

Resilience and Innovation: Tracing the Growth of the Indian Advertising Industry and its Response During the 2020 - 21 Pandemic Era

Dr. Nishith Anand¹, Aswin Prakash²

¹Associate Professor, School of Management Studies, Chinmaya Institute of Technology, Kannur
Email: nishithanand[at]chintech.ac.in

²Assistant Professor, School of Management Studies, Chinmaya Institute of Technology, Kannur
Email: aswin[at]chintech.ac.in

Making the Most of the Pandemic: How Indian Advertisers leveraged Digital Media during 2020

Abstract: *The Indian Advertising Industry is worth over INR 70, 000 crores and growing at 18.6%. Digital Advertising has seen consistent upward growth for a decade, peaking to 50% in 2020 - 21. The sudden outbreak of Covid - 19 in 2020 and the subsequent nation - wide lockdown took individuals and industry by surprise. Even as markets plunged, production got stalled and jobs got affected, the Indian Advertising industry displayed restraint and fortitude by contemplating the situation well and by responding with empathetic, inspiring creatives that conveyed hope, positivity and trust. PR agencies also worked in sync with market sentiment, resulting in advertising campaigns that not only spoke of relevant objectives, but were also executed creatively; amplified by the power of digital/social media. This paper describes the Indian Advertising Industry during 2020 - 21 and 2021 - 22. It also studies the impact of major advertisers during the pandemic period.*

Keywords: Indian Advertising, Digital Media, Consumer Sentiment, Covid - 19, Public Relations

1. Introduction

To state that the year 2020 was a Gamechanger, would be a gross understatement. The year witnessed individuals, industry and institutions recoil, recede and eventually renew themselves while adapting to the Global New Normal. The impact of the pandemic was immense in degree and kind, affecting business profitability and scale in unprecedented ways. As an enabler of strategic business development, the advertising industry plays a critical role in which individuals engage with products and services. From a Brand Management perspective, the communication strategy of companies make all the difference when it comes to consumer sentiment, readiness and expectations. As of 2020, India has 642 Million Smartphone users and 45% internet penetration. It is not surprising that Digital Advertising would carry significant consequence with regard to Message transmission, Brand Recognition and Consumer sentiment. This paper presents an overview of Indian advertising with special reference to Digital Media Advertising. It examines how companies were able to achieve optimum results for their communication objectives by leveraging the power of Digital Media Advertising.

Indian Advertising Industry - 2020 - 21

As per Dentsu Digital Advertising Report, 2022, the Indian advertising industry is presently valued at Rs.70, 715 crore, having grown at 18.6% over 2020. It is expected to reach Rs.93, 119 crore by the end of 2023, growing at a CAGR of 14.75%. However, the Total Advertising Expenditure had witnessed a year - on - year decline of 20% during 2020 - 21; but had picked up during 2021 - 22 to grow at 37%.

While traditional advertising grew by 31% during 2021 - 22, digital registered a growth of 50%. A comparison of Quarter - wise growth in Advertising Expenditure is given in Tables 1 and 2 below:

Table 1: Quarter - wise Ad Expenditure in 2021 versus 2020

Growth	Q1	Q2	Q3	Q4
2021/ 20	12%	91%	51%	28%
2020/ 19	4%	-33%	26%	49%

Source: Pitch Madison Report on Indian Advertising, 2022

Table 2: Growth in Advertising Expenditure by category

	TV	Digital	Print	Radio	Out of Home	Cinema
2021 Over 2020	25%	50%	39%	36%	69%	-25%
2021 Over 2019	11%	64%	-17%	-23%	-38%	-87%

Source: WARC and Pitch Madison Report on Indian Advertising, 2022

Growth of Digital Advertising

It is significant to note the growth of Digital Media Advertising in India. During 2020, the media grew at 50%. Mobile advertising constitutes 96%, Programmatic Digital Advertising makes up for 42% of advertising spends. E - Commerce players are the largest advertisers in the digital space, with Amazon Online India leading the list. A ranking of the advertisers of 2021 reveals that Upstox, Cred, netmeds. com, policybazaar. com, unacademy and WhiteHat Jr are the most active advertisers for the period. However, India's digital contribution to total Advertising Expenditure (34%) is lowest among other nations (China - 77%, UK - 74%, USA - 68%) when benchmarked against the global share of 65%.

Communications Strategy during 2020

While advertisers' outlay had suffered a de - growth during the outbreak of the pandemic, experts are of the view that Indian brands (and their agencies) displayed a distinct quality in their communications as opposed to those from Europe and America. Whereas non - Indian advertisers categorically conveyed ominous and sombre warnings about the pandemic, Indian brand communications were all about hope, positivity, responsibility and inspiration. To illustrate, Asian Paints extended their 'Har Ghar Kuch Kehta Hai' line to real home videos exemplifying the different ways in which families could spend time. Nescafe literally gave out a wake - up call to the youth to get started on their dreams and aspirations through its 'Karne se hee hona hai' campaign. While Vodafone continued their popular ZooZooos campaigns to address social distancing, hygiene and fake news, brands like Cadbury's and Facebook expressed their solidarity towards local businesses.

However, there were brands whose communication with customers were borderline misleading, too. The Advertising Standards Council of India (ASCI) reported that only 12 out of 332 ads related to Covid - 19 were true. Notably, Zodiac Clothing faced major criticism following its claim that its 'Securo' shirt range made of Heiq Viroblock technology can kill the Corona virus. The ASCI went on to list several brands from categories like Air Conditioners, fans, water purifiers, apparel, paints, detergents, plywoods and laminates, food and supplements; which sent out bogus promises on Covid - related benefits.

Table 3 presents a list of 12 advertising campaigns from India which were released during the outbreak of the Covid Pandemic in 2020. Given the strategic role of Digital Media in advertising, it is significant to note the reach and impact of these campaigns on Social Media as well as traditional media.

Table 3: Successful Advertising Campaigns from India, 2020

#	Client	Campaign	Integrated Social Media Reach	Other Achievements
1	Stayfree	#ItsJustAPeriod	FB+IG+YT: 10.17 Million 1.03 lakh male users	Media Coverage in Print & TV Collaboration with influencers like Sonu Sood, PV Sindhu, Rajkumar Rao, Genelia D' Souza, Kritika Kamra, Sanya Malhotra
2	Gillette	Gillette Barber Suraksha Programme	45 Million Views, 29 Million Engagement PR Impression worth 514 Million 99% Positive Sentiment	Barbers turned from direct competitor to Strategic Business Partners Sales growth of USD 9 Million over three years.
3	National Skill Development Corporation	#UnlockingSkills	3.7 Million impressions Reached 8, 26, 000 people	124 online events 30 organizations as partners
4	Reckit Benckiser	Dettol Banega Swacch India	5 Million School children 10% improvement in school attendance	52% schools increased access to toilets 40% increase in funds utilization for sanitation behavioural change
5	ITC Vivel	Vivel Voice of Art	7 Crore reach PR value of 3.15, 90, 000 Total Engagement: 1 million Total Impressions: 75 Million Video Views: 20.5 Million	Unique platform for artists Inclusive to visually challenged artists
6	Evocus	#PowerOfBlack	Over 2, 33, 046 impressions on Instagram 33% increase in audience garnered	
7	Airbnb	At home with Airbnb	3.6 Million Reached	150% increase in product page views
8	Indian Pharmaceutical Alliance	Mission Medicine: Delivering Life	Over 2.2 Million Video Views; Youtube, LinkedIn and Twitter 3 Million impressions across Facebook and Instagram	Media Coverage witnessed 1934K Viewers per week on India Today TV Total Digital Impressions of over 10 Mn on India Today YouTube and Twitter Total Readership of 42 Mn in print and online
9	Bolo Indya	A Silver Lining for the Digital Content	Over 180 Million Videos created in over 14 languages	
10	Hyundai Motors India	Click to Buy	1.5 Million Visitors	1900 Bookings in a month 20, 000 unique enquiries during March - June 2020
11	PepsiCo India	Covid - 19 Relief Program	431 Million Impressions from 220+ earned media clips 151 Million Impressions with 58 endorsements from stakeholders.	In collaboration with CII and other NGOs, PepsiCo provided 10 Million meals across 8 states (Punjab, Haryana, Maharashtra, Uttar Pradesh, Assam, West Bengal, Rajasthan & Tamil Nadu)
12	Adidas India	Ready for Sport	Over 600 Million Exposures Over 60K Indian Participants	Adidas engaged over 3, 000 athletes and artists to support the community

Source: Nafeesa Shaheen, 'A look at industry's most impactful PR campaigns that mattered in 2020, from www.exchange4media.com

From Table 3, it is evident that advertising campaigns with a strong element of Public Relations (PR) create meaningful impact in terms of message influence, social media reach, brand equity and community building.

2. Conclusion

This paper presented an overview of Indian Advertising Industry trends during the period of 2020 - 21. It is noteworthy that Digital Media Advertising displayed a significant growth of 50% during this period. This offers Advertising Professionals with immense opportunity and strategic advantage for crafting and communicating distinctive brand promises. It is commendable to observe that Indian Advertisers took their time to comprehend and contemplate an appropriate communication strategy in empathy with consumer sentiment. As a result, market leaders were able to differentiate themselves by establishing socially relevant communication objectives that lent positivity, inspiration, hope and support to the consumer. Specifically, these campaigns championed the causes of inclusiveness, empowerment, entrepreneurship and also promoted trust, empathy, solidarity, wellness and hope. Public Relations (PR) campaigns executed with rational budgets and timelines emerged successful, owing to the power of digital media. Indian Advertising did poetic justice by leveraging the power of social media with viral content, just when the Covid - 19 also went viral in the country. A review of successful advertising campaigns of 2020 - 21 reveal that clear objectives, effective media mix and creative execution have sustained the market during the de - growth of 2020 - 21 and enabled the industry to rebound with a growth of 37% in 2021 - 22.

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