MMA FORUM INDIA
OCTOBER 27, 2017 | NEW DELHI

nielsen

MOBILE: THE UNIQUE WATCH -BUY CONNECTOR

NEW MEASUREMENTS FOR THE NEW AGE

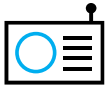


Prasun Basu
President, South Asia
Nielsen

MMA
MOBILE MARKETING ASSOCIATION

WATCH & BUY

WATCH (Media)



RADIO



PRINT



SMARTPHONE



TV



COMPUTER



WEB SITE



TABLET

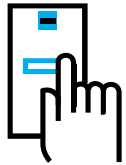
BUY (Commerce)



TRADITIONAL



IN-STORE PURCHASE



M-COMMERCE



MODERN



OUT OF HOME

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WATCH & BUY

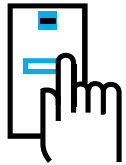
WATCH
(Media)



SMARTPHONE

Digital = Mobile

BUY
(Commerce)



M-COMMERCE

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INDIA: BIG, BUT GETTING A LOT BIGGER

GDP GROWTH: TO BECOME 3RD LARGEST BY 2030

2016
ECONOMY
$2.1 TRILLION
7TH LARGEST

2030
ECONOMY
$6.8 TRILLION
3rd LARGEST

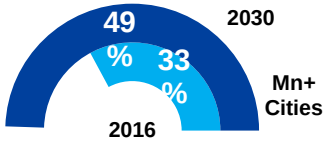
58% SERVICES | 24% INDUSTRY | 18% AGRICULTURE

POPULATION: TO BECOME LARGEST BY 2030

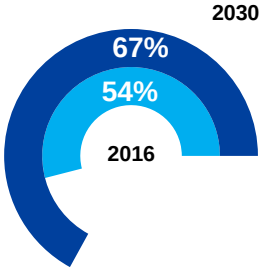
2016 1.21 Bn

2030 1.48 Bn

INCREASING HOUSEHOLD EXPENDITURE SHARE OF MN+ CITIES



INCREASING CONCENTRATION OF WEALTH IN URBAN AREAS

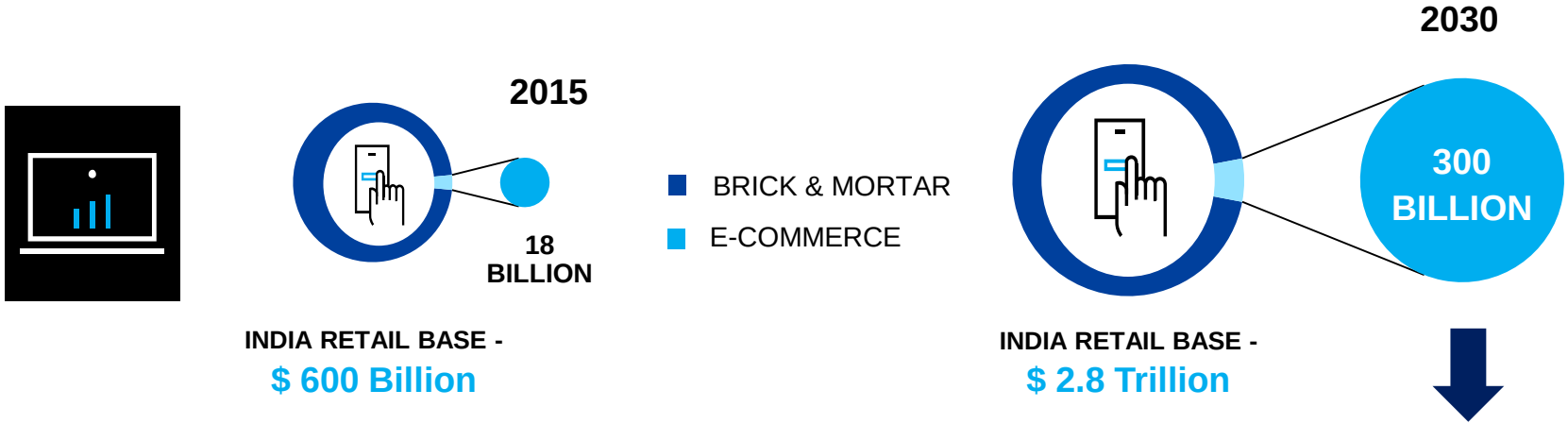


Concentration of population earning more than $15,000pa in urban areas

Source: GDP based on WB 2015, CII Fact book, UN Dept of Economic and Social Affairs, McKinsey Global – India's Urban Awakening Report

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RETAIL LANDSCAPE: SOARING ONLINE SALES



INDIA RETAIL BASE -
$ 600 Billion

INDIA RETAIL BASE -
$ 2.8 Trillion

E-COMMERCE WILL CONTRIBUTE GREATER THAN 10% TO INDIAN RETAIL BY 2030

4X OF ENTIRE CPG INDUSTRY TODAY

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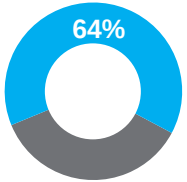
WATCH GROWING TODAY
BUY WILL GROW TOMORROW

TOTAL
TIME SPENT ON PHONE

3.6

HOURS PER DAY

ONLINE
TIME SPENT ON PHONE



2.3 HOURS PER DAY

VIDEO STREAMING

93%
REACH

1.3X
JUN 2017 VS 2016

23
MINS PER DAY

3.4X
JUN 2017 VS 2016

SHOPPING

76%
REACH

1.1X
JUN 2017 VS 2016

Rising share of M-commerce

E-commerce

2015		2020
$5.5bn	2.9x →	$15.8bn

Desktop

M-commerce

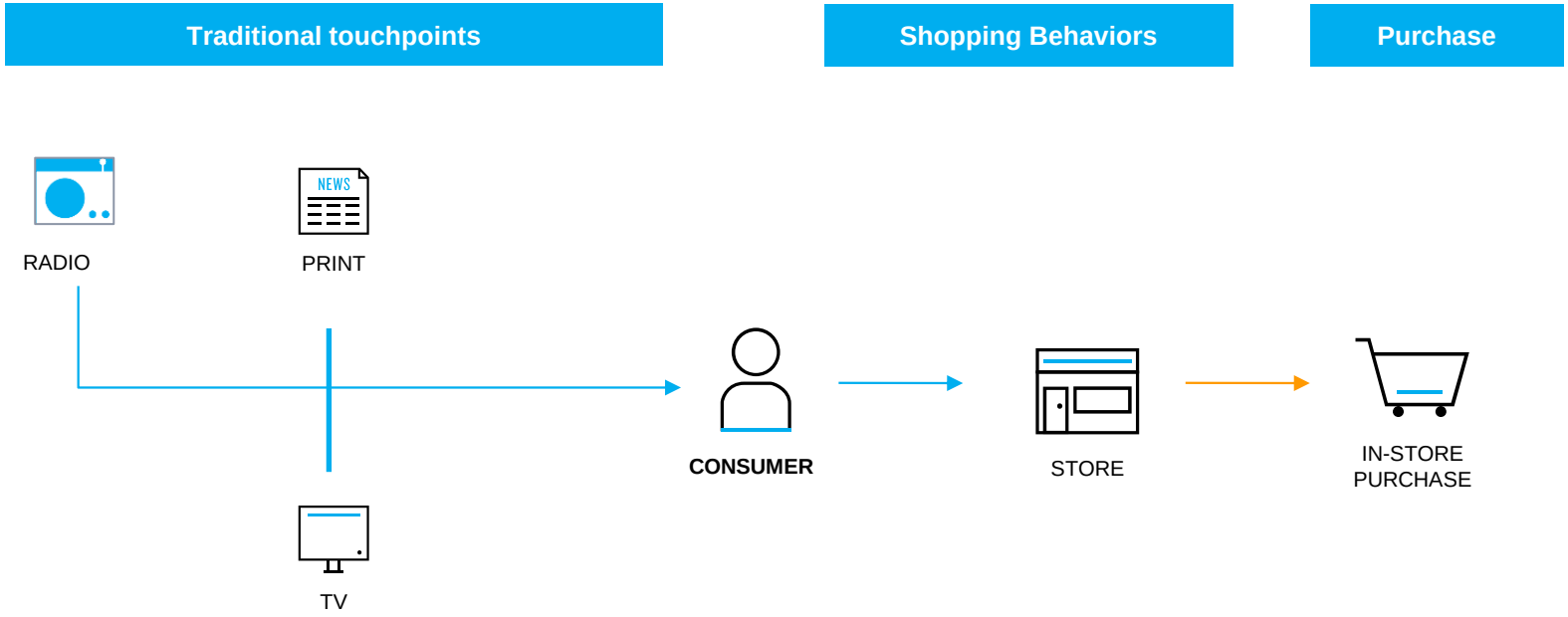
2015		2020
$7.5bn	8.4x →	$63.2bn

Mobile

Source: Nielsen ODM, eMarketer, : Internet Trends 2017 – Mary Meeker

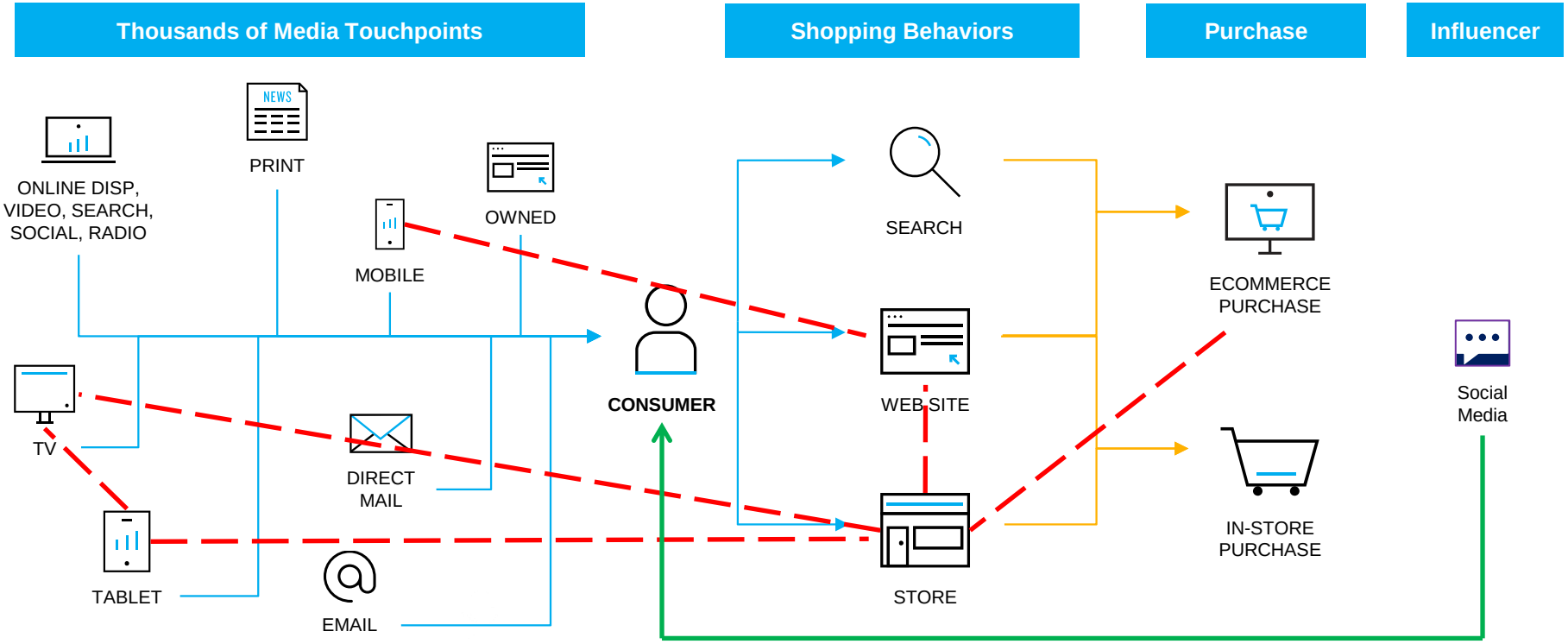
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LINEAR & SIMPLE CONSUMER JOURNEY…



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… IS NOW MORE COMPLEX



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MEASUREMENT OF M-COMMERCE



APP measurement

- Passive Measurement to track App performance on a panel representative of connected Android smartphone users in Urban India



IN-APP measurement

- Passive Measurement of In - App Usage to understand shopper journey and category level searches/purchases behavior



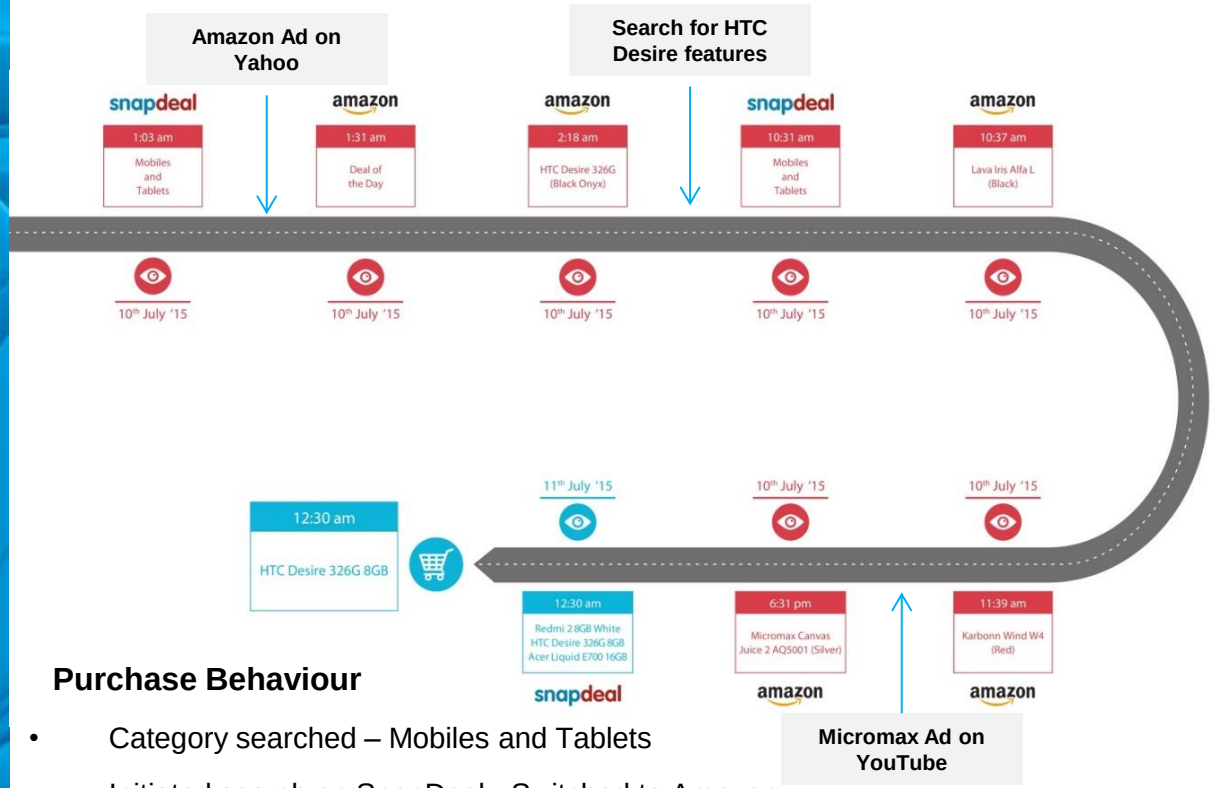
ASK MODULE

- Using inputs from passive measurement, compliment survey techniques to decode the online shopper

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DECODING PATH TO PURCHASE

ILLUSTRATIVE



Survey pushed to this user

Q. Reason for buying HTC over other mobiles
A. Better features
Q. Top 2 key features for you
A. Processor and Battery life
Q. Why Snapdeal and not Amazon
A. Had to gift someone next day. Snapdeal offered next day delivery

Purchase Behaviour

- Category searched – Mobiles and Tablets
- Initiated search on SnapDeal - Switched to Amazon
- Browsed through a few mobile phones on Amazon
- Made a purchase on SnapDeal the next day

No. of apps accessed	**2**
No. of days taken for purchase	**2**
No. of mobiles viewed*	**7**

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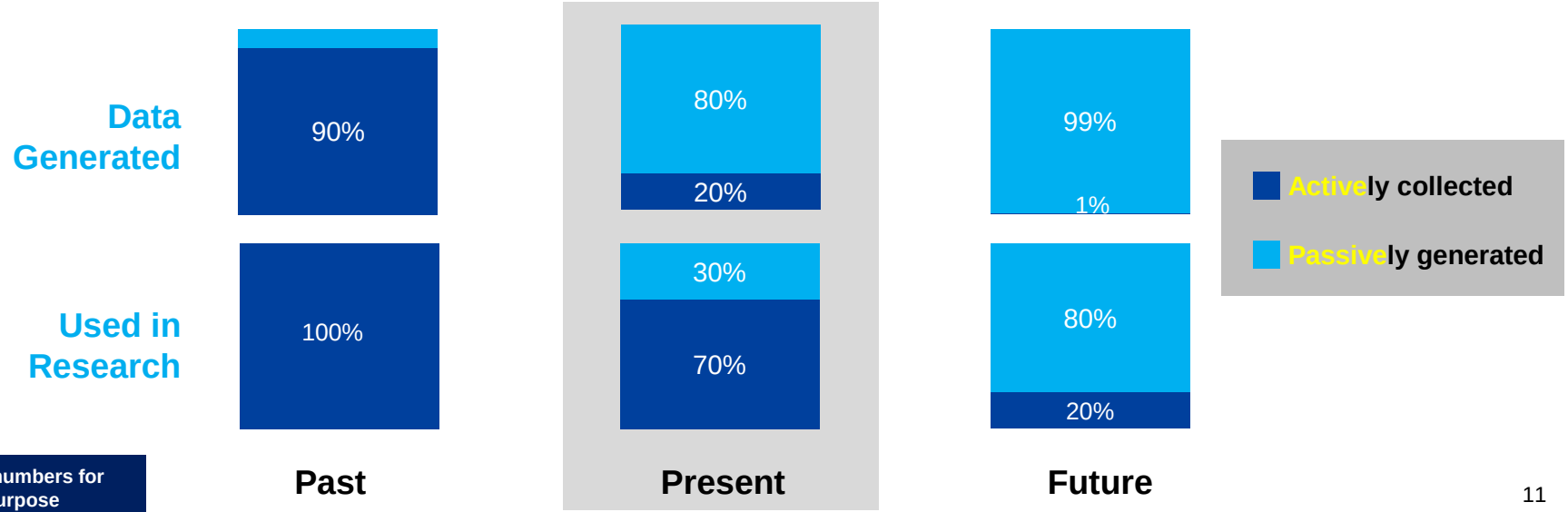
NEED FOR RESEARCH TO EVOLVE

Actively collected
F2F, Online, Mobile
Surveys
Focus Groups

More data was created in the last two years than the previous 5,000 years of humanity

Passively generated
Digital Meters
POS
Social Listening

Research & Measurement will continue to evolve to harness data generated through technology evolution
Trends: Digital Shopping, Buying, VR/AR, IOT



Conceptual numbers for illustrative purpose

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IS BIG DATA SUFFICIENT IN ITSELF ?

NEED FOR TRUTH SETS

Survey & Panel

- Limited dataset
- Structured Data
- Representative
- Enables monthly reporting

Big Data

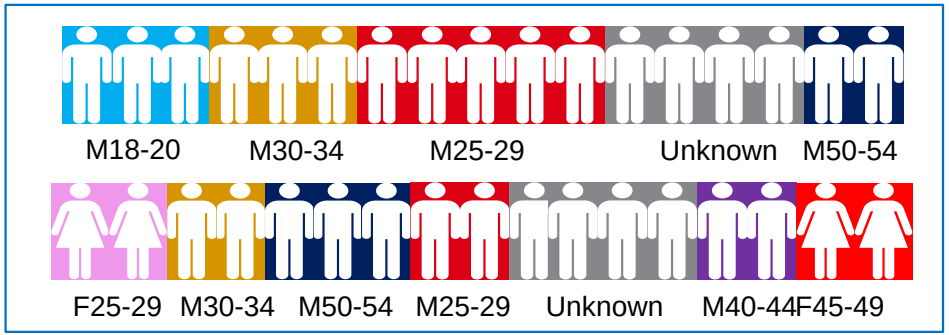
- Large data set
- Unstructured Data
- Can be biased
- Enables daily reporting
- **Validation?**

Ideal Approach → **Panel**
Leverage for Calibrations & Corrections

+ **Big Data**
Leverage for scale & coverage

Used Case: Digital Reach Measurement

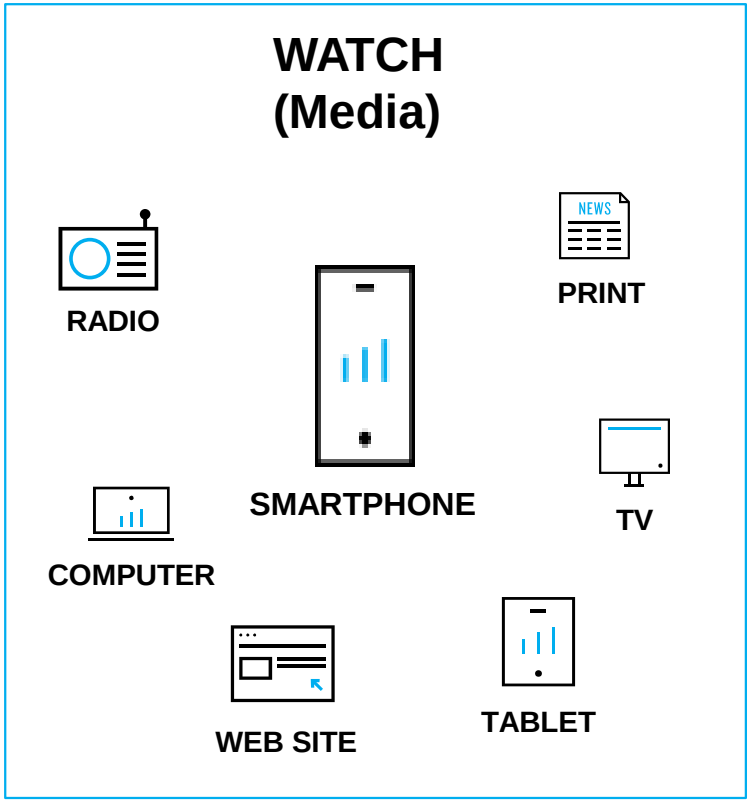
PANEL →



←

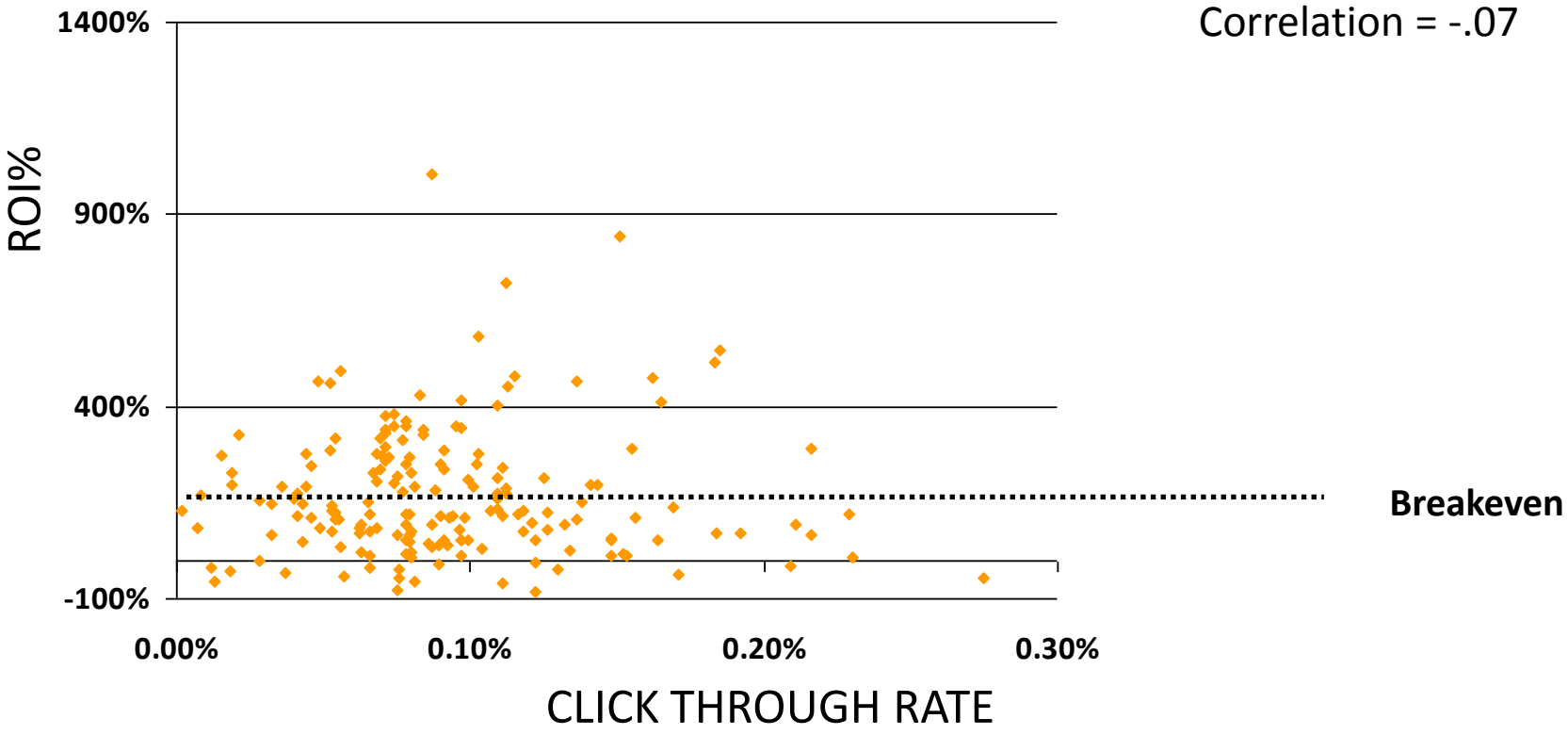
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WATCH



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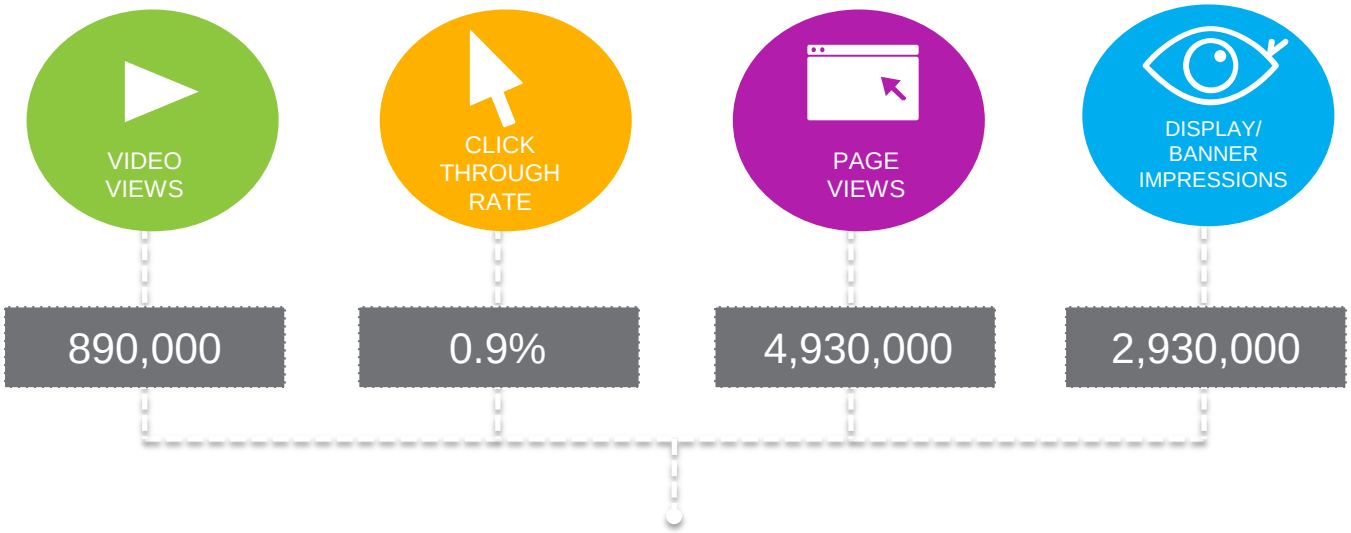
DON'T GET HUNG UP ON CLICK THROUGH RATES (CTR). THERE IS NO CORRELATION BETWEEN CTR AND ROI%



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CRITICAL TO BRING DIGITAL AT PAR WITH OTHER MEDIA

CENSUS + BIG DATA BASED MEASUREMENT FOR DIGITAL



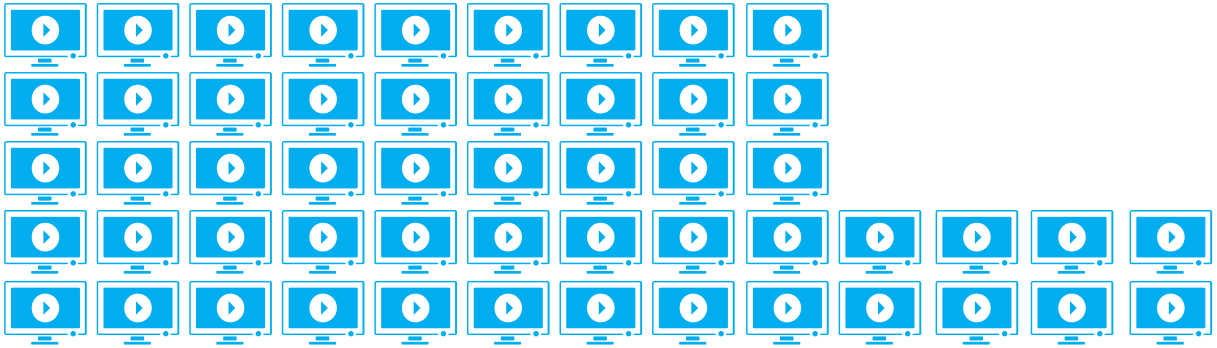
Still left asking…

Television => GRPs ***Is there a GRP for Mobile?***

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MOBILE CASE STUDY: FMCG CLIENT

TARGET GROUP: F18-34



ON TARGET PERFORMANCE
66.63%

WITHIN TARGET GROUP

REACH
21.7%

FREQUENCY
3.40

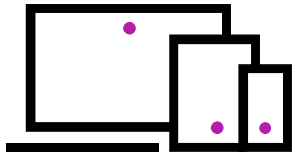
GRP
73.74

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ON-TARGET% - BENCHMARKS AVAILABLE VARIES BY TARGET GROUP & DEVICE

Target Group	Target
Female 18-44	62%
Male 18-34	76%
Male & Female 21-39	65%
Male & Female 21-44	75%

Device	On-Target%
PC + Mobile	72%
PC	61%
Mobile	74%



Mobile delivering better On-Target%

Source: 1500+ campaigns measured using Digital Ad Ratings across Target groups

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DIGITAL TEXT MEASURED TODAY

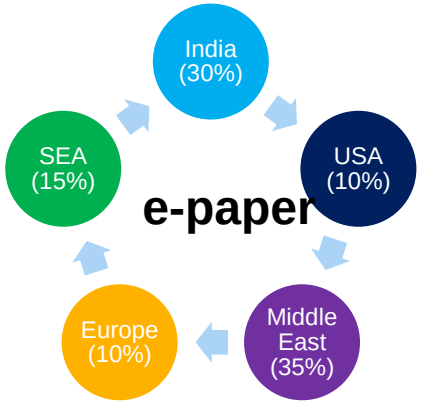
ILLUSTRATION



Medium	Q1 Unique Readers	Q2 Unique Readers
Physical	**35mn**	**30mn**



Medium	Q1 Unique Readers	Q2 Unique Readers
Physical	**30mn**	**24mn**
Physical + e-paper	**5mn**	**6mn**
e-paper	**5mn**	**15mn**
Total	**40mn**	**45mn**



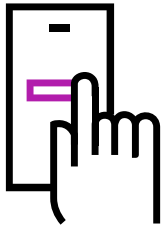
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CROSS MEDIA REACH (TV + MOBILE) AMONG SMARTPHONE USERS THROUGH IN-APP MEASUREMENT

Campaign	Only Digital Reach	Only TV Reach	Both Digital & TV Reach	Total Reach	Unique Digital as a % of Total Reach
Campaign 1	0.7%	13.3%	0.4%	14.4%	4.9%
Campaign 2	2.2%	9.6%	0.4%	12.2%	18%

Amongst smartphone and TV users

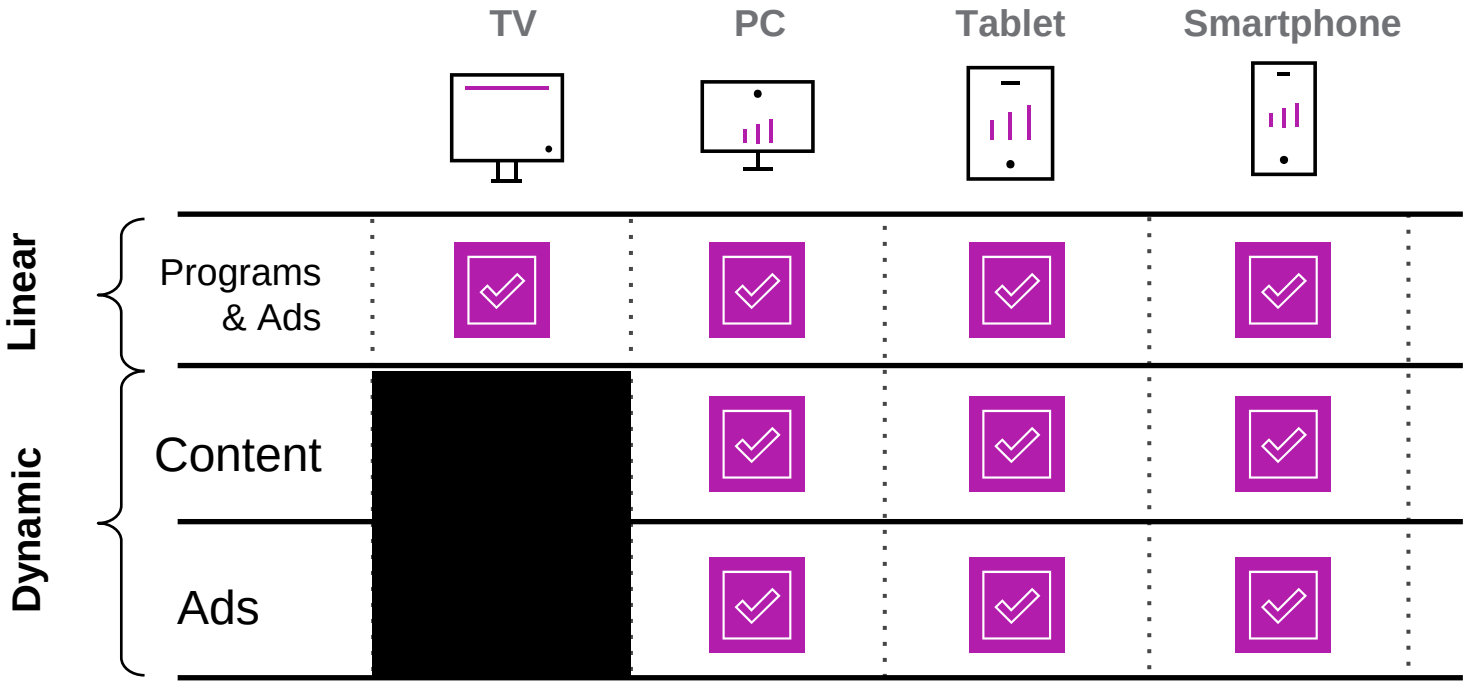
For certain target groups, campaigns on Digital medium have added significantly to incremental Reach



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LOOKING AT DATA IN TOTALITY... TOTAL AUDIENCE

CROSS MEDIA MEASUREMENT ACROSS PLATFORMS



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BUY

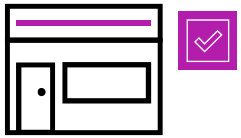


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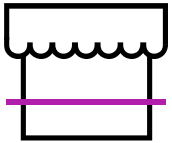
TOTAL CONSUMER MEASUREMENT

IN-STORE

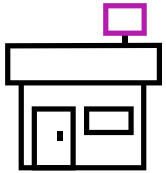
Cover over 90% of instore sales



Modern



Traditional



Convenience



Beauty



Pet

OUT-OF-HOME

Cover over 80% of on premise consumption



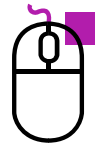
Dining



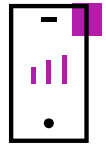
Cafe

ONLINE

Cover over 90% of e-commerce sales



Online



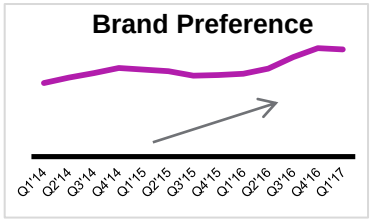
Smartphone

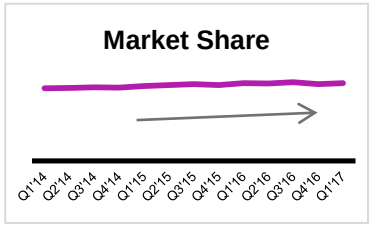
Higher dependency on newer methodologies.
Panel + Universe based

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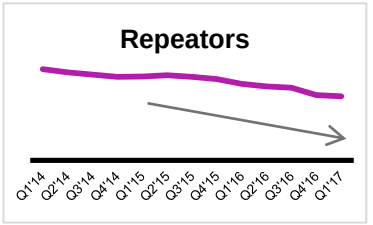
FROM PARALLEL TO CONNECTED/ INTEGRATED SYSTEM AUTOMATED BUSINESS DRIVERS

BRAND

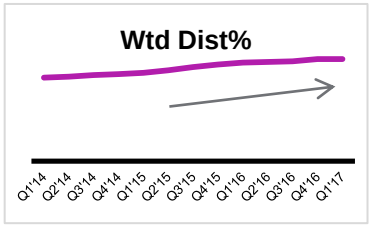


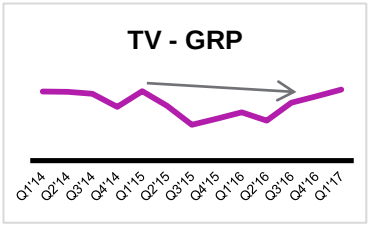


CONSUMER/ HH



TRADITONAL DATA SETS	TRADITONAL+ MODERN (SOCIAL/CRM/DIGITAL)
PARALLEL BUT SILOED	CONNECTED / ONE TRUTH
DESCRIPTIVE	CAUSAL/ PREDICTIVE
TIME BOUND	AUTOMATED / ALWAYS ON





RETAIL/ INTERNAL SALES

MEDIA

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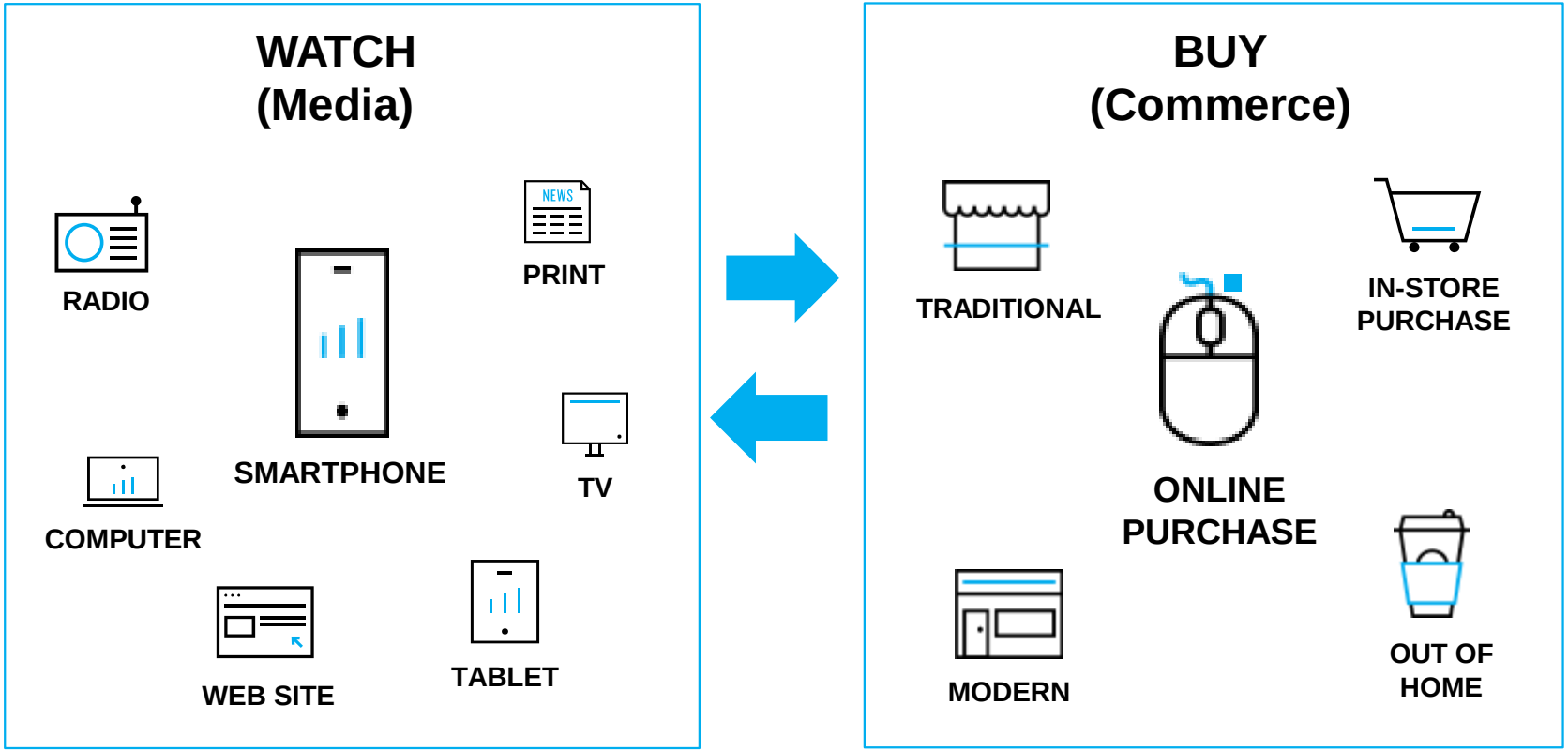
A REAL-TIME UNDERSTANDING OF CAUSALS



Quantifying the Impact: Retail Execution, Media, Brand?

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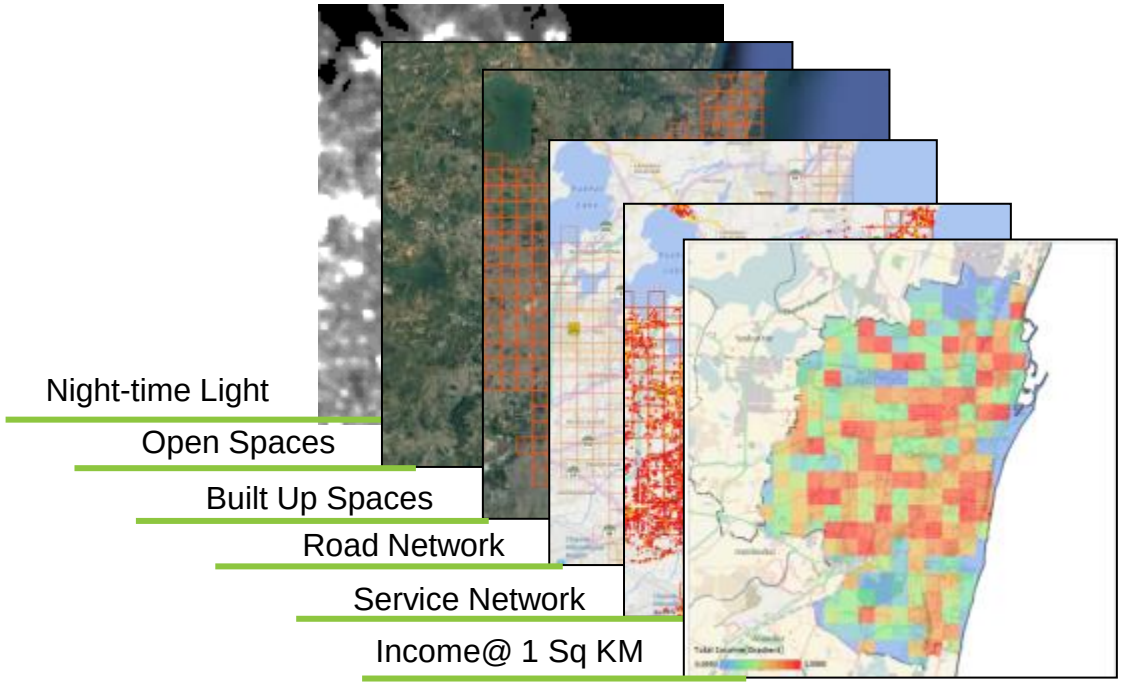
WATCH & BUY: and CONNECTING THE TWO



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EVOLUTION OF SOCIO-ECONOMIC DATA MEASUREMENT

Primary Surveys and **LARGE AREA** estimations

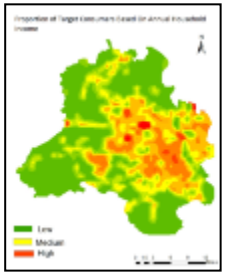


Source: Digital Globe, Open Street, Nielsen Research (MME Cellgrid)

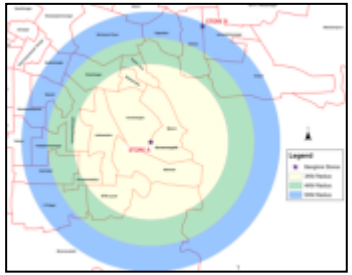
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LOCATION SEGMENTATION & TARGETING USING MOBILE

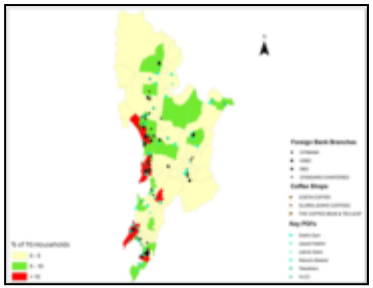
ILLUSTRATION



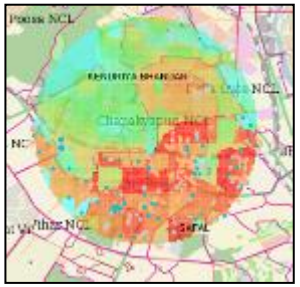
WHERE ARE MY CONSUMERS LOCATED?



WHICH AREA TO TARGET FOR THE MARKETING / PROMOTION EVENT?



HOW CAN I BENCHMARK MY PERFORMANCE AGAINST COMPETITION?



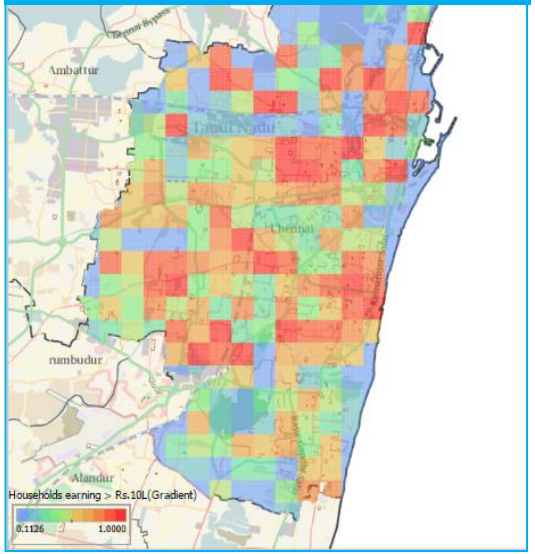
HOW CAN I TARGET MY AUDIENCE FOR DIGITAL INITIATIVES?

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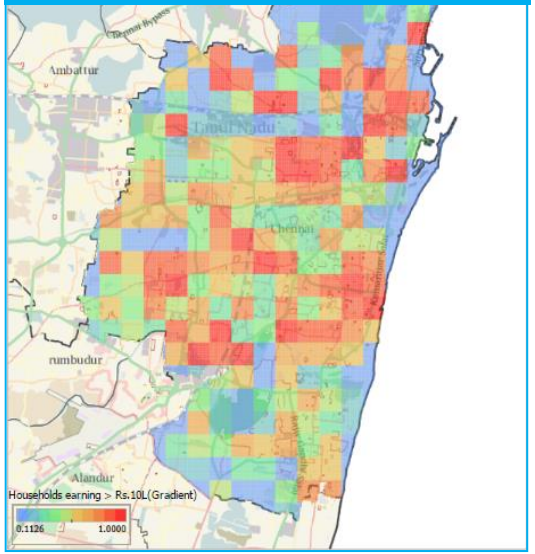
PRIORITIZE MICRO-MARKETS TO TARGET & IDENTIFY RIGHT STORES TO REACH THEM

- Leverage Multiple data sources to profile, target & reach Micro-Markets

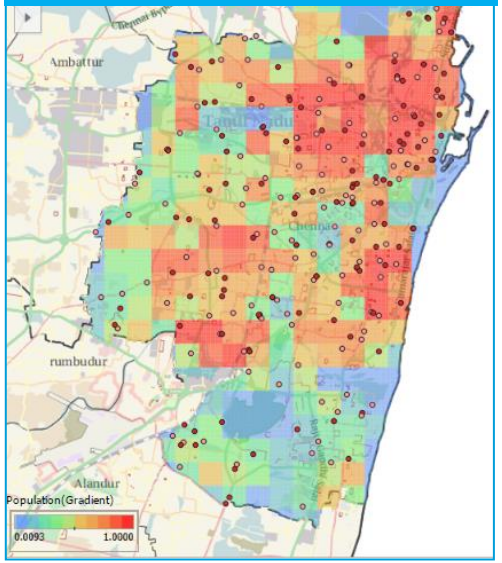
CHENNAI AFFLUENCE DISTRIBUTION



CATEGORY & AFFLUENCE



CHENNAI KEY STORES

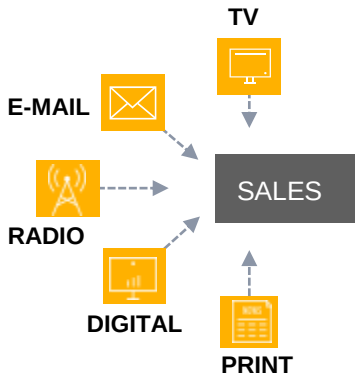


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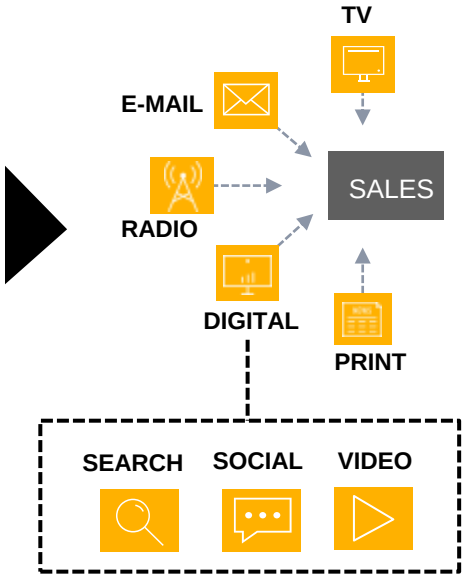
IT'S ALL ABOUT THE ROI PLAY ACROSS TOTAL AUDIENCE & TOTAL CONSUMER

In today's complex media landscape, drivers interact with one another, creating new layers of impact on final results

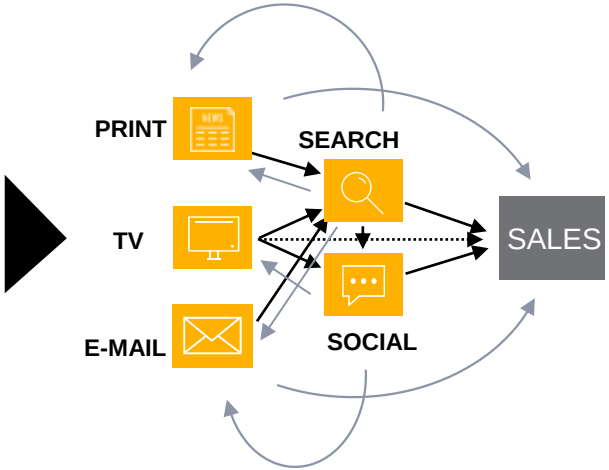
CONVENTIONAL MMM



DIGITAL DEEP DIVE



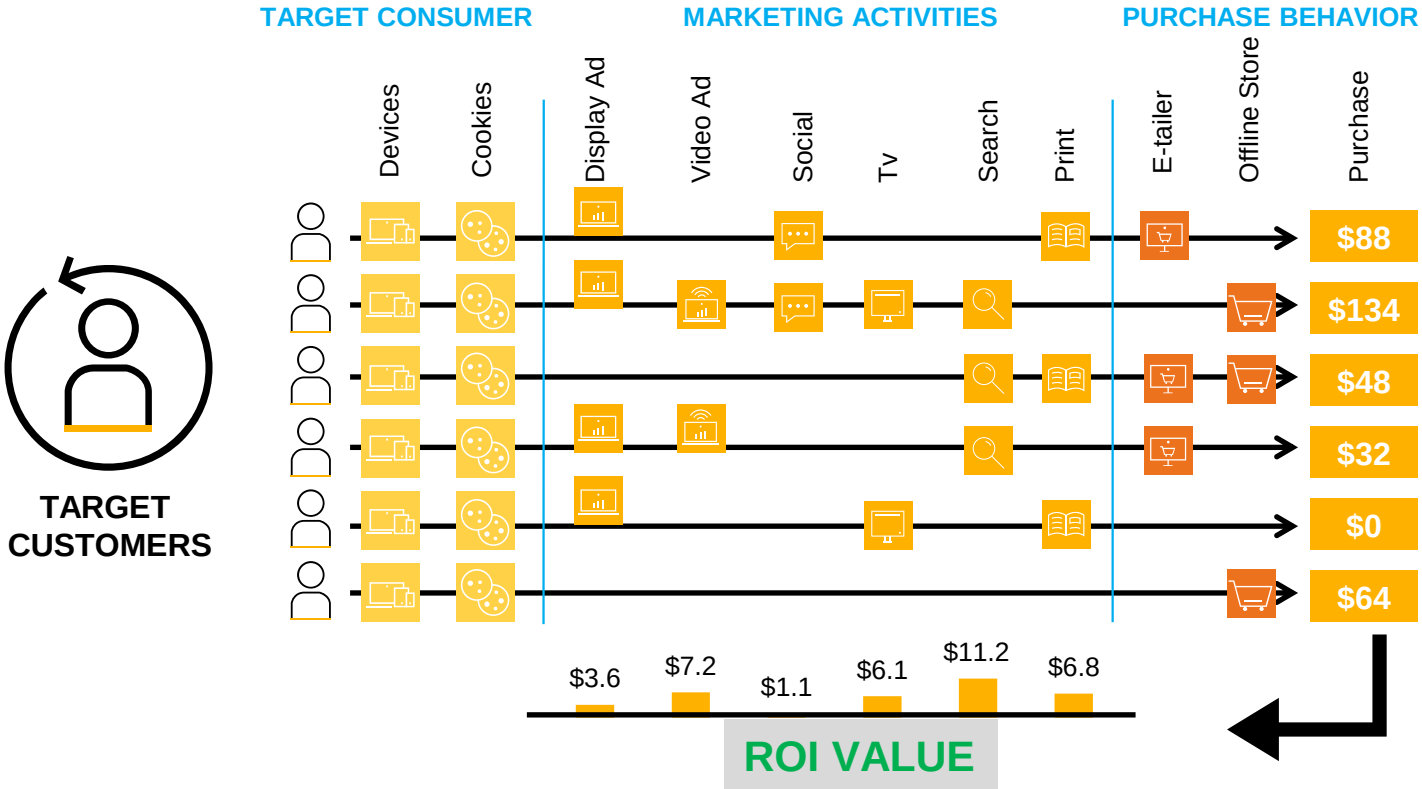
NETWORK ANALYSIS



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WATCH + BUY
TOTAL AUDIENCE + TOTAL CONSUMER

Multi touch attribution (MTA) studies how marketing activities affect the decision of purchase at consumer level



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CALL TO ACTION

1. **Mobile** allows us **One Source – bring on one platform**

2. **Connect** Data Points to enhance the Quality of Decision Making
   Key is to Identify **Right Metrics**, **Right Cadence**, **Right Measurement**

3. Leverage the Abundance of available data
   Important to define **Actionability Metrics** in a run up to **Final KPIs**

4. Mobile has enabled marketers to look **holistically** at “What Consumers **Watch**” & “What they eventually **Buy**”
   Make use of it

5. Unless you Measure, AND measure the RIGHT METRICS, **the medium will not Grow**
   Ask for the **Right Benchmarks**

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THANK YOU

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