-store for look and feel, searching for better deals on mobile while at the store, and completing the purchase online, in-store or via any other medium. Regardless of the varying touch points, they expect a seamless experience. The connected consumer journey is divided into three stages: Learn, Explore and Buy.

The 'Learning' stage is the first touchpoint with a brand that introduces or piques the interest of consumers in its products, services and offerings. The 'Learning' stage becomes critical for (re)discovery of brands reflecting in increased brand awareness and recall. The consumer, subsequently, starts interacting, engaging and investing time in the brand and its offerings.

The 'Exploring' stage involves extensive research on the products and its features, price comparisons, and user reviews. Relevant and in-depth content plays a key role in shaping the perception and favorability of the consumer during this phase.

The 'Buying' stage is the ultimate touchpoint when a consumer is at the brink of becoming a customer. However, a consumer can seamlessly float between the Learn, Explore and Buy stages multiple times, before making the final purchase.

The connected Indian lives in a world of divided attention across these multiple devices and is constantly multi-screening. The steps between awareness and purchase for the connected Indian consumer are many and varied, and often nonlinear. 27% of consumers learn about products through offline media, 95% explore and research on desktop & mobile, and 26% buy the product in a physical store. Consumers refer to at least three to four information sources pre-and post-purchase. The customer journey isn't what it used to be: one no longer sees a TV ad, walks into the store, and buys a product.

However, there is one constant in their shopping journey – the mobile to learn, explore, and buy. According to a survey conducted using InMobi Pulse, 63% of respondents claim to use their mobile to learn about and discover new



products, 77% to research and explore, and 62% to make purchases. The survey also reveals that while consumers are not completely averse to in-store visits in the new normal, they seek a seamless experience that involves mobile discovery/ booking and subsequent pick-ups in store. Whether online or in-store, mobile is the preferred companion; the beginning and the end of it all.

## An Omnichannel, Mobile-enabled Shopping Experience

In today's world, brands must create a unified and seamless consumer experience across both online and offline channels to connect with their consumers and create a sustainable relationship. According to our recent study on Marketing in the New Normal, delivering an omnichannel experience is the biggest priority for marketers across India. This omnichannel mindset provides customers with the much-needed choice and freedom to interact with the brand from the touchpoints they prefer.

However, with the multitude of choices that consumers of today are presented with, it is becoming increasingly tough to drive loyalty for one single brand. The mobile-first connectivity has paved a unique opportunity for brands to create their own closed and robust app ecosystem to capture these mobile-native users. The **Super App** ecosystem-led omnichannel experience will drive brand loyalty through mobile supremacy.

## The 2021 Super App Ecosystem

Shopping	Entertainment	HyperLocal Delivery	Payments	Subscription Program	Brand Name
Paytm Mall	Paytm First Games		Paytm	Paytm First	Paytm
Ajio Reliance Trends	JioTV Jio Chat JioSaavn Jio Cinema Jio Meet	Jio Mart	Jio Money	Jio Prime	Jio
Flipkart Shopping Myntra	Flipkart Video	Flipkart Supermart		Flipkart Plus	Flipkart
Amazon Shopping Future Retail	Amazon Prime Video Amazon Prime Music	Amazon Pantry	Amazon Pay	Amazon Prime	Amazon
Big Bazaar Central FBB Brand Factory EZone		Heritage Fresh Easy Day	Future Pay		Future Group
Facebook Shop Instagram Store WhatsApp For Business Messenger	Instagram Facebook Messenger		WhatsApp Pay		Facebook
Zomato Food	Zomato Originals	Zomato Market	Zomato Pay	Zomato Pro	Zomato
Tata Digital					Tata




### You are building a resilient brand if:

1. You embrace the m-commerce opportunity: 62% of smartphone users shop on mobile
2. You recognize mobile anchors the shopping experience: Be it learning, exploring or buying mobile plays a critical role in the shopping journey
3. You consider consumer preferences: You are enabling tap to mortar or online to offline experiences

## Chapter 2

# The Era of Mobile Marketing Maturity

A man with grey hair, wearing a dark suit, white shirt, and dark tie, is looking down at a smartphone he is holding with both hands. He is also wearing a blue face mask with a white floral pattern. The background is a blurred city street at night, with warm orange and yellow lights from buildings and streetlights, and some cooler blue lights on the left side. The overall mood is professional and modern, reflecting the theme of mobile marketing maturity.

In this chapter we discuss how 2020 has radically changed the ways marketers have had to think about their strategy. From overarching themes of digital maturity and omnipresent rise of video, to the nitty-gritties of tech that matters be it supply path optimization or consumer intelligence solutions.



## Chapter 2.1

# Achieving DMM – The Struggle is Real

*The following article showcases the top trends based on a survey of senior marketing and media leaders across India and Southeast Asia conducted during June and July 2020.*

COVID-19 has caused a major shift in the way consumers think, feel, and act. With market disruption dramatically shifting long-conditioned behavior in just a matter of weeks, digital has become the first prerogative in the way consumers choose to interact with the world. As a result, marketers today are re-evaluating their priorities and strategies to not only survive but thrive in a post-COVID world. What changes does it bring to the new normal in marketing? How are marketers staying on top of their game due to these transitions?

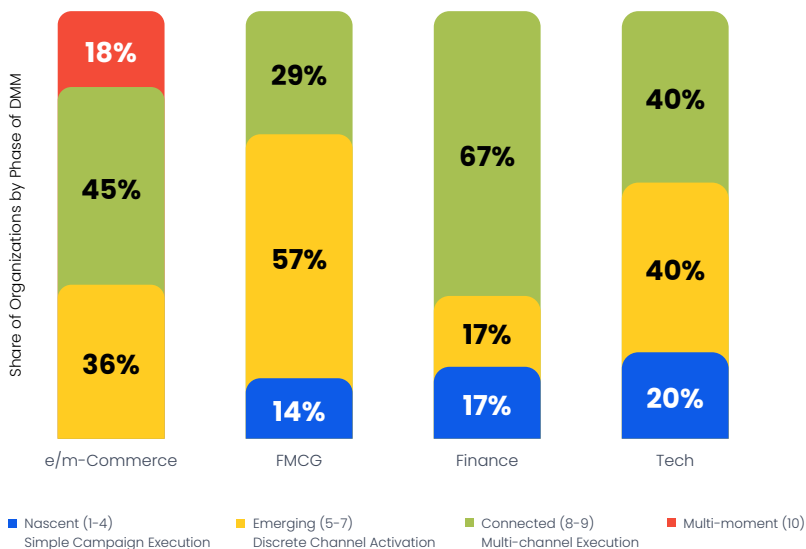
## DMM is Critical, but are Brands Ready?

BCG states that DMM is an organization's capacity in delivering seamless brand experiences and is characterized by four maturity levels: Nascent, Emerging, Connected, and Multi-moment.

According to our survey, expectedly, e-commerce and BFSI segments lead the way when it comes to Digital Marketing Maturity, emerging as the more connected and multi-moment focused categories. Yet over close to half of the marketers characterize themselves in the Nascent or Emerging Stage, leaving a large room for organizational growth.

## State of Digital Marketing Maturity by Industries

### State of Digital Marketing Maturity by Industries



Given the state of digital marketing maturity, what are the new goals in the new normal? Here's the list of goals placed in the order of significance:

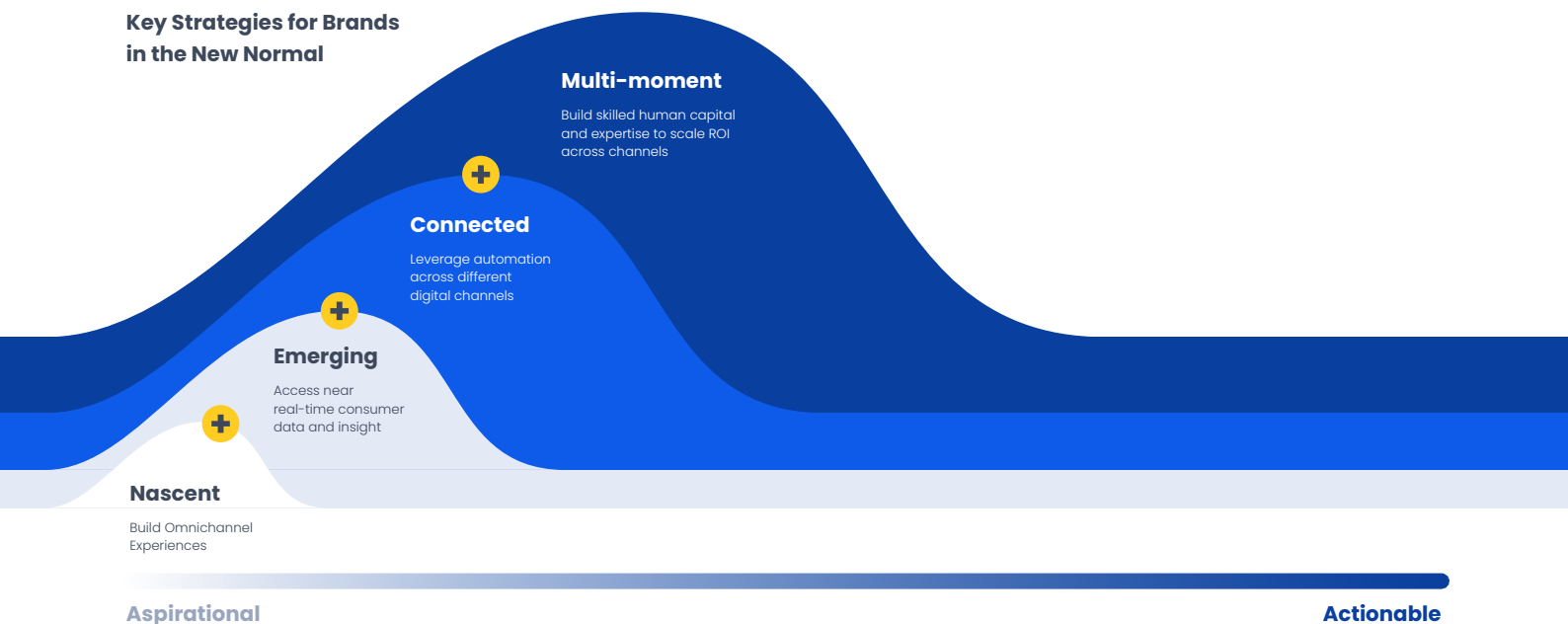
1. Acquiring new customers
2. Strengthening brand reputation and trust
3. Increasing brand awareness
4. Engaging the existing community of consumers

As the DMM of brands evolves, their strategies on digital channels shift from the aspirational end to the actionable end. Marketers are moving towards the 'actionable' end as they become better equipped to scale ROI and measurable outcomes.

## Evolving Strategies with Evolving Digital Marketing Maturity

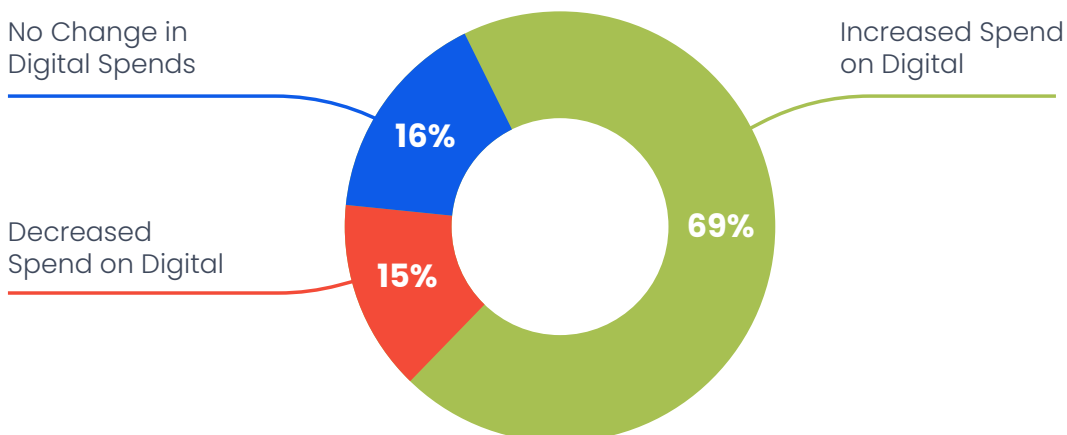
Acquiring new customers while engaging the existing customer base has become a challenge in India. Marketers look to drive measurable outcomes going forward by investing in the following strategies:

### Key Strategies for Brands in the New Normal



## Digital Advertising will Drive Growth in a Post-COVID world

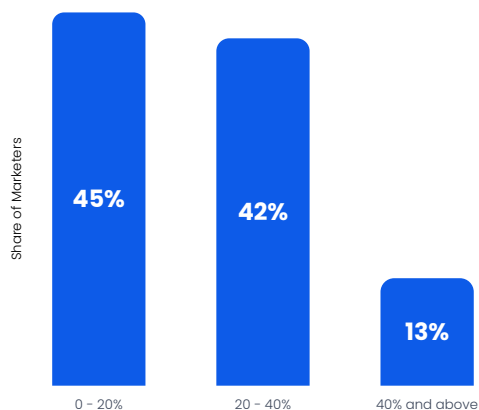
In a pre-COVID world, while digital was a part of most marketing strategies, 58% of marketers spent less than 40% of their budgets on digital. With a wide variety of platforms to explore like the TV, OOH, print, and radio, the budgets were well-spread across multiple digital and non-digital channels. The pandemic has resulted in marketers having to pivot their plans to be more digitally focused.



According to eMarketer, India sees a tremendous rise in ad spends on digital growing by 33% from 2020 to 2021. The mobile ad spends have also seen an upward trajectory in growth in India by 38% from 2020 to 2021. Overall, in the post-COVID world, there is a significant 69% increased digital ad spends.

## In-app Advertising Budgets will Grow

### Expected Increase in In-App Advertising Budgets



87% of marketers will increase their investments in in-app advertising by up to 40%. Programmatic buying remains the most efficient channel for marketers to reach and engage audiences in a brand-safe environment with 100% compliance with industry guidelines.

As brands continue to traverse different stages of digital marketing maturity, marketers will continue to evaluate different strategies and channels that drive the most meaningful outcome for not only their brands but also their consumers.



### You are building a resilient brand if:

1. You are reflecting on your brand's mobile marketing maturity and which stage your brand currently occupies Nascent, Emerging, Connected, or Multi-moment
2. You are taking steps to move the needle, and are adopting strategies to become an action-oriented brand focused on driving multi-moment experiences for your consumers
3. You are finding the right balance between branding-based and outcome-based digital marketing





## Chapter 2.2

# The Future of Mobile Advertising – Programmatic

*The following article is an excerpt from the keynote delivered by Vasuta Agarwal, MD, Asia Pacific, InMobi at Impact 2020, the Mobile Marketing Association's annual CXO summit.*

Programmatic advertising has witnessed an exponential rise from 55.9% in 2017 to an estimated 72% of digital spends by 2021. Asia Pacific and specifically, India are the growth markets for programmatic advertising with an expected 5-year growth of 2X and 3X respectively. Programmatic does stand tall as the future of advertising, but what are the trends that will shape its future in the Asia Pacific?

## The Video-on-demand (VOD) Phenomenon

With the 'video-on-demand' phenomenon, users are consuming content on OTT apps through TV networks such as Zee5 or content platforms such as Prime Video, Netflix, and Disney+. This shift is primarily triggered by the availability of affordable internet plans, the proliferation of smartphones as the primary connected device, and an increasing consumer propensity to view videos on mobile. Connected/ Smart TV, where consumers can view content on TV using OTT devices such as Chromecast, Fire TV Stick, gaming consoles such as PlayStation and Xbox, remain a distant trend though.

Short-form content, vertical videos with a personalized and vernacular content feed on mobile are also capturing the connected consumer's imagination. Advertisers must leverage short video platforms such as Glance and Roposo to leverage the micro-moments of the consumer journey and design personalized brand interventions.

## Scaling with Header Bidding

Header bidding, as an ad technology, has evolved from being an unfamiliar concept to a mainstream mechanism over the past few years. Header bidding has both sell-side and buy-side advantages over app inventory that's mediated through a traditional waterfall model.

To start with, header bidding addresses a crucial challenge many advertisers face - access to quality inventory and users, at scale. In a header bidding world, all exchanges can respond with a bid for every single ad request. As a result, platform partners like demand-side platforms (DSPs) can access not just a portion of a publisher's inventory but all the publisher's inventory. Advertisers, consequently, are better positioned to reach more users across the pool of inventory they choose to access. All auctions are unified and cleared using real-time bid responses from advertisers. This creates a true, fair mechanism for advertisers to reach the users and impressions they value the most. As a result of the equal opportunity and access to premium high performing inventory it provides, in-app header bidding empowers advertisers to have much more visibility over the supply that works best for them.

## SPO: The Search for Transparency

Supply path optimization (SPO) is an algorithm through which Demand-side platforms (DSPs) interact with Supply-side platforms (SSPs). With the extensive fragmentation of the programmatic advertising ecosystem, advertisers often have limited visibility into the costs and ad placements. SPO aims to remove inefficiencies in the programmatic supply chain by eliminating intermediaries. With SPO, DSPs can attain end-user transparency and lead them to the bid where they are most likely to win.

SPO primarily enables partners from trusted exchanges thereby enabling access to high-quality, brand-safe, and fraud-free inventory. By including sellers.json and app-ads.txt compliant inventory, SPO eliminates unauthorized sellers, guarantees increased cost efficiency and transparency as the advertisers have a clear breakdown of the cost across the supply chain.

## A non-IDFA World

With Apple announcing changes to the app tracking framework where it is mandatory to take user permission per-app before tracking, there are significant changes that arise in the advertising ecosystem. This can lead to concerns regarding:

1. Identification/ Targeting: Advertisers will be unable to build user profiles, audience segments, targeting, personalized targeting, and retargeting due to the non-availability of user data.
2. Optimization: There will be limited data signals to power efficiency-driven technology impacting fraud checks, ad rotation, and frequency capping.
3. Attribution/ ROI: Marketers will no longer be able to drive accurate attribution for a single user at a cross-device level, attribution of the store and web visits, app installs, and transactions.

Advertisers can deploy alternate identifiers such as IDFA and work with cross-device and universal ID players such as LiveRamp, Branch, Tapad, and Kochava to reach their audiences. Investing in technology that supports first-party data collection, storage, and activation such as Customer Data/ Data Management Platforms (CDP/ DMP) to run privacy-compliant, first-party data-based campaigns is a crucial step for advertisers.

While the long-term impact of the removal of identifiers on the mobile ad ecosystem needs to be seen, it is indeed a significant move towards providing more control over data to users. Advertising and app monetization, meanwhile, will learn to evolve around these changes on a trajectory that works best for publishers, advertisers, and, most importantly, the users.



### You are building a resilient brand if:

1. You are embracing the power of programmatic video and all that it has to offer
2. You are adopting the latest and greatest in tech, be it Header Bidding or Supply Path Optimization
3. You are focused on privacy and data as we move into a world with greater end-user control in a non IDFA world



## Chapter 2.3

# Playing to the Gallery with Mobile Video

*This article discusses the importance of embracing mobile first tech to empower delightful mobile first experiences for consumers.*

The world is amid a technological upheaval with an exponential rise in video viewing on connected devices including smartphones, tablets, and Smart TVs. Despite the consumption explosion, advertisers are yet to master playing to the gallery with mobile video.

The reason for this is simple. The underlying approach and technology powering video ad experiences on modern devices widely stem from the TV or desktop era. The ability of connected devices to deliver a highly personalized, contextual, and TV-like viewing ad experience is truly incredible but requires videos to be powered by mobile-first technology. Unfortunately, most mobile video ad experiences today continue to be built from TV or desktop-based, browser-first technologies resulting in very poor consumer experiences and decreased media effectiveness for advertisers. For instance, the average video viewability on mobile for a TV or desktop-based asset remains below 55%, while that for a mobile-first video via the InMobi Exchange comfortably lies above 80%.

Perhaps the most fundamental issue remains the lack of focus on mobile-first principles: truly understanding mobile environments to get the end-user experience right.

## Press Play without Latency

On average, mobile video ads take over five seconds to load, and with user attention steeply declining after the two-second mark, this is simply unacceptable. This latency in ad loading time, frequently caused by being unable to pre-cache a video on a particular device, severely damages the consumer experience and is the major contributor to the user drop-off that ultimately results in low completion rates averaging less than 50% and subsequent poor viewability metrics across connected devices.

## The Future is VAST, The Future is Now

Unlike desktop, users spend 90% of their mobile device time in-app. Frequently used video technology such as VPAID is only optimized to deliver ads on desktop browsers, depending on methods like Javascript tags and cookies, that doesn't work inside mobile app environments. The VPAID standards were created years ago and were never intended for use in the mobile app environment, so it comes as no surprise that VPAID ads perform poorly on these devices. By adhering to a VAST standard across connected devices' native players, publishers can pre-cache video advertising, and deliver a buffer-free ad experience for a higher media performance for buyers.

## Mobile First, Not an Afterthought

The inherent nature of mobile devices makes them perfect for delivering immersive video messaging with relevant brand actions to a consumer's current location and mobile context. By leveraging the combined power of sight, sound, and touch, mobile devices can now deliver personalized ad experiences that allow brands to truly differentiate themselves in a cluttered space. By continuing to run ad campaigns that are not interactive or worse, not optimized for mobile-native environments, advertisers are losing out on the opportunity to truly engage their users and meet their campaign ROI as well as maximize ROAS. Collectively, these issues complicate matters for the mobile video ad ecosystem, hindering the growth of the industry. There is the need to look beyond short-term gains within video planning, forcing mobile to be a small part of a cross-device video strategy.



## The Advertiser's Checklist for Doing Mobile Video Right

By focusing on the technology that is native to connected devices, brands can ensure that consumers are able to receive a seamless video ad experience and translate it into better media effectiveness. Advertisers must:



**Include in-app mobile video as part of your digital media video buys, not just mobile web and desktop**



**Adopt the VAST standard for mobile in-app video**



**Leverage MRC-accredited viewability partners that understand in-app video measurement**



**Go programmatic for increased efficiency and transparency**



**You are building a resilient brand if:**

1. You are delivering a buffer-free mobile video experience on mobile
2. You are quick to adopt VAST video standards to scale with mobile video advertising
3. You are incorporating interactive elements in mobile video, giving consumers a delightful two-way interaction



## Chapter 2.4

# The Rise and Rise of the Growth Marketer

*The following article has been written by Mr. Himanshu Kulkarni, Director of Sales, India at AppsFlyer. and elaborates on the current state, top trends, and the future of growth marketing.*

The pandemic has changed life as we know it and fast-forwarded digital transformation by at least 5-6 years. According to a BCG study, 87% of Indian consumers would prefer to avoid public places. This, in turn, has fueled digital adoption with an increase in smartphone usage by 12.5% a day. This fundamental shift in user behavior means that growth marketers have to compete more fiercely to reach, engage, and retain their customers.

## The Growth Marketer's Arsenal: Data and Customers

To succeed in this new age of the digital consumer and crowded app ecosystem, performance marketers have two primary weapons in their arsenal: data and their existing customer base. With the massive amount of available data, the performance marketer will have to build their quantitative aptitude and couple this with an understanding of user behavior to retain and grow their user base.

Additionally, the existing user base also provides an excellent avenue for optimizing an app's marketing strategy. Current customers can be a strong referral base by leveraging owned media, which serves a two-fold purpose - customer retention and driving down customer acquisition costs (CAC).

In these difficult times, managing costs and growing your user base is imperative for all performance marketers. Utilizing data insights

available at their disposal and ensuring that customer LTV is more than CAC will be critical in 2021.

While quality customer acquisition and retention will be the main challenges for performance marketers, they will not be the only roadblocks for app growth. As performance marketers increase their ad spend to capture more eyeballs, it will attract a higher level of fraud as well. According to AppsFlyer data, \$945M was exposed to app install fraud in APAC in H1 2020 alone. Hence, performance marketers should look to leverage robust fraud protection tools for real-time fraud detection and blocking.

With the fragmented app ecosystem, it does become a challenge for performance marketers to attribute each user to their correct source. Attribution modeling is a crucial component for being competitive in a crowded marketplace. Every

performance marketer should find what works best for them based on user behavior and monetization strategy. To find out which attribution model works best, experiments and then optimizing for the best results would be essential. Though marketers should also be mindful that the more sophisticated a model is, the more resources they'll need to implement it.

The pandemic hit everyone hard, and a WARC report states that media owners saw revenues fall by a combined \$63B in 2020. While some of the losses will be recouped, not all of it will happen in 2021. It is not all a bleak picture, though. Mobile-based services have also shown signs of growth, posting revenue spikes of up to 240% from the start of the lockdown. This indicates a sense of optimism amongst app marketers and an increased desire from consumers to leverage the app ecosystem to its full potential.

## The 2021 Growth Mantra: Automation, Personalization and Measurement

2021 would be the perfect moment for performance marketers to ride the post-lockdown wave of app growth. Performance marketers need to find the right balance between user acquisition and retention. Each aspect of marketing campaigns should be automated, personalized, and measured. The growing trend of automation is highlighted in the WARC report, which mentions that the majority of ad money will be transacted by machines in 2021.

Markets are now well equipped to handle extensive data for optimization, and programmatic media buying will be the way ahead. Many companies are leveraging machine learning to improve media buying and create the look-alikes of super users. Personalization, contextual advertising, and specific targeting will yield better results through programmatic media buying.

Peter Drucker is often quoted as saying that "you can't manage what you can't measure." and performance marketers should follow this adage, as well. They should invest in the right tools for their marketing tech stack to collect, attribute, and analyze all user activity data across paid and owned channels. This will become even more critical in 2021 as performance marketers battle it out to capture the new digital natives' mindshare and achieve marketing efficiency.

## Chapter 2.5

# Steering Intent – Making Search work from Awareness to Conversions

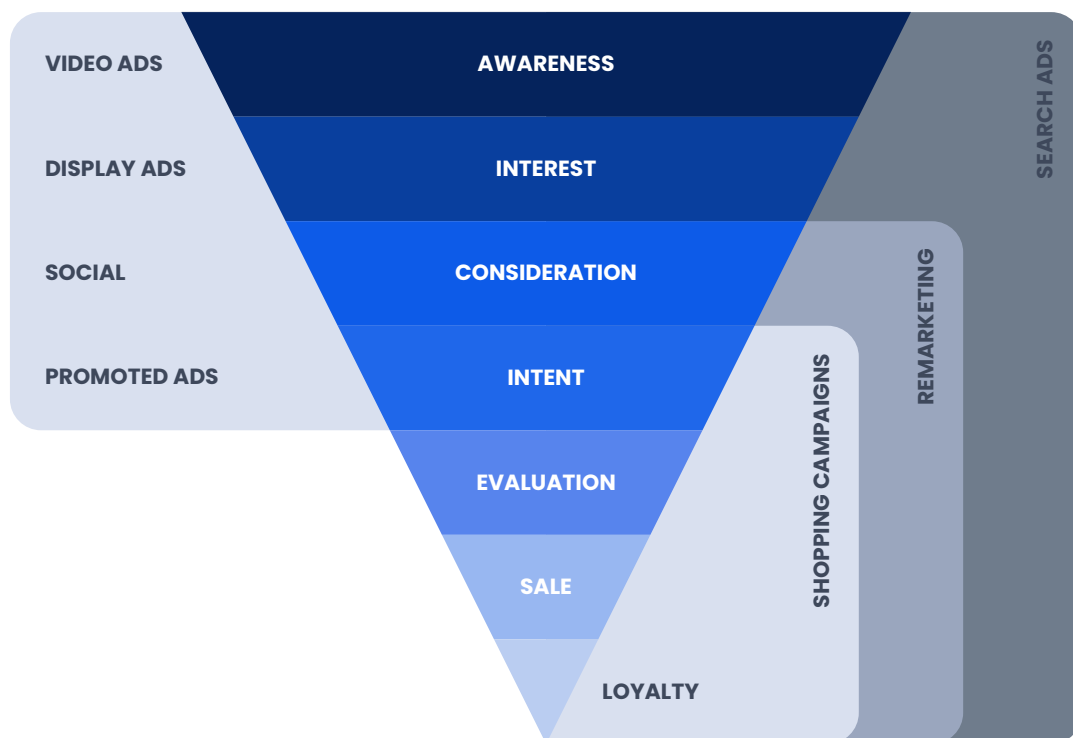
*The following content is from an article titled 'How brands can leverage search advertising to increase brand awareness', which was published in The Economic Times, on November 6, 2020, and written by Rohit Dosi, Director Microsoft Advertising at InMobi. This article acts as an ultimate guide for marketers to help them successfully capture consumers across every stage of the purchase funnel.*

Search influences the consumer at every stage of their decision journey, right from research to the post-purchase experience. This makes Search a crucial medium, not only to drive sales but also to build brand presence and drive consideration. Here is a glimpse of how brands can increase brand awareness and consideration using paid search advertising.

What is Search Advertising? How can I Steer Intent Using it?



Brands must influence the consumer journey at the awareness stage and translate that into user behavior including research-based queries, brand discovery through Search keywords, clicks, landing page visits, and transactions (purchases, form-fills, etc.)





### Awareness Phase

In the early phase, when the user is still exploring the brands in the market with broad searches and category keywords, using generic keywords helps establish a correlation with popular terms and connect with a larger pool of consumers. This strategy works well at category level searches when the consumer is in the learning phase. For example, virus prevention is a category level search that creates awareness.

### Interest & Consideration Phase

The consideration phase is the successor level of awareness, where the searcher knows the product or service but is unfamiliar with the brand and finds relevant matches. Showing ads to users who have initiated their search can help your brand stay on top of the mind of consumers, especially in driving

user intent, when the buyer is in the learning and exploring phases. Brands can use non-brand or generic keywords like “keeping the house clean” which can be the search result that drives user consideration for the awareness term “Virus protection”.

### Intent and Evaluation Phase

The evaluation phase witnesses high intent from the consumer to purchase the product or service and searches for the superlative ‘best’ options. Showing ads with specific keywords that reflect high intent such as “best service”, “price drop”, “compare” can help brands gain user attention and drive further closure of deciding on the purchase.

### The Sale Phase

The moment the consumer decides to purchase the product and makes the

transaction, brands must leverage specific terms like “Purchase the disinfectant from xyz.com” to nudge consumers to make the final purchase.

### The Loyalty Phase

When consumers are likely to develop preferences for a brand, advertisers can drive brand loyalty by reengaging with customers who have already visited a brand’s website. Alternatively, advertisers can even up-sell and cross-sell different products and services through remarketing tactics. Brands can continue to drive engagement by combining broad search terms or shift tactics to cross-selling by leveraging a new set of terms when remarketing, ultimately driving long term engagement.

## The Ultimate Search Advertising Checklist



Did you mean: **Microsoft Search Advertising**

Placement of the ad plays the most pivotal part in driving a stronger impact on consumers across various touchpoints in their shopping journey.



### Run your Brand Keywords in the Best Position



Aim for the best spot in the SERPs. This delivers the overall highest value in terms of higher CTRs and conversion rates. When the consumer reaches the transaction stage, your brand presence will most likely turn into a conversion.



### Leverage Shoppable Ads



Shoppable ads provide a seamless interactive shopping experience for the consumer, with a live feature of viewing and experiencing the product. Leverage the right combination of activating text and shopping ads together to increase awareness and consideration.



### Cross-promote with High-value Keywords



With high-value keywords that are automatically optimized on Microsoft Advertising, brands can reach consumers who are in search of a brand and showcase high purchase intent to drive meaningful conversions.



### Stay Ahead of Competition



Target consumers who are in search of the competitor's brands and engage them contextually to drive incremental acquisitions.



### Keep the Conversation Going



Leverage the power of remarketing to drive maximum ROI. Be it when reengaging with consumers who have abandoned carts, driving consistent top of mind awareness through high visibility ads, or cross-selling new products and services, remarketing should be a key pillar in every marketer's playbook

Showing up along the consumer journey as they research new products, compare models, and make a purchase, can help brands build awareness and ultimately steer intent in a meaningful manner.



### You are building a resilient brand if:

1. You are thinking of Search beyond performance marketing, but rather an across the funnel medium
2. You are using the latest features made available by platforms be it Audiences or Shopping Campaigns
3. You are using Search beyond conversions, and actively re-engage with consumers across Search



## Chapter 2.6

# The Quest for Mobile-first Consumer Intelligence



*The following article is a summary from a webinar conducted by InMobi and presided by Abhinav Mohan, VP and GM, InMobi Pulse and guest speaker Cinny Little, Principal Analyst, Forrester following InMobi's recognition in the Forrester New Tech AI-enabled Consumer Intelligence Report 2020.*

In a world that is rapidly evolving, brands are finding it increasingly difficult to keep up with the constantly changing preferences of their consumers. Even as consumers have struck a balance between the physical and digital world, it is not so with brands.

### Online or Offline: Data-to-insights Remains a Challenge for Brands

One of the biggest challenges that retail brands face is their inability to blend the physical and digital worlds as the current consumer journey is no longer linear. Consumers often shop in-store while searching online and can potentially complete the purchase on either medium. This poses a lot of last-mile challenges due to the lack of in-the-moment consumer feedback which is further exacerbated by inefficient methods of collecting it. Most consumer feedback relies heavily on face-to-face data collection which can lead to both higher costs and lead times. This method is now disrupted due to the pandemic with low footfall in-stores.

Similarly, staying relevant and driving personalization remains an uphill task for brands that have no online or retail storefronts, like in the case of fast-moving consumer goods, who are reliant on channel partners to shape consumer experiences. On the other hand, online/ mobile-first companies are also oblivious to the consumer's behavior and preferences outside the confines of their app and website, despite the abundance of data. In such cases, a combination of first, second, and third-party data can act as a goldmine for brands to understand the consumer's habits, behavior, attitude, and preferences. Additionally, to match up to the fast-paced consumers of today, brands cannot afford to merely gather data, they must extract actionable insights that drive real value for consumers and their business.

### Leveraging the Power of Mobile-first Consumer Intelligence

The only solution to bridge the widening gap between brands and their consumers is meaningful data across all touchpoints that lead to actionable insights. Brands need to invest in mobile-first AI-powered solutions that access real-time data signals from users – demographic, technographic, and location – and combine them to provide out-of-the-box analytics. This has a huge impact on not just how marketers reach consumers, but also on how they interact with them. Here is how the global CPG and digital transformation leader – Unilever, partnered with InMobi in its quest to gather and leverage mobile-first, consumer intelligence.

## Unilever: Mastering the Art of Personalization at Scale



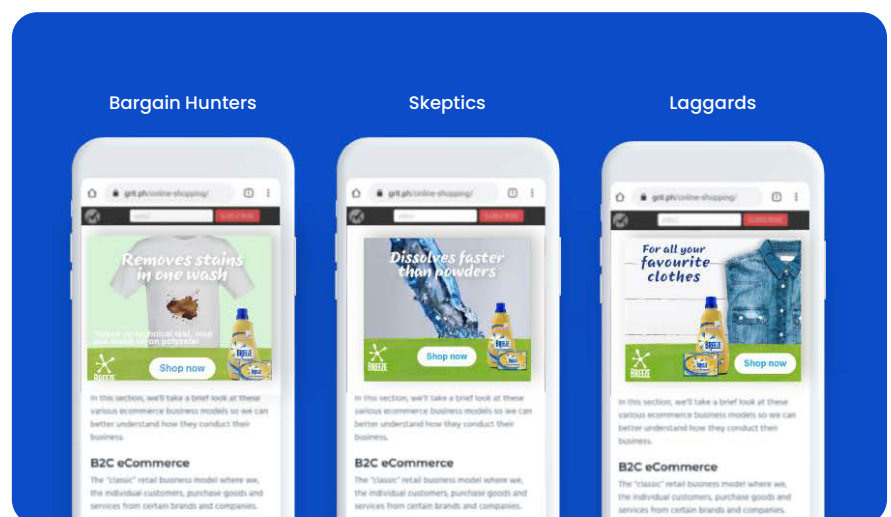
In the Philippines, Unilever provides consumers with laundry products under the brand name 'Breeze'. The detergent market, however, is dominated by powders and bars, with more than 95% of consumers preferring these formats over liquids. Breeze aimed to grow the liquids penetration in the market by familiarizing consumers that are traditionally used to the powder detergents with the new format. To this extent, Unilever needed to understand, identify, engage and acquire customers in a manner that drives a paradigm shift in their washing behavior. With a legacy of increasing convenience and brightening the lives of millions of households around the world, Unilever had to help consumers in the Philippines leap forward for effective washing through liquid detergents.

Unilever, through traditional research methods, had gathered seven key barriers for consumers to switch from powder to liquid detergents. However, this information fell short in providing the lower funnel triggers that are required to create sharp brand messaging. The qualitative insights were not sufficient to precisely understand such a broad category of consumers and to action a plan that drives a shift in their washing behavior.

Unilever leveraged InMobi Pulse, the leading mobile consumer intelligence platform, which accesses over 1.6 billion monthly active smartphone users (MAUs) across the globe. Through the platform, Unilever programmatically surveyed more than 11,500 consumers to understand their category preferences, usage and key barriers to adopting liquid detergents.

Along with an understanding of the washing methods, the mobile research disclosed drivers of preference for detergent choice (category adoption), how Breeze can unlock an improved

laundry experience and an adequate mapping of audiences based on interests (for creating effective communication). Unilever clustered its prospective customers in to three segments of non-liquid detergent buyers and designed personalized communication accordingly. The personalization at scale saw a marked effect on customer purchase patterns. With 1 in 3 consumers who saw the ad stating their intent to purchase Breeze, the brand witnessed a YoY turnover uplift of 30.3% in September 2019 and 24.8% in October 2019. As a mobile-only campaign, it drove a significant uplift.





A problem well understood is a problem half-solved. To gather actionable consumer insights from time to time, brands must invest in a sustainable approach. Using a mobile-first platform, brands can stay in touch with the evolving consumer needs by capturing the real voice of the customer. The mobile is the ultimate means to understand and identifying prospective customers while shaping how to engage and acquire them.



### You are building a resilient brand if:

1. You are moving beyond conventional research methodologies by leveraging the always-on device – mobile, to understand consumer sentiment
2. You are marrying first-party, second-party and third-party data to form a single view of the consumer
3. You are leveraging mobile-first consumer intelligence to understand your target audience and drive precision marketing at scale



# Stepping into the Era of Mobile Marketing Maturity

2020 has undoubtedly been a tremendous inflection point for the global community. While some may look forward to returning to business as usual, marketers must reconcile with the endlessly paraded phrase of New Normal and that a few key emerging trends are here to stay.

Mobile has truly emerged as the de-facto tool supporting both consumers and marketers alike, especially in moments that matter the most. While certain brands have been on the path of building resilience long before the pandemic struck, others are still finding their footing as they closely consider how to build on their Mobile Marketing Maturity.

It is critical for marketers to take comfort in the fact that true innovation and excellence often comes in the face of adversity. A challenge well understood, is a challenge half solved. Advertisers must be cognizant of the fact that mobile is the one true channel that can drive full-funnel efficiencies from awareness to conversions and beyond.

Be it gauging consumer sentiments, identifying the right cohorts, creating delightful custom experiences, or nudging consumers down the funnel with remarketing, brands can do it all on mobile platforms. While this may seem daunting to the uninitiated, marketers must maximize the potential that mobile has to offer by working with experts.

Brands across industries such as retail, finance, education, and FMCG are making the first move by investing heavily in these channels. Be it going direct to consumer, embracing online to offline experiences, leveraging first party data at scale, or creating custom cross device strategies, there is a unique solution that exists for each brand as we move into the next era of marketing and advertising.

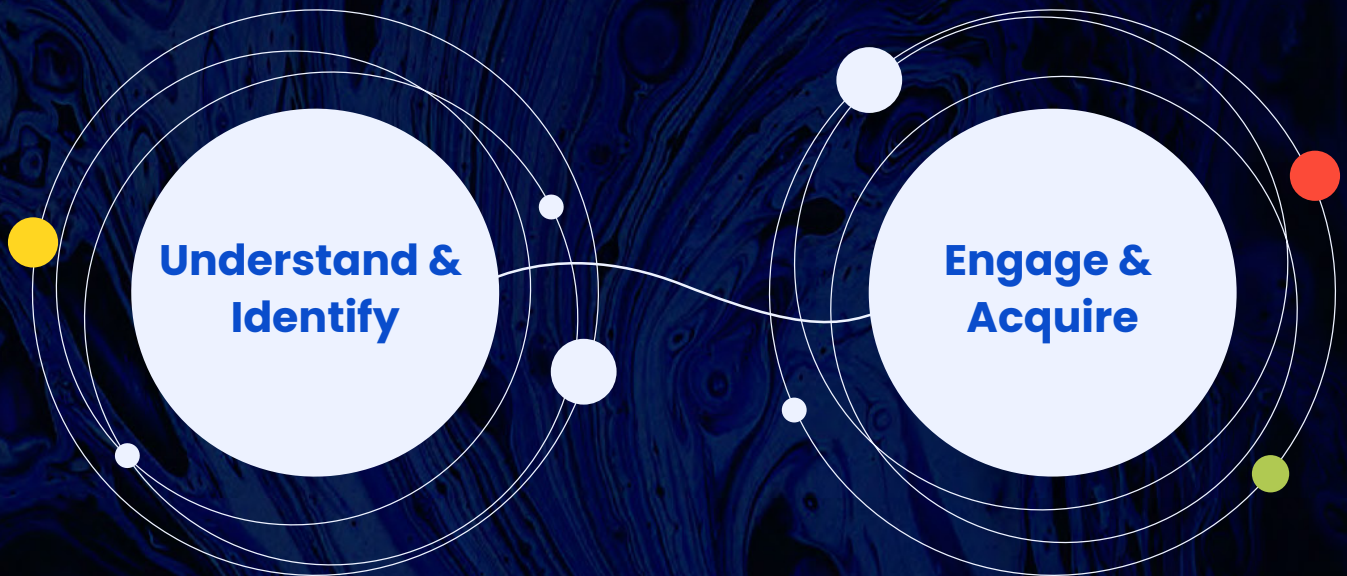
By partnering with experts, brands can build meaningful relationships with consumers that will last a lifetime and ensure that they are future ready.



**Jayesh Ullattil**  
VP and GM, India  
InMobi



# InMobi Marketing Cloud



InMobi drives real connections between brands and consumers by leveraging its technology platforms and exclusive access to mobile intelligence. Its Marketing Cloud creates new paths for brands to understand, identify, engage and acquire connected consumers.

Powered by

Mobile Intelligence

Transparent

Always On

Integrated

Interested in learning more? Write to us at

[mobilemarketing@inmobi.com](mailto:mobilemarketing@inmobi.com)

## Bibliography/References

1. *How COVID-19 has changed consumer behavior on mobile forever*, App Annie, HI 2020
2. *Coronavirus Research Multi-market research Wave 5*, GWI, July 2020
3. *Covid-19 to push India's monthly active internet user base to 639mln*: Kantar, May 2020
4. *Coffee with Comscore - India*, Comscore, June 2020
5. *Mobile games generate 1 billion downloads each week*, App Annie, 2020
6. Priori data, Jan - Oct 2020
7. *Mobile gaming revenue surged 27% year-over-year to \$19.3 billion in Q2 2020 amid COVID-19*, Sensortower, July 2020
8. *A year off script: India's Media and Entertainment Report*, KPMG, 2020
9. *Impact of Coronavirus on how India pays*, Local Circles, 2020
10. *EY's Digital Consumer Survey: Shaping the new normal*, EY, June 2020
11. *India's data consumption on OTT surges 947% between March to July*, DE-CIX, 2020
12. *Premium India on Search*, Microsoft India Advertising Report, September 2020
13. *Digital 2020*, Hootsuite, 2020
14. *Audience Insights Mobile Gaming APAC Report*, InMobi, 2020
15. *Global Games Market Report*, Newzoo, 2020
16. *Coronavirus impact sends app downloads, usage and consumer spending to record highs in Q2*, App Annie/TechCrunch, July 2020
17. *The India Opportunity*, Newzoo, 2018
18. *E-commerce industry in India*, IBEF, 2020
19. *BCG COVID-19 Consumer Sentiment Research, India Survey, Wave 5, July-August 2020*, BCG/Livemint, August 2020
20. *India Festive Season Guide 2020*, InMobi, 2020
21. *Marketing in the New Normal - APAC*, InMobi, 2020
22. *Digital Ad Spending by country*, eMarketer, 2020
23. *Mobile Ad Spending by country*, eMarketer, 2020
24. *COVID-19 Consumer Sentiment Snapshot - APAC*, BCG, May 2020
25. *Crisis Consumption: An Insight series into TV, Smartphones and Audiences*, BARC Nielsen, 2020
26. *The State of Mobile Ad Fraud in APAC*, AppsFlyer, 2020
27. *Global Ad Trends: The State of the Industry 2020/21*, WARC, 2020
28. *Marketing During a Downturn: An India POV*, AppsFlyer, 2020
29. *Unilever Breeze Case Study*, InMobi, 2020





# Contributors

## Research & Content

Rajesh Pantina  
Head of Marketing, Asia Pacific

Pooja Kalloor  
Global Research Lead

Sreeshna Ravindran Sreekishan  
Integrated Marketing Manager, Asia Pacific

Aishwarya Sridhar  
Senior Associate, Partner Marketing

## Design

Saja Skanda  
Art Director

Anoop Kumar  
Senior Art Director

## Special Mentions

Himanshu Kulkarni  
Director of Sales - India  
AppsFlyer

