



# INDIA ADVERTISING REPORT 2017

Adobe Digital Insights

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# Key Insights



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Indian Consumers Want Personalization

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Mobile is Increasingly the Channel of Choice for Video

3

Consumers are Mostly Happy with Marketers, but Want More

4

Indian Marketers Know that Mobile is the Future

5

Programmatic is the Path to that Future

6

Marketers ask for More Tech to Meet Consumers' Personalization Expectations



# Key Insights– Indian Consumers



- Indian Consumers Want Personalization
  - 75% of Indian consumers prefer to see ads that are personalized.
  - 63% are comfortable with brands they use regularly using their personal data to customize website content, emails, and advertising.
  - 59% of Indian consumers find digital ads “more interesting and useful” than ads on channels such as TV and radio that cannot be personalized.
- Mobile is Increasingly the Channel of Choice for Video
  - Consumers say they spend an average of 34% of their video viewing time on mobile, and that is 41% for those 18-34.
- Consumers are Mostly Happy with Marketers, but Want More
  - 73% of consumers think brands do a good job of showing them ads for products and services of interest to them
  - But only 48% think advertisers have gotten better over the last two years at delivering compelling ads (while 63% of Marketers think they have gotten better)

# Key Insights– Indian Marketers

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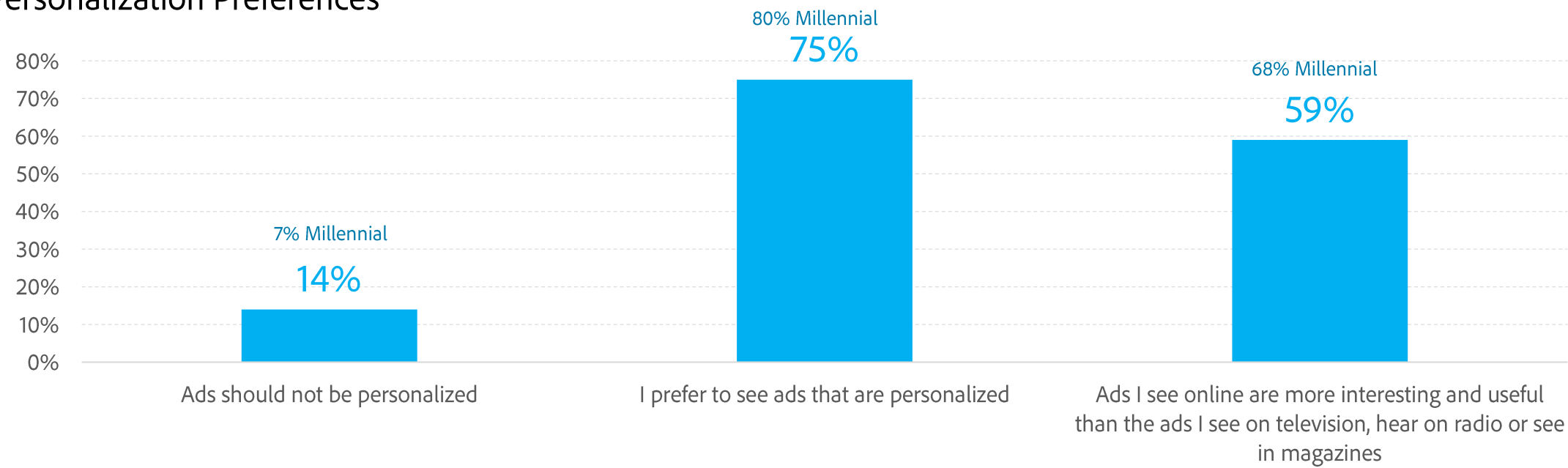


- Indian Marketers Know that Mobile is the Future
  - 89% of marketers felt that they had underinvested in smartphone advertising in 2016
- Programmatic is the Path to that Future
  - Most marketers in India expect their programmatic investment to increase in 2017.
  - Audience targeting is the top benefit of programmatic cited by marketers
  - Optimization is expected to be the top investment area for digital marketers – putting the audience targeting capabilities to good use
- Marketers ask for More Tech to Meet Consumers' Personalization Expectations
  - In terms of effectively targeting consumers, marketers are most likely to cite technology limitations related to pulling the available data together for personalization

# Personalization is Wanted and Works

- Indian consumers show stronger preferences for personalization than any other country we surveyed.
- And they tend to see online ads as more interesting/useful than those they see traditional ads such as those on TV, radio, and in magazines

## Personalization Preferences

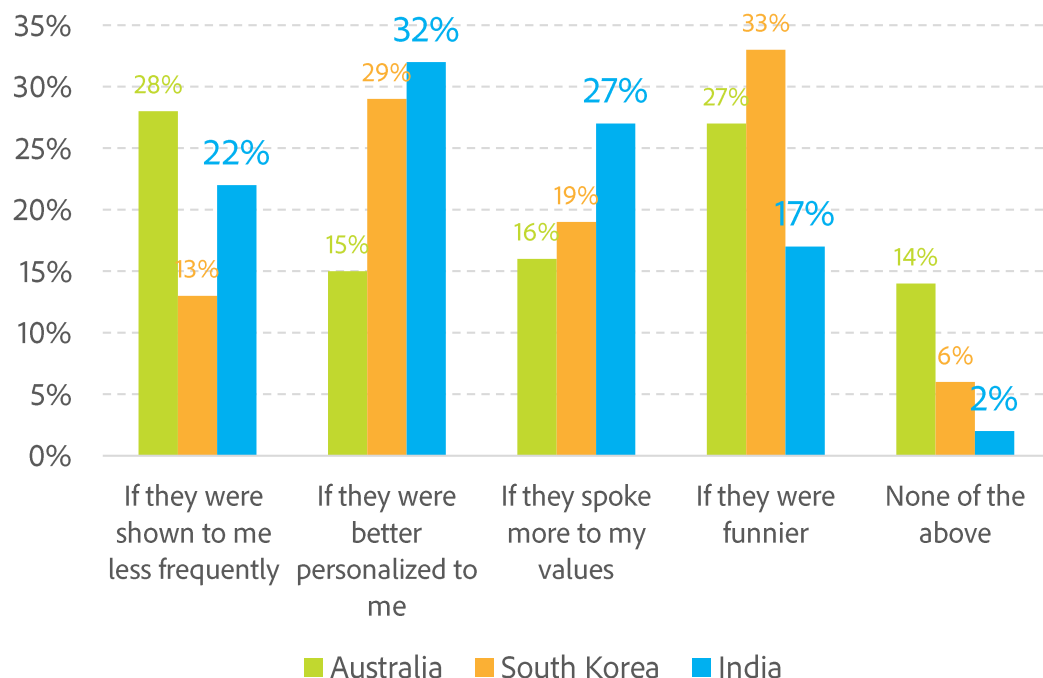


# In Fact, Personalization is Most Important Way to Improve Online Ads in India

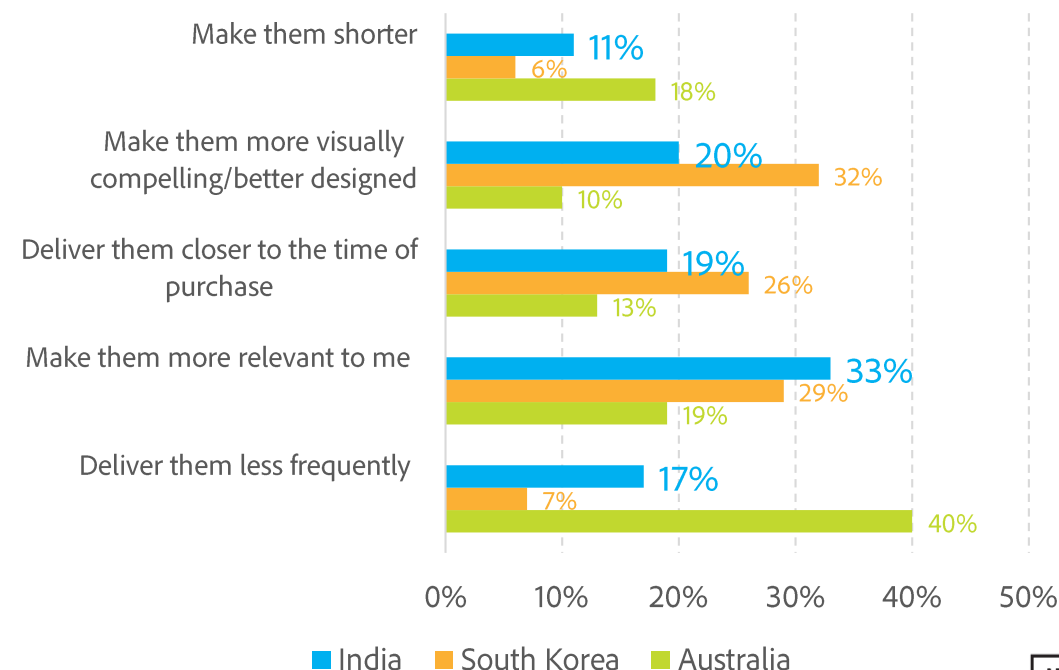


Personalization and relevance are seen as the way to better ads – more than anything else a marketer could do.

## What would most improve online ads?



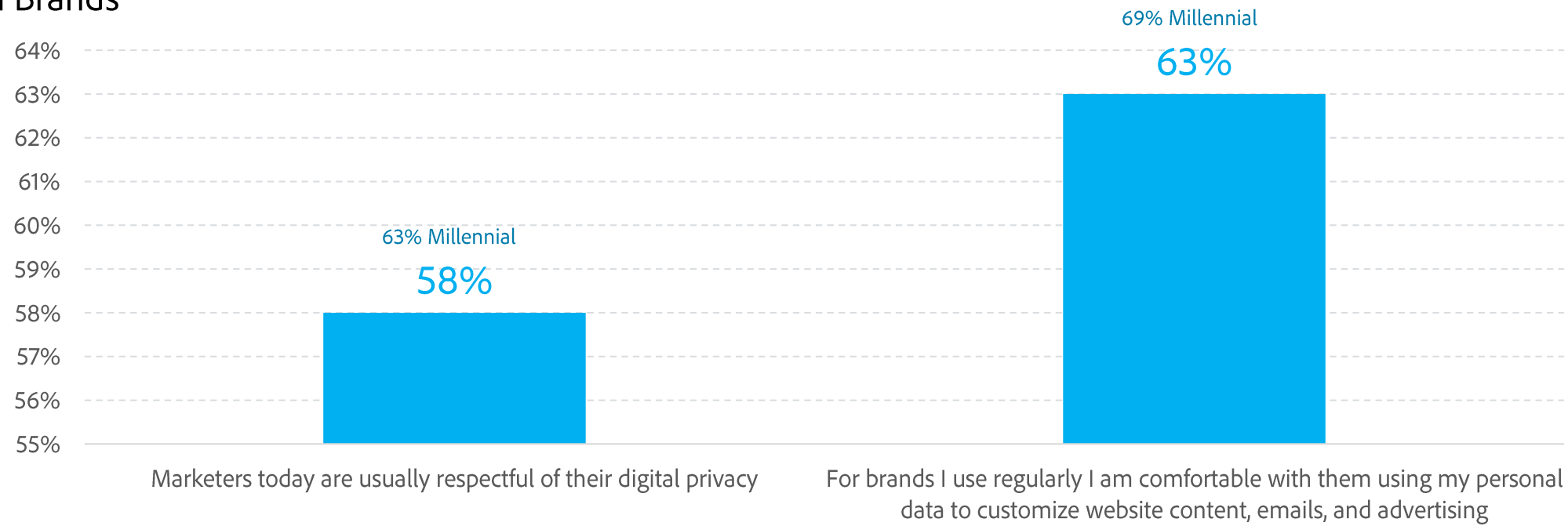
## Online Video Ad Improvements



# Brands are Trusted with Personal Data

- India consumers are much more likely than those in any other country surveyed to say that digital marketers usually respect their privacy.
- They are also more likely to be comfortable with use of that data for personalization.

Trust in Brands



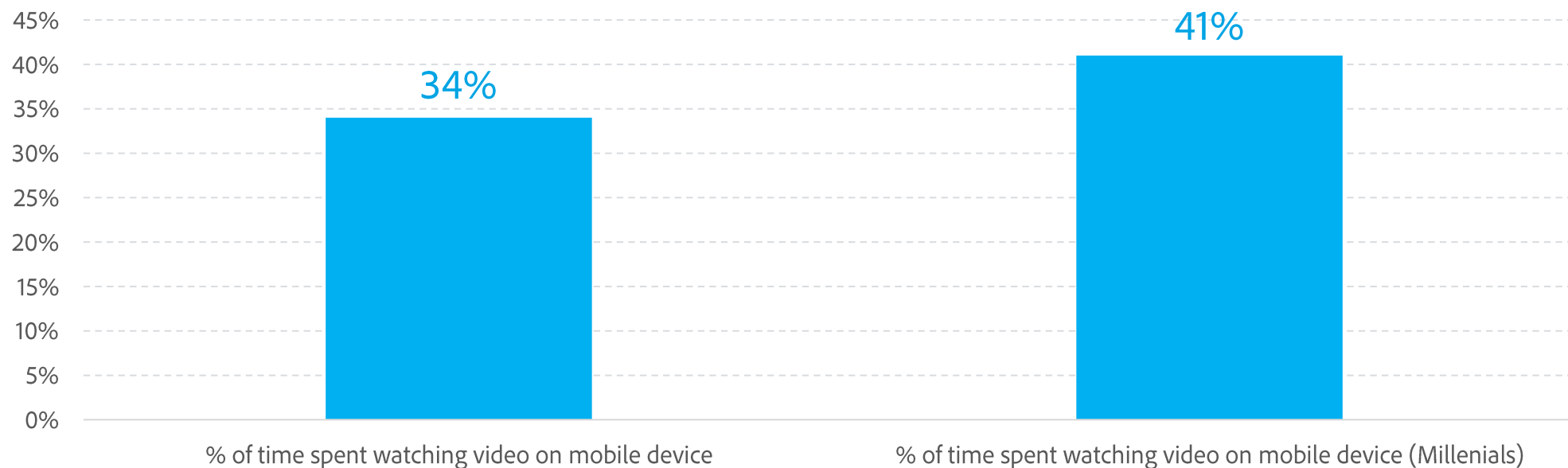


# Mobile is the Future



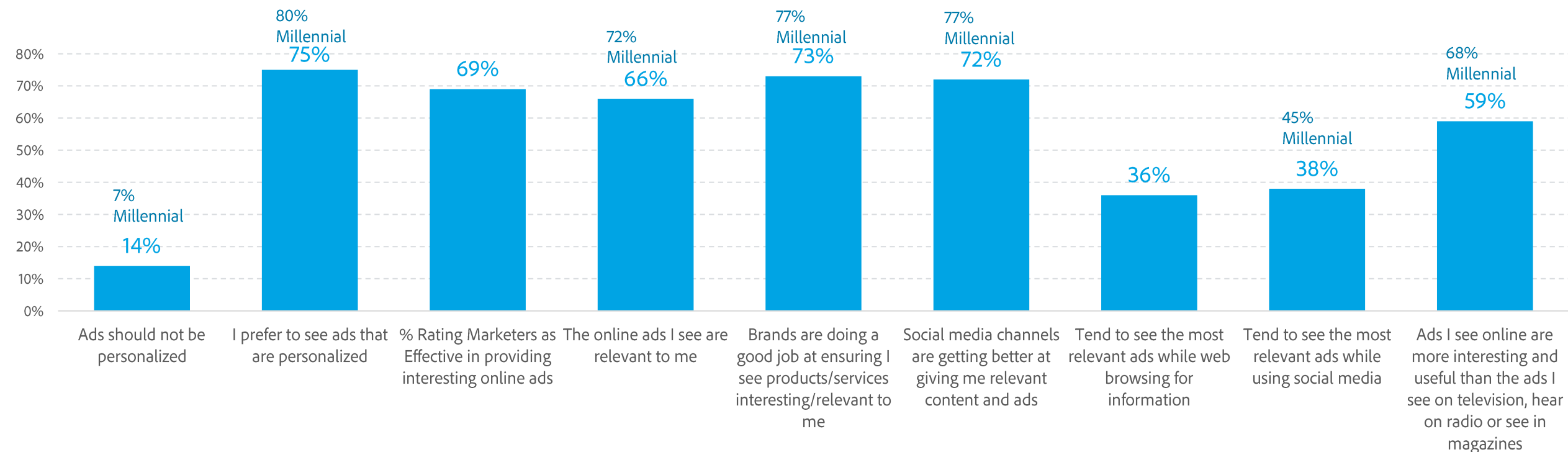
- Mobile represents over 1/3 of video watching time, even more among the Millennial generation.

## Mobile Video Watching



# Consumers are Mostly Happy...

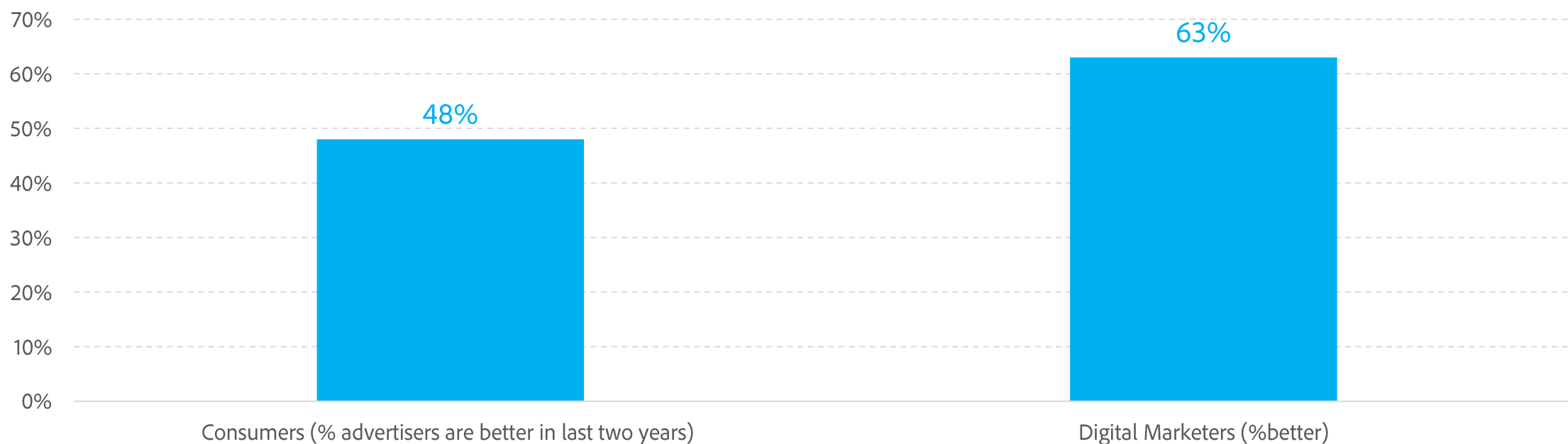
- Indian consumers prefer personalized ads, and give advertisers high marks for delivering relevant ads
- Indian consumers are most likely to see relevant ads while either browsing or while on social media (vs. in an mobile app or while watching video)
- Millennials in India are even more eager for personalization, with 80% preferring it.



## ... But Brands Still Have Work to Do

- Of all the countries surveyed, India shows the greatest disconnect between consumers and marketers in terms of whether ads have improved over the last two years.
- Consumers' opinions matter more.

### Ability to Reach Consumers with Valuable/Compelling Ads

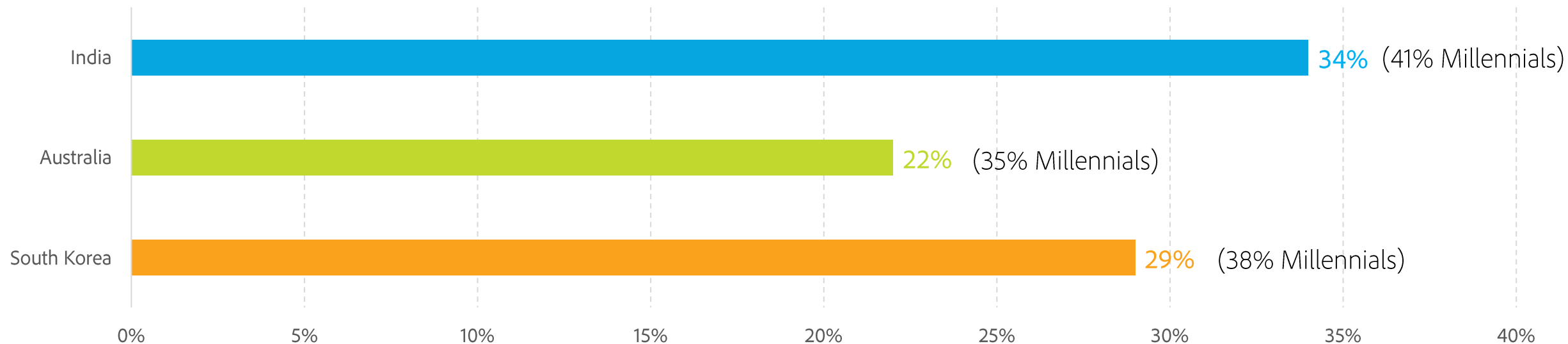


# Indian Marketers Know Mobile is the Future



- % of video viewing time on a mobile device varies by country, with India the highest at 34%, 22% for Australia, and 29% for South Korea.

## % of Video Viewing Time on Mobile



(Source: ADI Int'l Summit Survey 2017)

# Programmatic is the Future for Marketers

- Indian advertisers are particularly keen on programmatic
- 25-38% of advertisers plan to spend more than half their budget programmatically in any given channel. Social and Display are leading the way.

51% or More of Total Advertising Budget Allocated Towards Programmatic, by Channel

	Traditional TV	Connected TV	Desktop Video	Mobile Video	Out-of-home	Search	Display	Social
Australia	9	10	11	17	12	14	12	20
South Korea	3	6	11	14	8	20	19	25
India	25	29	26	31	23	31	38	38

■ Australia ■ South Korea ■ India

(Source: ADI Int'l Summit Survey 2017)



# Programmatic Benefits to Digital Marketers



Targeting, mix allocation and transparency are seen as the three top benefits of programmatic advertising

## Perceived Benefits of Programmatic

	Audience Targeting	Media Mix Allocation	Personalization	Optimization	Attribution	Transparent Ad Bidding/ Execution	Retargeting
Australia	50	34	22	25	16	24	29
South Korea	47	32	17	27	18	29	28
India	39	36	29	16	30	33	17

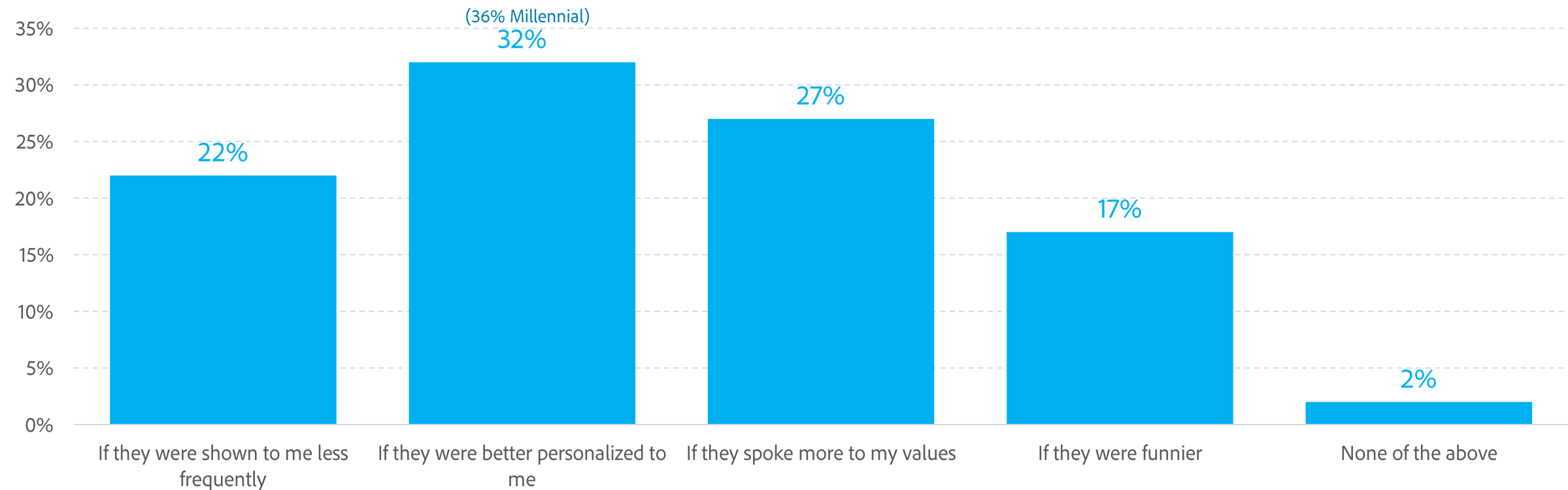
■ Australia ■ South Korea ■ India

(Source: ADI Int'l Summit Survey 2017)

# Ways to Improve Today's Advertising

- Better personalization and speaking to values are the way to improve advertising in India
- Interestingly, humor is less important than in any other country

## What would most improve online ads?



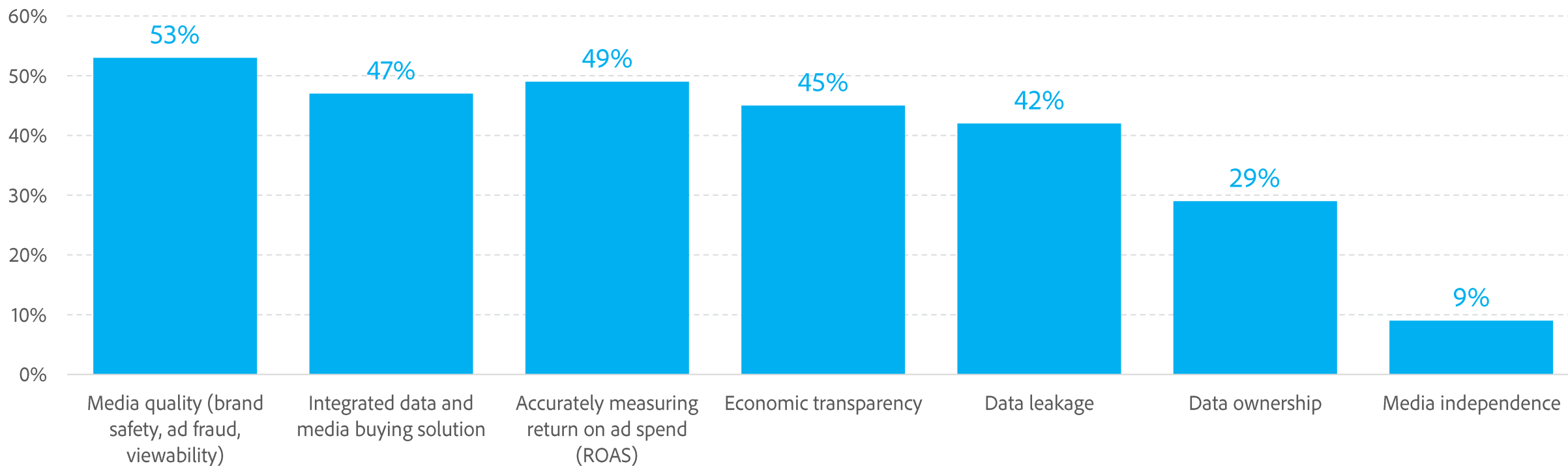
# Media Buying Challenges



ROAS, Transparency and Integrated Buying are Shared Global Concerns

- India is particularly concerned with Media Quality and Data Ownership

## Biggest Challenges in Media Buying

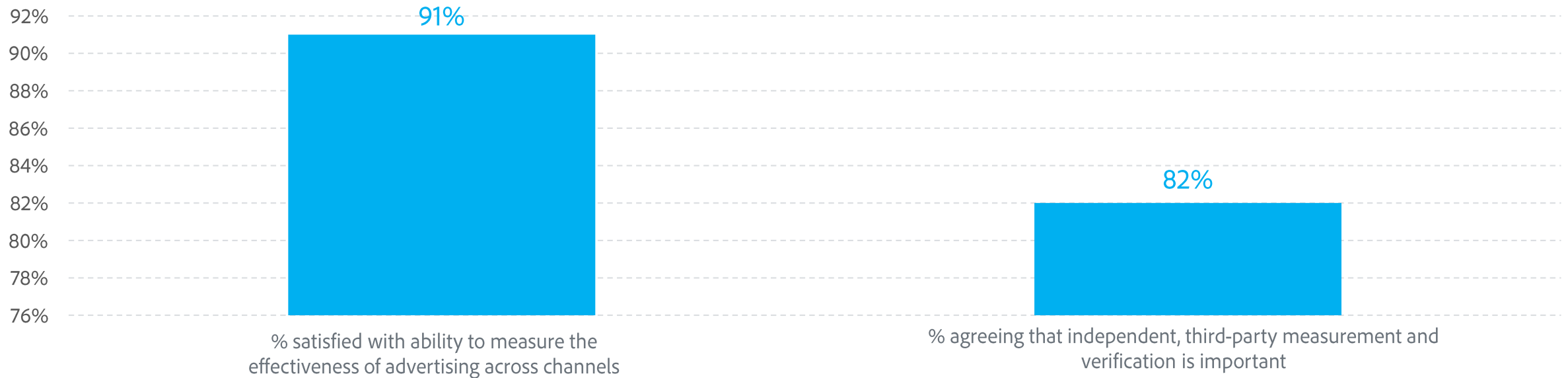


# ROI Measurement



- Most marketers are most satisfied with their ability to measure the effectiveness of their advertising across channels.
- India leads the way in believing that third-party measurement is important.

## ROI Measurement



# Fragmented Organizations and Technology Limit Advertising Progress



**49%**

work with 3 or more  
analytics platforms

**53%**

work with 3 or more  
creative agencies

**48%**

work with 3 or more media  
buying platforms

**43%**

work with 3 or more  
attribution platforms

**49%**

work with 3 or more media  
planning platforms

**50%**

work with 3 or more data  
management platforms





**ADI Int'l Summit Survey 2017:** Between February 1-17, 2017 we talked to over 3000 consumers in the Australia, India, and South Korea (over 1000 in each country) and over 300 digital marketers (over 100 per country in India and South Korea, 75 in Australia) concerning their views on digital advertising:

- Consumers were all over the age of 18
- In terms of digital marketers, we spoke to those who had influence over the purchase of digital advertising in their company. These marketers worked in either brands, ad agencies, technology providers or publishers.

For the purposes of the study, digital advertising was defined to include promotional advertisements and messages delivered through email, social media websites, online advertising on search engines, as well as banner ads on mobile or websites.

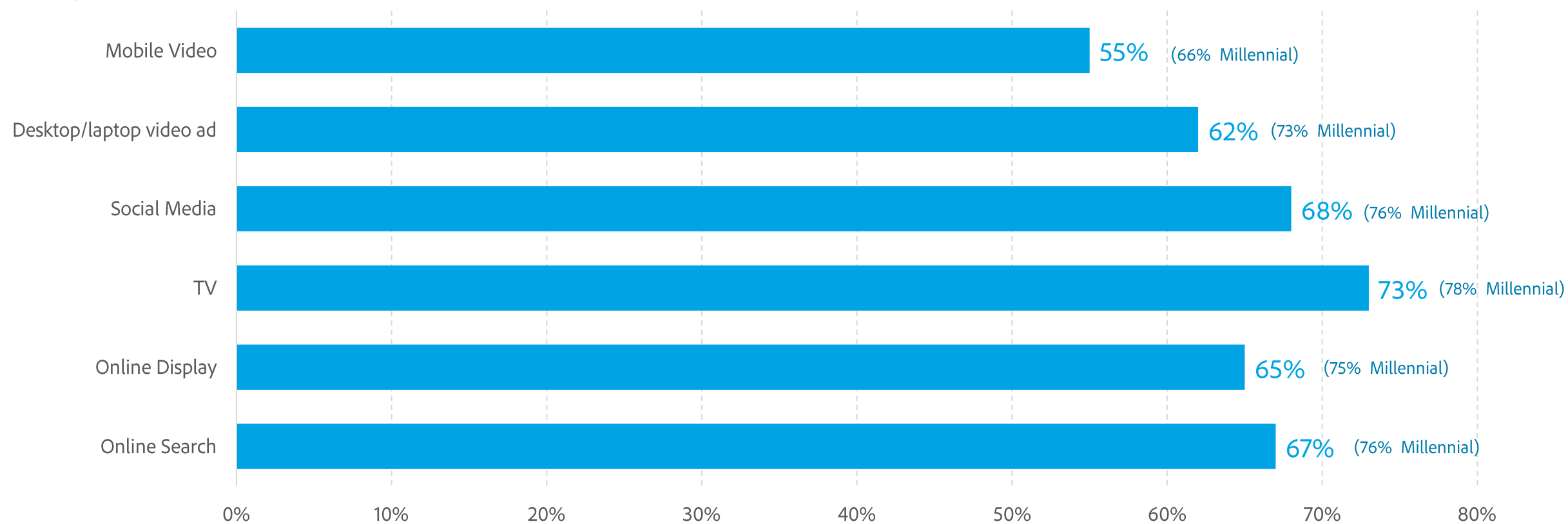
1. **Click Through Rate (CTR):** Clicks divided by impressions
2. **CPM:** Cost per thousand impressions
3. **CPC:** Cost per click
4. **Completion Rate:** Ads completed (100%) divided by impressions
5. **Growth:** Percent change from base period
6. **TVE:** TV Everywhere
7. **TVE Video Plays:** Start of a show from a programmer
8. **TVCD:** TV connected device. Used to access content via an app (Example: Roku, Smart TVs)
9. **Customer:** Visitor who has made one or more purchases
10. **Non-Customer:** Visitor who has not made a purchase
11. **Visits per Job:** Total visits divided by number of jobs
12. **Frequency:** How often someone visits a website
13. **Web Traffic or Visits:** Visits occurring to a website via any mobile device; exclusive of app traffic

# How Consumer See Relevant Ads



TV beats out online tactics in India. Social Media and Online Search tends to be the top online tactic.

## Tactic; % Often See Relevant Ads



# Advertising Technology Investment

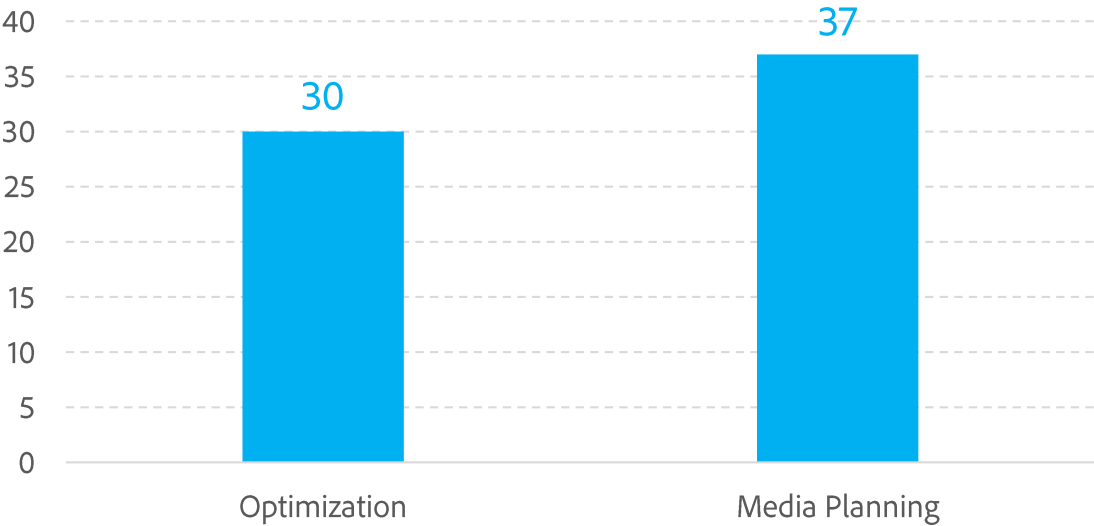


When asked to look back at 2016, digital marketers are most likely to say that the key media spend area they underinvested in was smartphone advertising (89% in India). Tablet and desktop advertising come in second and third, respectively.

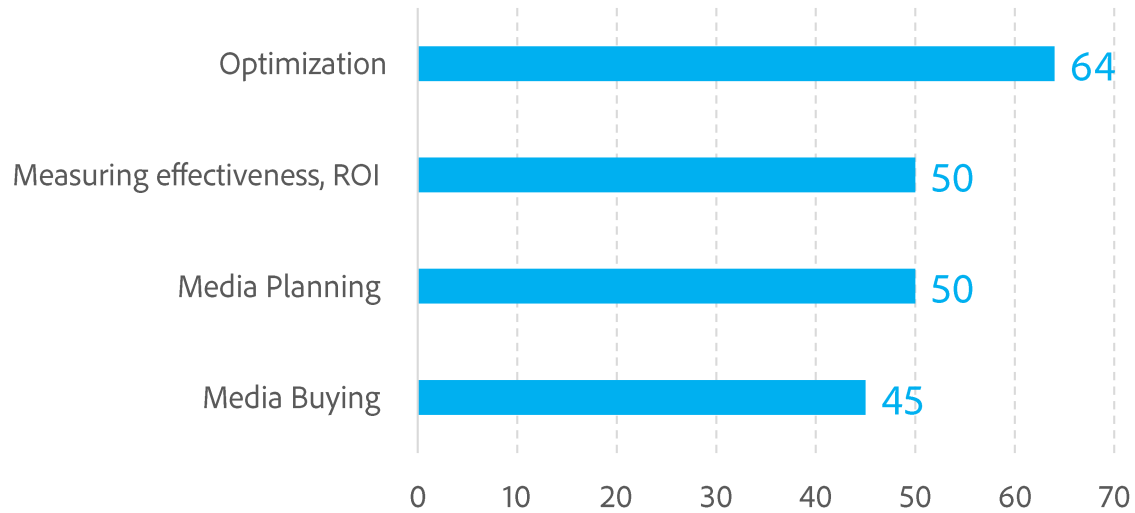
When asked to identify the biggest opportunity for technology improvements in 2017, Optimization and Media planning are the top choices.

Optimization is also the most likely to be rated the highest investment priority for 2017.

Biggest Opportunity



% Rating High





## Data Use and Quality



- Marketers in India tend to use first-party data in less than 50% of their digital advertising, and see the quality of this data as good.
- Purchasing outside data is common, but this data is much less likely to be rated as good.

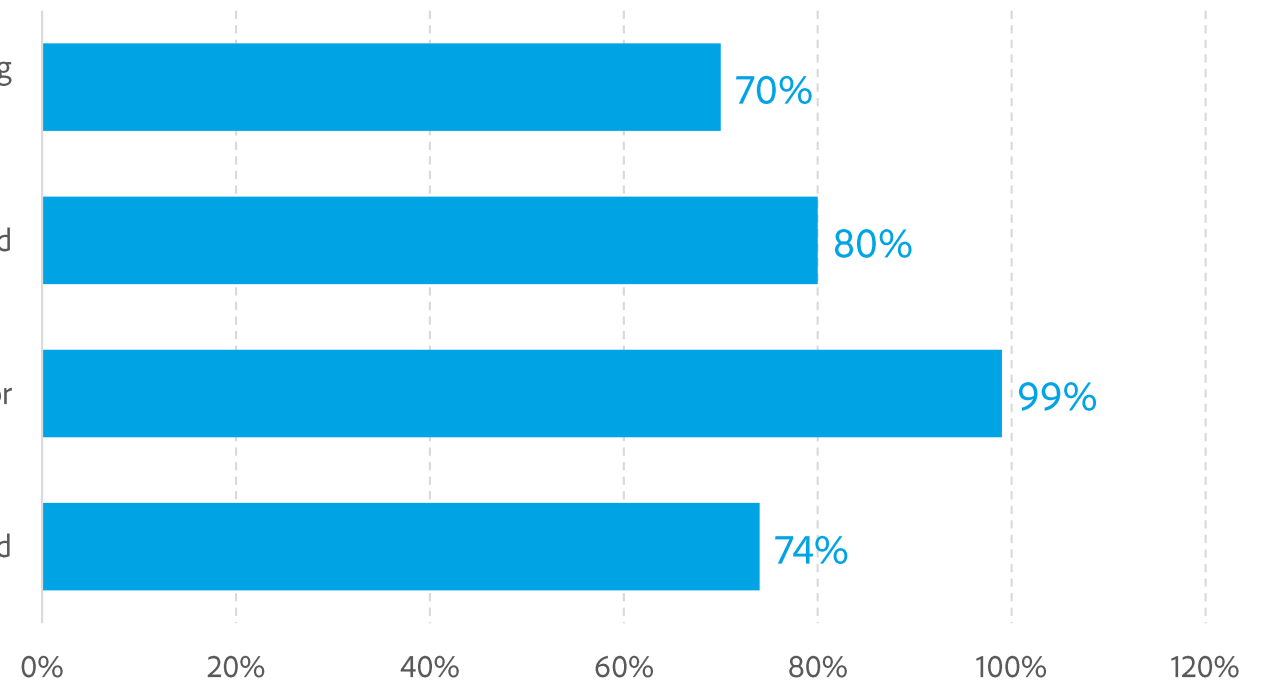
### Data Use and Quality

% who say that 50% or less of their digital ads use first-party audience data for targeting purposes

% rating the quality of their own customer data as good

% who've purchased demographic targeting data from an outside vendor

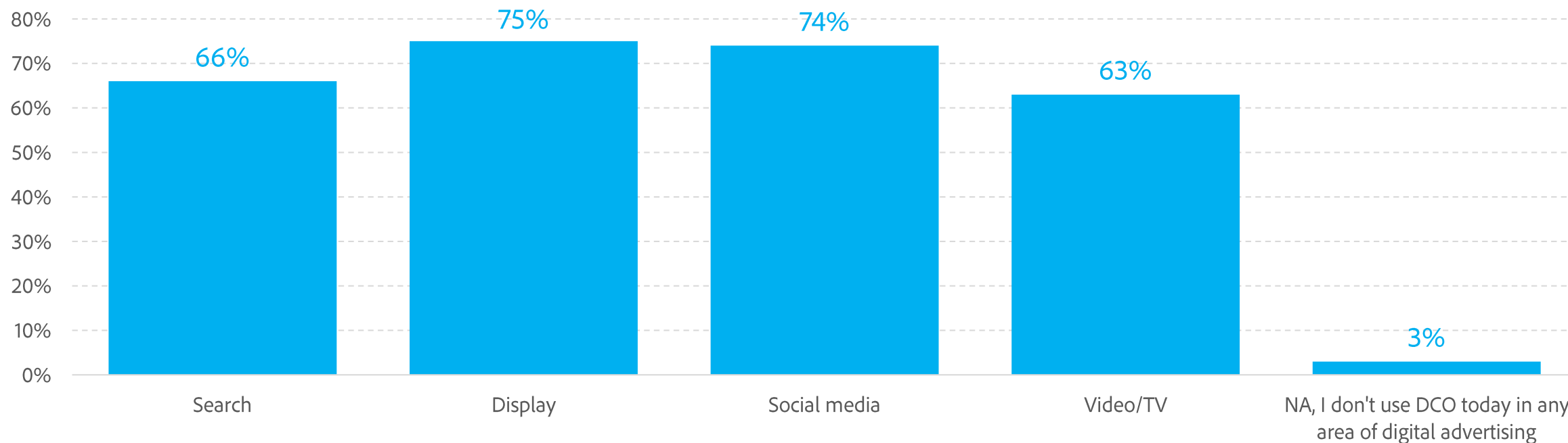
% rating the quality of purchased data as good



(Source: ADI Int'l Summit Survey 2017) [India]

The majority report using DCO today. The most common usage in India is Display and Social Media.

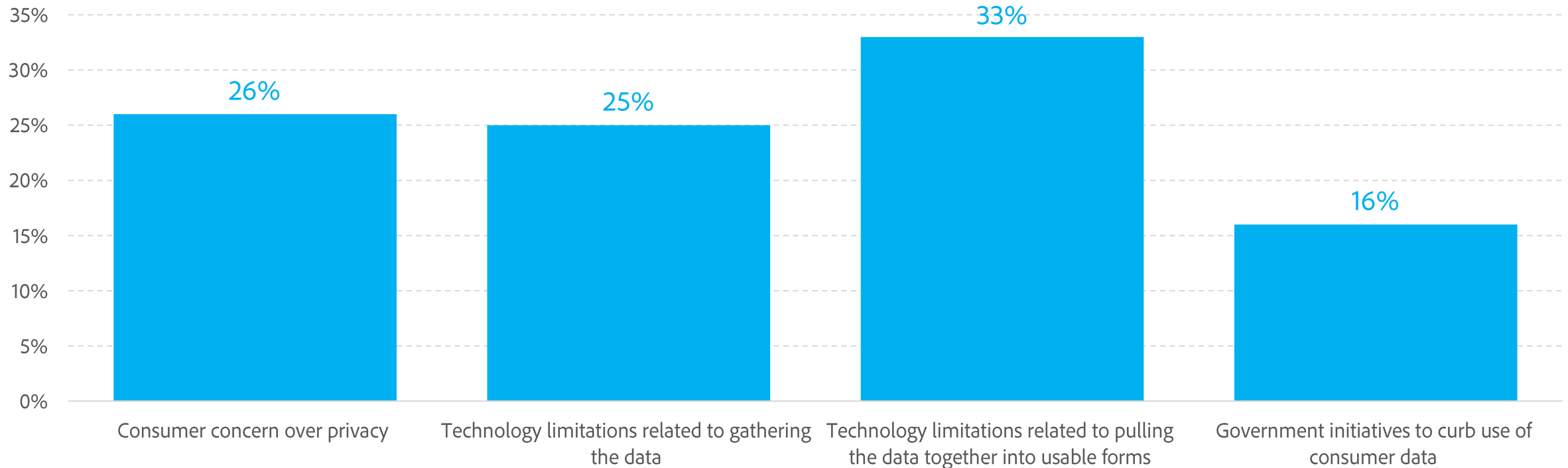
### Tactics Using DCO Today



## Biggest Concern About Your Ability to Effectively Target Consumers with Personalized Ads

When it comes to effective targeting, digital marketers' biggest concern tends to be around technology related to pulling customer data together into usable forms.

### Biggest concern about your ability to effectively target consumers with personalized ads





## Miscellaneous

