Marketing In India Is Personal, Not Just Business

Embrace Cross-Channel Personalization To Drive Marketing Efficiency

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Executive Summary

India's business leaders are showing an unprecedented level of enthusiasm toward digital. As such, Indian firms have slowly and steadily started on their digital transformation journeys to keep up with digitally empowered consumers.[1]

Marketers want to use data and customer insights to drive decision making and deliver the personalized and seamless experiences consumers expect across all touchpoints, but many of their initiatives miss the mark. Sixty-one percent of Indian consumers surveyed say that most marketing updates they receive by email do not offer anything that interests them.[2] And while 60% of those consumers ultimately purchase something related to those emails, many marketers do not know why or what journey the consumer took. In fact, creating customer-insights to drive decision making is the top ranked challenge for Indian marketers. Without that insight, marketers can fall into a trap of sending too many irrelevant messages. Even in a loyalty program where your brand has the attention of the consumer, to decide which message to send, you need insights to know if your consumer falls into the 94% of Indian consumers who value cash back and discounts, the 59% of Indian consumers who value loyalty points, of both.

To bridge that gap and to leverage insight into real-time personalization, half of the marketers in the Asia Pacific region plan to increase their investments in enterprise marketing technology (EMT) in the next 12 months.[3] Similarly, marketers in India increasingly invest in EMT solutions ranging from enterprise marketing software suites to cross-channel campaign management software, which outpace the investment in point solutions like email marketing and loyalty solutions. Indian marketers are also keen to work beyond the technology and develop partnerships with marketing technology and service providers to better understand and engage consumers, drive marketing efficiency, and create personalized brand experiences.

In May 2018, Epsilon India commissioned Forrester Consulting to evaluate the adoption and use of marketing technologies (martech) across targeted industries in India and how it relates to consumers' expectations regarding brand engagement and loyalty. Forrester conducted an online survey with 405 consumers and 202 senior marketing decision makers from four targeted industries in India (retail, consumer packaged goods, financial services and insurance, travel and hospitality) to explore this topic.

KEY FINDINGS

› **Indian consumers demand immediacy, relevancy, and practical benefits across channels.** They are increasingly empowered with technology and expect consistent and seamless experiences across touchpoints.[4] They are mobile mind shifted and expect a mobile-friendly experience delivering what they want, in their moments of need. They break down online-offline boundaries and expect brands to do the same.[5] They require relevancy and prefer personalized offerings: 63% are more likely to purchase from brands that provide relevant content and offers. The thirst for immediacy also drives their loyalty program preferences to skew toward instant discounts, mobile rewards, and real-time offers.

A majority of Indian marketers' initiatives to personalize customers' experience do not meet the expectations of digitally savvy and empowered consumers.

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> **There is a big gap between consumers' expectations and what marketers are doing today.** Consumers want relevancy and personalization, but a majority of marketers fail to deliver it: Only 28% of consumers say that brands send them email offers well-timed with their needs. In addition, only 2% of consumers prefer to receive marketing updates via short message service (SMS), but 74% of marketers are using martech to support SMS. Marketers need to realign their marketing strategies and priorities to better serve consumers.

> **Personalization is the top marketing priority, but marketers face challenges to achieve it and differentiate their brands.** To keep up with rising consumers' expectations, 92% of marketers in India consider improving personalization capabilities as a top marketing priority. It requires them to collect, analyze, synthesize, and react in real time to a flood of customer information and do so across multiple touchpoints and often disconnected internal teams.[6] However, many marketers are still immature in data and technology readiness, cross-channel expertise, and bridging organizational silos.

> **Marketers will increase martech investments to improve ROI and deliver personalized brand experiences.** Delivering contextually relevant customer experience requires significant investment in EMT.[7] In the next 12 months, 60% of marketers in India plan to increase their technology spend (76% of marketers from the travel and hospitality industry). Eighty percent are prioritizing improving the ROI of their departments. The solutions that garner the most interest from marketers are enterprise marketing software suites and cross-channel campaign management, as well as point solutions like email marketing and loyalty solutions.[8]

60% of marketers in India plan to increase their technology spend in the next 12 months.

Many marketers in India are still immature in data and technology readiness, cross-channel expertise, and bridging organizational silos to achieve personalization.

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Indian Consumers Demand Immediacy, Relevancy, And Practical Benefits

Power has shifted from business to consumers. Empowered consumers no longer purchase products; they buy experiences. They engage with brands that deliver what they need, when they need it, regardless of the delivery mechanism or channel.[9] Mobile-first Indian consumers have high expectations for seamless and personalized experiences at their moments of need, but also want practical benefits.

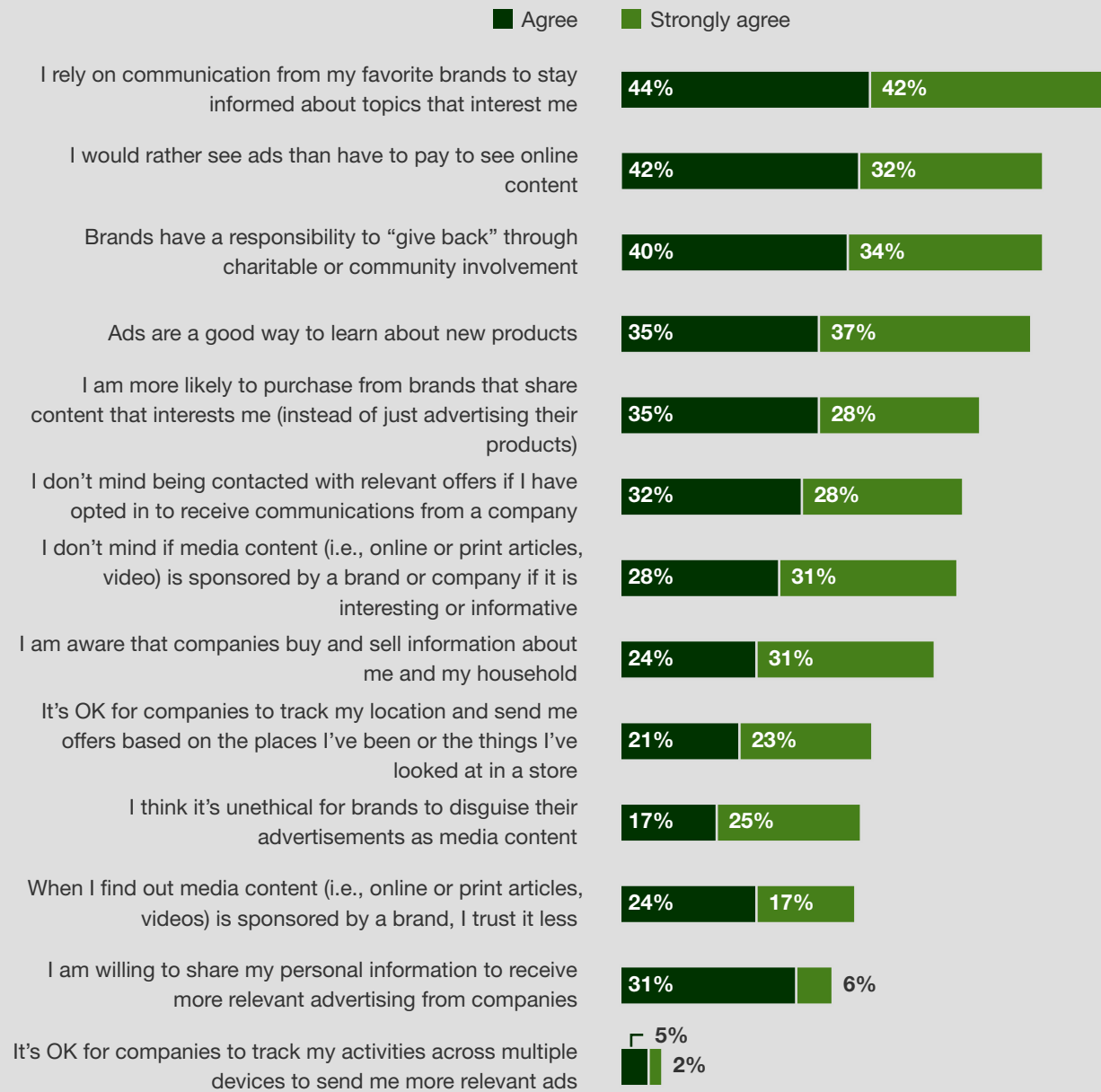In surveying 405 consumers in India, we found that they:

› **Are mobile mind shifted.** Regardless of their age, gender, or social background, consumers have high expectations when it comes to digital brand experiences: 78% expect companies to have a mobile app (50% already regularly keep in touch with their most frequently purchased brand on its mobile app), and 68% feel frustrated when a website is not mobile-friendly. Busy 35- to 44-year-olds (76%) and digital-native 18- to 24-year-olds (73%) are particularly impatient and have the highest frustration rates.

› **Break down boundaries between offline and online.** Digitally savvy consumers expect brands to provide consistent and seamless experiences across touchpoints. Seventy-two percent of the 25- to 34-year-old consumers surveyed read products reviews online, and 71% compare prices on their mobile phones when shopping in a physical store. It pushes marketers to develop a deeper understanding of consumers to evolve to a truly omnichannel advertising strategy.

› **Require a personalized experience, with caution on privacy.** Consumers want relevant content and prefer personalized offerings: 63% are more likely to purchase from brands that provide relevant content, and 60% don't mind being contacted with relevant offerings if they opted in (see Figure 1). However, they are cautious about personal data privacy and security; most of them (63%) are not willing to share personal information with companies to receive more relevant advertising. On the other hand, Indian consumers are more into practical benefits: Over 90% will give up information for perks and benefits, compared to only 66% in the US.[10] Indian marketers need fulfilling promises to tailor the "trade" for consumer information, treat it with care, and give back in the most relevant and practical way.

› **Prefer instant and practical benefits over exclusive and experiential ones.** Indian consumers are down to earth: 74% would rather see ads than pay for the online content. They are price and quality-sensitive; when they buy products from a new brand, 55% of surveyed consumers over four verticals prefer a brand that provides quality or price over a brand that is well-known and reputable (65%).[11] These echo with their loyalty tactics preferences too; instant and practical benefits like instant discounts/wins, mobile rewards, and real-time offers are more attractive to Indian consumers than exclusive services and experiential benefits (see Figure 2).

68% of consumers feel frustrated when a website is not mobile-friendly.

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Figure 1

"Thinking about advertising in general, how strongly do you agree or disagree with each of the following statements?"
(Not all responses shown; showing percentage of respondents selecting "Agree" or "Strongly agree" only)

■ Agree ■ Strongly agree

Statement	Agree	Strongly agree
I rely on communication from my favorite brands to stay informed about topics that interest me	44%	42%
I would rather see ads than have to pay to see online content	42%	32%
Brands have a responsibility to "give back" through charitable or community involvement	40%	34%
Ads are a good way to learn about new products	35%	37%
I am more likely to purchase from brands that share content that interests me (instead of just advertising their products)	35%	28%
I don't mind being contacted with relevant offers if I have opted in to receive communications from a company	32%	28%
I don't mind if media content (i.e., online or print articles, video) is sponsored by a brand or company if it is interesting or informative	28%	31%
I am aware that companies buy and sell information about me and my household	24%	31%
It's OK for companies to track my location and send me offers based on the places I've been or the things I've looked at in a store	21%	23%
I think it's unethical for brands to disguise their advertisements as media content	17%	25%
When I find out media content (i.e., online or print articles, videos) is sponsored by a brand, I trust it less	24%	17%
I am willing to share my personal information to receive more relevant advertising from companies	31%	6%
It's OK for companies to track my activities across multiple devices to send me more relevant ads	5%	2%

Base: 405 consumers in India who made a purchase in one or more of the targeted industries in past the six months, age 18+
Source: A commissioned study by Forrester Consulting on behalf of Epsilon, July 2018

Figure 2

"What's your level of interest in following loyalty program mechanisms?"
(Not all responses shown; showing percentage of respondents selecting "Interested" or "Strongly interested" only)

■ Interested   ■ Strongly interested

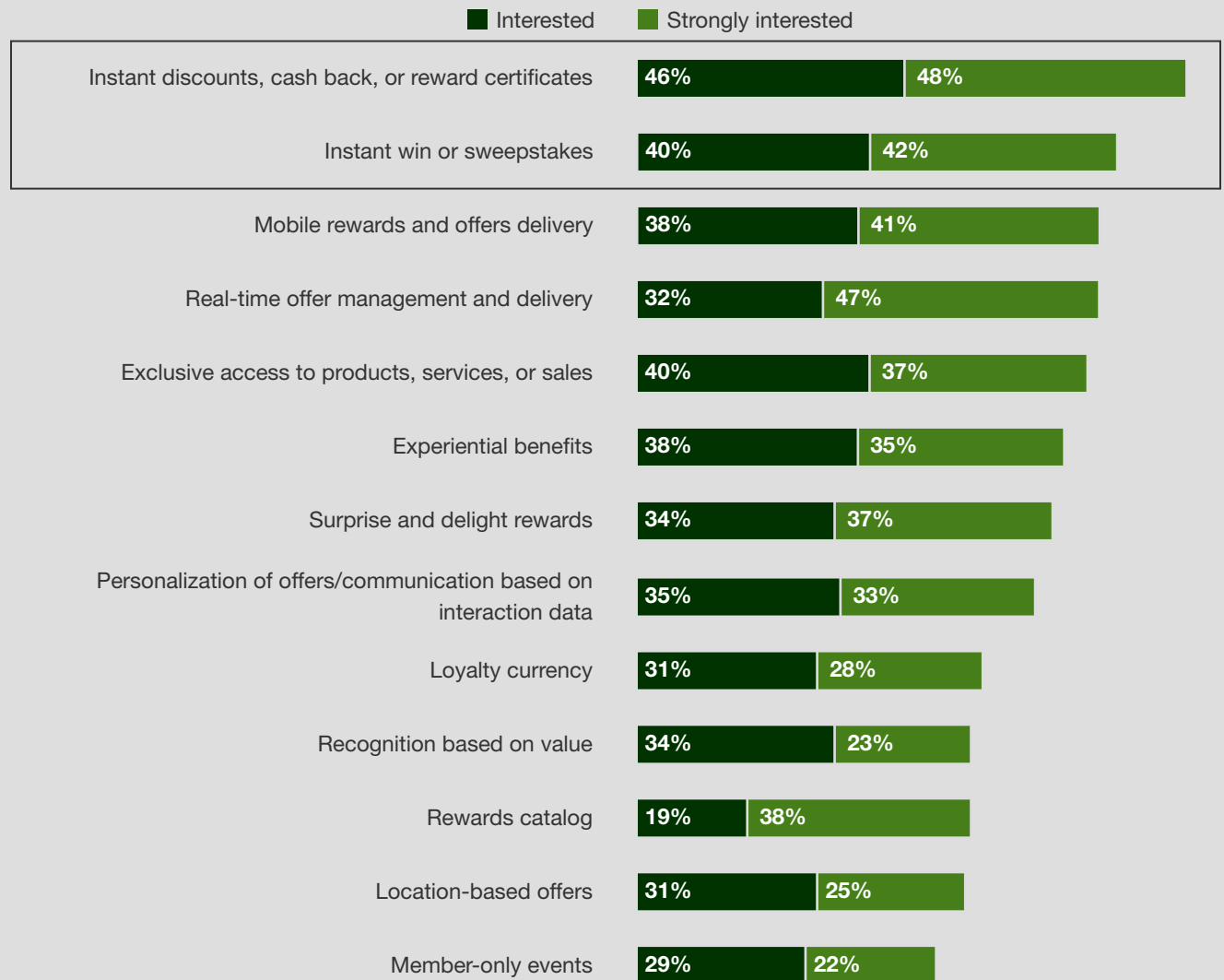| Mechanism	Interested	Strongly interested
Instant discounts, cash back, or reward certificates	46%	48%
Instant win or sweepstakes	40%	42%
Mobile rewards and offers delivery	38%	41%
Real-time offer management and delivery	32%	47%
Exclusive access to products, services, or sales	40%	37%
Experiential benefits	38%	35%
Surprise and delight rewards	34%	37%
Personalization of offers/communication based on interaction data	35%	33%
Loyalty currency	31%	28%
Recognition based on value	34%	23%
Rewards catalog	19%	38%
Location-based offers	31%	25%
Member-only events	29%	22%

Base: 405 consumers in India who made a purchase in one or more of the targeted industries in past the six months, age 18+
Source: A commissioned study by Forrester Consulting on behalf of Epsilon, July 2018

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Marketers Fail To Meet Consumer Expectations For Relevant, Secure, And Consistent Experiences

There's a big gap between consumers' expectations and what marketers are doing today. Consumers expect relevant and valuable brand experiences but feel overwhelmed by the high volume and low value of marketing communication they receive from brands. Marketing efforts are also undermined if they are spent on consumers' less preferred channels.

› **Current email marketing efforts fail to deliver value.** Email is consumers' most preferred channel to receive marketing updates from a brand, as it's less intrusive than other channels like calls and SMS (see Figure 3). However, the performance is disappointing: 66% say they receive too many email offers and promotions, and only 9% say they are likely to sign up for email from companies in the next 12 months (see Figure 4). Marketers should use email smartly for retention and engagement, rather than new customer acquisition.

› **Data transparency and privacy protection are an afterthought.** Indian consumers' privacy awareness is increasing: 55% are already aware that companies buy and sell their information. They require transparency and privacy protection: 59% wonder how companies got their names and email addresses. However, only 15% of marketers in India consider preparing for GDPR as a marketing priority — lowest among 14 initiatives.[12]

› **Email is not the only issue: Marketers fail to connect with consumers on the right channels.** Traditional media such as ads on TV (only next to email) is still an impactful channel for Indian consumers. Yet full integration across digital, mobile, and traditional channels is still rare — creating a single view of the customer with other marketing channels is among the top three challenges marketers have in India. In addition, 74% of marketers surveyed are using martech to support SMS, but only 2% of consumers prefer to receive marketing updates via SMS. Marketers need to better understand how consumers want to be served to align their EMT investments and optimize their omnichannel marketing execution.

Consumer require transparency and privacy protection, but only 15% of marketers in India consider preparing for GDPR as a priority.
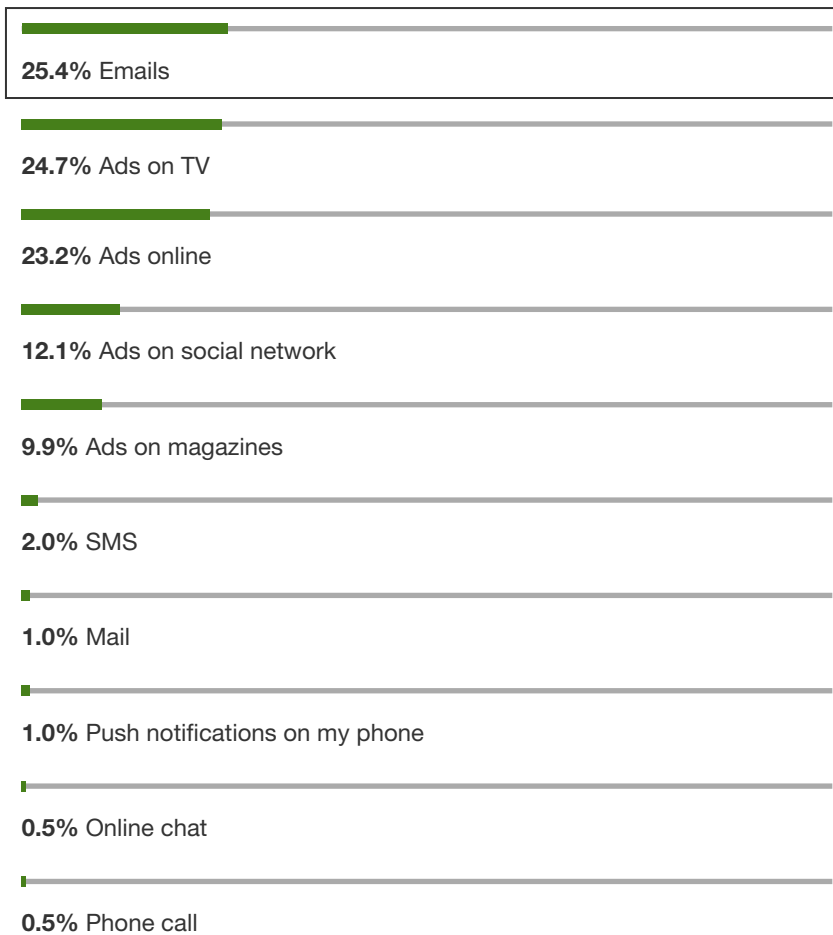
Ranked list of 14 initiatives among Indian marketers:

1. Personalization
2. ROI of marketing
3. Customer centricity
4. Align brand promise and CX
5. Data and analytics
6. Branding
7. Leads
8. Content marketing
9. New products/ services
10. Talent
11. Collab w/ non-marketing dept
12. Marketing role in company
13. Agency/partner relationships
14. GDPR

Figure 3

"How do you prefer to receive marketing updates from a brand?"
(Showing percentage who ranked each as the top choice)

25.4% Emails

24.7% Ads on TV

23.2% Ads online

12.1% Ads on social network

9.9% Ads on magazines

2.0% SMS

1.0% Mail

1.0% Push notifications on my phone

0.5% Online chat

0.5% Phone call

Base: 405 consumers in India who made a purchase in one or more of the targeted industries in past the six months, age 18+
Source: A commissioned study by Forrester Consulting on behalf of Epsilon, July 2018

Email is Indian consumers' most preferred channel to receive marketing updates from a brand, but consumers want personalized content.

Figure 4

"Which of the following statements about email marketing do you agree with?"

66% I receive too many email offers and promotions

62% I read most email ads just in case something catches my eye

61% Most email ads I receive don't offer anything that interests me

59% I often wonder how companies that send me email offers got my name and email address

56% I wish it were easier to unsubscribe from email offers I have previously registered for

28% Email offers are usually well-timed with my needs

25% I delete most email ads without reading them

23% I am more likely to read email from companies when the content is personalized to my interests

20 % Email offers are a great way to find out about new products or promotions

14% I have a separate email account I use just for receiving email ads

11% I often buy things advertised to me through email

11% I sometimes forward email ads to my friends

9% I am likely to sign up for email from companies in the next 12 months

Base: 405 consumers in India who made a purchase in one or more of the targeted industries in past the six months, age 18+
Source: A commissioned study by Forrester Consulting on behalf of Epsilon, July 2018

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Personalization Is The Top Priority, But Marketers Aren't Well Equipped With Data, Expertise, And Technology

Marketers in India are on the right track to keep up with consumers' rising expectations by improving personalization capabilities as the top marketing priority (see Figure 5). Delivering personalization requires marketers to collect, analyze, synthesize, and react in real time to a flood of customer information across multiple touchpoints and often disconnected internal teams. However, many marketers lack:
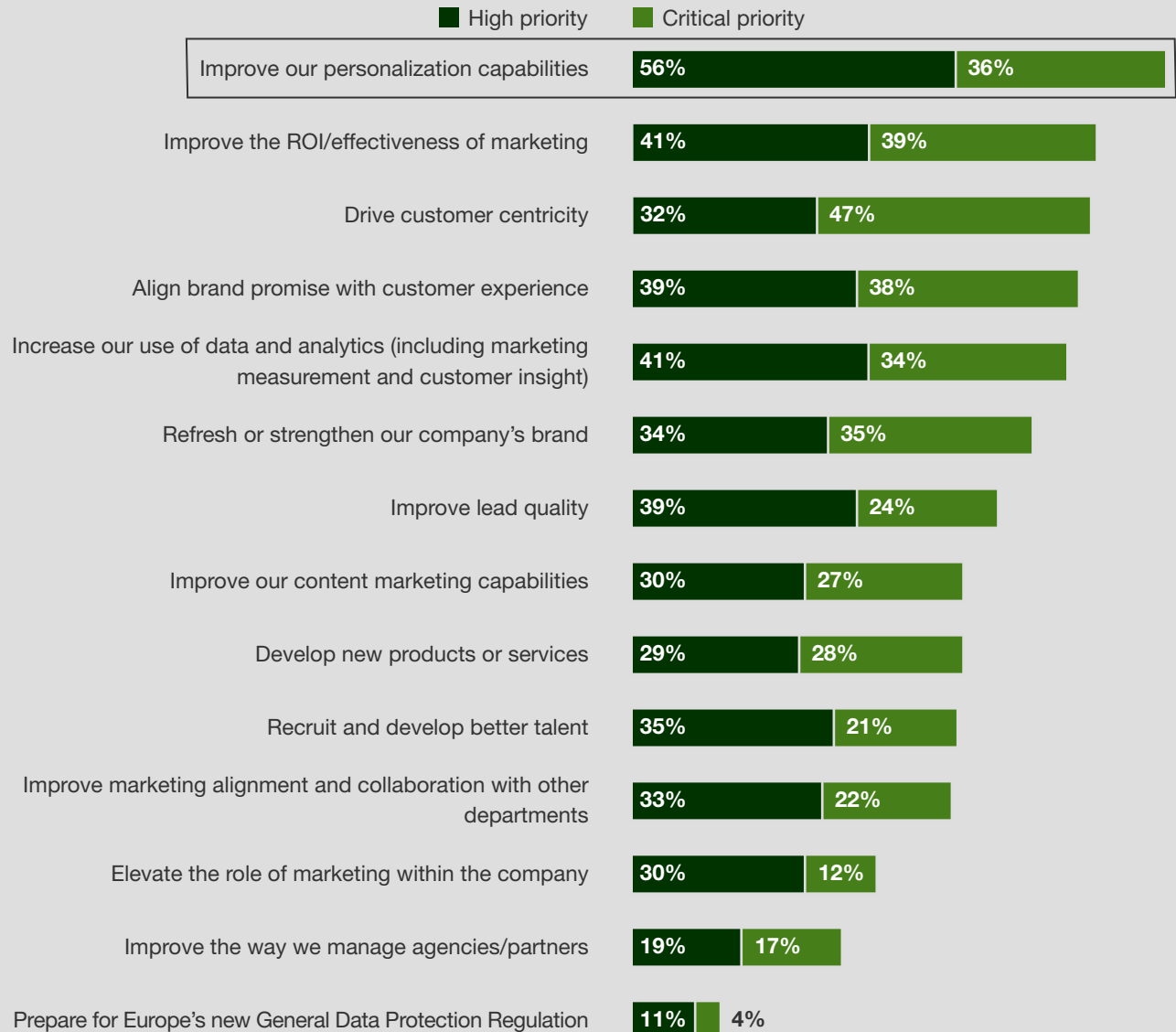
› **Data readiness to drive decision making.** Data strategy and good-quality customer data across channels and platforms are the foundation of personalization. However, lack of data accessibility, quality, consistency, and granularity is a common challenge is Asia.[13] Indian marketers also struggle to access relevant data and to bridge data silos to form a single view of customer across channels and teams. To overcome these data challenges, over half of marketers surveyed in India are planning to implement data preparation tools in the next 12 months.

› **Cross-channel expertise to bridge channel silos.** Acquiring talent to operate the processes and technology that companies want to invest in will become a top priority. Marketing teams are often structured in channel/functional-specific units, which leads to current cross-channel inconsistency. They need cross-channel talent to bridge that gap. In addition, marketers in India are not confident about their expertise in new channels like mobile, let alone delivering truly consistent, personalized cross-channel customer experiences.

› **Technology support to make real-time personalization.** Marketers face more complex, cross-channel customer journeys and higher expectations for real-time engagement. It is a big challenge for marketers to select and use the right technology to make sense of data and make actionable marketing decisions as fast as possible. Marketers need various technology support, from cross-channel campaign management to cross-channel attribution to journey analytics.

92% of marketers' top priority for the next 12 months is to improve their personalization capabilities, including 100% of those in financial services and insurance industry.

Figure 5

"Which of the following are likely to be your organization's top marketing initiatives over the next 12 months?"
(Not all responses shown; showing percentage of respondents selecting "Critical priority" or "High priority")

■ High priority   ■ Critical priority

Initiative	High priority	Critical priority
Improve our personalization capabilities	56%	36%
Improve the ROI/effectiveness of marketing	41%	39%
Drive customer centricity	32%	47%
Align brand promise with customer experience	39%	38%
Increase our use of data and analytics (including marketing measurement and customer insight)	41%	34%
Refresh or strengthen our company's brand	34%	35%
Improve lead quality	39%	24%
Improve our content marketing capabilities	30%	27%
Develop new products or services	29%	28%
Recruit and develop better talent	35%	21%
Improve marketing alignment and collaboration with other departments	33%	22%
Elevate the role of marketing within the company	30%	12%
Improve the way we manage agencies/partners	19%	17%
Prepare for Europe's new General Data Protection Regulation	11%	4%

Base: 202 marketing professionals in India from targeted industries
Source: A commissioned study conducted by Forrester Consulting on behalf of Epsilon, July 2018

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Marketers Will Increase Martech Investment To Improve ROI And Deliver Personalized Brand Experiences

Marketers invest in EMT solutions to deal with cross-channel complexity, deliver better customer experience, improve marketing performance, and boost efficiency.[14] In the next 12 months, 60% of marketers surveyed plan to increase their technology spend (see Figure 6). Specifically, they plan to:
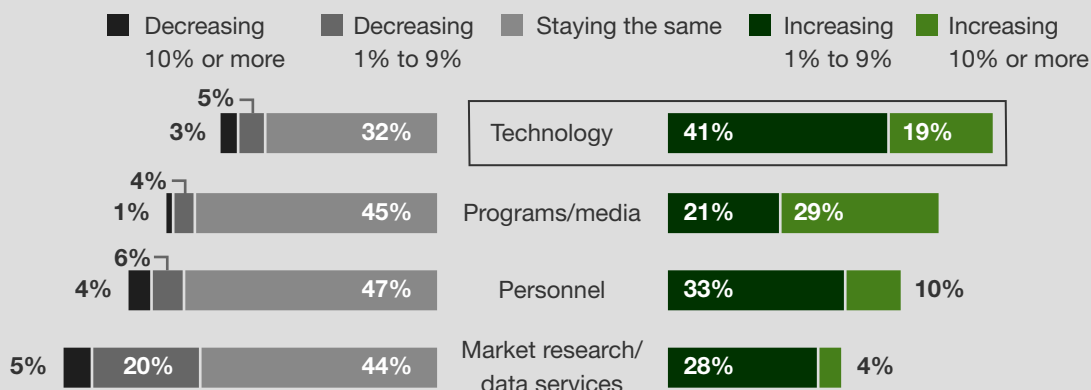
› **Continue to invest in integrated and point solutions to improve personalization.** Enterprise marketing software suites and cross-channel campaign management garner the most interest (64% of organizations from the CPG industry are planning to expand their use of cross-channel campaign management), as well as point solutions like email marketing and loyalty solutions (see Figure 7).

› **Increase investment in measurement solutions the most to better measure ROI.** As improving the ROI/effectiveness of marketing is a top marketing initiative for 80% marketers in India, it's no surprise that 71% of them are planning to increase spend in advertising and marketing performance measurement solutions.

› **Optimize channel investment.** Marketers in India should shift their mindset from inside-out to outside-in and let consumer preferences guide their channel investment optimization. Currently, 52% of Indian marketers surveyed are planning to expand their use of marketing technology to support SMS/MMS communications, which only 2% of consumers prefer; while only 42% of marketers are planning to do the same to support email, consumers' preferred channel of communication. Marketers should readjust their martech investment priorities to focus on the most relevant channels to consumers.
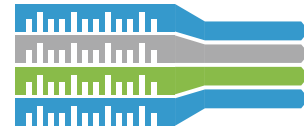
52% of respondents from the financial services industry are planning to expand their use of email marketing solutions in the next 12 months.

Figure 6

"Do you plan to increase, decrease, or maintain spend of the marketing budget on the following in the next 12 months?"

| Decreasing 10% or more | Decreasing 1% to 9% | Staying the same | Increasing 1% to 9% | Increasing 10% or more |

Technology: 5% / 3% / 32% / 41% / 19%

Programs/media: 4% / 1% / 45% / 21% / 29%

Personnel: 6% / 4% / 47% / 33% / 10%

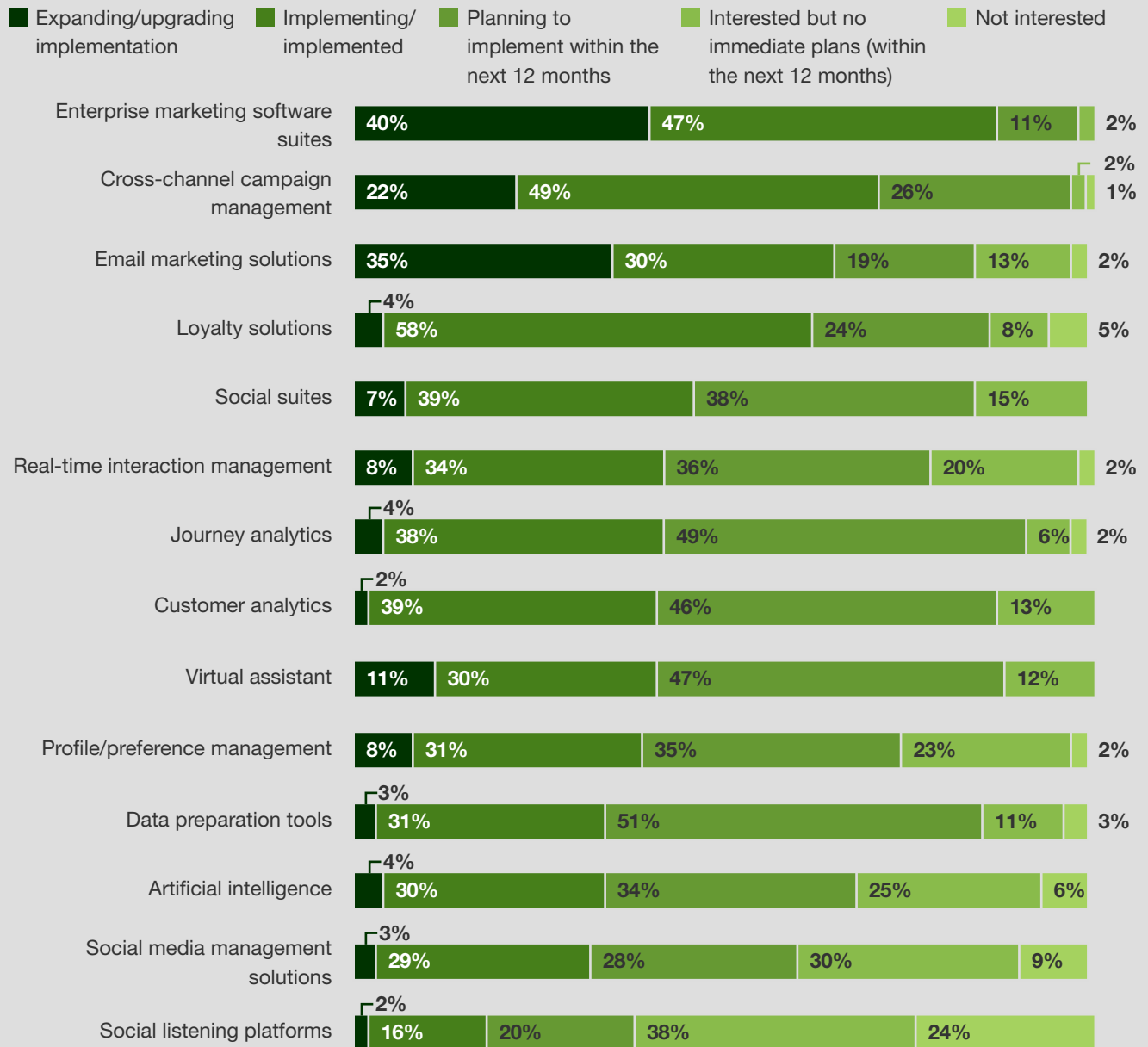Market research/data services: 5% / 20% / 44% / 28% / 4%

Base: 202 marketing professionals in India from targeted industries
Note: Percentages may not total 100 because of rounding.
Source: A commissioned study conducted by Forrester Consulting on behalf of Epsilon, July 2018

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Figure 7

"Please tell us what your marketing organization's plans are to adopt the following individual software technologies or services."

Legend:
- Expanding/upgrading implementation
- Implementing/ implemented
- Planning to implement within the next 12 months
- Interested but no immediate plans (within the next 12 months)
- Not interested

Category	Expanding/upgrading	Implementing/implemented	Planning to implement	Interested but no immediate plans	Not interested
Enterprise marketing software suites	40%	47%	11%	2%	
Cross-channel campaign management	22%	49%	26%	2%	1%
Email marketing solutions	35%	30%	19%	13%	2%
Loyalty solutions	4%	58%	24%	8%	5%
Social suites	7%	39%	38%	15%	
Real-time interaction management	8%	34%	36%	20%	2%
Journey analytics	4%	38%	49%	6%	2%
Customer analytics	2%	39%	46%	13%	
Virtual assistant	11%	30%	47%	12%	
Profile/preference management	8%	31%	35%	23%	2%
Data preparation tools	3%	31%	51%	11%	3%
Artificial intelligence	4%	30%	34%	25%	6%
Social media management solutions	3%	29%	28%	30%	9%
Social listening platforms	2%	16%	20%	38%	24%

Base: 202 marketing professionals in India from targeted industries
Note: Percentages may not total 100 because of rounding.
Source: A commissioned study conducted by Forrester Consulting on behalf of Epsilon, July 2018

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Evaluate And Select Right External Support To Accelerate Martech Maturity

Marketers in India partner with marketing technology and service providers to drive their EMT strategies. Marketers need help in martech: 70% of them are facing localization challenges (e.g., adopting EMT strategies, solutions, and/or services suitable for the local market), and half of them say that they do not have enough talents with the right skill sets to use marketing technology. Specifically, marketers:
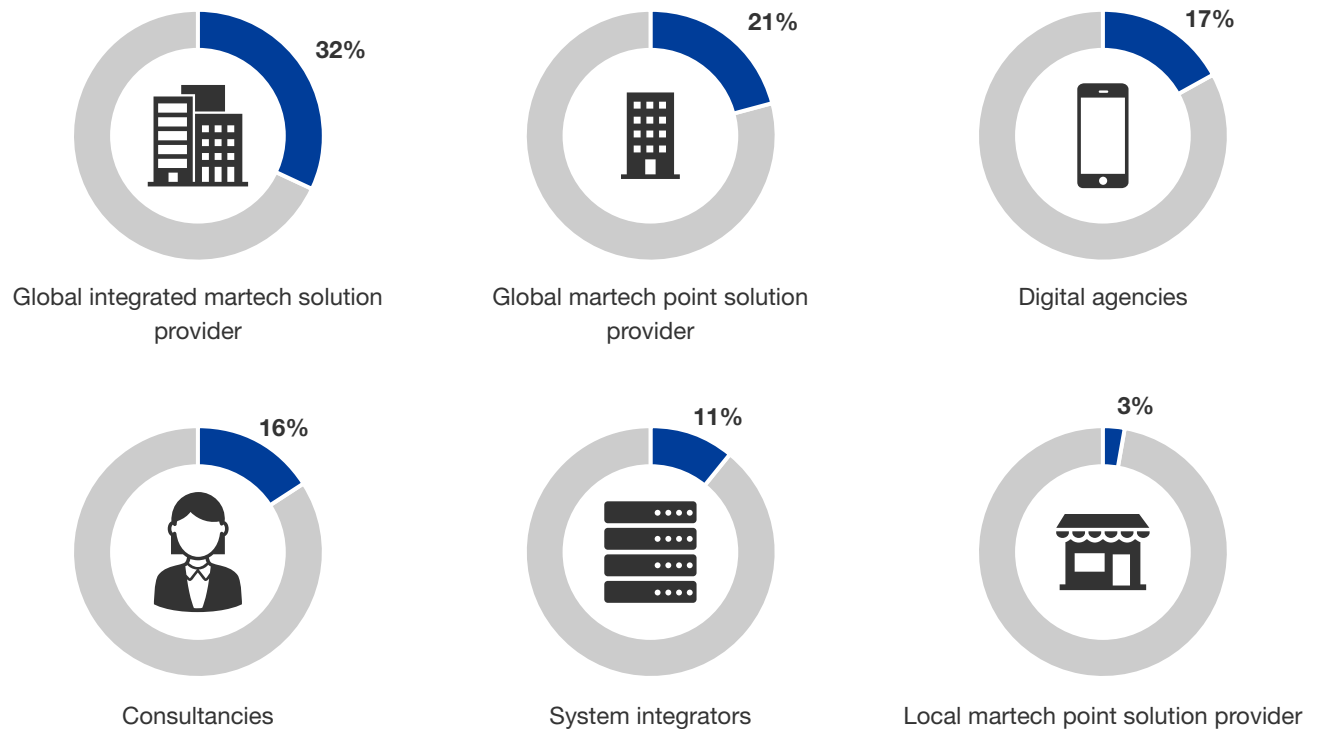
› **In different sized companies prefer various types of technology and service providers.** Small to medium companies (100 to 499 employees) work with consultancies the most because they need more hands-on services and ad hoc support. Medium to large (500 to 999), large (1,000 to 4,999), and very large companies (5,000 to 19,999) work with global integrated martech solution providers the most, because these solutions can meet marketers' multiple needs from planning to execution to measurement. However, global 2,000 companies (20,000 or more employees) work with global martech point solution providers the most, because they have larger internal marketing and tech teams to assemble the best point solutions based on specific business needs (see Figure 8).

› **Look for external support for both strategic and tactical purposes.** As a majority of marketers in India have low maturity in martech, they often don't have a martech strategy ready to guide their investment and implementation. On the other hand, they also need tactical support for delivering personalized experiences. Therefore, marketers primarily work with third-party vendors to build strategic road maps (30% of the marketers from the financial services and insurance industry), and design marketing campaigns (18%) and website and mobile apps (14%).

› **Evaluate vendors based on their top needed capabilities like analytics and measurement.** When selecting an EMT vendor, marketers' top selection and evaluation criteria are indicative of their greatest challenge — better customer insight to drive decision making. Therefore, analytics and measurement capabilities is a key selection criterion for 43% of marketers surveyed, along with ease of integration (51%) and total cost of ownership (41%).

› **Will further vendor partnerships.** Most marketers say they are satisfied and likely to continue working with all martech providers (global vendors, digital agencies, consultancies, and system integrators) with the exemption of local vendors. It indicates that marketers have better experience working with global vendors than local ones. Specifically, 93% of marketers from the CPG industry say they are likely or very likely to work with global integrated martech solution providers.

Website and mobile app design is the service requiring most support from vendors for the travel and hospitality industry.

Figure 8

"What type of marketing technology and service providers do you primarily work with for martech initiatives?"
(Showing percentage who ranked each as the top choice)

32%

Global integrated martech solution provider

21%

Global martech point solution provider

17%

Digital agencies

16%

Consultancies

11%

System integrators

3%

Local martech point solution provider

Base: 202 marketing professionals in India from targeted industries
Source: A commissioned study conducted by Forrester Consulting on behalf of Epsilon, July 2018

Key Recommendations

Forrester's in-depth survey of Indian consumers and marketing decision makers yielded several important recommendations for marketers to exceed consumers' expectations by optimizing the use of EMT solutions. To better meet the rising customer expectations and deliver personalized brand experiences to differentiate from competition, marketers in India should:

Solidify data fundamentals before pursuing consistent, seamless, and personalized brand experience. Many marketers still face key fundamental data challenges such as lack of data accessibility, timeliness, quality, consistency, and transparency. Marketers should start to collect, cleanse, and integrate consumer data; break down internal data silos; and bring in external data partners such as customer data management providers with a specific focus on cross-channel and cross-device integration. This will be the foundation to unleash the power of martech and make data-driven marketing decisions.

Find the balance between personalization and privacy. While investing and focusing on improving personalization capabilities, marketers should be aware of overpersonalization. They should define the line between personal and too personal and follow local data privacy laws and global regulations like GDPR to collect and use data responsibly for personalization. Provide data transparency to consumers through clear opt-in and -out options and work with responsible data partners. Be cautious that personalization and marketing efficiency plays are sometimes borderline creepy, especially for sensitive industries like financial and healthcare.

Experiment with emerging technologies like AI. AI, rather than mobile, will be the key differentiator and the next battleground for marketers. Based on a solid data foundation, AI will largely increase marketing efficiency and help marketers achieve personalization at scale. Marketers should invest in AI experimentations and start testing with tightly defined and measurable use cases before implementing them into large-scale projects. One early adopter used AI to consistently identify the right search keywords, and successfully increased the number of daily leads by up to 40% and reduced the cost per lead by 9%.[15]

Recruit and train EMT talent. As EMT maturity grows in India, marketers will start assembling cross-channel expertise, developing training programs to reinforce and expand employee skills. It's important to invest in developing and training professionals who understand both marketing and technology, as well as assemble cross-functional teams with members from different departments including marketing, technology, customer insights, and customer experience.

Prioritize local business needs and market nuances in evaluating marketing technology and service providers. Putting together a martech stack that works best to achieve marketing goals is a daunting task for marketers. They need external support from marketing technology and service providers. No matter the size, origin, or type, marketers in India should evaluate vendors' capability of understanding local business challenges and market nuances, adapting to local digital ecosystems with strong local presence, expertise, and data resources.

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Appendix A: Methodology

In this study, Forrester conducted an online survey with 405 consumers and 202 marketing senior decision makers from the retail, consumer product good and manufacturing, financial services and insurance, and travel and hospitality industries in India to evaluate the adoption and use of marketing technologies across those industries and how it relates to consumers' expectations regarding ads, loyalty, and brand engagement.
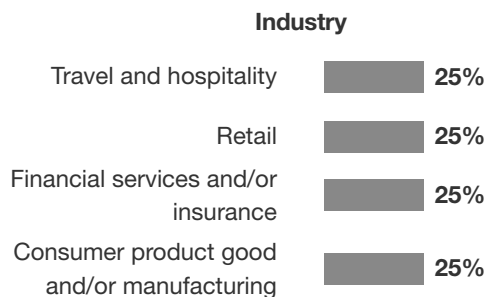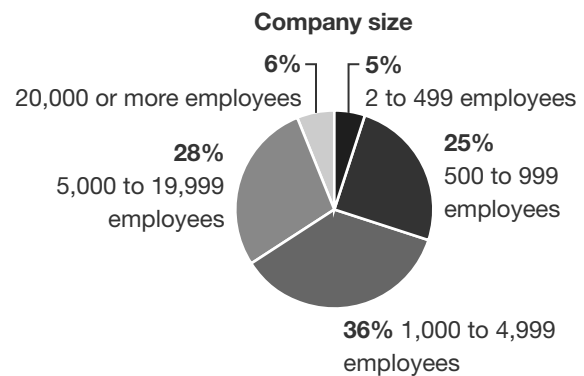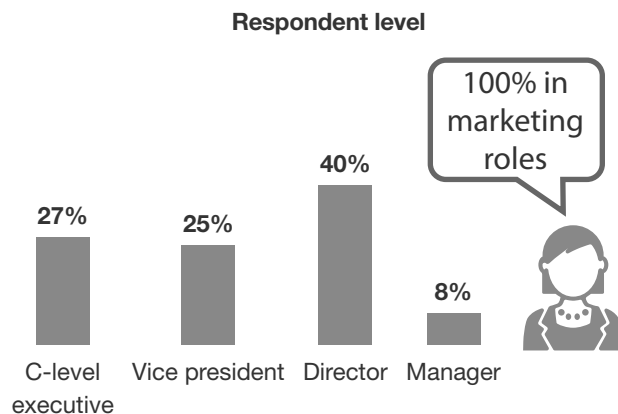
Survey participants included decision makers who were at the manager level or above from the marketing function and consumers aged 18+ who made a purchase in one of the targeted industries in the past six months.

Questions provided to the participants asked marketers about their priorities and challenges, budgets and planning, use of marketing technology, and vendor selection and asked consumers about their online and mobile behaviors and their point of view on advertising and marketing, loyalty, and brand engagement. Respondents were offered a small incentive as a thank you for time spent on the survey. The study began in June 2018 and was completed in July 2018.

Appendix B: Demographics/Data

RESPONDENT DEMOGRAPHICS: BUSINESS SURVEY

Respondent level

100% in marketing roles

27% C-level executive
25% Vice president
40% Director
8% Manager

Company size

6% 20,000 or more employees
5% 2 to 499 employees
25% 500 to 999 employees
28% 5,000 to 19,999 employees
36% 1,000 to 4,999 employees

Industry

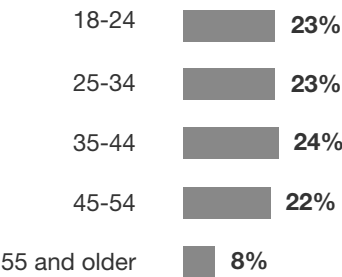|	
Travel and hospitality	25%
Retail	25%
Financial services and/or insurance	25%
Consumer product good and/or manufacturing	25%

India **100%**

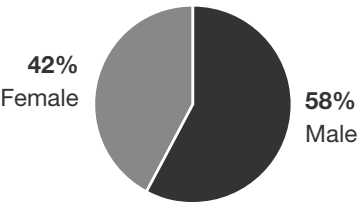Base: 202 marketing professionals in India from targeted industries
Source: A commissioned study conducted by Forrester Consulting on behalf of Epsilon, July 2018
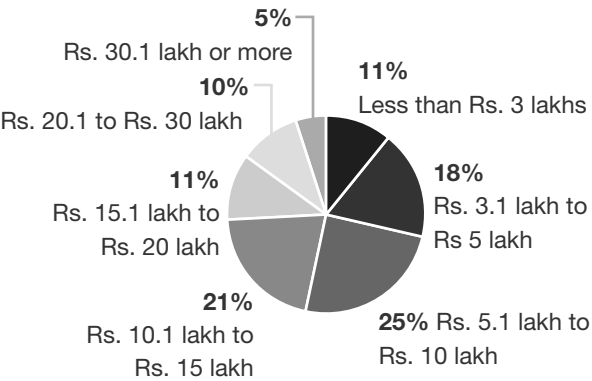
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## RESPONDENT DEMOGRAPHICS: CONSUMER SURVEY

Age range

18-24	**23%**
25-34	**23%**
35-44	**24%**
45-54	**22%**
55 and older	**8%**

India **100%**

Gender

42% Female

58% Male

Household annual income

5%
Rs. 30.1 lakh or more

10%
Rs. 20.1 to Rs. 30 lakh

11%
Less than Rs. 3 lakhs

11%
Rs. 15.1 lakh to Rs. 20 lakh

18%
Rs. 3.1 lakh to Rs 5 lakh

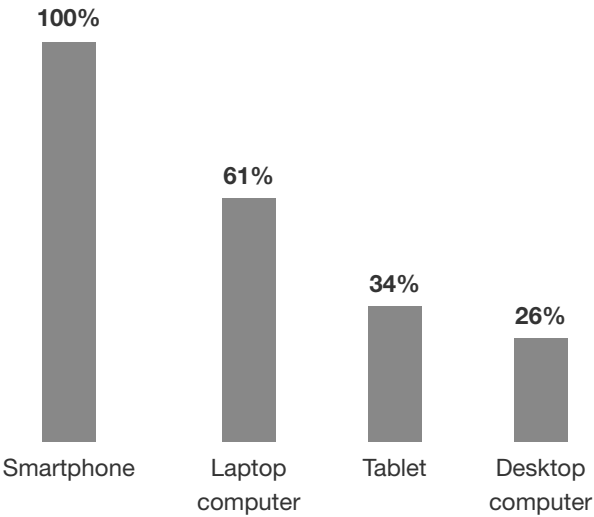**21%**
Rs. 10.1 lakh to Rs. 15 lakh

25% Rs. 5.1 lakh to Rs. 10 lakh

CONSUMER GENERAL ONLINE BEHAVIOR

How often do you go online? Please include internet access from home, work, or elsewhere.

| Several times a day	At least daily	At least weekly
41%	48%	11%
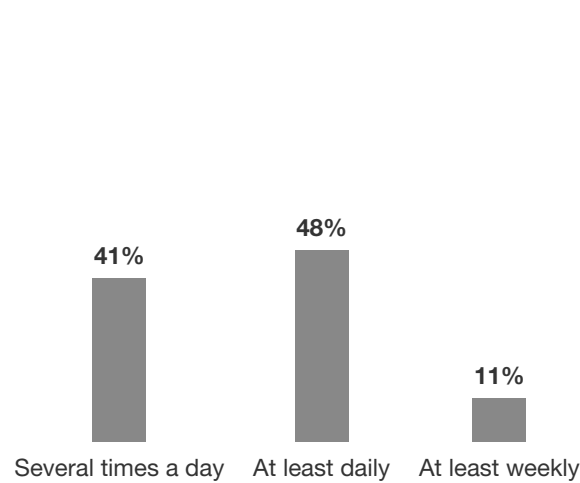
Which of the following devices do you use (including any supplied by an employer)?

Smartphone	Laptop computer	Tablet	Desktop computer
100%	61%	34%	26%

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How often do you go online from the device listed? This includes any access to the internet via web browser or app.

■ Several times a day ■ At least daily ■ At least weekly ■ Less than weekly ▫ Never
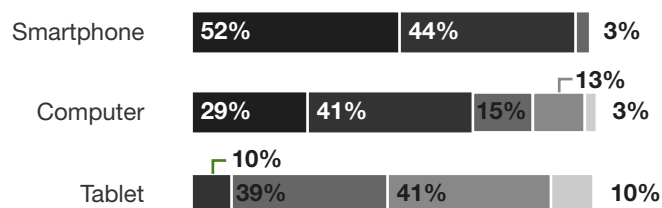
Smartphone | 52% | 44% | 3%

Computer | 29% | 41% | 15% | ⌐13% | 3%

Tablet | ⌐10% | 39% | 41% | 10%

Base: 405 consumers in India who made a purchase in one or more of the targeted industries in past the 6 months, age 18+
Note: Percentages may not total 100 because of rounding
Source: A commissioned study by Forrester Consulting on behalf of Epsilon, July 2018

Appendix C: Supplemental Material

RELATED FORRESTER RESEARCH

"Now Tech: Marketing Measurement And Optimization In Asia Pacific, Q3 2018," Forrester Research Inc., July 11, 2018.

"The State of Enterprise Marketing Technology," Forrester Research Inc., July 11, 2018.

"Model the ROI of Enterprise Marketing Technology Investments," Forrester Research, Inc., April 6, 2018.

Appendix D: Endnotes

[1] Source: "Indian Firms Have Made Progress On Digital Business Maturity, But Still Have Miles To Go," Forrester Research, Inc., July 25, 2018.

[2] Originally worded in the survey for this TLP as "Most email ads I receive don't offer anything that interests me."

[3] Enterprise marketing technology comprises software solutions that manage the execution and orchestration of marketing processes from planning to execution to measurement across marketing teams. It covers five major categories: marketing automation, analytics, online marketing, mobile marketing, and ad technologies. Source: "Overcome Top Enterprise Marketing Technology Challenges in Asia Pacific," Forrester Research, Inc., January 3, 2018.

[4] Source: "Journey Mapping Must Keep Up With Customer Expectations In A Rising Economy," Forrester Research, Inc., January 19, 2017.

[5] Already, 57% of metro Indian consumers use mobile phones to compare prices when they shop offline, compared to only 24% in the US. Sources: Forrester Analytics Consumer Technographics® Asia Pacific Survey, H2 2016 and Forrester Analytics Consumer Technographics North American Retail And Travel Benchmark Recontact Survey 1, Q3 2017 (US).

[6] Source: "Evolve Now To Personalization 2.0: Individualization," Forrester Research, Inc., December 5, 2017.

[7] Source: "Plan Customer-Centric Enterprise Marketing Technology Requirements," Forrester Research, Inc., August 1, 2018.

[8] An enterprise marketing software suite is an integrated portfolio of marketing technology products that provide analytics, automation, and orchestration of insight-driven customer interactions to support inbound and outbound marketing.

[9] Source: "The Rise of the Empowered Customer," July 12, 2016.

[10] Perks and benefits include cash rewards, loyalty points, VIP and exclusive access to events, etc. Source: Forrester Analytics Consumer Technographics Global Online Benchmark Survey (Part 2), 2018.

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[11] The only distinction in this area where brand recognition could mean more than price or quality is in the financial services industry according to the survey; however, this is directional, and there is a strong linkage between brand reputation and quality.

[12] Full description from the survey of the ranked list of 14 initiatives among Indian marketers:
  - Improve our personalization capabilities
  - Increase our use of data and analytics (including marketing measurement and customer insight)
  - Improve the ROI/effectiveness of marketing
  - Improve lead quality
  - Align brand promise with customer experience
  - Recruit and develop better talent
  - Refresh or strengthen our company's brand
  - Improve marketing alignment and collaboration with other departments
  - Drive customer centricity
  - Elevate the role of marketing within the company
  - Improve our content marketing capabilities
  - Develop new products or services
  - Improve the way we manage agencies/partners
  - Prepare for Europe's new General Data Protection Regulation

[13] Source: "Master The Fundamentals Of Marketing Measurement," Forrester Research, Inc., April 25, 2018.

[14] Source: "Overcome Top Enterprise Marketing Technology Challenges In Asia Pacific," Forrester Research, Inc., January 3, 2018.

[15] Source: "Leverage AI To Improve Marketing Efficiency," Forrester Research, Inc., August 24, 2018

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