



Digital 2021


Adapting to The New Normal





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Street view by Punit Modhgil



Dear marketing colleague,

"The future looks exciting," wrote my colleague Rhea Jain in her editorial for our 2019 annual state of online marketing report.

And so we ventured into 2020, knowing little what was in store.

I was enjoying a well-deserved long nap, (alright, call it a sabbatical) from my last professional assignment as a CMO when I got the COVID-19 wake-up call. It is being touted as the disruption that happens once in a century, and clearly the snooze button didn't help me.

With the heightened awareness of the big reset, I was seeking answers. I noticed in the first few months that India marketing community was responding very well even in these unfamiliar times. Marketing teams had broken down into individuals working from home. Yes, we knew how to collaborate—but to do this from the comfort of our beds with less-than-powerful computing horsepower for our graphics and snail-like speed with our internet connectivity wasn't easy.

With this backdrop of massive change, cautious optimism and a momentous shift in consumer-producer interactivity, we set out to gather the latest trends and forecast for the annual state of online marketing research study.

We are now in year ten of our annual ritual. Yes, it's hard to fathom, but it is our 10th anniversary for Octane Research. For almost a decade now, we have been diligently tracking the spectacular rise of digital in India as it shifts gears from Internet 2.0 (mobile) to Internet 3.0 (video and local). Over these years it is our endeavour at Octane Research to help you with trends, data, forecast, opportunities and practices that assist you to derive sizable benefits—especially as you plan for these next twelve months.

COVID-19 indeed threw us a curveball (either that or a flighted yorker). It seems Indian marketers have dug in their bat, converted it into a full toss and played a helicopter shot towards the fences. There are lot more twists and turns to this story of how marketers from India took on the COVID-19 challenge and pivoted swiftly. As you turn the pages of this research study, I hope you glean insights on an optimistic and resilient story of marketing transformation that 2020 truly is.

Such a journey of ten years is made enjoyable with like minded company. It is our pleasure to acknowledge DMAasia, IMAI, CMAI, RAI and Digital Vidya for their partnership and continued support and contribution in this industry research study. Special mention for Vatsal Asher, Subho Ray, Kumar Rajagopalan, Pradeep Chopra and Ram Jalan for their support in reaching a high-quality audience for our efforts. A special deep-hearted gratitude must also be given to the over 2000+ marketing professionals who have contributed a fair share of their experience and inspiration in this journey that started in 2010. And this time we have created—with extra love and appreciation—our special Hall of Fame section to honor those who have voyaged with us these many years.

So, thank you. And here's to an inspiring, and brand new, 2021.



Punit Modhgil
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Foreword

A crisis in storytelling?

Dear Marketing Maven,

Storytelling. It's what's at the heart of the brand building process. But these are unprecedented times. A world that had to operate in lockdown mode; where social distancing and remote working are the new normal; where misinformation constantly distorts the view.

So, how does one continue to tell stories? And in a world that was gripped by fear, what kind of stories does one tell? It's a crisis for which there are no frames of reference. But a few brave marketers have risen to the challenge.

Working with empathy, with courage, and with imagination, they have unlocked new kinds of stories to tell. And new ways to tell those stories. In shaping their narratives, they have been mindful of the consumers' new reality: a heightened state of anxiety; a feeling of hopelessness; a quiet dread.

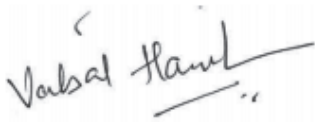
That's why their stories are purpose-driven: they give hope, they reassure, they provoke thought, and occasionally, they release the pressure by making us laugh. In doing so, these marketers have turned the crisis on its head. They have made the most of an adverse situation, using it to open up a fertile space for brave new storytelling ideas.

Our sincere thanks to every participant, Octane Research for their hard work to aptly summarise the findings and ValueFirst for the print partnership.

We hope the insights from the survey conducted with 200+ TOP CMOs to identify "How India Marketers turned adversity into opportunity" serve as the spark to ignite further growth for your brand.

Season's greetings & wishing you a prosperous new year. I am certain it will be time soon to celebrate their achievements & yours.

Warm Regards,



Vatsal Asher
CEO - DMAasia



Balanced Adaptation



Wisdom meets ingenuity.

Balance. Sometimes nature adjusts to equilibrium within physiological dynamics. In aspects of law, one expects there to be an equal distribution between the fairness of justice and the lenience of mercy. In marketing, spend and return play at each other like pieces on a chess board. Adaptation to external factors cautions us to address stabilization in different ways when looking at how to reach our audience and convert leads into customers. It's often necessary for intuitive parties to notice these components and outmaneuver them with tactically-minded plans focused on the long-term. An innately clever marketing leader shall always be thinking, "How have the channels where I reach my audience been altered? And what do I need to modify to gain position?"

There has been unprecedented change in India in 2020, with consumer safety standing at the forefront of internal and external marketing strategies. Many brands have been a part of this year's digital transformation, with our survey responders either accelerating their transfer to digital channels, or becoming a complete digital sales & marketing organization. When asked, social media continues to stand as the biggest increase for both online traffic and engagement out of any platform. A majority of CMOs said that they would use the evolving field of AI & chatbots to increase brand engagement and sales conversion with their e-commerce.

At the same time, the most important type of connective communication is that which assesses customers as individuals. Tools such as localization and enhanced targeting are only as useful as the content with which a marketing head wields them. Awareness and interest are primary steps in the purchase funnel before conversion is theoretically recognized. Thus, the dual perception of expressing brand identity, and assessing consumer's day-to-day experience (which is much different than in 2019), is a determining factor in any effective marketing plan. A hard-selling mindset is less strategical than understanding the mentality of the consumer in the new normal, which is more focused on discretionary spending and contactless purchase. "How have my channels been altered" indeed.

In the COVID-19 climate, communicating a message of sincerity and safety have an initial import that can either flourish or diminish with the tools at a CMO's disposal. Shaping content to fit the mold of consumer choice, with the myriad of customization and personalization options that are at the modern marketer's fingertips, is paramount. We saw how popular a combination can be in such campaigns as "Not Just a Cadbury Ad," where a joint emphasis on hyper-localization data and communal messages of small business support gained major popularity during the festive season.

With location-based marketing, cross-channel automation, and high-impact video content across multiple platforms, marketing leaders are not only increasing the scope of their content but fitting with the changing times, where half a billion consumers own smartphones and the average daily user in India spends 2.4 hours on social media. At the same time, the enduring field of email marketing remains as valuable as ever for communicating and building consumer relationships, with a majority of our responders achieving their 2020 marketing objectives with relatively low subscriber inactivity.

By the way, what did our email marketing responders say was their most-used activity to reduce email spam and clutter? Increased personalization and targeting. The older meets the newer, the wisdom of the past meets the ingenuity of the future. Balance.

It was my pleasure to work on the 10th Annual Marketing Report for Octane Research, and I hope you enjoy.



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India CMOs Outflank the Impact of COVID-19



A Bird's Eye View

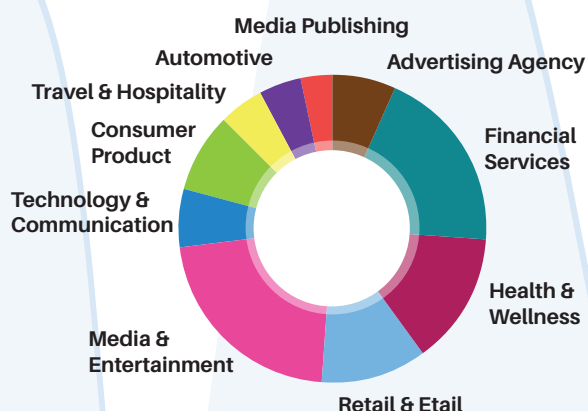
INDIA CMOs BEAT THE IMPACT OF COVID-19

Octane Research engaged with 250+ of India's leading Chief Marketing Officers (CMOs) and Leaders—as part of its research study to gain first-hand insights & perspectives on outflanking the impact of the COVID-19 pandemic.

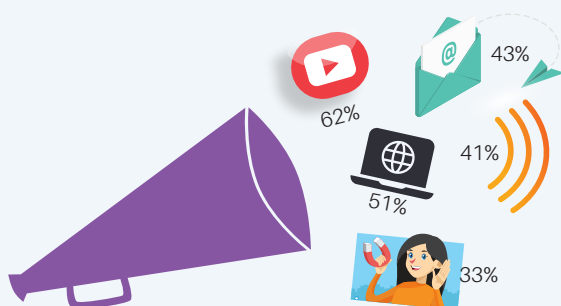
India CMOs increased budgetary spends even as sales declined during the lockdown ▼



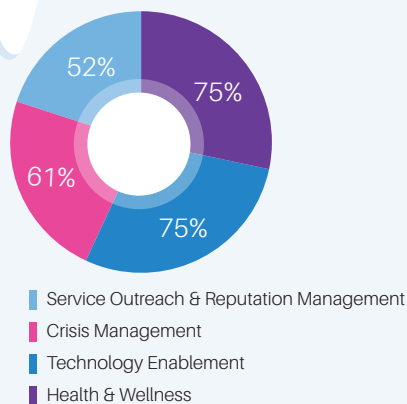
TOP 10 industry-wise break up of respondents ▼



India CMOs reveal the TOP 5 marketing channels that delivered the highest ROI Impact ▼



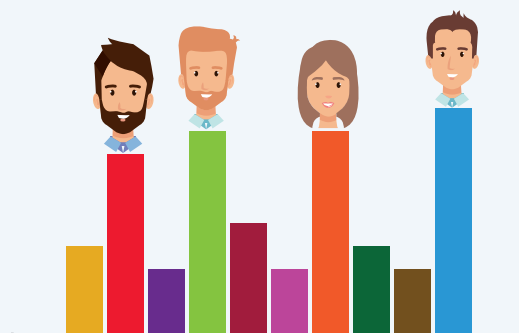
The TOP 5 creative & communication spends that created the most Impact, in the lockdown, for CMOs ▼



India CMOs are more hopeful that their industry may have faster economic recovery than the over all economy ▼



4 in 10 CMOs turned adversity of COVID-19 Lockdown into Opportunity ▼



Breaking Barriers Unshackling Growth

Figure 1: Unsurprisingly, 8 out of every 10 CMOs in our research revealed sales declined by as high as 60% during lockdown



Figure 2: However, CMOs increased marketing investment by 35% between April-July 2020



The next section of DMAasia's research reveals the impact of marketing investment by CMOs in India during the lockdown.

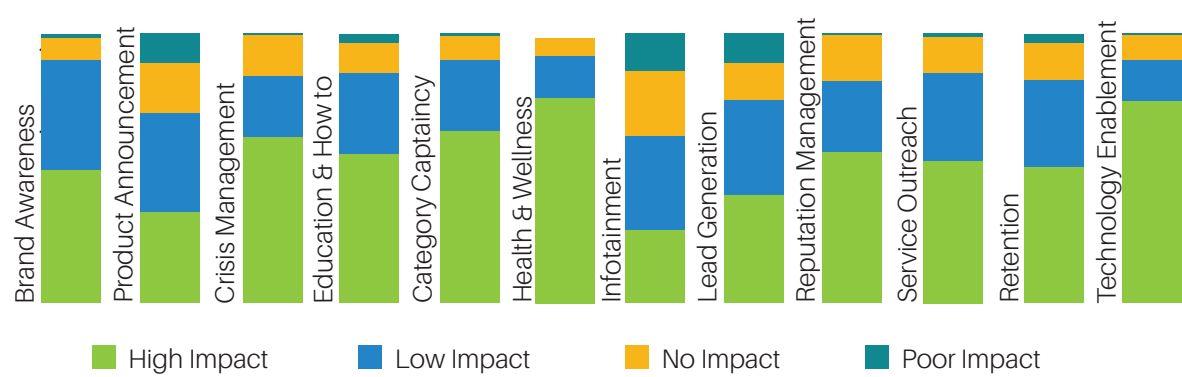


High Impact Spends by India CMOs in Lockdown



High Impact Spends by India CMOs in Lockdown

Figure 3: India CMOs rank the creative & communication spends by the impact they created



An overwhelming 75% of India CMOs ranked health & wellness and technology enablement as the TOP two creative & communication marketing spends in terms of the impact they created.

1. Health & Wellness

Citizens sought safety, security and reassurance during the pandemic as the impact of the pandemic came to the fore amidst the lockdown.

India CMOs reached out to consumers with communications centered around health & wellness activities.

Tupperware shared videos of healthy cooking recipes on its social media channels during lockdown.¹

Fevicol uploaded a picture of a door on their Instagram handle—with the caption “Ab sabse mazboot door—INdoor.”—urging citizens to maintain social distance and stay home during lockdown 2.0.²

2. Technology Enablement

India CMOs responded to the challenge of the lockdown by steering their mindset and strategy to a “Digital First” approach. They proactively leveraged technology to reach out to consumers online, engaged them with digital marketing— to encourage purchases via self-owned and third-party e-commerce platforms. They also invested in post-purchase redressal systems in order to better serve consumers and resolve their issues.

According to Jai Ganesh Ramnath, Managing Director, Fresh and Honest Cafe (Lavazza India), “Lavazza used to derive 95% revenues in India from Business-to-Business (B2B), hotels, restaurants, cafes and public locations prior to the lockdown. However, Lavazza quickly scaled up and leveraged its eCommerce platform to satiate its consumers’ desire of ‘that perfectly brewed cup,’ and has witnessed a steep rise in traffic on its eCommerce platforms recently.”³

Tupperware is training and equipping its direct selling salesforce with technology-enabled virtual solutions for driving sales and enhancing consumer outreach and engagement.⁴

3. Education & “How To”

63% of India CMOs participating in DMAasia’s research directed their communication & creative spends towards guiding consumers to newer ways of experiencing their brand’s offerings and services. This was facilitated with “how to” videos.

Consumer-friendly brands like Tata Voltas shared videos on its website informing customers on how to solve common Air Conditioning complaints such as cleaning filters.⁵

The communications activities by banks focused on educating consumers to perform banking activities online & on mobile devices amidst lockdown. State Bank of India asked its customers to follow six important protocols in order to safeguard their personal information from fraudsters.⁶

HDFC Bank ran a festive campaign on digital channels with the tagline: “The way we celebrate Eid this year may be a little different, but the joy we feel is just the same.”⁷



4. Crisis Management

61% of India CMOs highly ranked the communication & creatives spends centered on managing the COVID-19 crisis in a responsible manner. This created a significant impact for their businesses.

Marketing leaders had an internal and external communication plan in place identifying crises—employees, consumers, business partners, suppliers, shareholders and other stakeholders. The messaging was customized for each stakeholder group—and focussed on a mix of their business’s resilience, new ways of working, health, safety, and, physical & psychological well-being.

The Bajaj Group’s chairman, Kushagra Bajaj proactively sent out a strong confidence inspiring message to his employees: “no one will lose their jobs.”⁸

At mining company Vedanta, managers conducted regular online team huddles. The company also offers psychological counseling helplines to employees facing anxiety and stress-related problems.⁹

A variety of communication channels and formats— from e-mails, webinars, newsletters, videos, and even pandemic-specific internet pages—were used by companies to engage their workforce and keep them informed amidst the lockdown.

5. Services Outreach & Reputation Management

52% of India CMOs said they focused on reaching out to consumers with highly relevant services during the lockdown.

Reliance Jio launched special ‘Work from Home’ plans for uninterrupted service as consumers utilized more data while working from home amidst the lockdown.¹⁰

CMOs in India were equally prudent about their brand’s reputation. Lifebuoy selflessly ran ad campaigns for cause-related public interest on digital, print and television formats.¹¹ The communication focused on prudence for washing hands with any brand of soap to stay safe from the virus. The company also stressed that the ad was not for promoting sales, but to spread awareness.

6. Brand Awareness & Consumer Retention

49% of CMOs in India focused on enhancing their brand's awareness and retaining consumers amidst the lockdown.

Consumer loyalty oscillated as movement of goods was restricted and shoppers focussed on off-the-shelf availability of products. India CMOs used digital media to sustain their brand's awareness while engaging with and retaining consumers in meaningful ways. ITC, a leading conglomerate, partnered with food delivery service providers Swiggy and Zomato, and even leveraged the delivery network of pizza restaurant chain Domino's to ensure supplies of essentials remained uninterrupted during lockdown. This ensured sustained awareness, brand recall and consumer retention.¹²

7. Product Announcements

Unsurprisingly, only 33% of CMOs in India said that their creative and communication spend was on product announcement.

This was largely geared towards categories that eased the load of household chores amidst lockdown, and helped consumers better manage work-life demands. Some of the categories that marketers say experienced an increased demand during lockdown were laptops, dishwashers, washing machines, vacuum cleaners and air purifiers.

Insurance players launched COVID-19 specific health care plans—that could be availed online—after Insurance Regulatory and Development Authority of India (IRDAI) instructed companies to offer two standard Covid-specific covers¹³—“Corona Kavach,” a mandatory indemnity plan, and “Corona Rakshak,” an optional benefit-based plan.

The next section reveals the channels that generated maximized returns on budgetary investments by India CMOs.

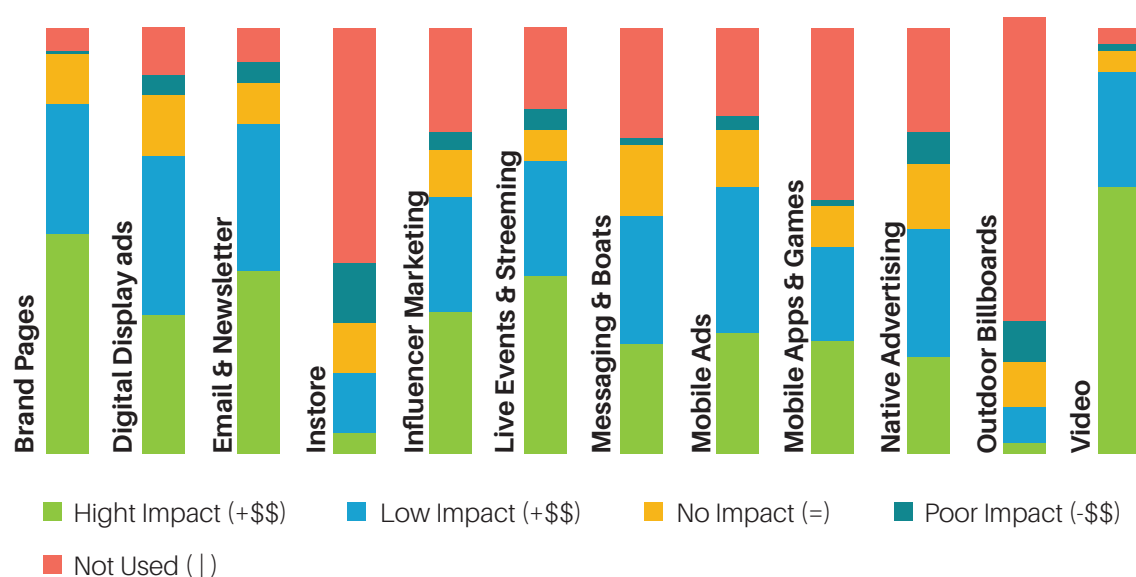
Winning Marketing Channels in Lockdown



India's internet consumption increased by 13-14 percent in the first week of lockdown alone, as per the data from the Department of Telecommunications.¹⁴ CMOs in India responded agilely by increasing their focus on digital marketing—aware that consumers were spending more time online—keeping a tab on the latest developments on the pandemic, working from home and in increased recreational activities online.

DMAasia asked India CMOs participating in our research to rank the channels that delivered the highest ROI and impact.

Figure 4: Rank the importance of communication channels as per their impact during lockdown





Consumers were increasingly online during the pandemic, and therefore spends on mobile and digital display ads were expected during lockdown. Our research reveals the top five channels that India CMOs say outperformed both mobile & digital display ads in generating impact by ROI.

1. Video

62% of India CMOs in our research said that spends on video for consumer outreach delivered the highest return on investment. The digital industry and streaming video players like Netflix, Amazon, Facebook, YouTube and others decided to temporary default their video quality to SD.¹⁵ This initiative was in consumer interest to ensure better access to internet by maintaining the robustness of cellular networks.

A video for “Nutrela” titled #AcchaKyaHua, and promoted with minimal budget, managed to garner over half a million views on Facebook during the lockdown.¹⁶



A 'Mindshare-Vidooly' report¹⁷ has revealed the time spent by the average user on social media platforms more than doubled from 1.5 hours to four hours per day. YouTube saw a 20.5% surge in subscriber base in a span of 45 days during lockdown. Covid-related content also experienced a surge of 199% in terms of engagement.

Social media channels such as YouTube and Instagram undeniably played a key role in driving consumer inclination for short-form, "snackable" videos, both for entertainment and education.

2. Branded Pages, Microsites & Handles

51% of India CMOs in our research leveraged branded pages, microsites and social media handles for marketing promotions & consumer engagement. Promotional microsites allow consumers to have a quick, focused journey based on their immediate need, rather than dispersing their attention. They are also cost-effective in increasing a consumer's engagement by promoting brand specific content.

Kerala Tourism prepared for engaging consumer post-lockdown with six theme-based microsites.¹⁸ Leveraging the emphasis on wellness in view of the pandemic, Ayurveda, Yoga and "Kalaripayattu" were given prominence amongst these microsites.

Samsung promoted its new frame TV models through a branded microsite page on Flipkart.¹⁹ Aster DM Healthcare launched the "Our New Earth" microsite to guide citizens to transition to the new normal living post-lockdown. The website launched in May had logged 340,000 users by August.²⁰

CMOs in India also leveraged their brand's social media handles to actively reach out and engage with their followers. They used their Instagram and Twitter handles to showcase emerging creative talent—and commissioned select creative work to help tell the brand story. The brand "Converse" ran a campaign on new ways to create progress together with consumers.²¹

3. Emailers & Newsletters

43% of India CMOs participating in our study ranked email third in terms of impact & return on investment generated. According to Campaign Monitor, open rates for email increased by 16% in March and email sends increased by 19%.²²



Swiggy, a popular online food ordering and delivery platform, achieved a record click-through rate (CTR) of 7%, and an open rate of 25%, on a user base of millions. (The average CTR industry standard is 1-1.5%.)²³

4. Live Events & Streaming

Research findings from “StreamElements” and Arsenal.gg reveal that the live-streaming sector grew a full 45 percent between March and April; year over year, the industry is up by 99%.²⁴

Non-profit think tank Bridge India hosted nearly 20 webinars on Indian public policy during the lockdown, helping its watchers better engage with national topics.²⁵

Young professionals also hosted webinars to build new networks for themselves. These webinars covered entrepreneurship, coding, digital marketing and other topics of industry relevance.

5. Influencer Marketing

33% of India CMOs across sectors said they found influencer marketing impactful in driving awareness & engage consumers to stay relevant.

Celebrities regularly conducted “Instagram LIVE” sessions to engage their followers.²⁶ In addition, a number of BFSI (banking, financial services and insurance) and e-wallet brands utilized influencers to inform consumers on how their services were relevant during lockdown.²⁷

The India Influence Report published by influencer marketing platform Zefmo Media Private Limited²⁸ revealed 95% of influencers agree that 2020 would see their earnings impacted due to COVID-19. However, 72% are confident in the revival of influencer marketing post-lockdown.

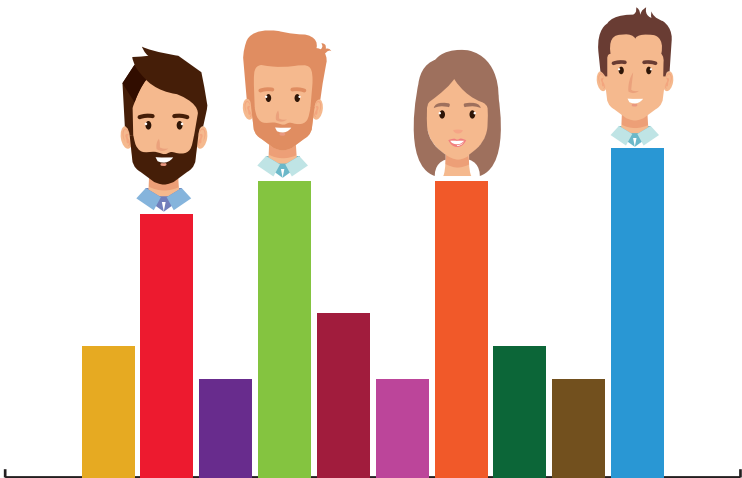
In the next section, our research study reveals how winning CMOs in India turned adversity into an opportunity.

How India CMOs Turn Adversity into Opportunity



How India CMOs Turn Adversity into Opportunity

Figure 5: How many CMOs in India turned the adversity of COVID-19 lockdown into a good opportunity for their business & consumers





4 out of 10 India CMOs in our research study said they were able to pivot adversity into a beneficial opportunity for their business and clients. This inspired DMAasia to analyze how marketing leaders propelled their growth.

DMAasia’s analyses reveals growth driven CMOs sensed & responded to consumer needs with agility. They launch new products & services relevant to the shifts in demand amidst lockdown, and leveraged online marketing to stay relevant and connected with consumers.

Our secondary research details the categories that helped sustain demand amidst the lockdown:

1. Ready-to-Go Meals

Quick fix meals, packaged foods and ready-to-eat products witnessed a rapid increase in demand during the lockdown. This was likely due to a combination of factors: closed restaurants, growing concerns about food hygiene, convenience and saving time on time spend in the kitchen due to an increase in household workload (and even perhaps lack of culinary skills).



For the quarter ending in June '20, fresh packaged food brand 'iD Fresh Food' has seen paratha sales rise by 60% compared to the previous quarter.²⁹

Amul, which usually launches 10-12 products every quarter, tripled the number of its products reaching the market. The brand launched several products under the bakery, ice-cream and cheese categories. It also introduced ready-to-eat packaged foods.³⁰

2. Immunity Boosting Products

Brands responded with immunity boosting product launches during lockdown in order to cater to consumers' demand for health & wellness products. ITC, a major player in the FMCG (fast-moving consumer goods) category, launched the "B Natural +" range, expected to provide immunity through fruit and fibre. Amul launched new "Haladi Doodh" & "Panchamrit" for their respective immunity strengthening qualities.³¹

3. Smartphones

Data by Counterpoint Research reveals India's smartphone user base increased to over half a billion in June '20, aided by pent-up demand which grew during the lockdown.³²

Smartphone brands largely opted for online launch events as Apple, Samsung, Xiaomi, OnePlus and other companies introduced new phone models.

According to retailers, smartphones priced between ₹12,000-20,000 have been in demand in Kerala as the lockdown restrictions were eased in the state in the month of May.³³

Xiaomi has shared that amidst gradual easing of lockdown restrictions, it witnessed sales in about 50% of its offline stores in Kerala over a few weekends, and saw twice the number of its usual demand.³⁴

4. Laptops & Notebooks

Data from the International Data Corporation (IDC)³⁵ reveals that shipments of enterprise notebooks, mostly used for heavy office work, jumped by a whopping 105.5%. Shipments of notebooks surged by an impressive 17.6% during the April-June quarter, despite lockdowns and poor consumer sentiment.



Most information technology services, global enterprises and consulting companies placed large orders for notebooks, while massively cutting down on purchases of desktops.

5. EdTech

Schools and colleges across India transitioned to learning online driving using online video streaming services such as Microsoft Teams, Microsoft LMS and Zoom Meetings to offer such classes. Meanwhile, working professionals also enrolled for online learning to learn and upgrade to newer skills.

India's EdTech market leader BYJU'S saw a triple increase in the number of students accessing its app³⁶, with other start-ups in the space growing exponentially as well.

Even government digital education platforms witnessed an increase in their footfalls according to the data shared by Ministry of HRD, Government of India.³⁷

As per the data, the access to the national online education platform SWAYAM and other digital initiatives tripled in the first week of lockdown. About 50,000 people accessed SWAYAM since March 23, 2020. This is over and above the 25 lakh students/learners, who had already enrolled for the 571 courses of the January 2020 semester on SWAYAM.

A repository of 1900 courses under SWAYAM is being accessed by people from over 60 countries. The significant majority is from India, with students from other countries including USA, UAE, Germany, Nepal, Singapore, Canada, United Kingdom and Australia also joining in.

Videos of the SWAYAM Prabha DTH TV channels are viewed by approximately 50,000 people every day. Meanwhile, the National Digital Library is now being accessed by about 43,000 people daily—which is more than double the number of users who usually accessed it pre-lockdown, according to the HRD ministry.

Although it is early to judge how the current trend, due to the COVID-19 outbreak, will affect the education system across the country, experts believe that it could have a lasting impact on the trajectory of learning innovation and digitization.

6. Power Backup Solutions

TAM's AdEx data³⁸ reveals that household UPS and inverter batteries advertised 307 times more in the print media during the April-June period compared to the previous year. The demand for power back-up products by households likely witnessed an increase as citizens predominantly stayed and worked from home, while children shifted to attending classes online.

In the next section of our research report we share the CMOs outlook on the road ahead for the economy and their industry.

India CMOs Outlook on the Road Ahead



India CMOs Outlook on the Road Ahead

Figure 5: India CMOs predict the recovery of Indian Economy and their Industry



DMAAsia’s analyses of CMOs sentiments for their Industry as compared to the India’s economy reveals the following:



1. Only < 10% of India CMOs are skeptical that the Indian economy will have a sluggish L-shaped recovery and growth post-lockdown. However, an even lesser 3% of India CMOs are skeptical of their industry expecting a sluggish L-shaped recovery and growth post lockdown. India CMOs are more hopeful of a faster economic recovery for their respective industry when compared to the economy as a whole.

India CMOs are hopeful Industry & Commerce may boost economic recovery.

2. 23% of India CMOs expect the economy to likely rebound in two years with a W shaped recovery, i.e. a cycle of sharp decline-short recovery- another decline-then full recovery. Whereas only 15% of India’s CMOS expect their industry to have a delay in rebound with a W shaped recovery.

The monsoon as of August was seven per cent above normal according to a CRISIL report, with rains the most well-spread in three years.³⁹

CMOs are likely pegging hopes on consumer demand fueled by both FY’20 festive season and favorable performance of the agriculture sector post the FY’20 monsoon.



The better sentiments of India CMOs on the recovery of their industry may also be driven by increased internet penetration, which is opening up new avenues for marketers to cost-effectively increase consumer reach via e-commerce in urban & rural markets amidst the limitations imposed by the pandemic. Telecom Regulatory Authority of India (TRAI) data for the quarter ending March 2020 reveals that the number of Internet subscribers in India increased to over 743 million.⁴⁰

3. **4 in every 10 of India CMOs** are hopeful that **Industry & Economy will recover** in 12-18 months with a **U-shaped recovery**.

The parity in expectations of the industry's & economy's future may be based on falling unemployment numbers. According to the Center for Monitoring Indian Economy (CMIE) data, an estimated 121.5 million jobs were lost in April 2020. It recovered to 100.3 million in May and fell to The parity in expectations of the industry's & economy's future may be based on falling unemployment numbers. According to the Center for Monitoring Indian Economy (CMIE) data, an estimated 121.5 million jobs were lost in April 2020. It recovered to 100.3 million in May. 29.9 million in June. July saw a further recovery in jobs and the number of jobs lost fell to 11 million.⁴¹

4. **India CMOs' hopes are realistically restrained** of a quick and sustained **V-shaped recovery of Industry & Economy**.

Only 21% of India CMOs expect the economy to experience of a quick and sustained **V-shaped recovery** in about a year's time.

According to a CRISIL report "Silver Lining in Dark Clouds," farm profit per hectare for field and horticulture crops is expected to increase 3 to 5 per cent in the kharif season 2020—boosted by higher crop acreage, expected improvement in productivity and government support. Agriculture accounts for about 15 per cent of India's GDP.⁴²

35% of India CMOs are hopeful their Industry will have a V-shaped recovery and further boost the economy.

This relatively positive sentiment for their industry may be based on the farm sector's performance, coupled with a reliance on industries catering to essential commodities and FMCG that experience a comparatively inelastic demand.

Our secondary research reveals exports of certain commodities have indeed gone up. For instance, spice exports from India saw a rise of 34% in rupee terms in June. The automobile sector has also seen an increase in exports. Total exports across categories increased 2.95% to more than 4.76 million vehicles in the fiscal year ending March 31.⁴³

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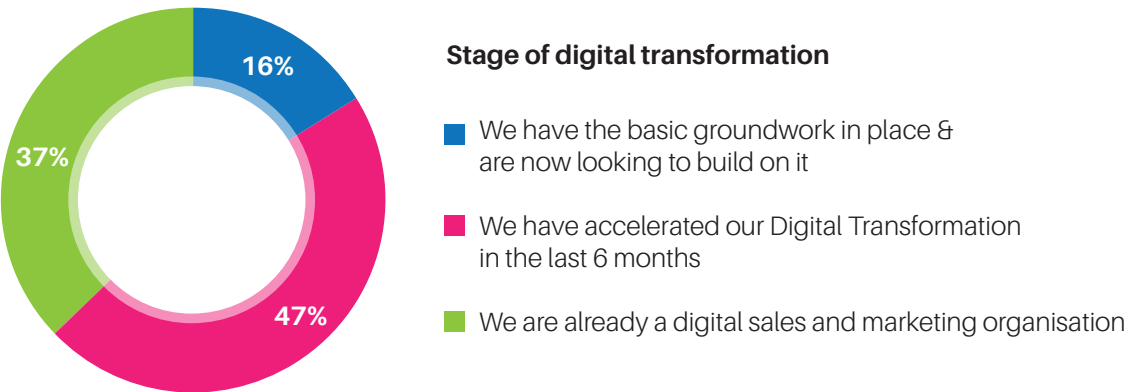
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2.1. Digital Transformation & Ecommerce

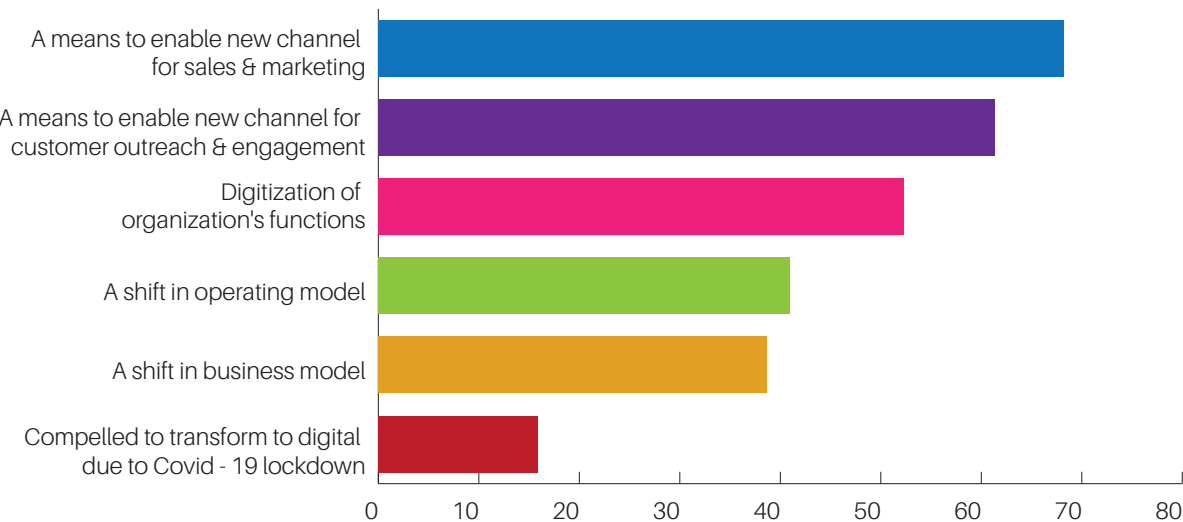
One of the main themes of the year? Digital access to products/services, and constructive communication within ad messaging is evolving quickly in the digital space—no matter the size of the business. A majority of our responses—47%—said that they already thought of themselves as a digitally-transformed sales and marketing organization; 37% replied that they were “accelerating the process” to transform their company.

Q01. Where would you place your marketing organization in the 'Digital Transformation' journey?

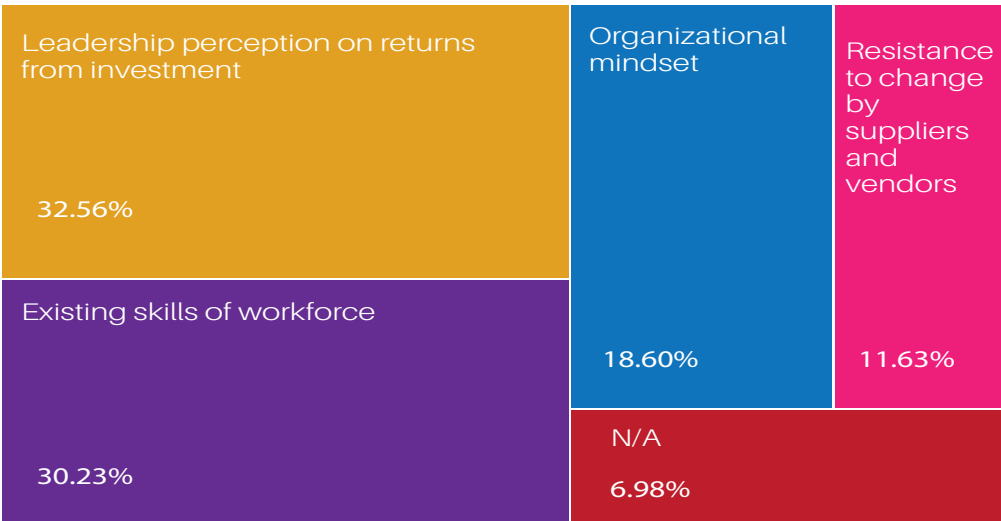


The digital shift has been the main focus of 2020, with thousands of marketers transferring user flow into their brands' products and services over to the digital sector to provide safe and contactless access for their consumers. When asked how they perceived “digital transformation,” 25% of our responders said that it was “a means to enable new channel for sales & marketing.” Another 23% marketers looked at Digital Transformation as a new channel for customer outreach. In total, almost half (48%) of our responders looked at digital transformation as a new channel for customer outreach, including sales, marketing and service.

Q02. How does your organization perceive 'Digital Transformation'? Select all that apply.



Q03. What is the biggest impediment in 'Digital Transformation' of your marketing organization?



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Expert View

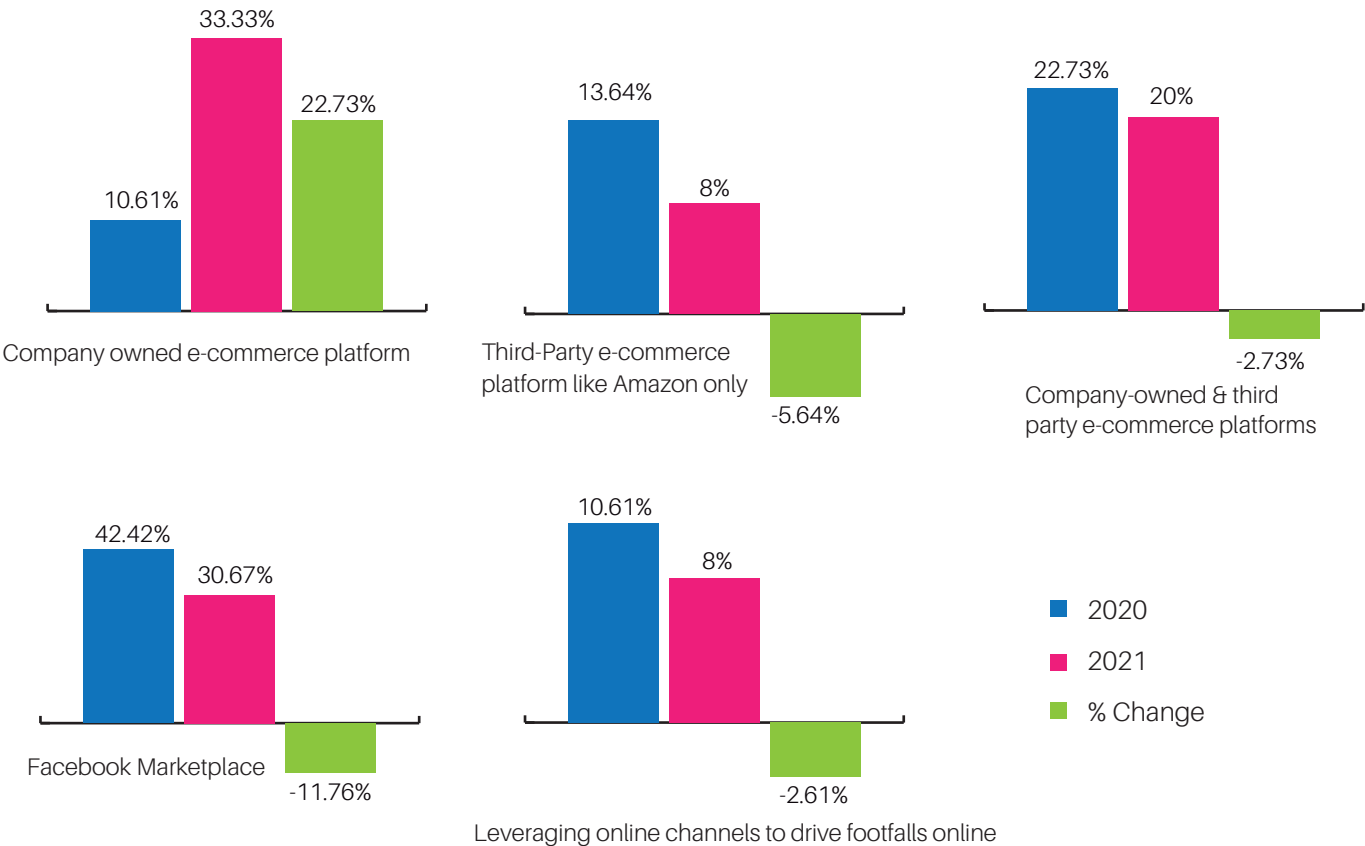
“Digital has long been an associate of pharma marketer but was used sparingly and occasionally as a hobby or to impress bosses. For long time pharma had the advantage of having field reps making one to one call with customers and pitching for products and negotiating sales. With one to one contact impacted badly, pharma marketing has pulled out the digital stuff from closet and is learning to use it for commercial use. The situation is akin to households pulling out vacuum cleaners and brooms when house maids have gone out of circulation.”

Manish Agrawal, Marketing Lead - India & Emerging Markets, Mylan

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In terms of online platforms used by our research participants to drive online sales for their respective organizations, there is a sharp focus towards building their own e-commerce platform for 2021. There is a sense to reduce dependency on third party platforms for online sales.

Q04. Which online platforms have you used in the last one year to drives sales online (and also your plans for 2021)?



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Expert View

Holistic marketing and organisational level digitisation will be the way forward.

Bhuvana Subramanyan, CMO, Randstad.

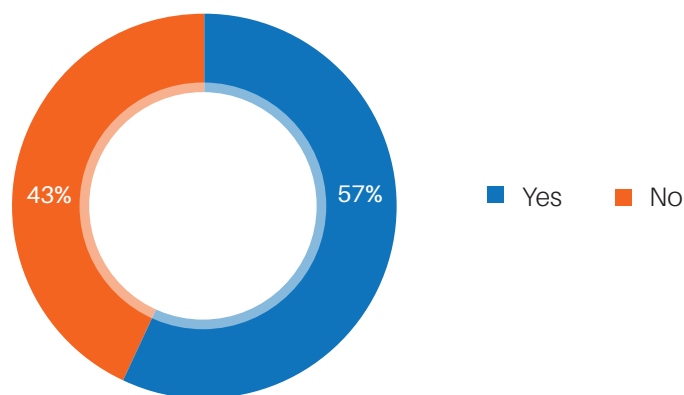
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2.2. Online Marketing - Channels, Budgets, COVID-19 and RoI

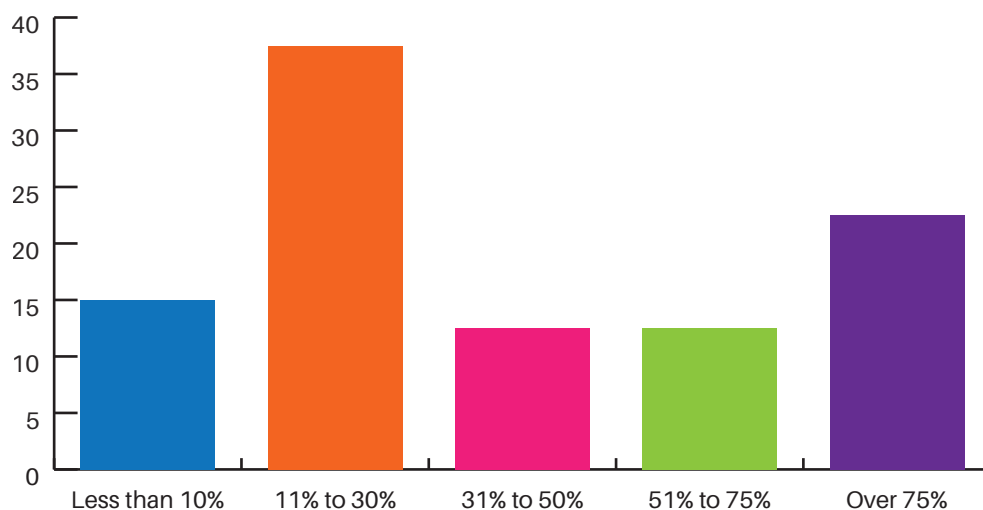
Positivity, achieving small victories, and resilience through adversity continue to be major messages that businesses amplify within the new normal.

With regards to budget, a high percentage of our CMO responders (57%) said that they did not reduce their budget during lockdown. Along that line, 55% will be increasing their marketing budget by at least 11% in 2021 (details in the next chapter).

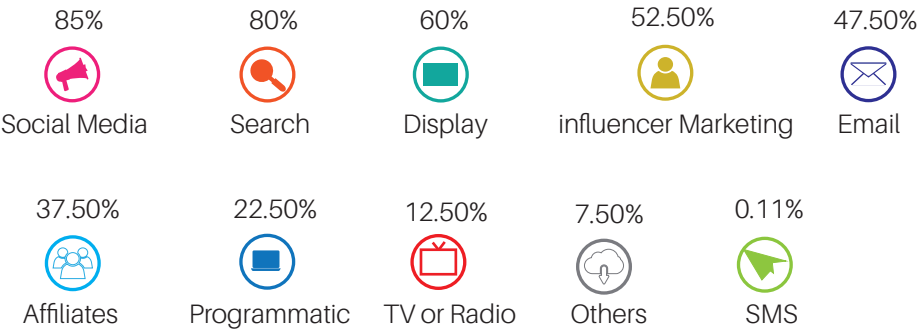
Q05. Given the COVID-19 lockdown, did you reduce your online marketing budgets for the financial year?



Q06. For this financial year, approximately what percentage of your marketing budget is allocated to Online Marketing activities?



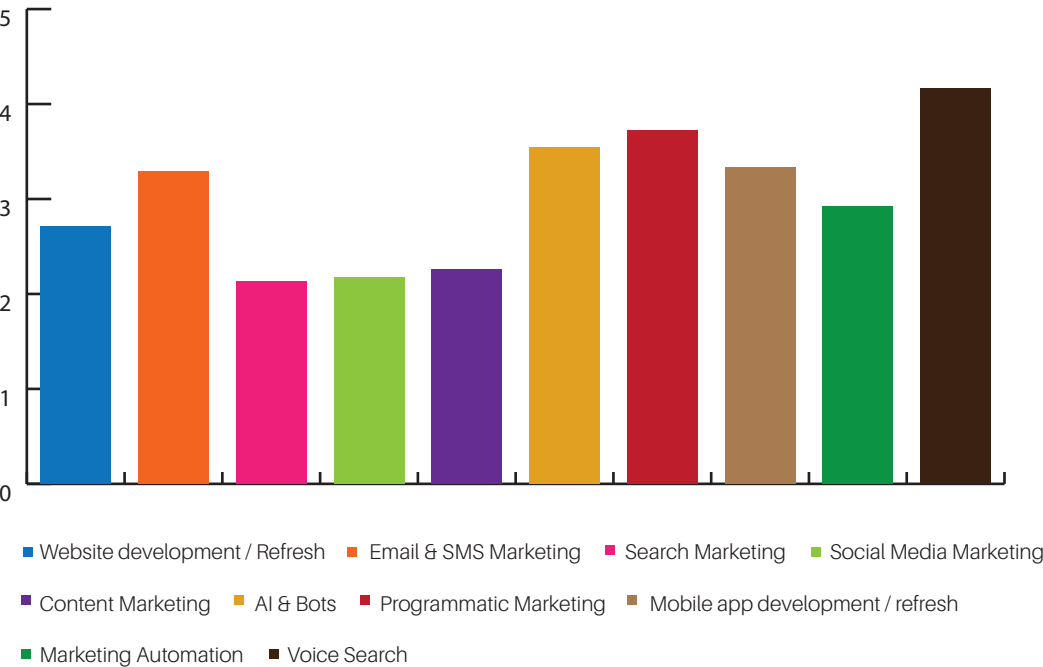
Q07. In 2020, which of the following were your primary online marketing channels? (Select all that apply)



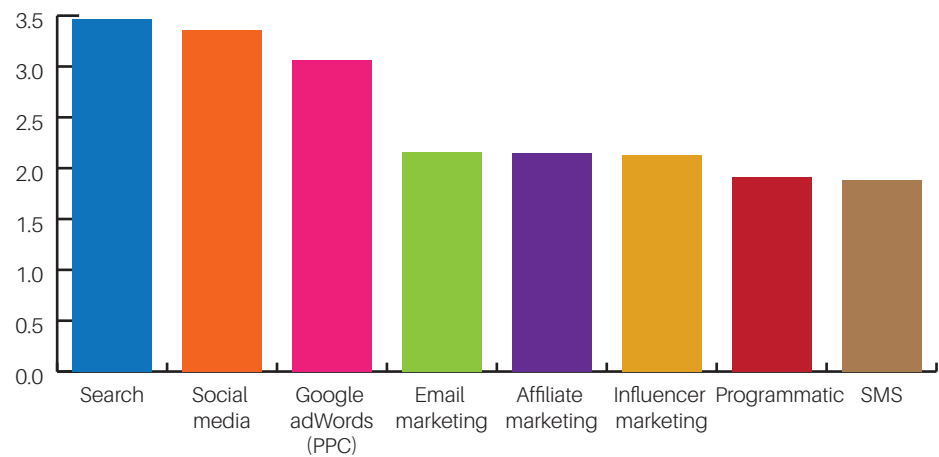
Social, Search, Display, Influencer Marketing and Email are the TOP 5 online marketing channels. Interesting to note the rise of “Influencer Marketing” in this year’s research.

In our earlier studies, we have forecasted the growth of voice search. This year Voice Search, Programmatic Marketing, Email & SMS are the TOP 3 online marketing activities with the maximum increase in budgets for 2020.

Q08. Which Online Marketing activities saw the maximum % increase in your budget in 2020? (Select all that apply)



Q09. In 2020, what is the revenue impact (ROI) on your business from the following digital channels?

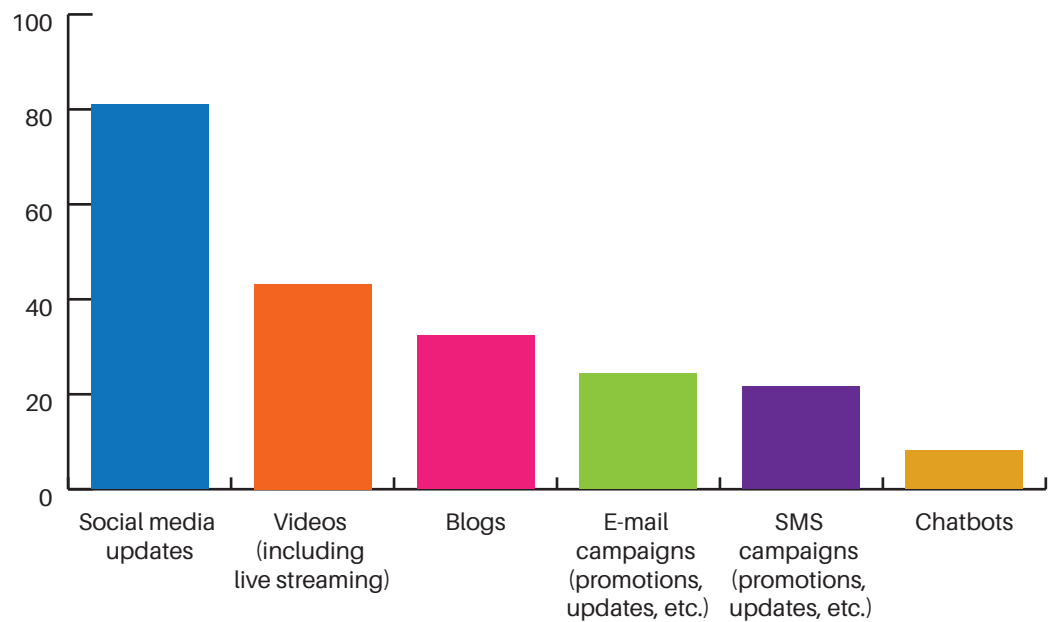


For 2020 Search, Social and Email are the TOP 3 channels in terms of revenue impact (ROI) on marketing investments.

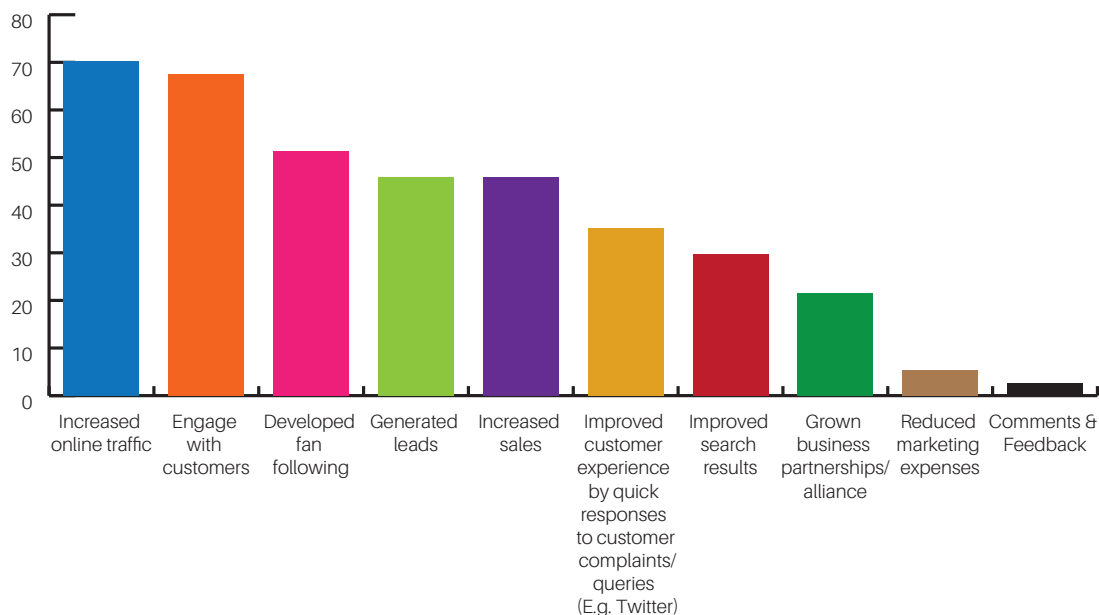
Q10. Which digital channel gives you maximum customer engagement? (Select all that apply)

Video continues to be the most stimulating type of content for the consumer, as well as offering maximum engagement. Marketers said that video—along with live streaming—gave their brands the maximum amount of customer engagement; only social media had more.

Blogs and Email campaigns continue to be in the TOP 5 channels for customer engagement.



Q11. How has social media marketing benefitted your marketing efforts?



Social media continues to be the most engaging type of content for the consumer, as well as offering a communication platform for users. Marketers said that updates on social media gave brands the maximum amount of customer engagement.

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Expert View

Gone are the days when marketers had only a handful of channels to focus on. The marketing landscape has been constantly evolving during the last 20 years, especially over the last 4-5 years there's been a transformation beyond recognition. Alongside the advent of digital disruption, marketing channels have evolved from a few distinctive channels to a multitude of web, search, social media, mobile and video channels. Keeping customer centricity & digital ecosystem in mind it's time to be present and future ready with the use of IOT, AI, ML, digital footprints, content marketing, marketing automation, multi/omni channels to serve customers better and to be ahead of the curve.

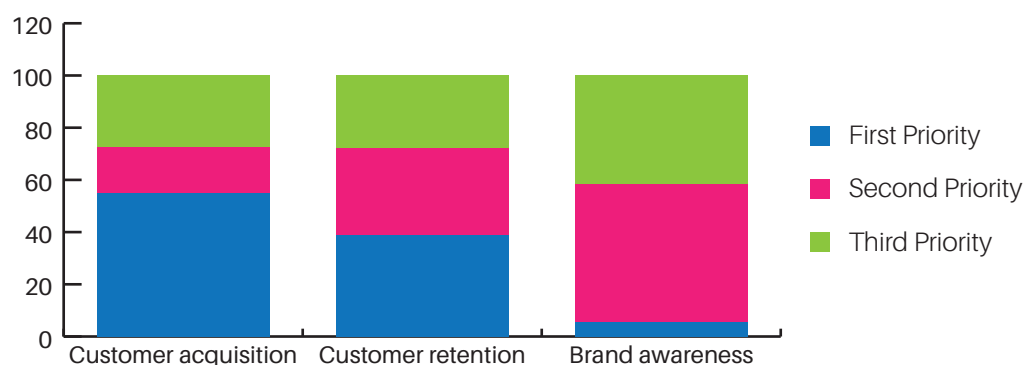
Prashant Awasthi, Marketing Head, Siyaram Silk Mills

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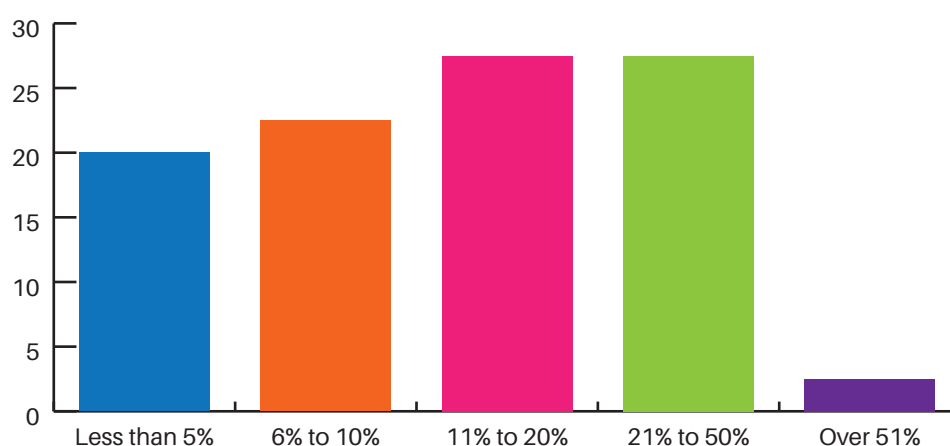
2.3. Marketing Budgets 2021

Customer acquisition seems to be the primary marketing goal for 2021. This is understandable as businesses gear up for growth as an agenda for 2021 based on an expected increase in consumer demand. With regards to budget, a majority of our CMO responders (58%) said that they did not reduce their budget during lockdown. Along that line, 55% will be increasing their marketing budget by at least 11% in 2021.

Q12. What is your primary marketing goal for 2021?

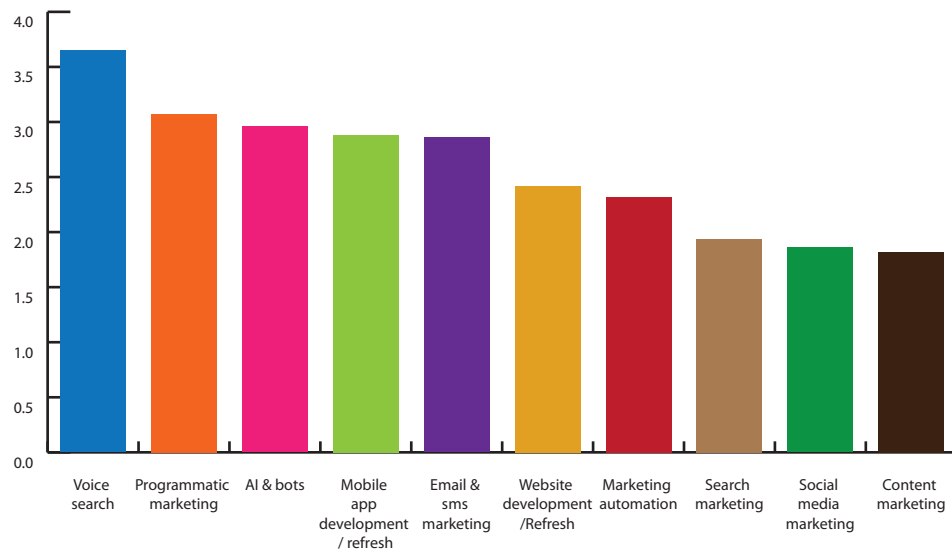


Q13. What is your likely increase in online marketing budget for 2021?

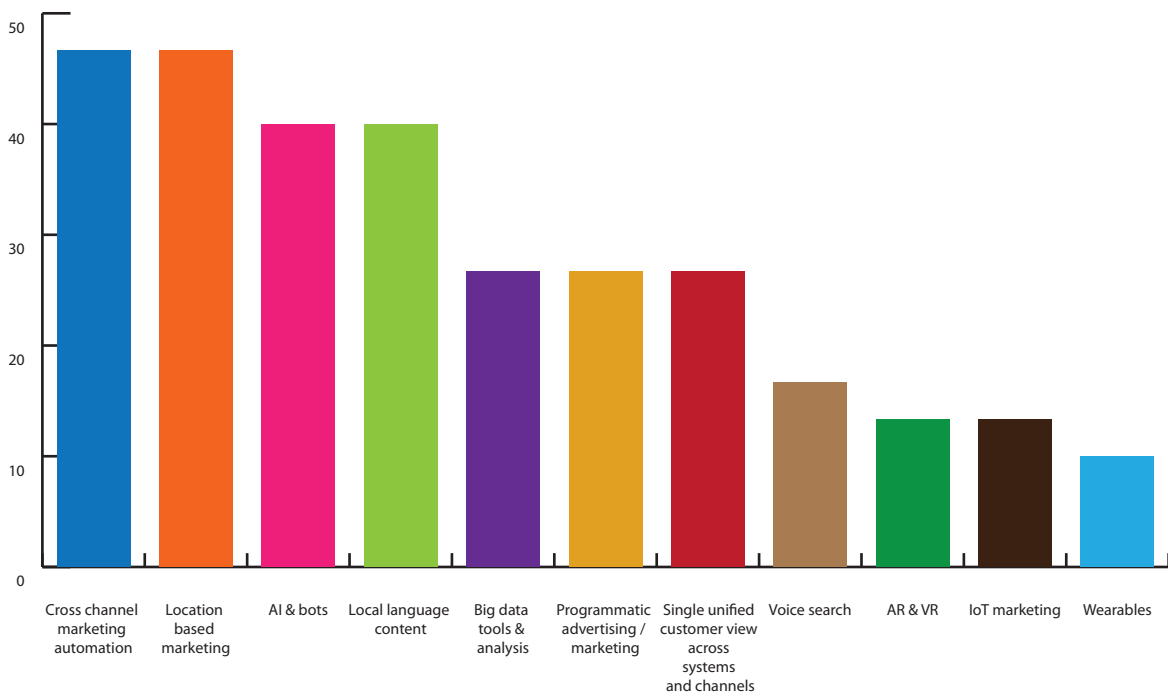


Respondent data is on the Y axis in terms of % respondents.

Q14. Which of the following online marketing activities will see an increase of your marketing investment in 2021?



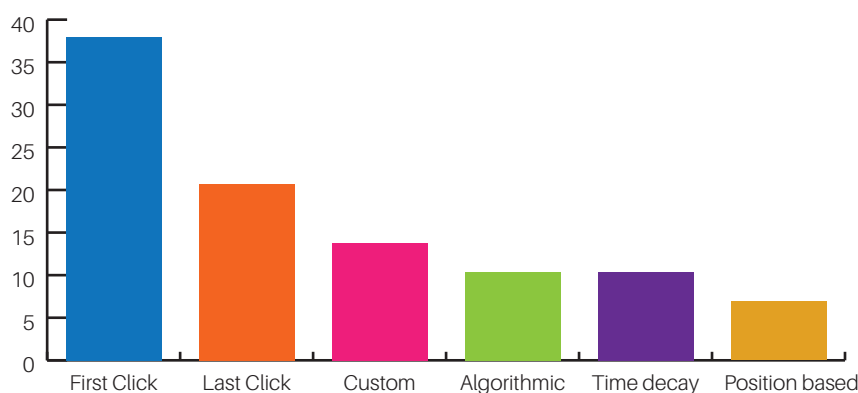
Q15. In which new tech areas/marketing projects do you plan to invest in 2021? (Select in order of importance.)



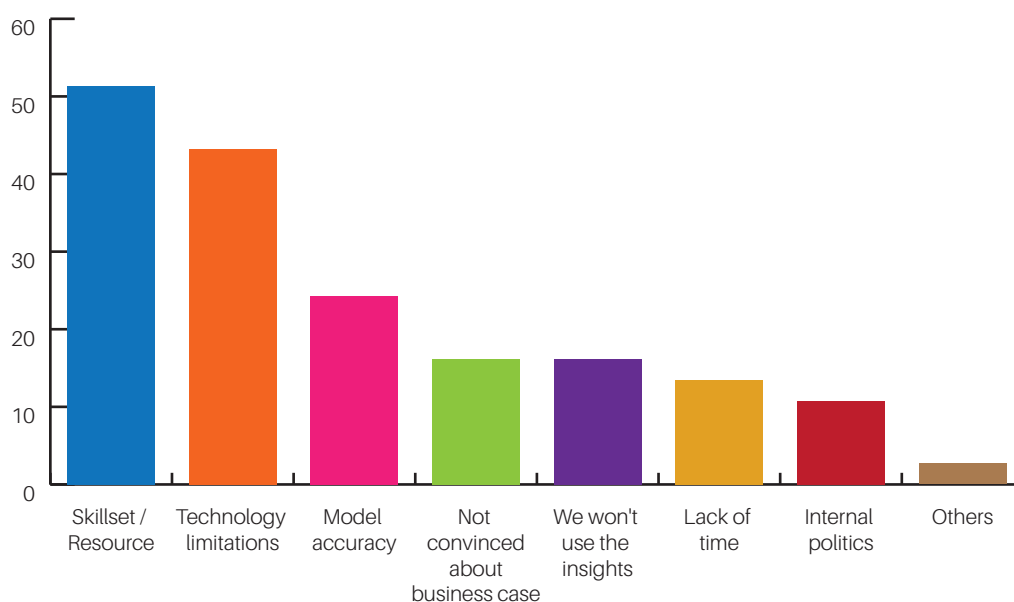
2.4. RoI & Attribution Models

As digital spends have increased as a % share of the marketing investments for India brands, we have seen an increased sophistication of measurement techniques over the years. Last click (even though somewhat flawed as per best practices) seems to be the most popular attribution model. In this section we also explore what are the biggest hurdles for India marketers to move towards advanced and more accurate attribution models.

Q16. For calculating ROI, which attribution model do you use?



Q17. What are your biggest hurdles with applying marketing attribution? (Select all that apply)



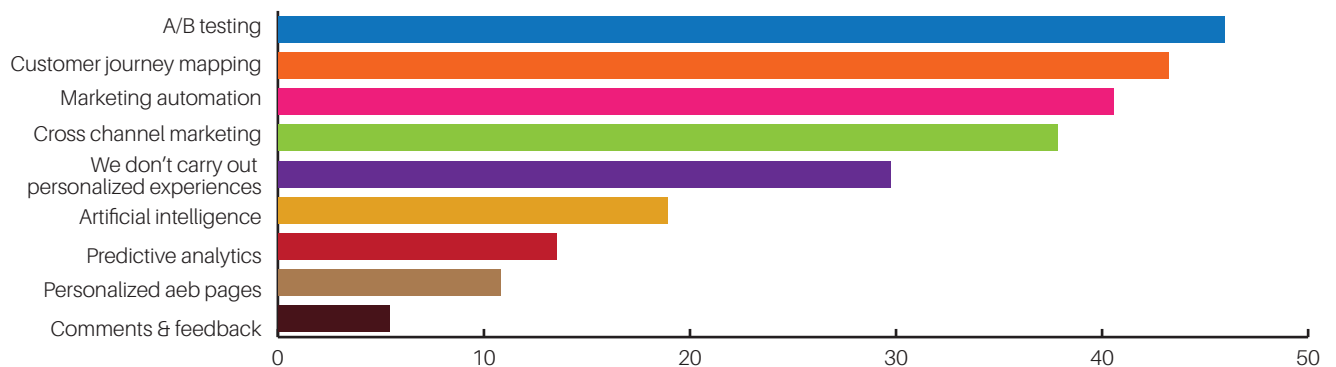
2.5. Automation & Personalization

Constructive communication within marketing is being utilised more in tandem with digital tactics such as personalization and advanced audience targeting. We've seen this in prominent campaigns such as the "Not Just A Cadbury Ad," and we of course saw this in our India marketer survey responses: majority of our responders have been using automation in digital advertising and social media, and using customer journey mapping and cross channel marketing, respectively, for their customer personalization strategies.

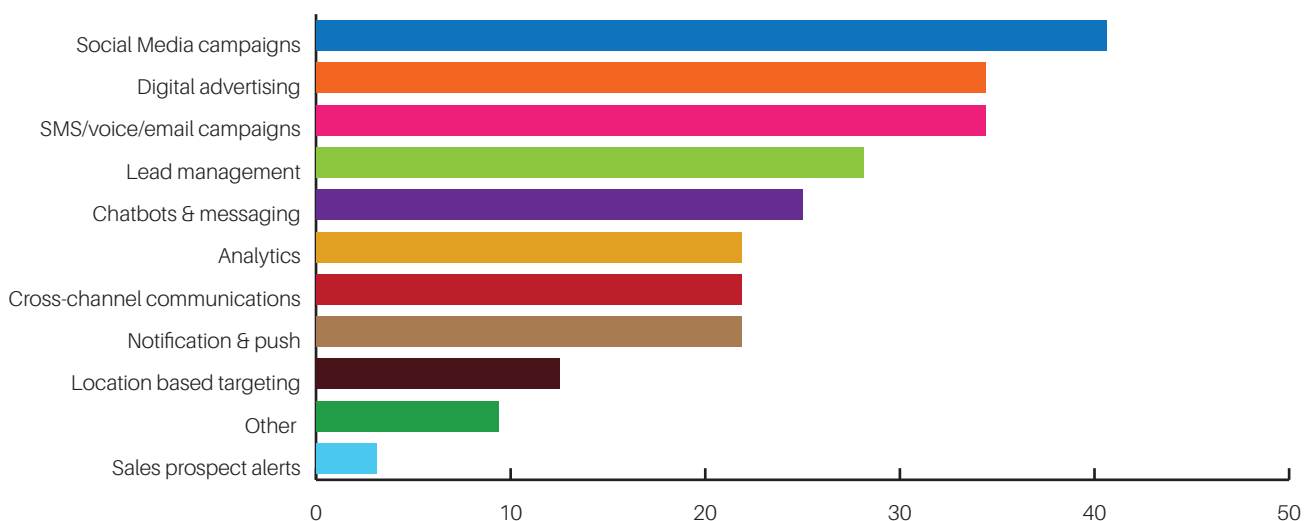
It does seem that a lot of our respondents have not yet received the benefits of marketing automation. Whether this is because of no marketing automation or a failure of the automation project needs to be ascertained further.

Ease of implementation continues to be the No. 1 factor for choosing an automation solution.

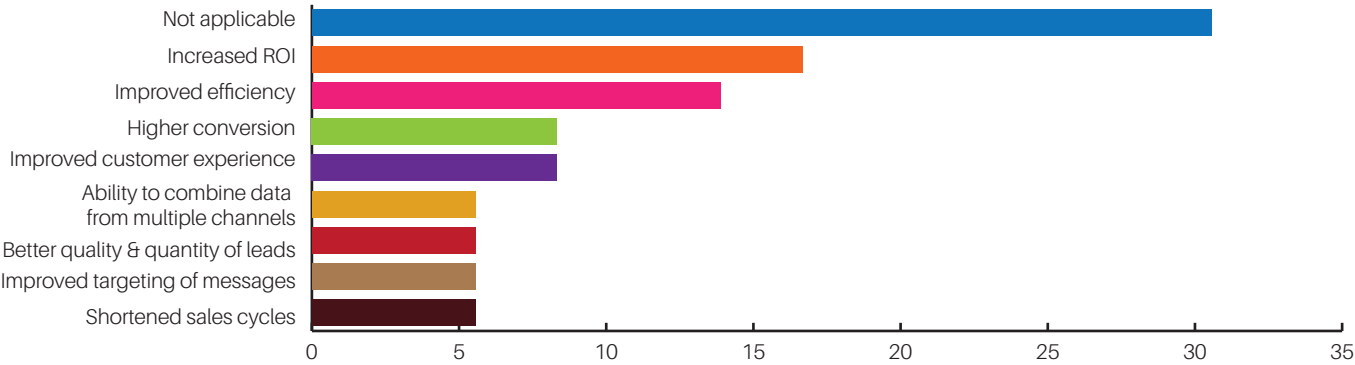
Q18. Which of the activities or tools does your team use to create personalized customer experiences? (Select all that apply)



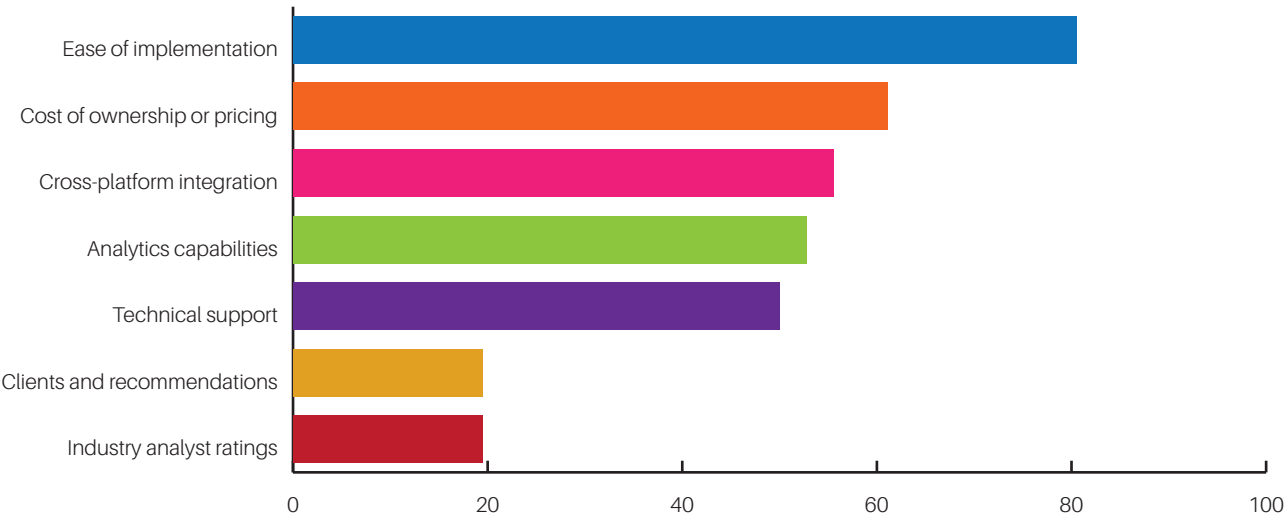
Q19. Which of the following have you used automation for? (Select all that apply)



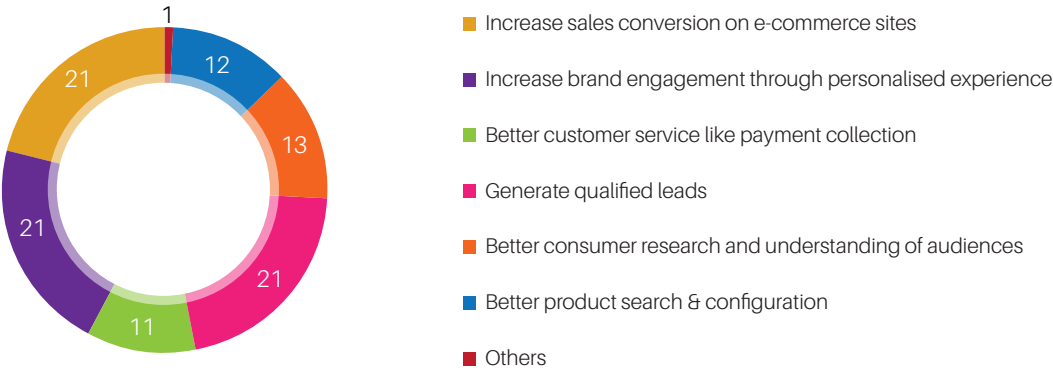
Q20. How has marketing automation benefitted your business? (Select all that apply)



Q21. What are the most important evaluation criteria for selecting a marketing technology solution (say MarTech or AdTech, select all that apply)?



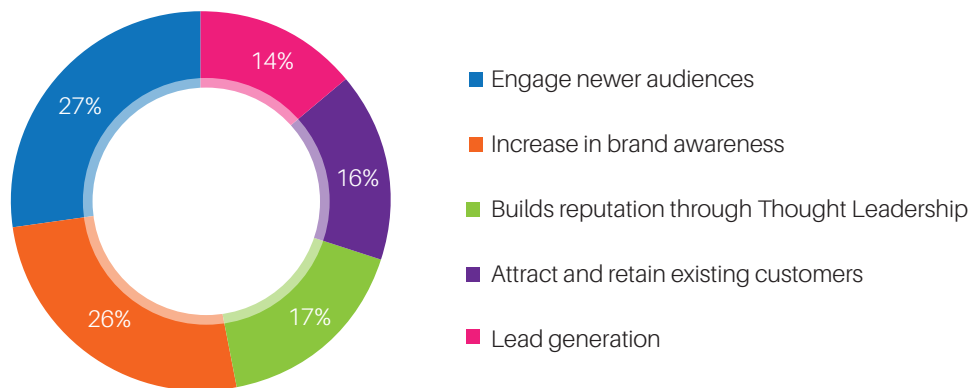
Q22. How are AI & Chatbots most likely to help online marketers in India? (Select all that apply)



2.6. Content Marketing

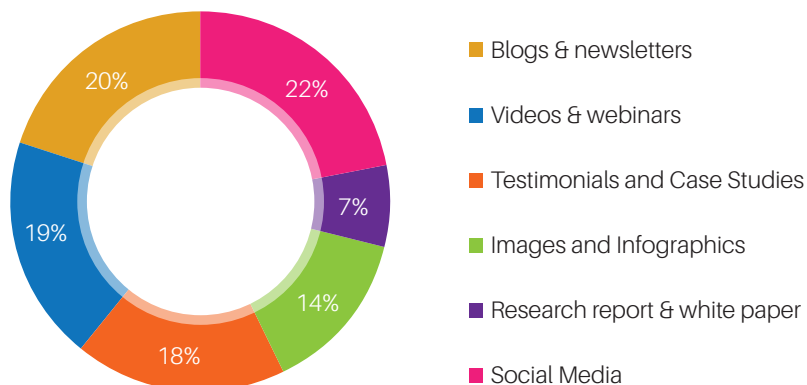
Content Marketing in India has finally found its place as a separate line item on the marketers' budgets. Online is driven through effective content management practices and we anticipate surge in this area for the 2021 Annual. Engaging new audiences emerges as the no. 1 area of opportunity for India brands.

Q23. Which areas does Content Marketing help you in? (Select all that apply)



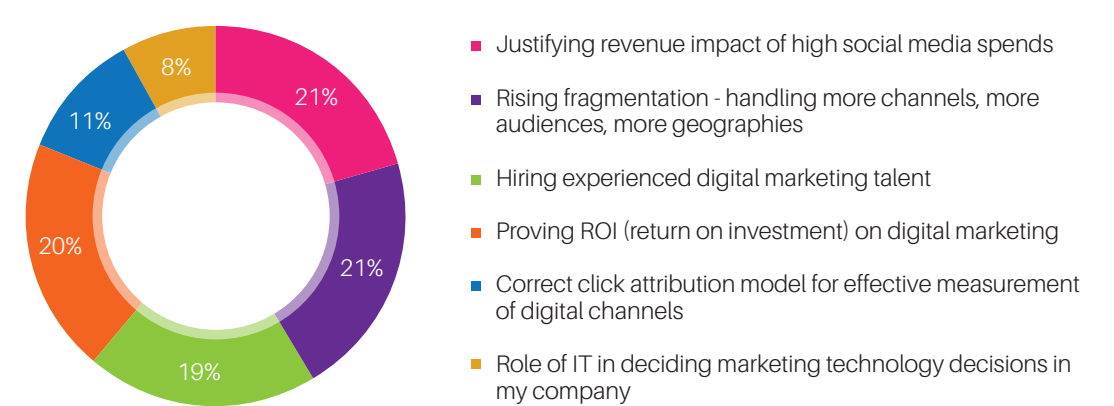
Video continues to be the most stimulating type of content for the consumer. It continues to offer a solid ROI, as 61.8% of our responders deploy content marketing strategies within the videos & webinars format.

Q24. How do you deploy content marketing strategies for your business? (Select all that apply)



In terms of challenges that marketing strategists see on the horizon in 2021, the largest hurdles seem to be not a lack of knowledge or skill, but rather getting tactics rooted in the new normal and digital transformation through the idea pipeline, and approved by the proper parties. 41.2% of responders said that rising fragmentation—handling more channels, audiences, and geographies in demographic terms—was the biggest content marketing challenge. Interestingly enough, that same number (41.2%) said that justifying revenue impact on social media ad spend was their largest hurdle. The role of IT in deciding martech decisions being a possible hurdle was an astoundingly low number, at just 14.7%; this denotes a rising synergy between tech and marketing as new, more effective channels are developing for the modern consumer, who focuses more on safe access to their products and is keener at decision-making through the buying funnel.

**Q25. What are the content marketing challenges that you foresee in 2021?
(Select all that apply)**



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Expert View

Education as a sector highly relied on offline channels such as Print, TV, Events and Radio. The digital transformation of automation, nurturing, intelligence etc was getting implemented but now it has completely accelerated. And because of this acceleration the online space will get crowded. And what used to happen to newspapers with news content swimming in advertisements; that is likely to happen to all online mediums. And to break from that clutter intelligence led marketing and clutter breaking marketing tools will come into play else many companies would be just burning their monies.

Tarun Verma, Chief Manager - Marketing, Pearl Academy”

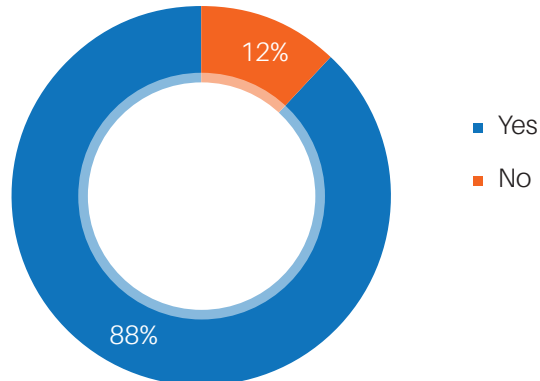
2.7. Influencer Marketing & Loyalty Programs

We're seeing a burgeoning growth in contemporary realms such as influencer marketing, where an overwhelming majority of 88% said that they would be trying out this new area over the next twelve months.

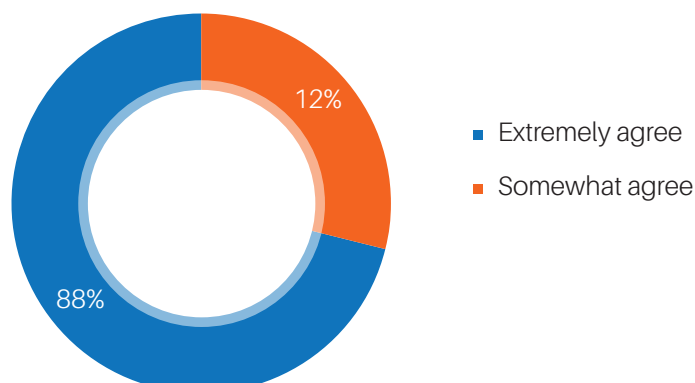
Q26. Do you feel loyalty programs and initiatives are still relevant in your industry from a marketer's point of view? Please select the ones that are most relevant.



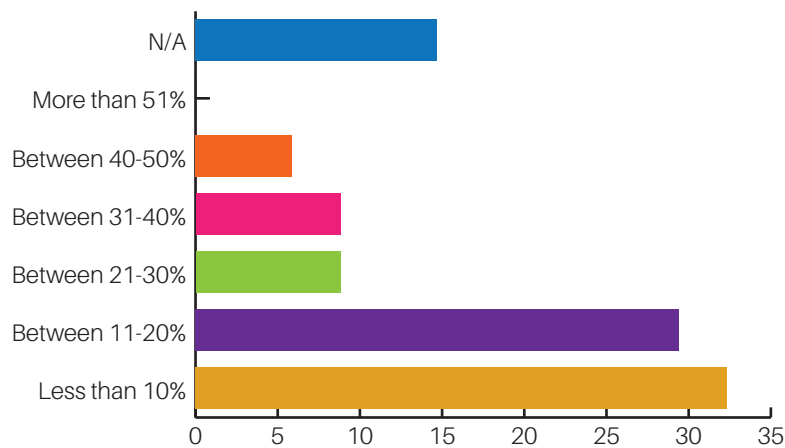
Q27. Will you be trying influencer marketing in the next 12 months?



Q28. "Consumers trust what influencers say about brands far more than what brands say about themselves in their advertising." What is your view on this?



Q29. Have you seen influencer marketing impact consumer purchase decisions in your markets? If yes, what % of your sales is influenced by this type of marketing. If your answer is no, please select N/A.



X-axis is the % of the respondents

“

Expert View

It will be interesting to see how technology and marketing together empowers Indian customers through phygital experiences and redefines the \$800B retail industry in the new normal era.

Amit Sethiya, Chief Marketing Officer, SYSKA Group

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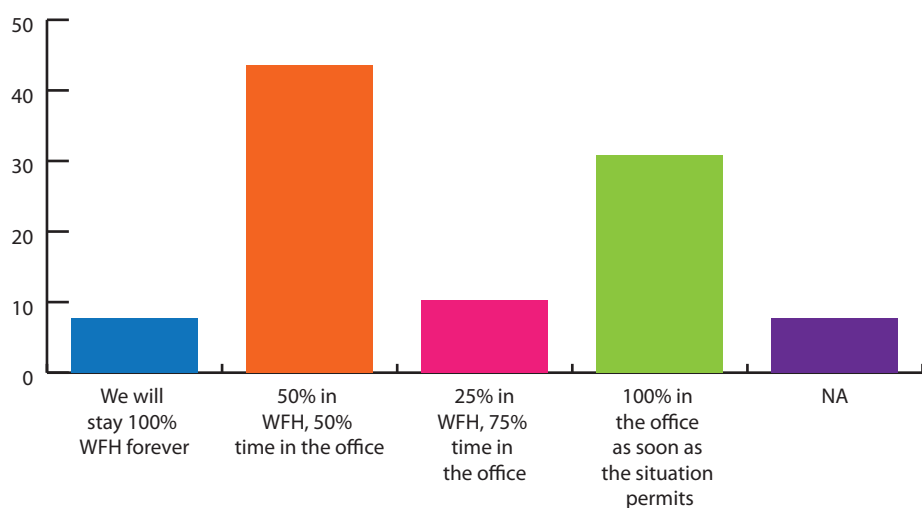
2.8. Marketing Teams – Remote, Skills & Compliance

COVID-19 or the Wuhan virus as it is popularly known, has hugely impacted how the marketing teams and operations are structured. Though marketing teams were used to collaborate from various locations, the ability to execute on time with almost all individuals working from anywhere has been a big challenge for 2020. 44% of marketers feel at least 50% of WFH or WFA anywhere to continue even post the COVID-19 enforced lockdown. So remote working for marketers at an individual level is definitely the new normal as indicated by our respondents.

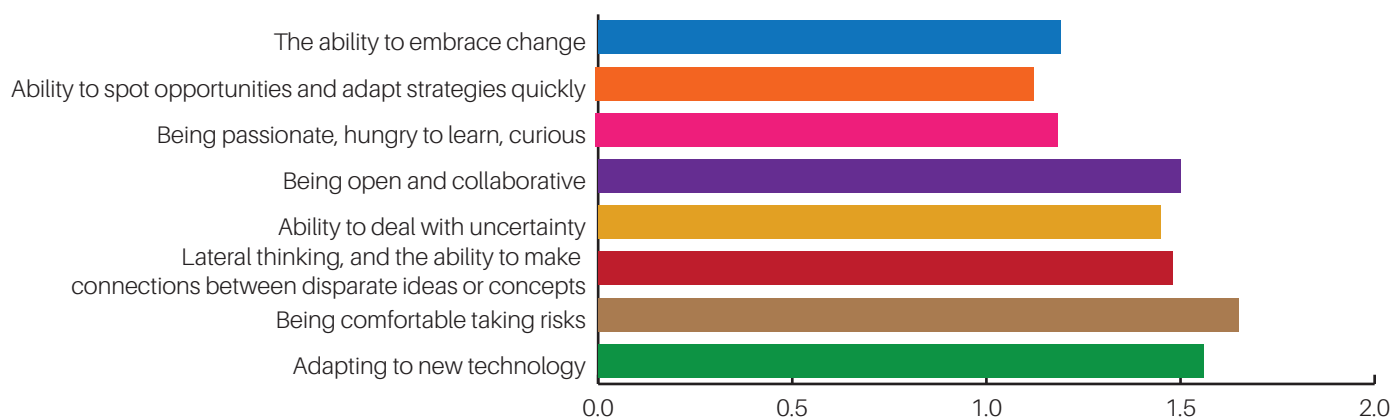
“Adaptation” and “the ability to react quickly” to the constantly-changing market in 2020 and beyond are characteristics that are not only helpful, but critical. When asked about which soft skills/behaviours were effective for marketers, a majority ranked “the ability to take risks” as the highest.

48% of our responders are confident that their brands will be able to completely adhere to the new government/TRAI policies.

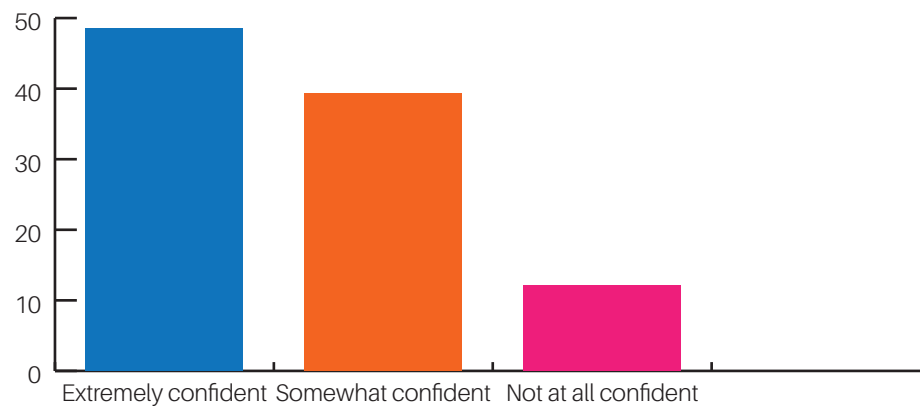
Q30. With the COVID-19 lockdown, marketing teams had to work remotely (or WFH)? How likely are you to revert back to pre-COVID-19 format?



Q31. To be an effective Marketer today, how important would you say the following soft skills or behaviours are?



Q32. How confident are you that you/your agency completely understand and adhere to Govt/TRAI policies and guidelines governing website, SMS and voice calls?



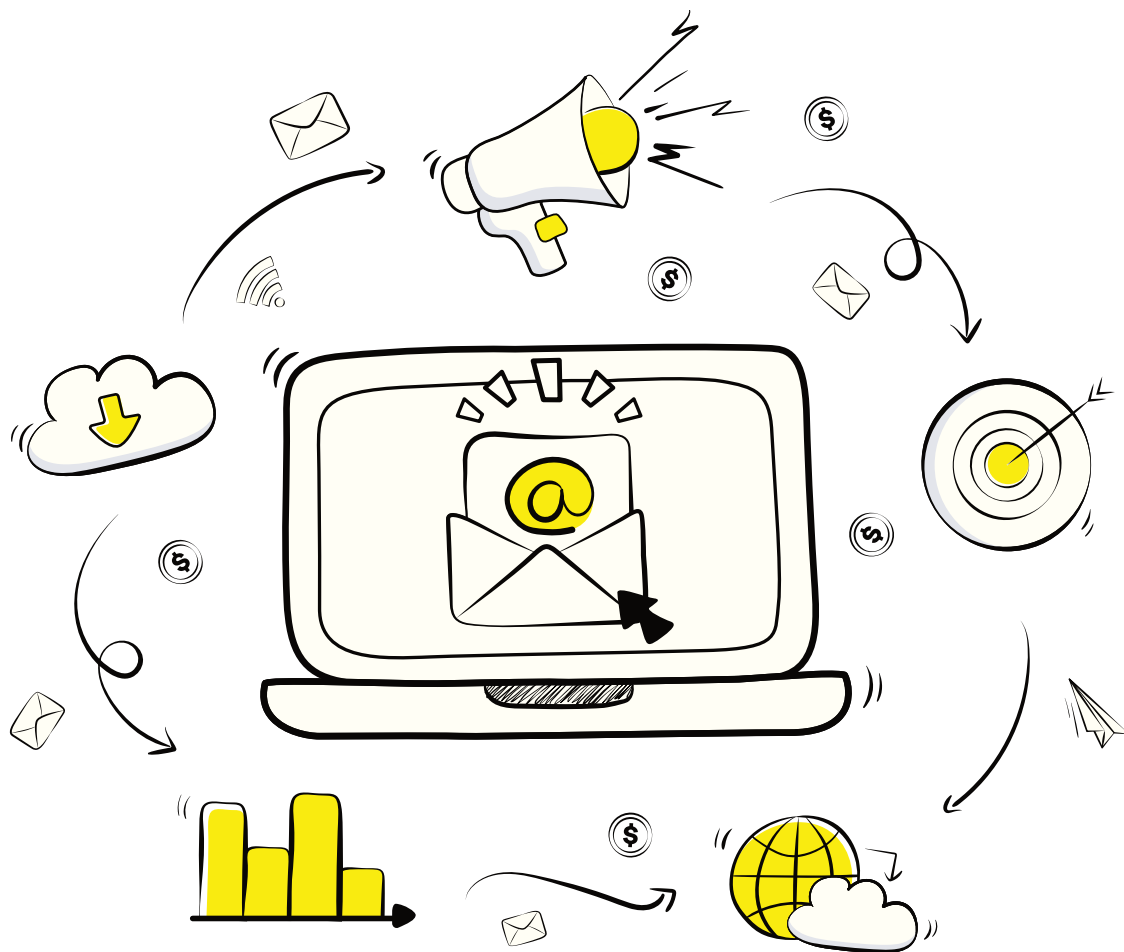
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Expert View

In India, the penetration of smart devices has shifted the power balance towards the consumers. Since customers are better informed it is imperative that brands stay authentic in their communication, product or service delivery and customer experience. Brands also need to draw a line between customer engagement and privacy.

Anirban Mukhuti, Head- Marketing, Saint Gobain

”

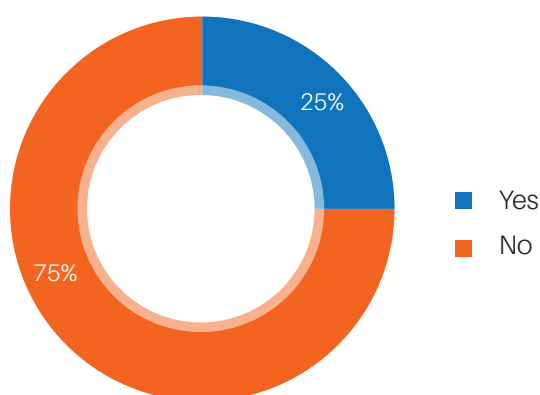


Inbox 2021

3.1. Email Marketing – Budgets, Rol, Programs

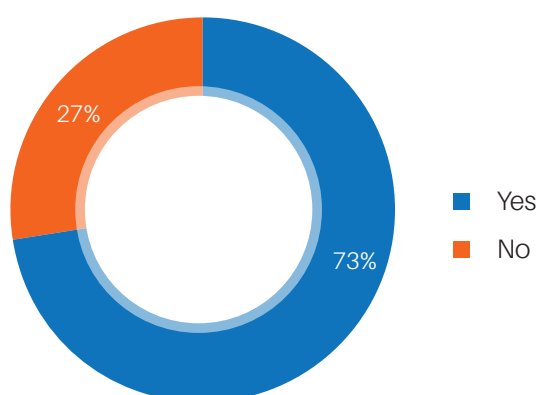
Email continues to grow in its importance for India marketers. With regards to budgetary decisions, there was less of a setback when compared to other channels. 75% of our email marketing leaders said that they did not reduce their email marketing budgets for the fiscal year even in the face of the Covid19 situation.

Q33. Given the pandemic/COVID-19 lockdown, did you reduce your email marketing budgets for the financial year (April 2020 - March 2021)?



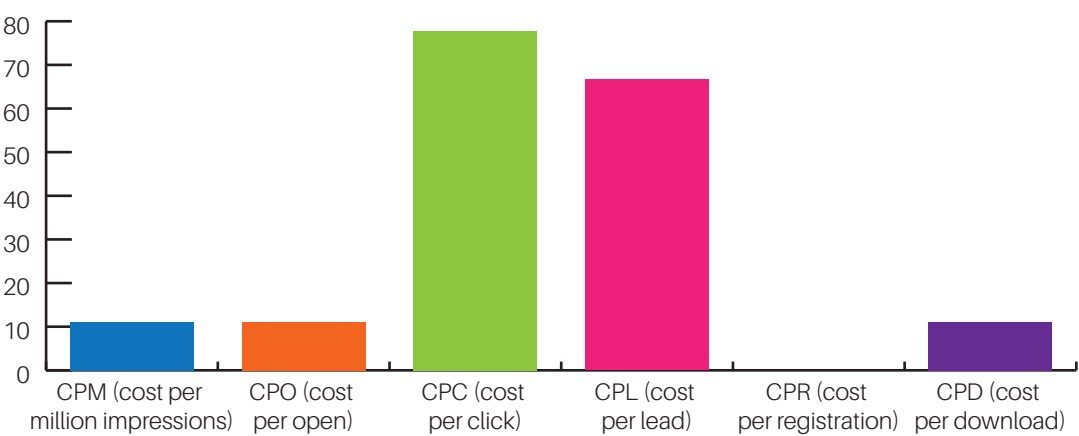
The overall response on email marketing objectives was positive over the past year, as 73% of our survey respondents noted that their email marketing endeavours helped them achieve their objectives.

Q34. Did your email marketing programs in 2020 help you achieve your marketing objectives?



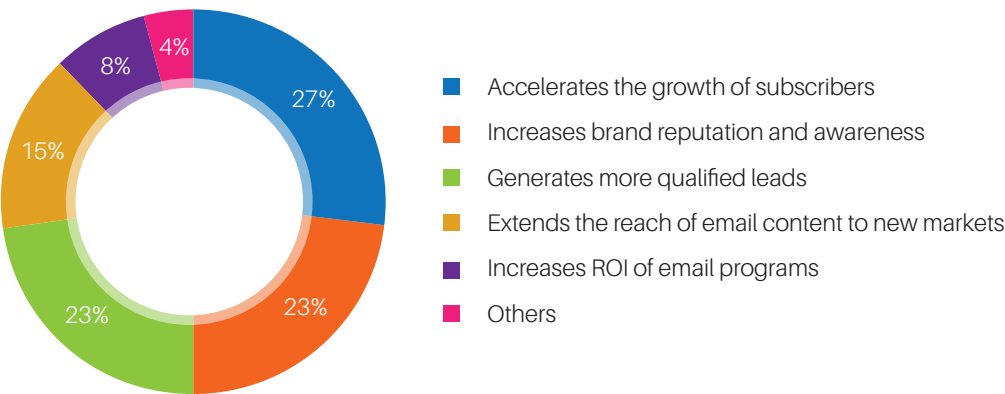
CPC (cost per click) remains the most valuable performance marketing metric for our email marketing respondents, with a majority of responders choosing it as such. The next highest was CPL (cost per lead), which majority of responders looked to as their best.

Q35. Which of these performance marketing metrics do you utilize for your affiliate email marketing campaigns? (Select all that apply)

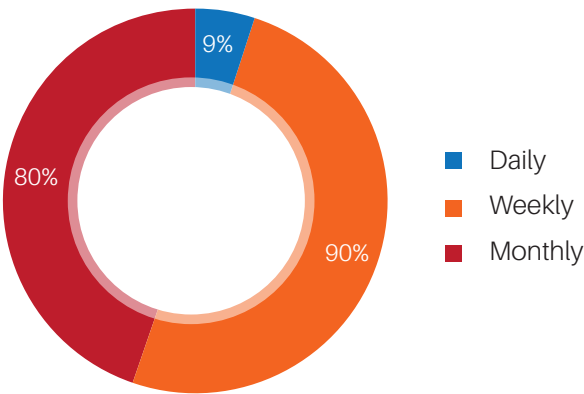


When asked how social media affects email marketing, the highest number of responders said that it accelerates the growth of subscribers—making social media a valuable tool for expanding brands’ scope for signups. The next highest amount, 23%, said that it both generates more qualified leads and increases brand awareness.

Q36. How do you think social media influences email marketing? (Select all that apply)

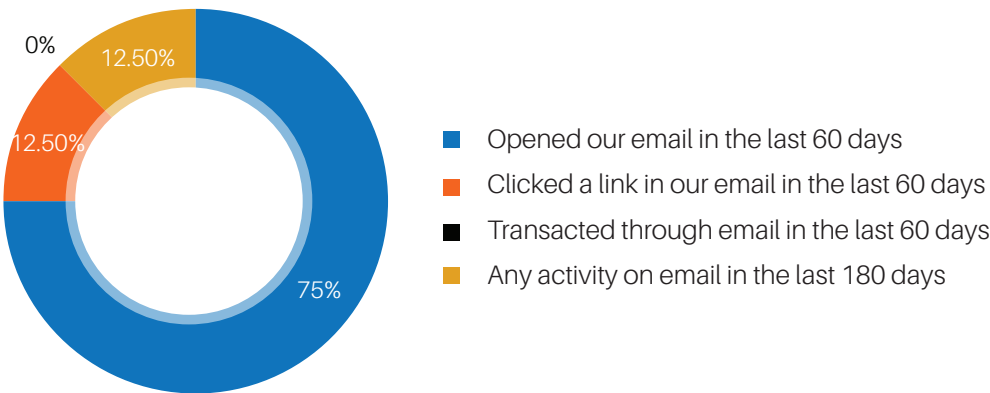


Q37. How would you describe the frequency of your email marketing communication?



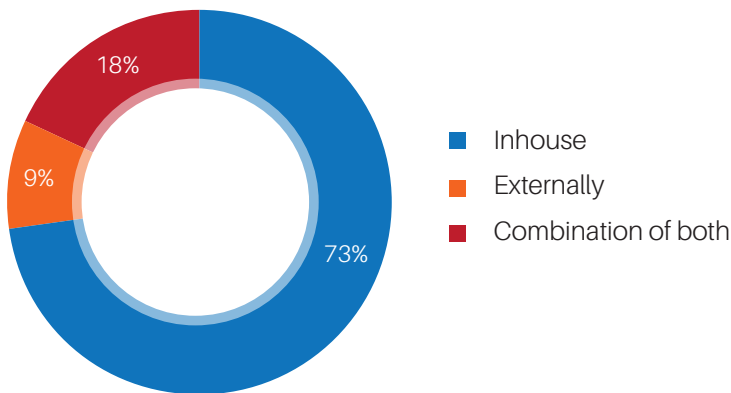
Subscriber opening an email at least once in 60 days is deemed to be an active subscriber by most marketers. In our view, this may be a lost opportunity. No activity in 30 days should be considered as an inactive subscriber and suitable email marketing programs like a preferences centre mailer should be deployed to convert the status of the subscriber to being an active one.

Q38. Which of your Email subscribers do you define as "Active Subscribers?"



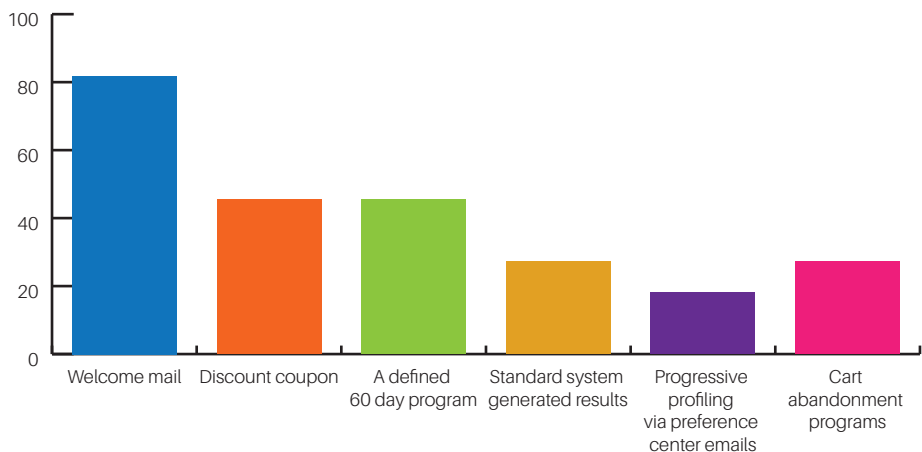
Email marketing campaigns are still mostly handled inhouse, with an overwhelming majority of our respondents (73%) answering so. Only 9% said that they were handled externally, with 18% saying that their companies do so as a combination of both.

Q39. How do you currently handle Email marketing campaigns?



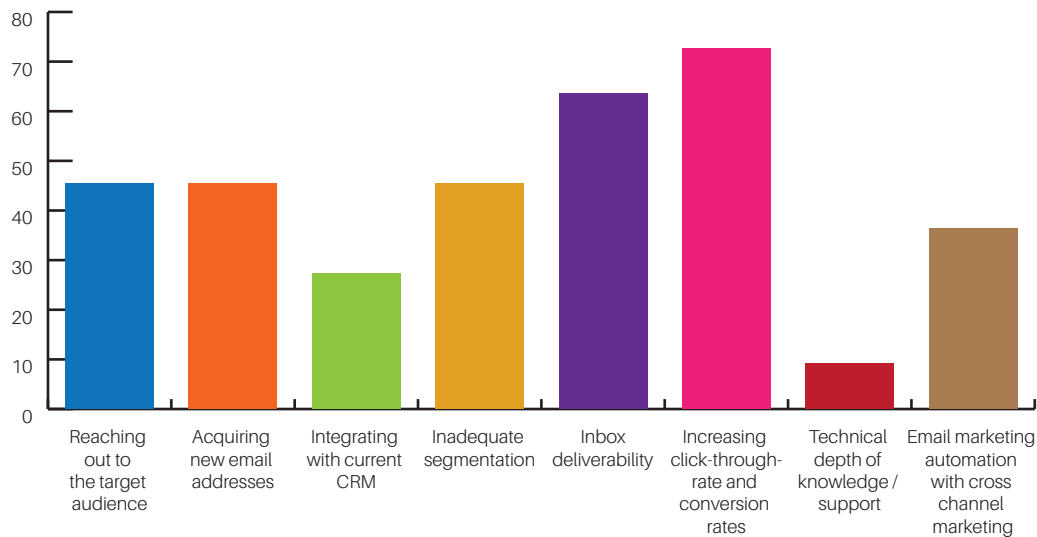
For triggered emails for signups and promotions, India marketers had a wide variety of responses. A majority said they use welcome programs for new sign ups. As the second-best option the email marketers in India used both discount coupons and a well-defined 60-day program. The least preferred option is that of using progressive profiling via preference center emails, which we feel is a missed opportunity to know the subscriber even more closely.

Q40. What special email program(s) do you have for new signups/registrations? (Select all that apply)



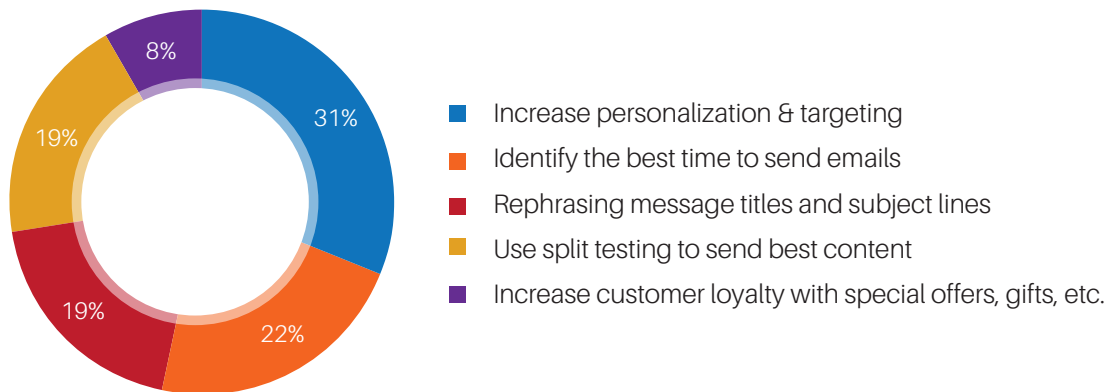
Increasing CTR on the mailers and Inbox Deliverability continue to be the TOP 2 challenges for email marketing programs, as reported by India marketers.

Q41. What were the biggest challenges with your 2020 Email marketing programs? (Select all that apply)



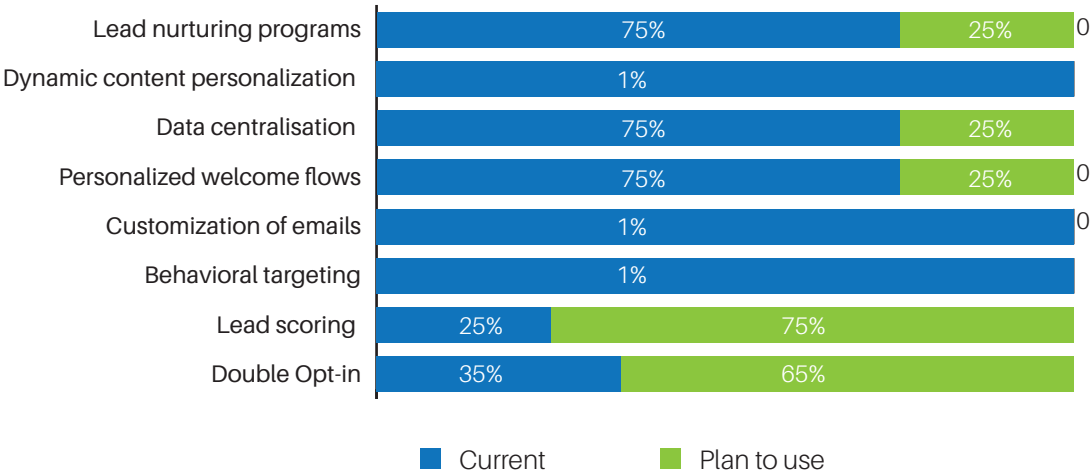
“Increase personalization & targeting” are priority tactics being deployed by marketers to reduce spam complaints and inbox clutter. We have observed that marketers in India are yet to go to the advanced level of personalized emailers triggered based on a subscriber’s behaviour either on the earlier mailer or on the website. Leading email automation tools like Octane or Augmento from ValueFirst enable such automated workflows.

Q42. What Email activities are you implementing to reduce the effects of spam complaints and inbox clutter? (Select all that apply)



In terms of current and future plans, increased “Customization of emails”, “Dynamic Content Personalization” and “Behavioral Targeting” are the 3 most popular email marketing tactics currently with all marketers. “Lead scoring” as a potential tactic for higher effectiveness of email marketing towards inbound lead is also on the horizon.

Q43. What are your current and future plans for Email marketing?



“

Expert View

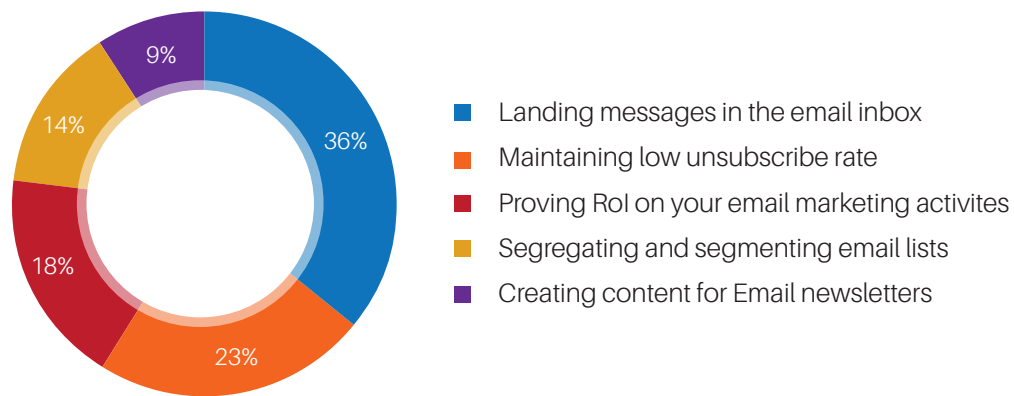
The future of email marketing will be behaviourally-based and customised accordingly. Research is already showing greater success rates through personalisation. Personalised emails based on behaviour are 3x times better received than impersonal, large batch emails. Personalised emails also drive 18x more revenue than pure broadcast emails. With the help of AI this information can be more easily categorised and readied for efficient use

Arun Malkani, Leading Brand & Marketing Consultant.

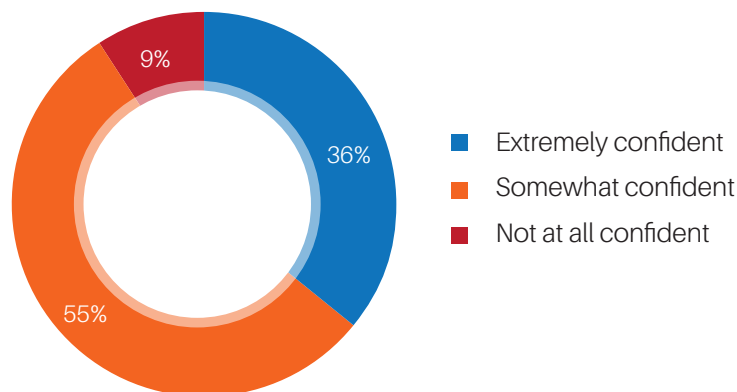
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3.2 Email Marketing – Challenges, Compliance & Skills

Q44. What do you as an email marketer find difficult?



Q45. How confident are you that you completely understand the data privacy legislation governing email marketing?



Expert View

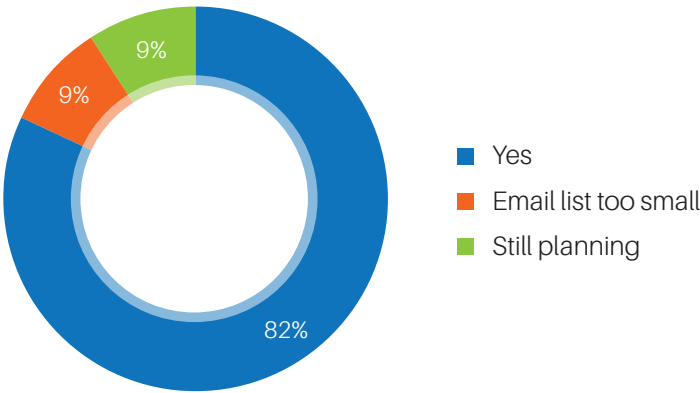
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Integrated marketing efforts will handhold the customer at every touch point, proactiveness will be understanding the consumer behaviour by using means of technology without directly asking them through traditional feedback method.

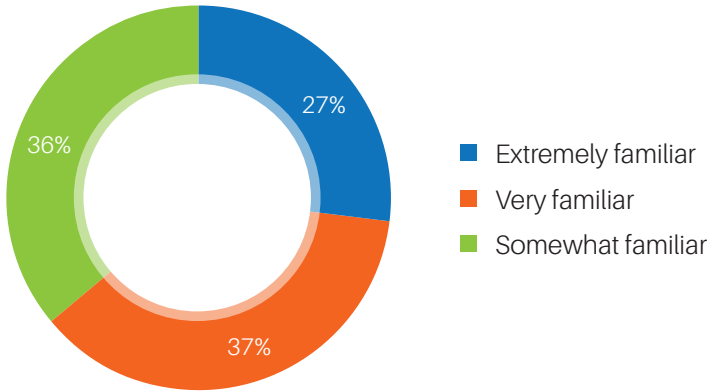
Manish Mehra, Marketing Manager - ZipLoan.

”

Q46. Are you able to efficiently segment your email lists?



Q47. How familiar are you about the role of IP reputation and domain reputation for email marketing success?





Research Methodology

For conducting this research study, we reached out to marketing practitioners and decision makers across the country via online channels by a diversified questionnaire survey asking them their primary marketing channels, budget allocations, strategies for improvement, outlook on new technologies, challenges and opportunities in digital marketing.

We performed a thorough analysis of the responses of different business sectors and industries to bring out the most relevant and insightful data that can prove helpful to businesses in chalking out their marketing strategies.

The research is an aggregation of responses from 250+ professional marketers.

- **Standardized Online Questionnaire:**

A standardized online questionnaire in a survey format was fielded to a verified list of marketing professionals through various online channels.

- **Statistical Evaluation:**

Survey was closed and statistical evaluation of the collected responses was conducted with equal weightage to each response, maintaining anonymity.

- **Analysis of Data:**

The data was turned into meaningful information and insights after thorough analysis on emerging trends from the statistics.

- **Comprehensive Presentation of Results:**

The results drawn from the study are represented in an easy to read graphical format without losing details.



Research Participants

The active participation of 250+ industry professional serving as CEOs, CMOs, CDOs, Founders, Directors, Marketing Heads, Manager and Digital Strategists from different industries across India has made this year's report insightful.

Octane Research partners with industry bodies for such research projects to 1) make them inclusive and 2) for a wider outreach. DMAasia partnership played a key role this year in reaching out to the marketing community.

Figure 1: Organization-wise breakup of CMOs in our research

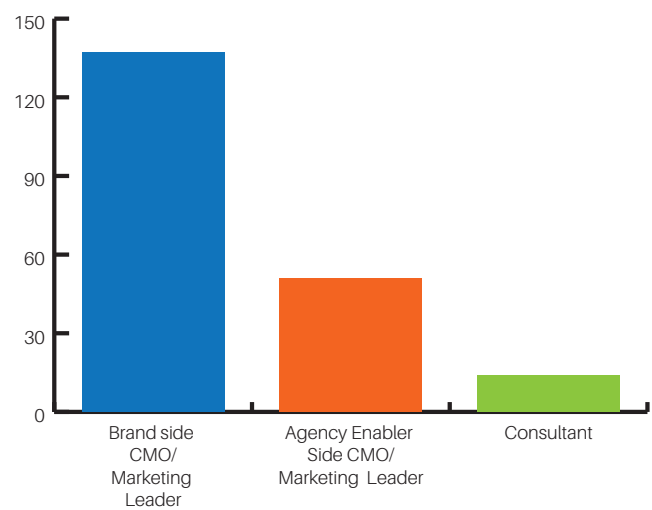
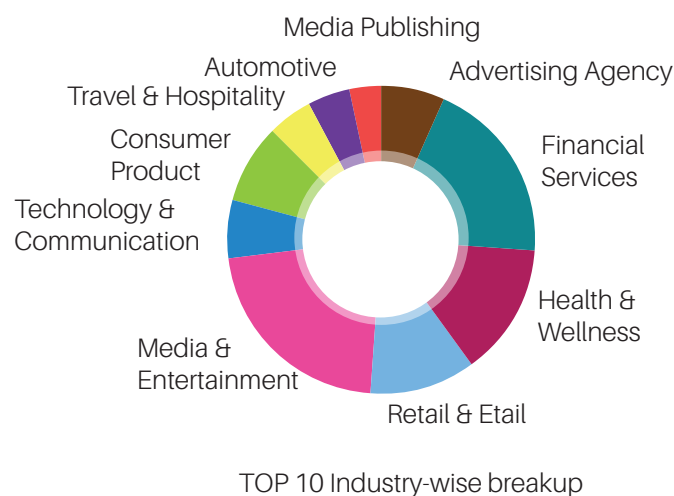
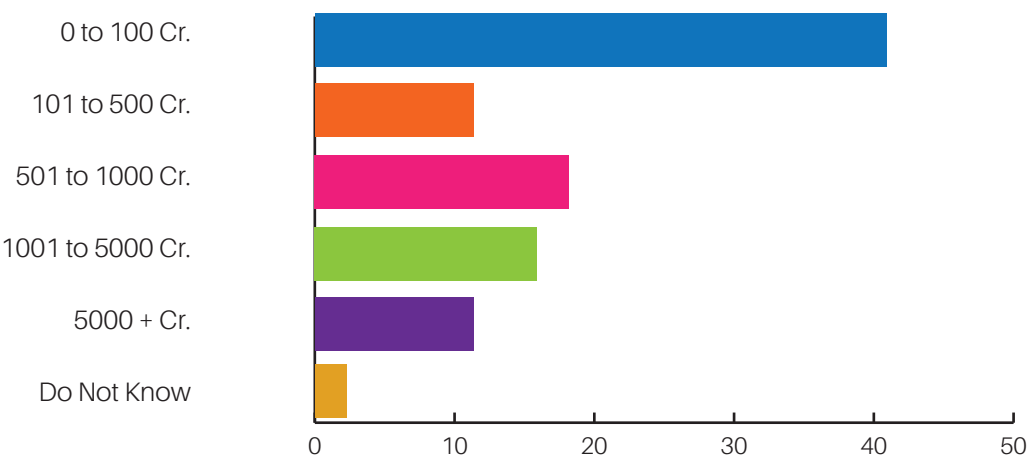


Figure 2: Industry-wise breakup of CMOs who participated in our research

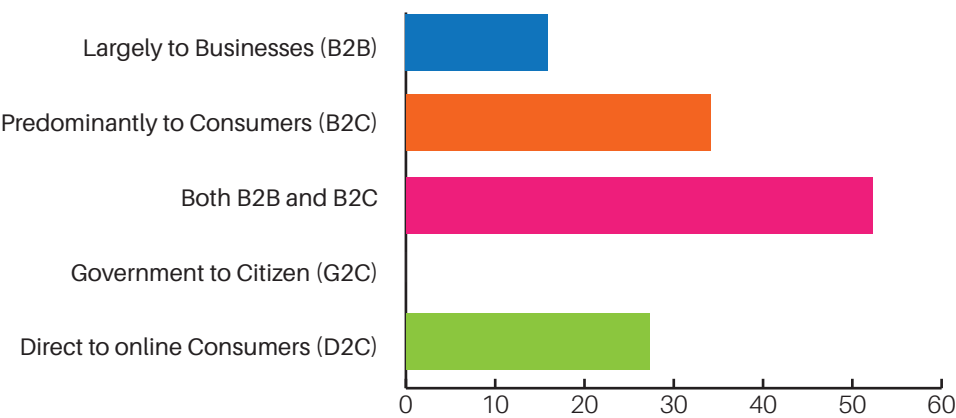


Research Participants

What is the annual revenue of your company (in INR)?

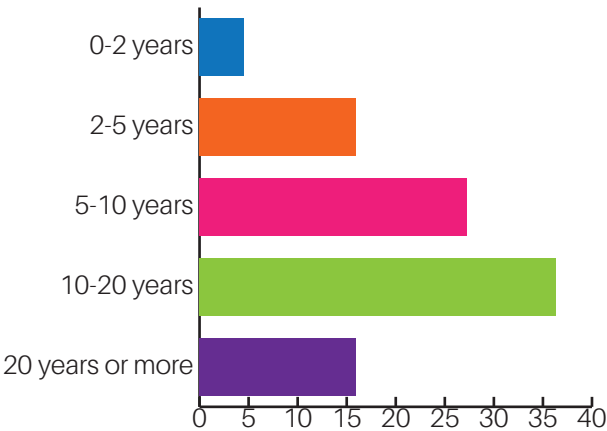


What do you largely market to ?



Respondent data is on the X axis in terms of % respondents.

How many years of experience do you have in the Marketing function??



Research Participants

How did the marketers respond to our Annual State of Online Marketing in India research survey?
It continues to be a detailed study, one of its kind in India.

77%
Completion rate



18 min
Typical time spent



Select Research Participants

ABP Network	A	DINTW	Hansa Cequity	H
Accentiv India		Discovery Communications India	Happiest Minds	
Airtel		DishTV India	Havas	
Amway		DLF	Havells	
APR		Duroflex	HCL Technologies	
ATT World		Dyson	H-D Motor Company	
Aviva		Edelweiss Tokio Life Insurance	HMD Global	E
Axis Asset Management		EdgeVerve Systems	HotWax Commerce	
Ayurveda		Embassy & WeWork	Housejoy	
Bajaj Capital	B	Enormous Brands	Housing.com	
Bajaj Electricals		Escorts	IHCL	I
BCG		Eureka Forbes	IKEA India	
Birlasoft		Exidelife	IndiaCircus	
BlackRock		EY	IndiGo	
Boult Audio		FabIndia	Indigo Consulting	F
Boxybite		Fenesta- DCM Shriram	Isobar India	
Brigade Enterprises		Finance	ixigo	
Brigade Group		Flipkart	JetPrivilege	J
BSE		Franklin Templeton	Jiva	
BWH Hotel Group		FrogIdeas	JLL	
CamCom	C	Fulcro	Kansai Nerolac Paints	K
CarDekho		Future Generali India	Kinnect	
Carrier		Future Lifestyle Fashions	KLAY	
Case New Holland		Garware	Knowetic	G
CouchLane		Geometry Encompass	Kokuyo Camlin	
Coverfox		Glance	Landmark Group	L
Cvent Inc		GLOBAL INFRAEARTH	LDRA	
Dailyhunt	D	Godrej & Boyce	Lodestar UM	
DB Corp Ltd		Godrej Consumer	Logicserve Digital	
DELHI DUTY FREE		Gold's Gym	LogMeIn	
Dentsu Aegis Network Consult		Gradeup	LTI	
Diageo		Grey	Luminous Power	
DIC India		Greytip Software	Madison Media	M
Digit9.0 Web Marketing		GroupM	Magic Bus India Foundation	
Digitas		Guardian Life	Mahindra Hospitality	

Manipal Global	Riyo Advertising	TRUECALLER
Manya Realtors	RPSG	Tupperware India
Max Bupa Health Insurance	Saatchi & Saatchi Propagate	UCID
Max Healthcare	Saint Gobain	UiPath Inc
mCanvas Advertising	SAP	UnboxSpaces
McCann Health	Schneider Electric	Urja Communications
McDonalds India	Sharekhan	UTI
Mindtree	Shopmatic Group	Velvetcase
Mirum	Shoppers Stop	Verloop
MoEngage	Siyaram Silk Mills	Vinculum
MOTILAL OSWAL	Sodexo Benefits	Visa
Motivator, Group M, WPP	Soulflower	VMware
Mullen Lowe Lintas Group	Spotify	WAT Consulting
Nestle India	Sterlite Power	Wipro
NIIT	Studds	Wyndham Destinations
Nissan India	Swarovski	ZEE5
Oracle India	SYSKA Group	ZipLoan
Pearl Academy	Talisman Tech	
Pepperfry	Tally Solution	
Performics India	Tata Capital	
PharmEasy	Tata Communications	
Philips India	Tata Consumer Products	
Phoenix Mills	Tata Elxsi	
pi communications	Tata Motors	
Pinkvilla LLC	Tata Teleservices	
Piramal Group	TBWA	
Pitchfork Partners	Tech Mahindra	
Plank and Weave Retail	Technosoft	
Randstad	The 120 Media Collective	
Rediffusion Brand Solutions	The Adecco Group, India	
Reliance General Insurance	The Leela Palace Bengaluru	
Reliance Home	The Moody Rhino	
Reliance Retail (Digital)	thedigitalfellow	
ResMed	TKM	
Retail Jeweller Media	Triton Valves	



Expert Talk

8 Op-Eds by Marketing Thought Leaders



State of Influencer Marketing and Future



Archana Dhankar

Director Marketing, EMEA EDB

Archana, a self-confessed social media fanatic and fashion blogger, is an executive MBA from Warwick Business School, UK. She is an Integrated marketing strategist with 15 years of experience working on brands, content strategy, marketing automation, workshops, employee engagement, consumer psychology and journeys, across a wide range of channels and industries, for both B2B & B2C organizations.

Influencer marketing, as a strategy, has witnessed immense growth and popularity over the last few years. The rise of new social media platforms, like Snapchat and TikTok, has taken things a notch higher, with the number of people making purchase decisions based on influencer recommendations growing at a rapid pace.

FOMO - the new social mood

Leading brands like M&S, Jaguar, Jo Malone, L'Occitane, H&M, Myntra and Nykaa are only a few names that have embraced influencer marketing, as an integral part of their marketing mix. The strategy empowers brands to target customers through the trust and credibility of niche influencers, making these influencers sometimes even more potent than celebrity endorsements. New and upcoming brands have tested this tactic to gain immediate reach within the target market.

Influencer marketing and COVID-19 - How things have changed?

Like everything else, influencer marketing too was impacted by COVID-19. Although brands were scared initially, and budgets slashed, things turned in favor of influencers as brands aligned with the situation.

The crisis came as an opportunity, with consumers spending even more time online due to social isolation and shopped online even more because of restrictions on going out. Social channels today have emerged as the TOP choice, for marketing budgets rather than invest in "Out of Home" advertising.

Consumers are looking for a confidence boost when it comes to buying from brands, and a positive word by an influencer can make all the difference.

2021 and the future of influencer marketing

As the New Year draws closer, brands and marketers need to plan for achieving the best with their marketing efforts. When it comes to influencer marketing in 2021, there are a few things that they need to bear in mind:

- Trust is the most vital selling factor in the pandemic world, the focus entirely must be on genuine influencers and authentic content. Video content will win over, as it brings credibility to words and makes a more significant impact on the consumers.
- Authentic influence and long-term vision will reap better results, and brands who will aim for long-term collaborations with the influencers will win
- Brands should see influencers more as content partners who can drive sales with their recommendations.
- A right mix of micro and macro influencers to build both broad base awareness using macro-influencers and trust & relatability using micro-influencers will lead to a better ROI for the brands.

With the influencer marketing trend poised to grow in 2021, it is time for brands and marketers to gear up and embrace a strategy that would win the online selling game for them.

What Doesn't Kill You, Makes You Grow



Damandeep Singh Soni

Chief Marketing Officer & Vice President Growth, boAt

Daman heads growth at boAt and has grown multiple products to 50+ million users. Earlier he was the CMO and growth head at Mobikwik, Milkbasket and WeCash. He was also the India Head for LINE. He also consults startups on marketing, growth, India entry and go-to-market strategies. Daman is an ISB alumni, and has done his Engineering from NIT Rourkela. He blogs at www.damansoni.com about growth marketing and startups.

2020 has been like a strong punch in the ribs to the marketing community. It has left many bruised. The fighters picked themselves up. Some came back stronger, while others reconfigured their strategies. It would be safe to say that 2020 has driven growth marketers to reinvent themselves.

Martech adoption has accelerated across industries, while focus on personalization of the consumer's journey and engaging them with empathy has been a common theme. Working from home has led marketers to understand the importance of building growth engines and automating marketing processes to achieve scale. With teams working in different locations, face-to-face conversations and follow-ups virtually (pun intended) non-existent, many marketing leaders have begun to appreciate the benefits of automating processes.

Companies that saw rapid growth have seen the marketing function being scaled up in a short time. Some of these teams have had a decade's learning in the past eight months. They've had to build solutions to fix the funnels, recruit customer service professionals and experiment with multiple channels to drive scale. Specifically, I have seen companies create self-serve options for B2B clients and reduce the path to purchase. With users having more time at hand, order follow-ups have increased which in turn have got companies to ramp up on their customer service teams.

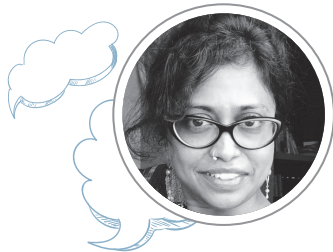
Marketers in companies with moderate demand impact have had to focus more on ROI-centric solutions, build the marketing infrastructure to prepare for when demand comes back and retrain teams to prioritise customer care and communications.

Companies that have seen a major impact in business have seen marketers pare their spends on above the line (ATL) marketing activities and invest in mobile-first solutions. The focus has been on creating mobile-friendly content, and enhancing the websites to give them app-like speeds due to the surge in users shopping on their handheld devices.

Consumer behaviour has changed significantly in this year and new target segments have emerged for companies. The auto sector has seen an uptick in demand from first-time car buyers. Communication strategies and the marketing mix will change to address such changes. The income shock will lead a large segment of already value-conscious consumers to rethink their purchases while in the near-term revenge shopping and travel will take centre stage.

The year may be a gut punch for the marketers but what doesn't kill you only makes you stronger. .

The Rise of Micros & Minis – D2C Brands



Jyothsna Yalapalli

Seasoned Brand Strategist. Brand/Marketing Consultant for Start-ups. Aspiring Cultural Anthropologist.

Jyothsna, an Engineer and an MBA by qualification, landed in her dream world of advertising, and has won a set of Gold and Silver Effies (Advertising Efficiency awards). She is fortunate enough to work with some of the best global advertising networks like FCB, DDB, Lowe Worldwide, McCann, JWT, Havas Worldwide etc, and with the rising star, the Womb Communications (founded by Ex-O&M seniors), on some truly enviable, highly process oriented portfolios of Global brands and prominent Indian brands.

The 15+ yrs long rigorous planning phase has groomed her on 'upstream brand thinking' – going beyond communication campaigns to handle clients' deeper-lying business problems. She is a keen follower of behavioural economics, cultural anthropology.

"...my brother's cough & chest congestion problem did not improve much with allopathic medicines. When my friend told me about this Green Cure (German Indian) ayurvedic syrup on Facebook, I went and read what others wrote about the syrup and got a sample. We are continuing it as my brother feels better now." (a young farmer, Village in MP)

"...for years, I have been using Whisper Sanitary pads (a pack of 50 pads for ~ Rs 345). Some time back, I read that a sanitary pad takes around 500-800 years to decompose. I decided to switch to biodegradable pads; I use Carmesi (all natural pads, made with cornstarch and bamboo fibre, a pack of 30 pads for Rs 559) now." (me)

Many of us, in recent times, can recall having switched from a big popular brand to a lesser known digitally native brand that is yet to enter shops in our neighbourhoods – it could be a face wash, an ayurvedic hair cleanser, a protein bar, a dress or a personal grooming range etc. This adoption of direct-to-consumer (D2C) brands is happening faster than what anyone would have thought of a couple of years ago – Does this indicate a gap between consumers' evolving needs and the actual delivery by big popular brands (backed by heavy advertising budgets, celebrity muscle, global level R&D efforts), which is being addressed by new age D2C brands? Appears so. Let me add my two big observations to the body of learnings in this space.

1. D2C brands' Creating mindset vs. Big brands' Manufacturing mindset

Deeper insights into consumers. Leveraging consumer data to create. Rigorous consumer-centrism.

Despite their vast ecosystem & resources, and rigorous thinking processes— most big brands failed to act on the tiny yet high potential, forward-thinking consumer segments, quickly. On the other hand, D2C brands started building something 'new and fresh' to address the compromises, discomforts, worries and frustrations of consumers—resulting from the yet unfulfilled lofty missions of the big brands. They leverage the data gathered at every touchpoint in the customer journey—comments on social media, customer feedback, historical purchase data etc—in order to grow, personalize and connect with consumers. Through their high consumer-centric product development, D2C brands seem to be challenging the status quo of Big brands. If we notice, most from the current crop of DTC brands have enviable a product-centric advantage. Their products/concepts seem to have been created with:

- a good degree of thought and sophistication (which usually is a realm of premium and affordable luxury brands), say Juice Chemistry's Kakadu Plum & Pomegranate facial oil that reduces signs of ageing without damaging the skin's natural composition
- a shared mission that consumers identify with and always wanted to be a part of— say Save Earth. Nicobar's dress priced at Rs 8000, is made with polyester from recycled plastic bottles and acrylic + nylon yarn from recycled fabric
- an increased personalization (do read about Glossier pop-up shops, Graze's customized nibblebox)



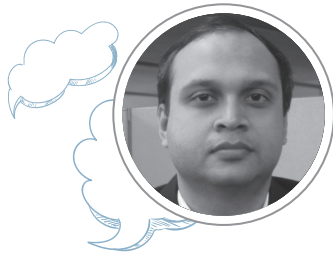
2. DTC brands mirror Communities. Communities of Selfish* yet Societal/Planet Conscious people (* Selfish here means being considerate of one's personal, emotional and physical needs)

Millennials and Gen-Z who grew up amidst the dawn of liberalization in the country, opening of the markets, rapid development and stable economies & cultures— want to balance their 'personal desires, benefits and consumption' with 'contribution to the world and locals'. As consumers, they not only look for new products & services, but also explore newer ways of consuming things and interacting with brands. They are individuals yet 'members of communities', a collection of commoners (non-celebrities with a voice and an opinion) knit together by a mission, a desire to address a need/societal gap or a disparity, a shared experience or a value system. Mirroring this attitude, DTC brands are building their products/services as actively integrated with a social cause or a fresh perspective on the society, which could mean— the mission or the value system that the brand stands for gets reinforced with its every initiative.

Stash, an innovative fintech targeting younger cohorts, offers Stock-Back Rewards program for their customers' stronger financial future. Bombas (a \$100 million+ firm) founded on the discovery that socks were the most requested item in homeless shelters, has donated over 30 million items, till June 2020. Caviar, a food delivery service that caters to hip audiences, supports women empowerment and is partnered with Pineapple Collective, a platform for women to explore their style, identity and values through food.

At an overall level, DTC brands are succeeding in bringing a fresher perspective about their respective categories. Hope they continue this fantastic run and won't turn out like the biggies when they become big.

How Digital is changing B2B sales & what should a CMO do about it



Kingshuk Hazra
Founder LeadStrategus.

Kingshuk Hazra is a founder of demand-gen consulting firm LeadStrategus. Prior to LeadStrategus he was the CMO of Amazon Web Services. He has worked across SAP, Gartner, Pluralsight, Oracle & IBM. You can find his blogs on LeadStrategus.com or on LinkedIn.

As a founder of demand generation services firm, I was pitching to US marketing-tech company's Chief Marketing Officer (CMO). They were looking for Inside Sales support. We don't offer any telemarketing. I thought I was fighting a lost cause. Almost apologetically I talked about our primary service line - LinkedIn account-based marketing (ABM). The CMO liked it, and said we are keen to explore a non-tele 1-1 social approach. I was pleasantly surprised!

We are living in a world where face-to-face prospecting is an endangered species, tele-prospecting is getting difficult by the day, and digital marketing is a cottage industry.

The golden arrow?

Non-cheesy social selling - before everyone else cottons in to the fact, and social channels become overladen with cookie-cutter sales messages!

How do you do it? The TOP 3 tips

1. Train yourself, your marketing & sales team to be master Social Sellers – particularly LinkedIn. The #1 investment you can make is to enable your teams to research & message on social media and produce authentic content. Arm them with sales-stage segmented content they can pass on 1-1 or many-1; help them become mini-influencers.
2. Give up on overzealous customer-annoying tactics, and build digital & social first communities instead: Drop that prospecting mass-mailer. Build opt-in communities that your prospects will want to join. Do that by creating non-salesy unscripted communication. Focus on keeping straight-from-the-heart 'ask-me-anything' sessions where you are talking about something of immense value to your buyer personas. Try different media. Fun happens when you livecast on Youtube, LinkedIn, & Facebook simultaneously!
3. Use Intent Analytics to fish where the fish hang out. And you don't need to be a PhD in Statistics to use Intent Analytics. Study your buyers to begin with. Try reading the subtle buying signals they leave on Social Media or what you can get from intent aggregation websites or old-fashioned CEO/CMO interviews/ their PR.

We live in a world where all marketers have a megaphone in their hands. Don't lose it by shouting, rather sing a soft touching song that inspires your audience to action!

Roadmap for an effective digital fundraising framework



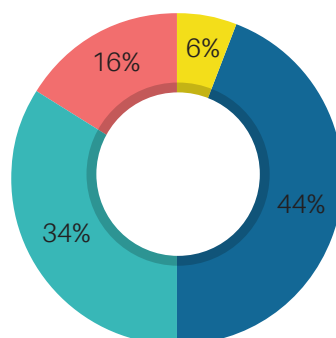
Prasant Naidu
Digital Strategy Consultant

Prasant Naidu - Digital strategy consultant. Additionally, he shares his thoughts about marketing in the digital world for nonprofit and for-profit organizations on his blog-<http://prasant.substack.com>

Strategic and tactical framework guide for nonprofits that includes building a donor-centric organization and investing in organic mediums

There are two kinds of people—one who believes that the world will soon be back to normal as if the pandemic was a bad dream. Others are the ones who accept reality and try to live in the present. This article will add value only if you belong to the second kind. Be it people or organizations.

We are aware of the harsh realities the pandemic has thrown to us. The non-profit organizations (NPO) are no exception. A recent report conducted by the Centre for Social Impact and Philanthropy in the months of April and May 2020 highlighted the growing concern of funding. NPOs primarily depend on corporate social responsibility (CSR) funding and are grappling with the highest order of anxiety.



■ CSR ■ International ■ Indian Philanthropic Foundation ■ Individual Giving

The challenge is that the majority of CSR funds are being diverted to the immediate relief work, including the PM CARES Fund. Additionally, with a shrinking economy, it is obvious that the CSR budgets will be on the radar by the corporates. NPOs dependent on Indian philanthropists noted that bureaucratic structures and slow approval processes are bottlenecks.

This is where NPOs have to broaden their horizon of funding and look at individual giving. And digital is one of the ways.

According to the latest 2020 Global Trends in Giving Report, more than 50% of the participants opted for online donations. 52% of donors in Asia prefer to give online with a credit or debit card, up from 51% in 2018. 13% prefer bank/wire transfer, up from 9% in 2018. 8% prefer PayPal, down from 13% in 2018.

Pre-COVID-19 majority of NPOs have looked at social media as just a medium of engagement and getting virality. However, running campaigns and ads on social media isn't digital fundraising.



Here is a simple guide for nonprofits who are interested in understanding the true nature of digital fundraising:

Strategic guide

Even before we ask for money from our prospective donors as NPO one needs to ask:

- Is the cause bigger or the organization?
- Why should someone give to your NPO?

The majority of donors really don't care about the organization with the exceptions of large NPOs. They care about the cause and how the cause is making a difference to society. When an NPO communicates in the same language then it is trying to speak the language of the donor by being a donor-centric organization. So transform yourself into a donor-centric organization. You are no more about the organization but about the cause.

When you start communicating this from all your respective mediums to your donors and non-donors then you are also addressing the second question from a strategic point - Why should someone give to your NPO?

Additionally, your donors will answer your NPO's value proposition. So it makes more sense to be a donor-centric organization.

Tactical guide

Addressing the tactical side, an NPO should look at the assets that it owns on the Internet. Basically, they are:

- Website + Donation Page
- Blog
- And Email
- You don't own social media

The TOP three are your owned assets and an NPO should concentrate on how to effectively use them rather than creating anxieties and problems for a prospective donor.

On digital there are two ways to converse with your audience - one is the classic storytelling way where content drives your initiatives and the second way is where the media budgets drive the campaign and content remains in the background.

I am an old school thinker and prefer content driving the entire initiative. In this case, it will be the blog where you communicate with the world how the cause is making a difference to society. It also informs your nondonors how they can support the cause.

Your blog becomes a strong tool for donor-centric storytelling.

Thanks to the pandemic and the growing problems of social media, Email is finally getting it's due. There isn't a better tool than email when it comes to one on one communication with your donors and non-donors. But don't treat email as a broadcasting medium rather than a channel of personal communication with donors. How do you do it?

The answer lies in - segmenting your email database, building email user journeys, and having a content plan that matches with your overall content plan i.e. your blog

Finally it is your website and the donation page. While your website will showcase the world how your cause is making a difference, the donation page should provide the environment for a seamless donation. The donation page should not increase the donor anxiety by asking for unnecessary personal information, a donation page that works, and provides the security of safe transaction.

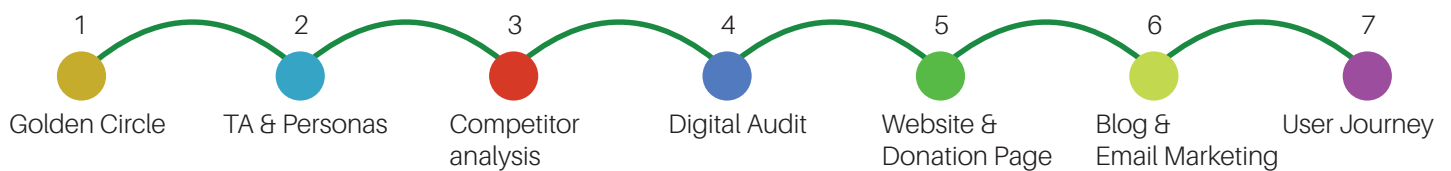
The majority of NPOs think that once the money is in their bank account, their job gets over by sending a tax statement and a monthly newsletter. Do you really think that relationships are built like this?

Just like a for-profit brand is judged on parameters like after-sales service, in an NPOs case the stakes are high how it treats a donor after that first payment.

How you build a relationship from here on will decide the donor transforming into a recurring donor and even advocating others to join the cause. You will need to bring the strategic and tactical mindset in synch and patience will play a huge role.

Here is my template of "Digital Journey" that I recently created for a nonprofit with an objective of effective digital fundraising.

Digital Journey for a Non Profit



Just like any other form of fundraising, digital fundraising takes time and won't happen overnight. But if you lay the foundations of your digital fundraising properly it will give you compound returns in the coming years. Additionally, you will be investing in your own assets or organic mediums.

Digital fundraising isn't a campaign. It is your program.

TOP Digital Transformation Trends In 2020 Triggered By Covid19



Sairee Chahal

Founder & CEO

SHEROES (women-only social network)

Sairee Chahal is Founder and CEO of SHEROES – the world’s largest online ecosystem for women, comprising the SHEROES app, Babygogo, SHECO, SHEROES Money, MARS by SHEROES and Naaree.com. The network has a national and global footprint of 21 million women. Sairee is on the Board of Directors of Paytm Payments Bank and Milaan Foundation, and on the advisory board of US-based initiative Women In Cloud.

She has an M. Phil from JNU and a PGDBM from IMT Ghaziabad. She is an Aspen Fellow and a Cartier Award Alumni. In a personal capacity, Sairee has mentored hundreds of women entrepreneurs, and continues to do so to help strengthen the women-led entrepreneurship ecosystem.

One of the most unique aspects of the pandemic of 2020, is that millions of people around the world, had access to the internet unlike any global pandemic. Even more unique is the fact that millions of women had access to the internet. As more and more people reached out on the internet with a vengeance—for support, upskilling, advice and access, the world saw a number of macro trends emerge from this unprecedented scenario.

Global job losses and salary cuts led to the birth of millions of micro-entrepreneurs. People turned skills, passions, side hustles and community needs into small businesses to stay afloat, and break out of the “secure jobs” mindset.



Global shifts to remote working have inspired businesses to reimagine how their teams work, with many creating full-time remote positions. We also saw the growth of platforms offering skilled workers access to gig-style opportunities and full-time work. SHEROES’ remote enterprise business ‘MARS’ saw a surge of in-bound business, as more and more companies looked to scale-up or scale-down, without the difficulties associated with hiring and managing teams.

Accelerated digital transformation in the healthcare sector is another important trend. Telemedicine came to the rescue of consumers struggling to access several basic health services. Several healthtech businesses grew in relevance as they leveraged tech to facilitate online consultations and delivery, bringing healthcare – from orthodontic care to reproductive health services – to homes.

We are also seeing the emergence of several women-led healthtech, fintech, menstrual and mental health platforms emerging—with a women-first, high-empathy, high-trust approach. Many of them leverage the SHEROES platform to drive conversations, and connect with women consumers on a deeper, authentic level.

Women and money is also a growing theme, with platforms offering fiscal literacy programmes, investor education and products designed for women. Yet, the latter needs much more innovation to serve the real needs of women, whether it’s for education or business loans, or building a retirement fund.

At SHEROES, over the last few years, we have been silently building what has now come to be known as the “Women’s Internet”. Our women-only social network is designed in a way that aligns with four universal goals of women—building digital identity, nurturing meaningful connections with other women, investing in physical and mental health, and growing financial independence. During the pandemic, these goals emerged as the frontrunners of what women internet users were seeking.



Domestic violence grew around the world. Women lost jobs and struggled with health issues. They felt isolated, lonely, and these experiences impacted mental health. Millions of women turned to the Internet for community support and engagement. For instance, the traffic on the Ask SHEROES counselling helpline, not only grew exponentially, but the geographies that women came from, grew more diverse and remote.

Our health communities saw a surge in queries, while more and more women wanted to become micro-entrepreneurs, consultants, and join the gig economy. In response to these real-time needs, SHEROES launched several initiatives to support members. 'SHECO', our social commerce platform launched an academy, where women can become entrepreneurs and build their own business from home. 'SHEROES Money' was launched to offer financial products to underserved audiences lacking credit histories, but with potential to grow. We are also launching newer initiatives to support rural entrepreneurs, women leading cloud businesses, and other niche areas in the coming year. One area where we need more innovation is the legal ecosystem, to bring in empathy and access.

As these online ecosystems grow stronger, I believe internet users, especially women, will have access to superior, more relevant choices, and in turn, be able to take charge of these universal areas of life, in a way that benefits them, with a long-term perspective.

Brands Basics And Consumer Behaviour During a Pandemic



Shalini Rawla
Founder & CEO, The Key LLP

Shalini is the founder and CEO of her boutique qualitative research The Key (www.thekey.co.in), unlocked in late 2004. Prior to starting The Key, Shalini worked in the advertising and communication industry for over a decade in some of the best ad agencies like Lowe, Ambience and Contract. She was also the programming head for Hungama TV.

Shalini has authored a weekly column 'Pop Code' for DNA and has written many a marketing lessons for various trade magazines and websites. She has also been a guest faculty in EMDI and MET. She has also hosted a live consumer focus group – a first in India – at the Ad:tech Delhi.

Lockdown that opened our minds

It was all very new when the lockdown was implemented in March this year. We had our optimism biases and were happy for the much-deserved break from work. Our sleep patterns changed, the tyranny of habit was broken, we adapted to technology whether it was conducting or attending online classes, handling a zoom meeting, reading e-papers or paying digitally. Picking a new skill of cooking or baking and dropping a bad habit of eating junk food seemed to be the perfect trade-off. From conspicuous consumption we finally moved to conscientious spending and understood the 'simple living and high thinking' tenet of our forefathers. We were embracing the past and going back to our roots.

FOMO - the new social mood



It is a new kind of FOMO we are experiencing— Fear and Outrage More than Others. One of the central emotional responses during a pandemic is fear. The mounting infections and death rates gave us a closer-to-the-bone worldview of our temporal lives. Add to that, the no-touch greeting, contactless technology, embracing the six feet social distancing norm and the ubiquitous face mask, shields or partitions - all worked together to fuel a new culture of distrust. This heightened distrust is shaping our responses to people of different social and cultural backgrounds and to even brands and influencers. We have started respecting real experts than the fake influencers of Bollywood.

Shrinking circle of trust

Ironically technology that first enabled us to expand our circle of friends, is today encouraging us to limit that very circle of trust. Online reviews from anonymous users that were so important once are today looked at as motivated. Fragmented smaller trust groups are forming everyday - on WhatsApp and even on other social media platforms. Home grown brands, home chefs, artisanal products, made in India all point to our comfort in familiarity and trust in a few. The pandemic has permanently changed our societal DNA and made us more cautious and sceptical about everything and everybody.

Shift to value and essentials

Cautious and sceptical means expecting brands to cut to the chase and deliver on basic functionality and maximum value. No flowery overclaims. No evolved emotional connect. Roti, kapda, makaan, dava and daru are enough during a pandemic. Rest all is dispensable luxury. So, what's the trend across these 5 basic categories?



Roti - Since we are cautious about health, expect more consumer packaged goods (CPG) with immunity boosting ingredients, UV germ killing machines, home chefs, artisanal and home cooked stuff to be in demand. Desi fruits and indigenous organic super foods and cereals like bajra, sorghum, nachni etc shall shame the Californian apples and American white quinoa

Kapda - We are defying structured silhouettes in fashion just as we no longer respect all power structures like media, police, judiciary. A new work from home (WFH) line is begging to happen with soft, comfortable cottons, modals and breathable fabric that are also chic. Tee shirt brands can finally make it to the fashion runway. A luxury brand of sanitizers? No way!! We are not seeking luxurious necessities but affordable luxuries - so yes to designer masks and antivirus coated fabrics

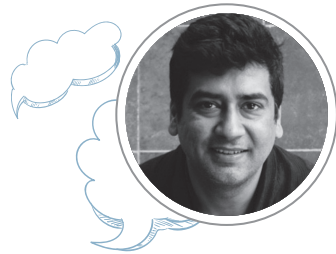
Makaan - Developers may well start thinking of providing homes with a small office/home office (SOHO), hidden shoe racks at the entrance, walls coated with anti COVID paint, homes pre-fitted with COVID germ kill gadgets and filters, sales of cordless vacuum cleaners and magic mops likely to go up.

Dava - Telemedicines, online prescriptions and consultation, doorstep delivery, oximeters - all constitute pharma e-comm. Homeopathy, naturopathy, ayurveda, shall co-exist with immunity builders, vitamin zinc supplements. Alternative therapies, yoga, open air gyms - all indicative of a recharged commitment to stay fit.

Daaru - Never was drinking at home done so unapologetically before this pandemic. WFH managed to break stereotype of consuming liquor only in the evenings. Craft and artisanal beers, zero alcohol beverages, small get togethers at home, weekend get-aways by road, anytime netflixation versus a Friday release are all ways of entertaining ourselves. Ambitious materialism in the name of lifestyle shall give way to shared hedonism.

The pandemic has made us all re-evaluate and re-prioritize our life goals and savings. It is all about self-preservation, self-care, self-improvement, self-help and self-reliance. Similarly, businesses and brands must reassess the market situation, understand emerging consumer needs and pivot accordingly. Forget obsessing about traditional competition - they are themselves groping in the dark. Perhaps there is newer competition from a different category now. Enter the narrow trust circle through empathy, delivery, and redefining brand values.

MarTech—A Match Made in Heaven



Vijayant Dhakaa

Senior Vice President, ValueFirst Digital Media

Vijayant Dhaka has 14 years of experience in the digital ecosystem with internet first businesses like ValueFirst, Cheetah Digital, Group M, Octane, Nanu and Policybazaar.com. In his current role at Value First, Vijayant and his team enables enterprise clients in banking, finance, aviation, hospitality and ecommerce industries—to collect, manage and activate billions of individual customer records—to deliver timely, relevant and automated messages, thereby helping them drive online conversions at scale in real time.

We are headed towards a business economy with a frictionless experience. The question however has been, how do we arrive there? My wish for marketing teams across industries in India is that they spend more time in enabling themselves on tools and platforms, adoption of features that can do wonders like A/B testing, and build actionable insights out of the fancy good looking dashboards they get access to. 2021 is the year of marketing automation in India I feel, we are already experiencing this with brands making faster decisions than ever in evaluating automation platforms.

What all can we expect in 2021?

Data Centralization

Majority of the brands still struggle with this. Have all your data from all your sources in total sync on a single platform and get better visibility of your customers for hyper-personalization.

Build Relationships: Never leave any customer un-attended again

Drive engaging customer experiences by building automated and personalized campaigns across multiple channels even with complex conditions and rules, and automate entire customer communications scalable across your entire customer journey.

Measure finer, optimize better

Get actionable insights out of your data. Visualize it, monitor it, understand what works best for which of your user, and then optimize your campaign activities to improve your sales funnel and generate revenues.

The tide is changing from software islands to all-in-one solutions that empower not just tools but also teams to play nicely together. MarTech and 2021 is a match made in heaven.



Partnership that matter | Thank you

Research Industry Partners over the last 10 years

Thank you for your partnership. At Octane Research, we love the company we keep.



digitaldefynd
digital marketing hub

Digital Vidya



DMAasia
Knowledge that transforms



Research Participants Community

Brands who are part of our research community.

Thank you for sharing your ideas and opinions over the last 10 years. We believe our shared voice has played a positive part in India online journey. This list of brands is over 2500+ long so here's our list of select brands that have been a regular in our research outreach since 2011.



Research Participants Community

Brands who are part of our research community.



Research Participants Community

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Marketers' Corner: vox populi

Community feedback over the years...

Your words of encouragement have been helpful. We are pleased to share such words over the last 10 years. In an alphabetical order.

Ashish Kumar

Venture Coach, Blackstone
Launchpad

Advancements in artificial intelligence when combined with proliferation of various messaging apps, is fueling the development of Chatbots which can carry out various kinds of tasks such as scheduling a meeting, reporting temperature, assisting users buy a new gadget, etc. This has led businesses to invest heavily in the chat economy. The bot revolution is still in early phase, but the enthusiasm is clearly growing rapidly among customers and businesses. They allow you to do many more things that mobile apps already do, and are more convenient because you don't need to download a different app each time and you use them through a chat interface. A lot of developers believe that it will be a lot easier to get users to just chat with the Chatbots than to download an app, login, learn to use, and then try to remember what it was that they wanted to do in the first place. Technology analysts have forecasted that bot stores will be the biggest incoming after the Facebook Messenger and the biggest thing since the rise of app stores and we couldn't agree more. In fact, it's actually going to get much bigger than that. Bots will be the future of the way we communicate, shop, travel, book things, and use other services. We may even go to the extent of saying that, in the future, we may forget the traditional websites we use as bots will be the new websites.

Daman Soni

Chief Marketing Officer, Wecash

A full-stack marketer is the one who is creative, eager to learn, and has a sound knowledge of both marketing and sales. Research reports like these give better idea to today's marketer on how effective are the different digital channels and what are the contemporary best practices in India marketing. I admire the way this Octane Research industry report comprehends the year on year trends and provides deep insights based on data and sound analysis.

Franziska Schaad

Social Selling Coach & Speaker,
FRANSCHA

The value of Social Media doesn't necessarily lie in what we say, but in what we hear! Every post, update, share, and comment offers valuable insight into your target group's life, choices, preferences and behavior. 2018 has been another great year for social networks and I predict these four trends to overtake the development in the coming year.

#1- Video Content will increase, especially Live Streaming: Live videos gained great popularity on YouTube, Facebook, and Instagram and will see further growth in 2019. Online videos will make up more than 80% of all consumer internet traffic by 2020.

#2- CEOs will be on Social: It's crucial for CEOs and other executives to be present on social media to avoid fake news and propaganda. This will not only boost the company's reputation, but also increases trust with (potential) employees, partners, and clients.

#3- Higher Investment in Social Listening Tools: For 2019, I'd advise you to invest your time and money in social media listening before you talk. This will help you to find the channels that work best for you and where your target audience listens.

#4- LinkedIn will continue to fetch traffic on Websites: More than 50% of all social traffic to B2B sites comes from LinkedIn. Especially if you are a rather unknown player in the market, most prospects will find you via social first. Your company's, as well as your employees' social profile, will decide the first impression of your company.



Marketers' Corner: vox populi

Community feedback over the years...



Jatin Modi

CEO, FrogIdeas

While AI and technology driven experiential marketing will certainly come to the fore, I think 2018 will also see the rise of the sophisticated marketer. Someone who is able to understand attribution, discuss ROI and map customer journeys/behaviors better. There has been no better time to get our basics right. This is where the Octane research report will come in handy. For the invaluable insights and its ability to understand the Indian marketing industry's challenges and opportunities, there is no better report than this one.

Manish Kalra

Chief Executive Officer,
Homeshop18

I look forward every year to receiving my own copy of Octane Research year ahead guide on digital trends in India. It's an interesting format with relevant business insights and customer trends which make it a handy reference and a useful guide for business leaders and marketers. Keep up the good work Octane team!

Rajesh Kumar Jindal

Head of Audience, Industry & Digital Marketing, Asia Pacific Japan, SAP

Octane's annual research is one of the very few reports in the India that help in getting a 360-degree view on how digital marketing is evolving with every passing year. I had been a part of their research team myself in 2014-2015 and know how exhaustively the research is carried out. It strives to bring forth valuable insights and plethora of opportunities that a digital marketer should be looking at. I'm glad to share that I refer these reports to see how businesses are yielding from digital standpoint.

Prateek Chatterjee

SVP, Corporate Communication & Marketing, NIIT Limited

Branding is about the sentiment you create around your product or service. Marketing has long been based on the principals of brand building, until recently when digital gave us a shortcut to everything and before we realized it, digital marketing became the buzzword that everyone kept swooning over. Someone out there kept promoting more the footprint, more the conversions' and so we kept running after quantity over quality. In a race for reach, most brands are missing the opportunity of creating meaningful and possibly long-term relationships with the right customers, because everyone is targeting a large number of people over a good conversation. To create a compelling difference, brands must tap into the emotions of the consumer and do it with honesty. It doesn't have to be an exorbitant tale – just a simple thought or story is enough. Use technology to your advantage and try to make it interactive, immersive experience that connects them with the history, purpose, and vision of a brand. Make consumers eager to become a part of your success story.

Sairee Chahal

Founder & CEO, Sheroes

India Internet much like net neutrality stands to make a few leaps ahead of its global peers. As more and more number of people use the internet for the first time, we are bound to break some barriers and set a few India first trends. It is an opportunity. We should continue to invest in it. Octane's Annual State of the Online Marketing India Reports have been my reckoner for a few years and I am happy to begin my year with a bird's eye view of things in the industry. Very empowering and educative. Get your copy



Marketers' Corner: vox populi

Community feedback over the years...



Sahiba Sachdev

Senior Manager, Essence
(a GroupM company)

Digital and the mobile internet specifically has revolutionized how we Indians lead our lives and run our businesses to solve genuine customer problems. Forward looking enablers such as Octane have been on the forefront as proactive catalysts to not just create a vibrant ecosystem but also to energize all relevant stakeholders within this community. I have personally found their reports to be specifically relevant, useful and insightful to provide meaningful directions and enable business decisions. I congratulate them on the great work done so far and do sincerely hope that they continue to break new ground in the future.

Subhrangshu Neogi

Director : Group Marketing & Brand,
Religare

Digital and the mobile internet specifically has revolutionized how we Indians lead our lives and run our businesses to solve genuine customer problems. Forward looking enablers such as Octane have been on the forefront as proactive catalysts to not just create a vibrant ecosystem but also to energize all relevant stakeholders within this community. I have personally found their reports to be specifically relevant, useful and insightful to provide meaningful directions and enable business decisions. I congratulate them on the great work done so far and do sincerely hope that they continue to break new ground in the future.

Sunil Kumar

GM - eCommerce & Innovations,
India, Jet Airways Ltd.

Digital is a vast topic, where disruption is a critical element of the consistent evolution of technology. In India, internet disruption is primarily being driven by consumers and though we have a lot of data/resources available on consumer behavior online, what we often desire is understanding of what's working and what's effective. For the last 8 years, Octane Research's annual has proven to be a ready reckoner for digital marketers especially in ecommerce. I appreciate their efforts on the project done

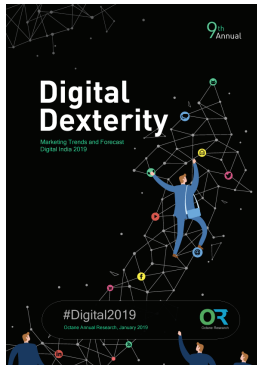
Vishwas Anand

Head of Content and Thought
Leadership, Aspire Systems

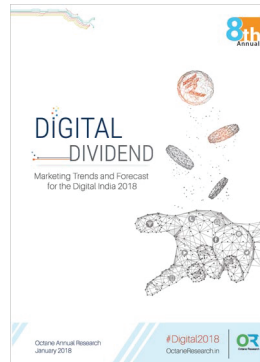
In this Post-Truth digital era marked by an explosion of alternative facts, brands must invest in True Content Power built upon the pillars of Contentworthiness. Content worthiness is a philosophy I've coined that goes beyond amplifying a website's rankings or the maximum number of shares of a Content Asset. It is the Science of a valuation that determines the possibility a brand may default on their truth-telling obligations. My 3A Content Model of Authenticity, Accuracy and Agility builds a platform for data-inspired creativity to blossom. This is when the Art of a Science makes the Science of an Art possible, as it were! It builds the foundation for a differentiated brand narrative.

Octane Research Over the Years

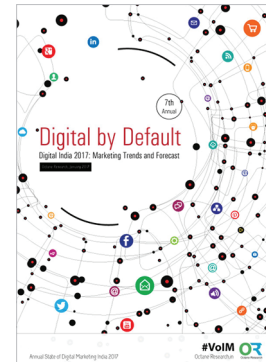
9 annual state of online marketing reports. A few glimpses of our journey.



Digital Dexterity
9th Edition 2019



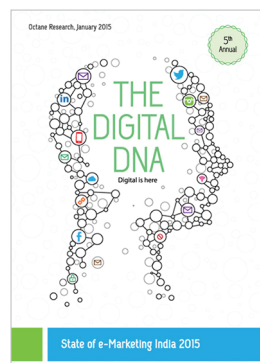
Digital Dividend
8th Edition 2018



Digital by Default
7th Edition 2017



Digital India 2016
6th Edition 2016



The Digital DNA
5th Edition 2015



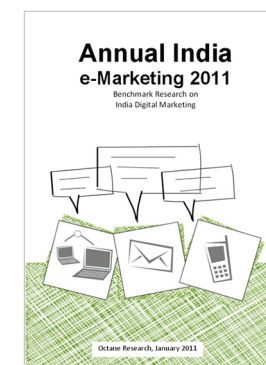
Igniting Engagement
4th Edition 2014



Spark The Surge
3rd Edition 2013



Gearing up for Growth
2nd Edition 2012



Annual India e-Marketing
1st Edition 2011

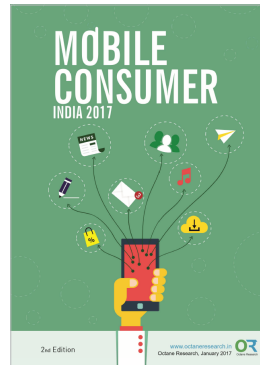
Proud of our 9 annual research covers, thoughtfully designed. Much appreciated by the India marketers. Thank you.

Octane Research Over the Years

14 industry reports & best practices publications.



Trends & Forecast for BFSI Industry 2017



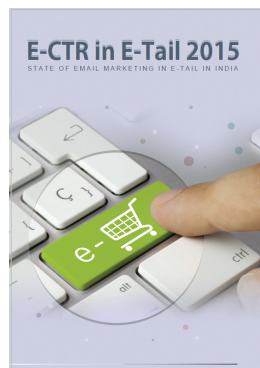
Mobile Consumer India 2017



A Path to Revolution RAI 2016



Retail Marketing Initiatives That Work! - RAI 2015



E-CTR in E-Tail 2015



Email Marketing Playbook 2015



e-Travel Marketing India 2015



Inbox-State of Email Marketing in India 2015

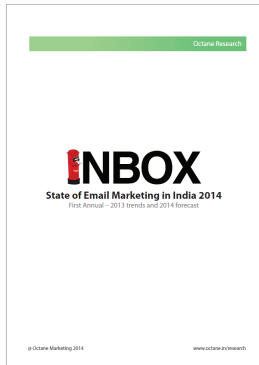


Shopping Cart Abandonment 2015

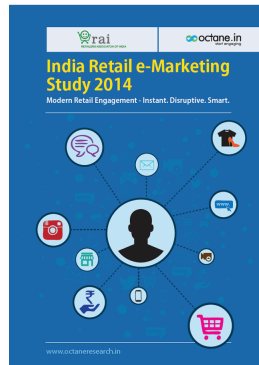
Over the last 10 years, we have researched and explored how is online impacting various sectors like travel, retail, bfsi etc. We have documented best practices on email marketing. We have tracked millions of clicks of consumer experience whether it is mobile usage or unsubscribing behavior. Proud of our 14-industry research covers. Thank you.

Octane Research Over the Years

14 industry reports & best practices publications.



State of Email Marketing in India 2014



India Retail e-Marketing Study 2014



CTR eTail 2014



India Mobile Users Experience Monitor 2013



India Retail e-Marketing Study - RAI 2013

Over the last 10 years, we have researched and explored how is online impacting various sectors like travel, retail, bfsi etc. We have documented best practices on email marketing. We have tracked millions of clicks of consumer experience whether it is mobile usage or unsubscribing behavior. Proud of our 14-industry research covers. Thank you.

Hall of Fame | The team behind OR

Marketing mavens who have made the OR difference.

Octane Research Team over the years (in an alphabetical order)



Aanchal Sharma

[!\[\]\(a810766bb3ae538cb12fe1c29558d28d_img.jpg\) /aanchalshrma](#)



Ahmer Hasan

[!\[\]\(d0dd62620446511fd8d8f5d227a7a162_img.jpg\) /ahmerh](#)



Akanksha Madaan

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Akshita Khurana

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Anant Shree Seth

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Anindita Mukhopadhyay

[!\[\]\(06f8c01ea6dce1efaefbf86be919c257_img.jpg\) /anindita94](#)



Ankita Bhardwaj

[!\[\]\(9061bc3f3629985c512d13fb305d12bb_img.jpg\) /ankitapopli](#)



Anurag Nigam

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Anshula Tiwari

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Apoorv Ahlawat

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Apurva Bhandari

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Digvijay Bhandari

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Himani Madan

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Jayati Baweja

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Jawahar Gadhvi

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Mallika Khosla

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Mayuri Dixit

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Praveen Kumar

[in](#) /praveeniitdhn



Priyanka Bhadoria

[in](#) /priyanka-bhadoria



Priyanka Sharma

[in](#) /priyankasharma8



Rahul Khattar

[in](#) /rahulkhattar



Rhea Jain

[in](#) /rheajain



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Samarth Saxena

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Shweta Bahl

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Swati Mehta

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Tejapal Chani

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Vijayant Dhaka

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Octane Research 2021 Team (in an alphabetical order)



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Paul Adler

 /paulwadler



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 /punitm



Santosh Bhat

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Tanya Dwivedii

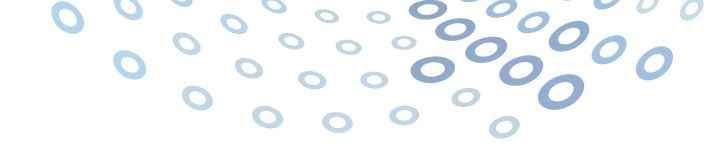
 /tanya-r-dwivedii



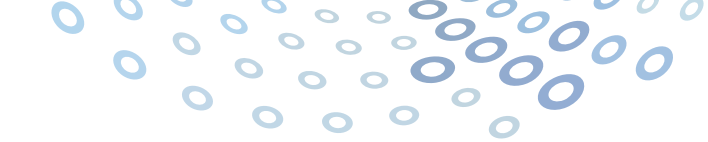
Udai Jain

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Notes:



Notes:



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