



Real-time Conversation Marketing Cloud

OMNICHANNEL MARKETING READINESS IN INDIA A RESULTICKS RESEARCH REPORT

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1. Foreword



Redickaa Subrammanian

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For businesses in India, omnichannel customer engagement has become a new marketing imperative. It is already shaping how brands worldwide acquire and retain loyal customers. As the country undergoes rapid digitization and its economy continues to expand, businesses of all sizes across virtually every sector will experience increasing pressure to undergo digital transformation.

Forward-thinking marketers know that transformation must happen sooner than later. Customers in India are becoming increasingly tech savvy and channel agnostic. They have come to demand more from brands than mere commercial transactions. They expect sophisticated, consistently relevant, individualised experiences in real-time across whatever channels they choose to interact.

The ability of brands to meet such expectations will separate the leaders from those that merely keep up. Brands that do this successfully stand to make enormous gains.

So, how ready are India's marketers and businesses to seize the moment? Who has what it takes to stay on the forefront of digital transformation and the omnichannel shift? What separates the leaders from the laggards?

We've created this report to offer research-based insights into where you stand today and what you need to lead and succeed in the future. As a data-driven, omnichannel, real-time marketing solution, Resulticks is helping brands across India make the leap towards digital transformation that marketplace leadership requires.

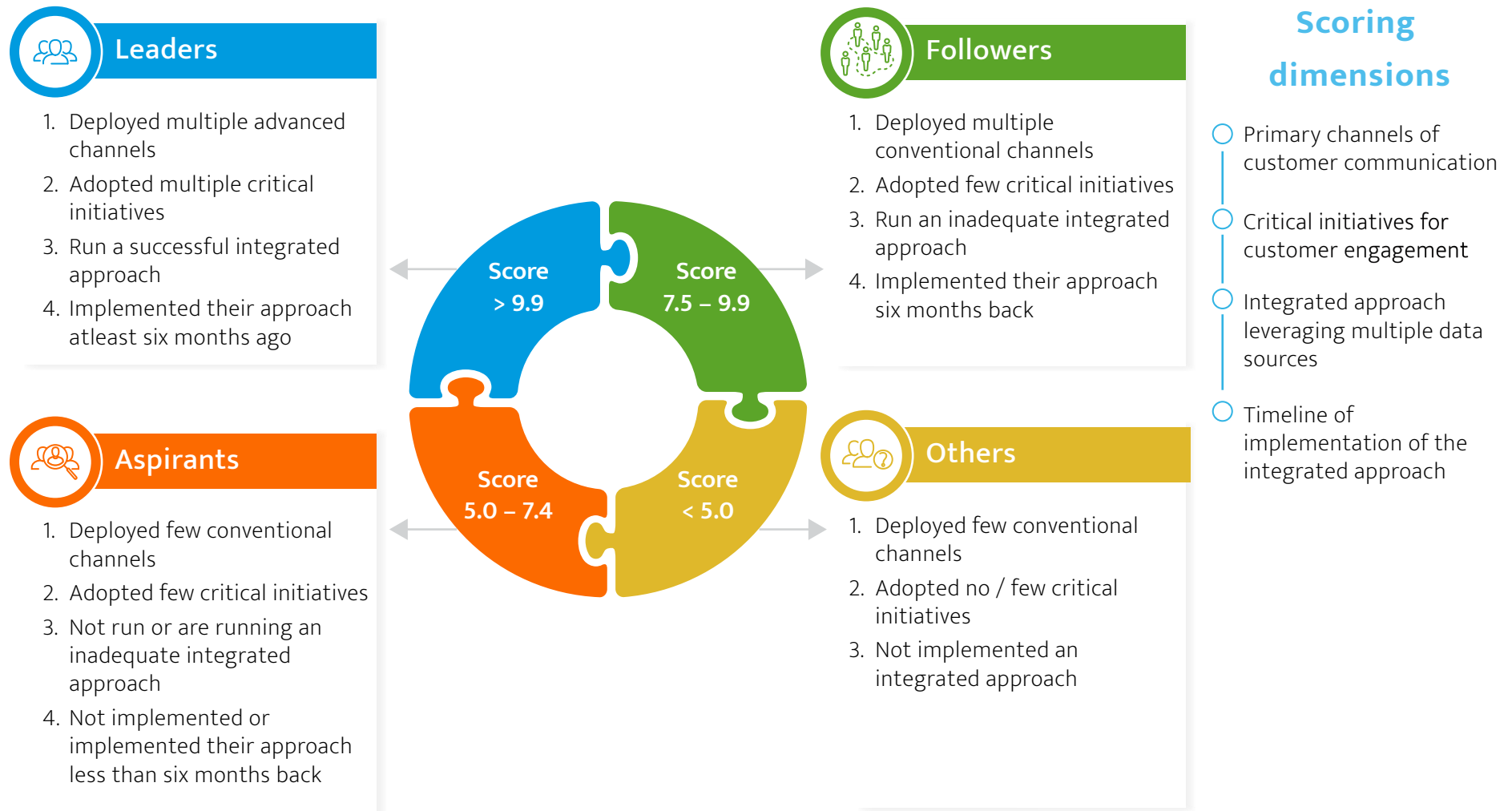
About the report

- **Omnichannel Marketing Readiness in India** is a research-based report on the degree to which Indian brands have successfully implemented an integrated omnichannel approach to customer engagement, and how such efforts have contributed to the realization of marketing goals and top-line growth. It also addresses the key initiatives, challenges, and priorities of Indian marketers and concludes with an assessment of their expectations and future plans for investing in marketing automation.
- The insights presented here encompass most of the significant attributes marketers should consider during their implementation of an omnichannel strategy. The report can also help marketers benchmark their own omnichannel readiness, practices, and performance against those of the marketplace and arrive at informed decisions about improvement.
- The report is based on the findings of a survey of 414 senior marketers (General Managers and Heads of Marketing) representing 17 business sectors, from businesses across India with revenues between INR 5 crore and exceeding INR 250 crore. Respondents have been classified as “Leaders”, “Followers”, “Aspirants” and “Others” as described on the following page.

The Respondents

The study classified survey respondents into four cohorts based on their stage of omnichannel readiness.

The classification hypothesis serves to validate a causal model leading to better adoption of omnichannel customer engagement technology and increased near-future investments.



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2. Executive summary

Executive summary

The market opportunity

- The Indian marketplace comprises a very large number of digitally savvy consumers – a billion-plus mobile phone subscribers, more than half a billion individuals online, and nearly 300 million social media users. Channel proliferation and surging mobile-internet penetration levels have created unprecedented opportunities for marketers.
- Three market forces have brought omnichannel customer engagement to the forefront – the enormous volume of customer data generated across an ever-expanding number of channels, access to actionable analytical insights, and a generation of consumers receptive to marketing innovation.
- Integrating data from disparate communication channels and leveraging analytics to deliver individualised (and not just personalised) customer experiences are fast becoming the new normal. Customers can move across multiple channels seamlessly thanks to rapidly advancing technology. Because they expect brands to keep pace, omnichannel marketing has become the new business imperative.
- A 2019 McKinsey Global Institute study titled **Digital India** reported that 74% of respondents exhibit omnichannel behaviour. Most urban consumers shop across retail formats conduct pre-purchase research online and willingly share personal data in exchange for deals and rewards. An estimated 42% of all online consumers are from tier-2, tier-3 towns and rural areas, and use their mobile phones to shop.
- Indian marketers are looking to the convergence of marketing technology (martech) and advertising technology (adtech) to deliver timely, targeted content. Omnichannel initiatives are indispensable to this endeavour.

* Digital India, McKinsey Global Institute, March, 2019.

Executive summary

The current state of omnichannel marketing

- 1 Those Indian marketers designated as leaders in this report consider newer channels of communication (Social media, Augmented reality, Beacons and others) as efficient as conventional channels (Email, SMS and Website), while the rest consider the latter far more efficient in comparison.**

Slightly more than half of the omnichannel leaders put social media on par with conventional channels. 28% do the same with augmented reality, QR codes and beacons. For three-fourths of all marketers, though, conventional websites and email top the list.*

- 2 Personalisation / Individualisation and a unified 360-degree view of the customer are considered two of the most critical customer engagement initiatives by marketers.**

90% of omnichannel leaders rate personalisation or individualisation as the top critical initiative, and three in every four leaders rate unified 360-degree view of the customer as the top critical initiative for customer engagement.

* Percentage of respondents rating the attribute 4 or 5 on a 5-point scale

Executive summary

Omnichannel readiness

- 1 India is a relative newcomer to the integrated approach to customer engagement, but marketers are rapidly adopting it, leveraging data across disparate communication channels.**

About 40% of all marketers have implemented solutions with an integrated approach. These comprise nine in ten leaders and three in four omnichannel followers. About 50% of all leaders and followers have implemented the approach within the past 6 to 18 months.

- 2 The integrated approach has contributed significantly to the marketing goals of most businesses that have implemented it.**

A tenth of all businesses have derived exponential benefits, including 26% of all leaders. More than eight in ten businesses, including nearly 90% of all followers, have derived marginal benefits.

Executive summary

Challenges and priorities

1 Marketers have faced varied challenges – strategic, technological, and data related – while implementing omnichannel initiatives.

Nearly 40% of leaders and followers and nearly half of omnichannel aspirants face strategic challenges that include a lack of multichannel strategy and real-time, data-driven marketing capabilities. More than a third of all leaders and aspirants and a fourth of all followers face technology, software, and data segmentation challenges.

2 In the course of implementing their omnichannel customer engagement initiatives, Indian marketers have prioritised three key technology investments.

Nearly half of all respondents – across leaders, followers, and aspirants – plan to invest in an integrated marketing automation tools. Slightly more than a third – including two in three leaders – plan to invest in better analytics tool and practices. 41% of all respondents would invest in data integration tools.

Executive summary

Outcomes, expectations and investment plans

- 1 While the primary focus of marketers continue to be customer acquisition, retention, building loyalty and increased return on investments, marketers are striking hard to leverage technology to provide seamless customer experiences over the next three years.**

Nearly 75% of all followers and aspirants have set customer acquisition as the top outcome expectation, and nearly all leaders (more than 80%) expect increased returns on their investments above other outcomes.

- 2 Most Indian marketers can reap only lower-order benefits from their existing marketing technology platforms and would like to invest in omnichannel marketing to transform their businesses.**

Two-thirds of all marketers – across leaders, followers, and aspirants – expect multichannel campaign orchestration and data integration from an omnichannel platform and 40% of them expect a user-friendly interface.

- 3 Marketers who are in the advanced marketing automation journey are optimistic about their Omnichannel Marketing Investment**

75% of all leaders and nearly half of all followers plan to spend 11% to 25% of their marketing budgets on omnichannel marketing.

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3. The current state of omnichannel marketing in India

The omnichannel mix: Primary channel for customer communications

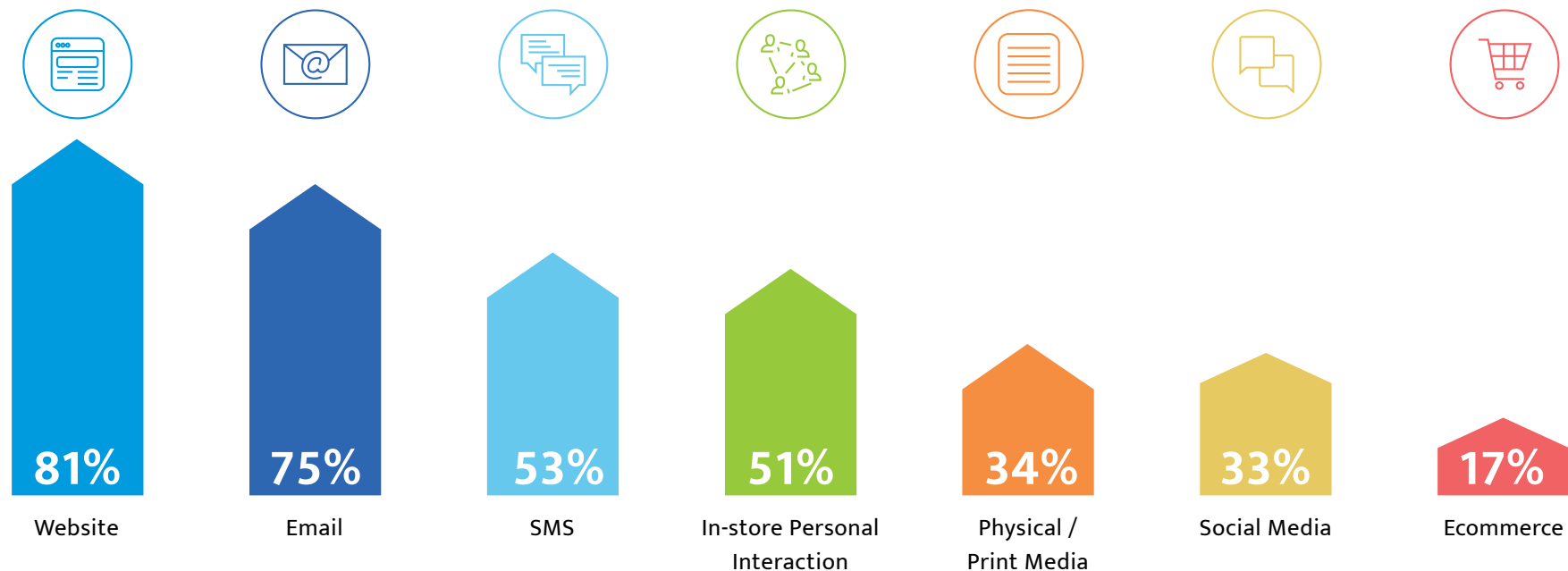


Figure 1: Respondent rating of customer communication channels – top rated channels

Website and email dominate a rather conventional set of communication channels that comprise the Indian marketer's omnichannel mix. Three in four marketers, or more, regard these two channels as the most efficient, while about a third or less associate newer channels, such as social media, with a similar degree of efficacy.

Legacy communication modes – physical / print media and in-store personal interaction – continue to hold sway for a third to half of all marketers surveyed. These marketers seem to be addressing a degree of customer diversity that hinders them from moving much of their offline communication online.

The omnichannel mix: Primary channel for customer communications

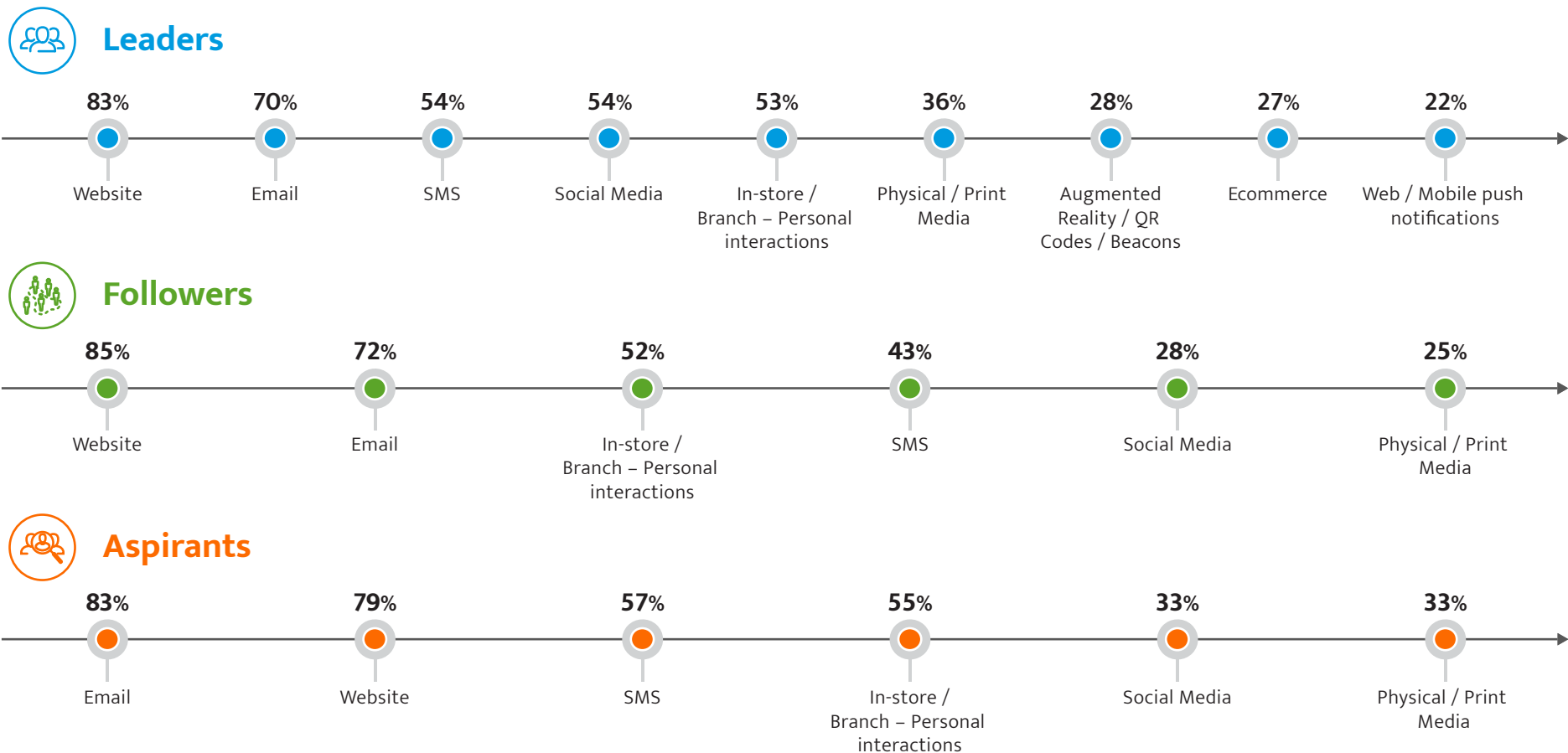


Figure 2: Respondent rating of customer communication channels – top rated channels by stage of omnichannel maturity

Omnichannel leaders are successfully leveraging newer technologies in their communication mix. The leaders' omnichannel mix straddles the old, the conventional and the new with more than one in two marketers rating social media high on efficacy and more than a fourth successfully deploying augmented reality, QR codes, and beacons.

Clearly, leaders are the outliers. The channel mix for followers and aspirants resembles that of the traditional marketer, albeit with substantially lesser reliance on physical / print media.

Critical initiatives for omnichannel customer engagement

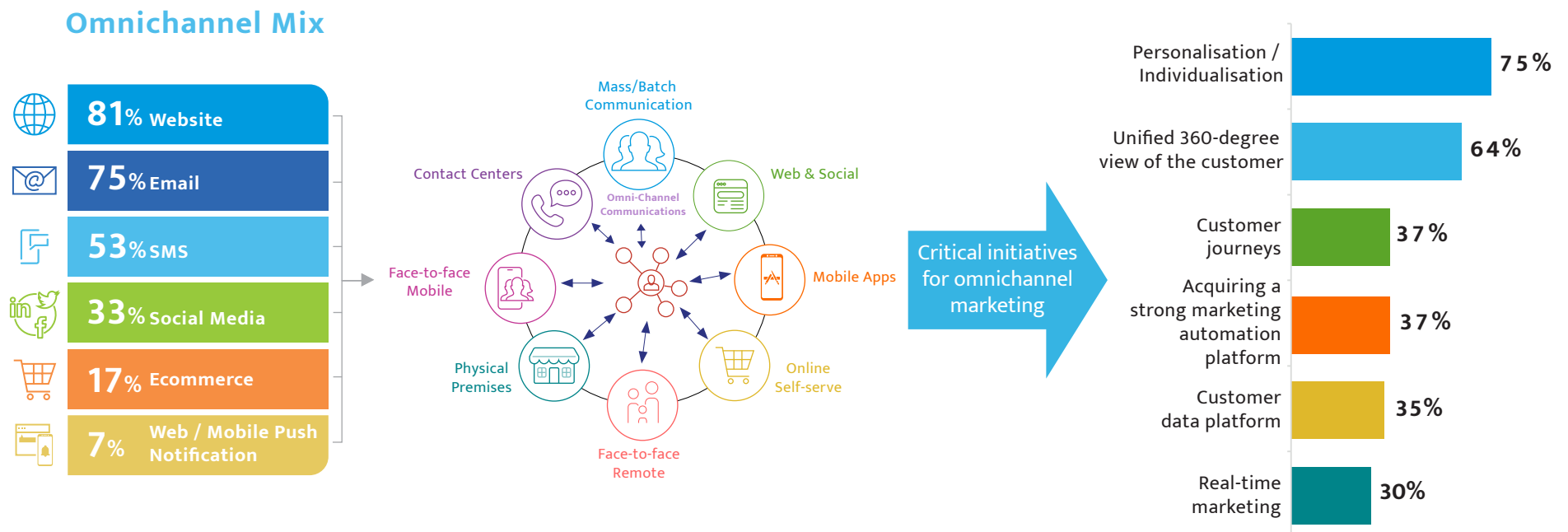


Figure 3: Respondent rating for critical initiatives for customer engagement

Two key initiatives marketers consider the most critical to their omnichannel customer engagement activity are personalisation / individualisation (75% of all marketers) and a unified, 360-degree view of the customer (64% marketers).

Indian marketers are aware of the elements that unify and optimize fragmented customer interactions across multiple devices and channels. Nearly a third or more acknowledge the criticality of customer data platforms, customer journeys, marketing automation platforms, and real-time marketing to their omnichannel initiatives.

Critical initiatives for omnichannel customer engagement

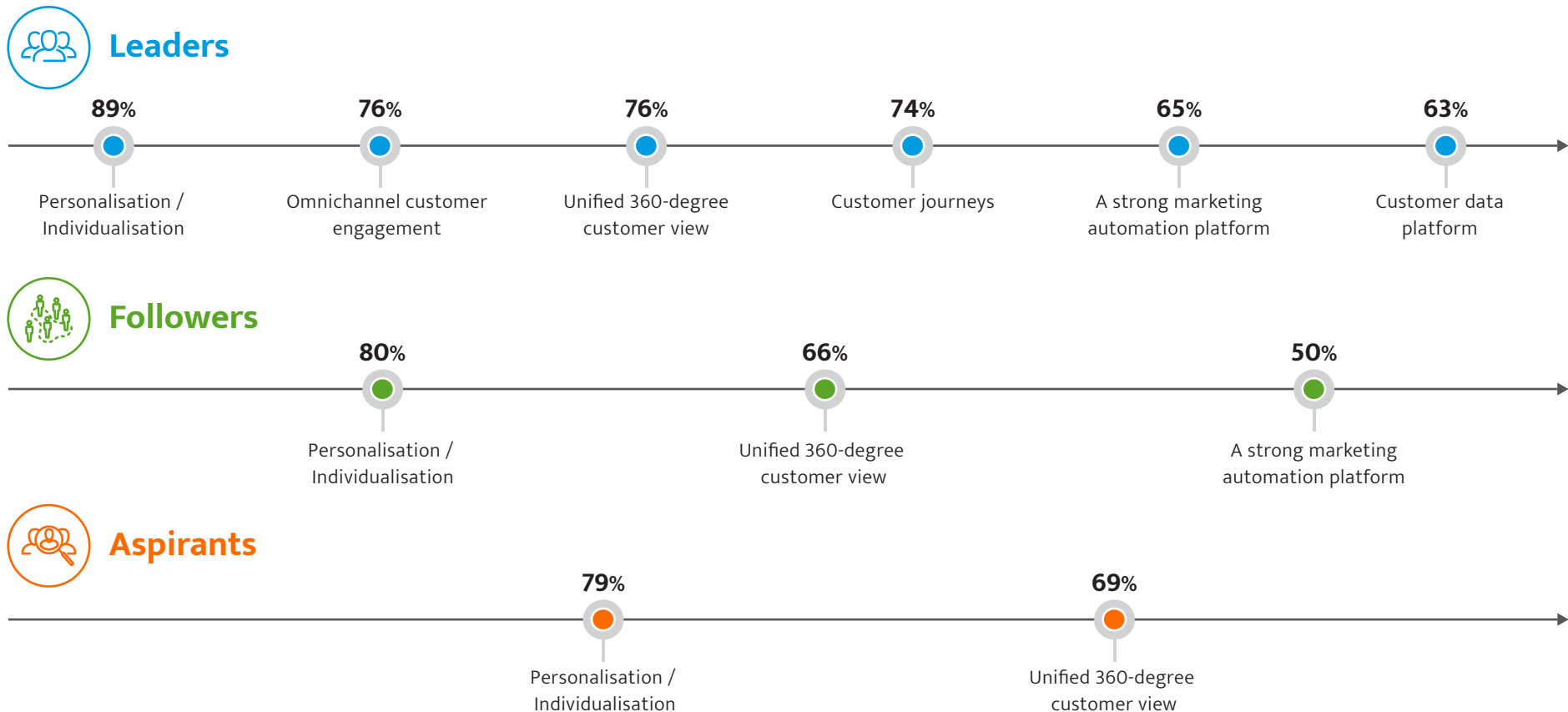



Figure 4: Respondent rating of initiatives critical for customer engagement – top rated critical initiatives by stage of omnichannel maturity

Omnichannel marketing maturity drives the criticality of customer engagement initiatives. An overwhelming proportion of leaders (nearly two in three, or more) consider six customer engagement initiatives as critical, while half or more of followers and aspirants consider fewer as critical (3 and 2 initiatives, respectively).

A large majority of marketers (80% and more) across the spectrum of omnichannel maturity, rate personalisation / individualisation as the most critical. The criticality they accord to customer data platforms and customer journeys sets leaders apart from the rest.

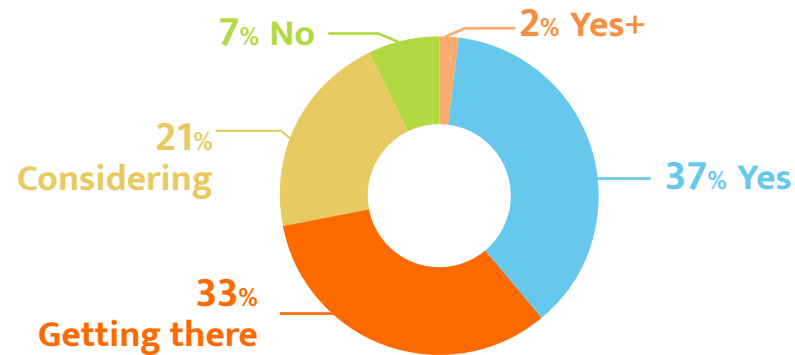
Key takeaways

- ① Website and Email are the primary choice of communication channels for marketers.
- ① Omnichannel leaders are successfully leveraging newer channels in the communication mix while conventional and legacy modes dominate the mix for most marketers.
- ① Personalisation / Individualisation and a unified 360-degree view of the customers are considered as the most critical initiatives by marketers for omnichannel marketing.
- ① Leaders consider twice the number of customer engagement initiatives as critical, compared to followers and aspirants, implying that omnichannel maturity drives criticality of initiatives.

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4. Omnichannel readiness of Indian brands

Omnichannel readiness - integrated approach to customer engagement



- Yes + - We have one and have achieved personalisation and 360-degree customer views
- Yes - We have one, but are yet to achieve 360-degree customer view
- Getting there - We don't, but we're on the way
- Considering - We don't, but are considering an integrated approach
- No - We don't have an integrated approach

Figure 5: Presence of an integrated approach to customer engagement across diverse channels

More than nine in ten marketers have either implemented an integrated approach to omnichannel customer engagement already or are inclined to do so. Of all the implementations done, 95% of these implementations would have been carried out within a rather short period of 36 months.

Indian marketers are, therefore, quickly adopting diverse online and offline communication channels on their way to accomplishing omnichannel goals. Two in five marketers have implemented an integrated approach to omnichannel engagement by now. A third is “getting there,” and a fifth is considering its implementation.

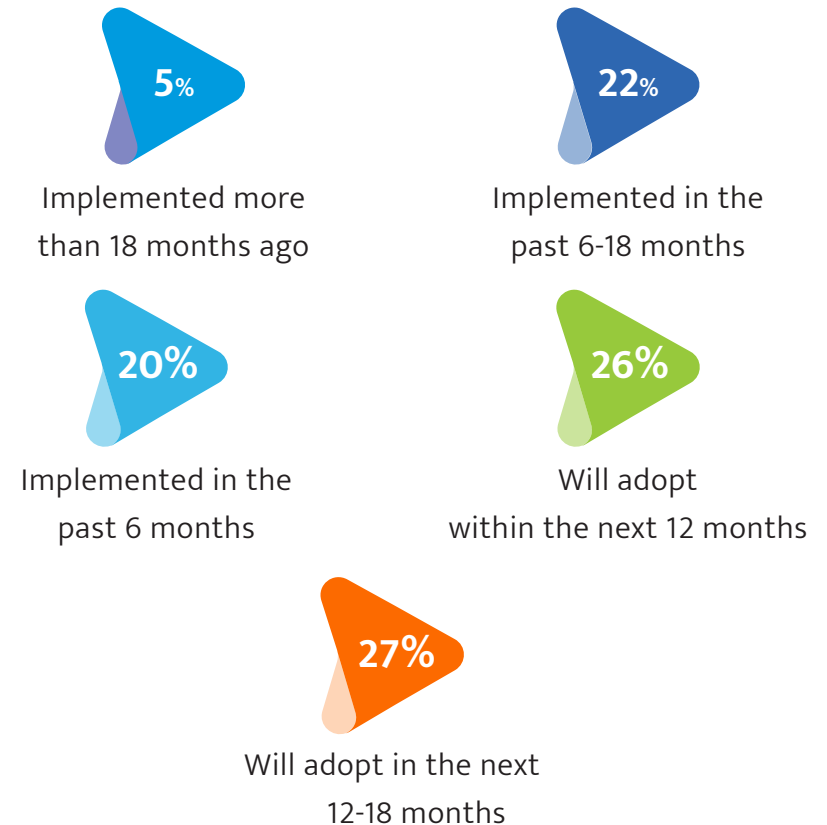


Figure 6: Presence of an integrated approach to customer engagement – implementation

Omnichannel readiness - integrated approach to customer engagement

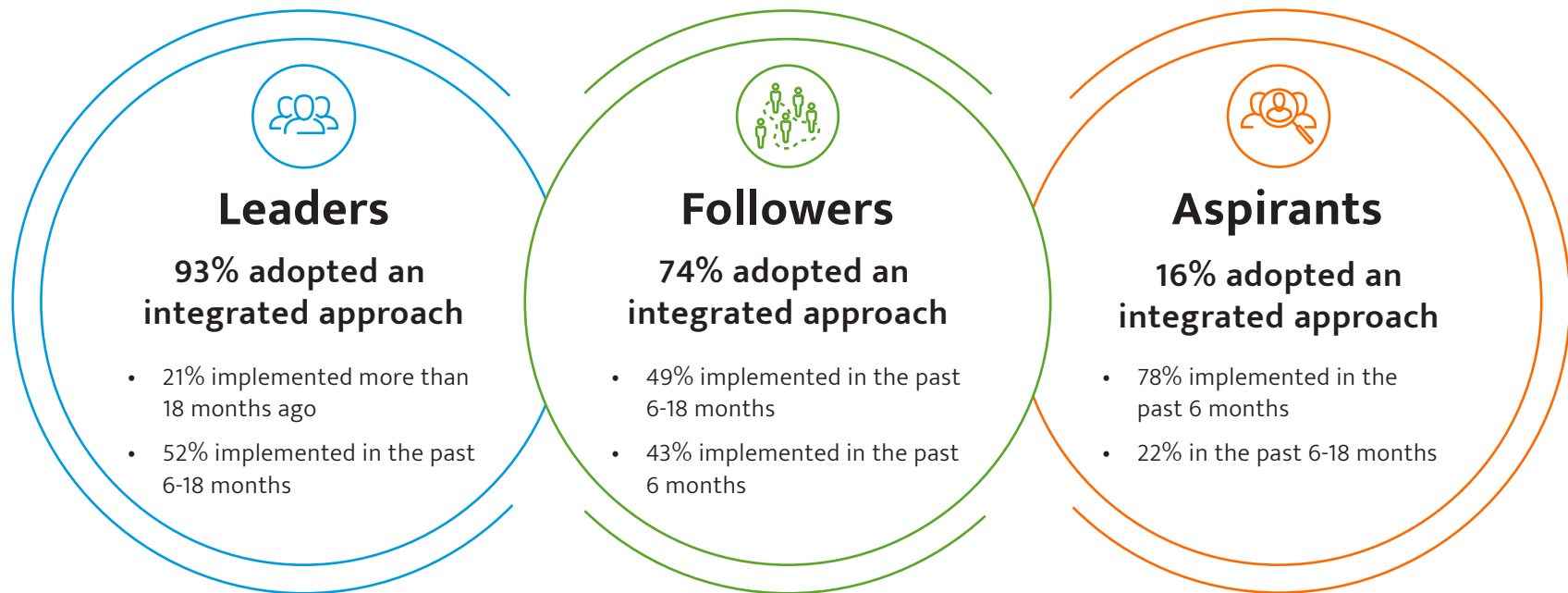


Figure 7: Presence of an integrated approach to customer engagement and implementation timeline by stage of omnichannel maturity

Both leaders and followers dominate the class of marketers that recognise the need for an integrated approach to omnichannel customer engagement. While leaders pioneered its implementation, half of the followers and a fifth of the aspirants quickly caught up.

More than 90% leaders and about 75% followers have implemented an integrated approach. One in five leaders were among the earliest to implement the approach, more than 18 months ago. While 43% of followers have recently adopted the approach, more than 75% of aspirants are catching up on the rally and have implemented the integrated approach in past 6 months.

Omnichannel readiness - integrated approach to customer engagement - by industry

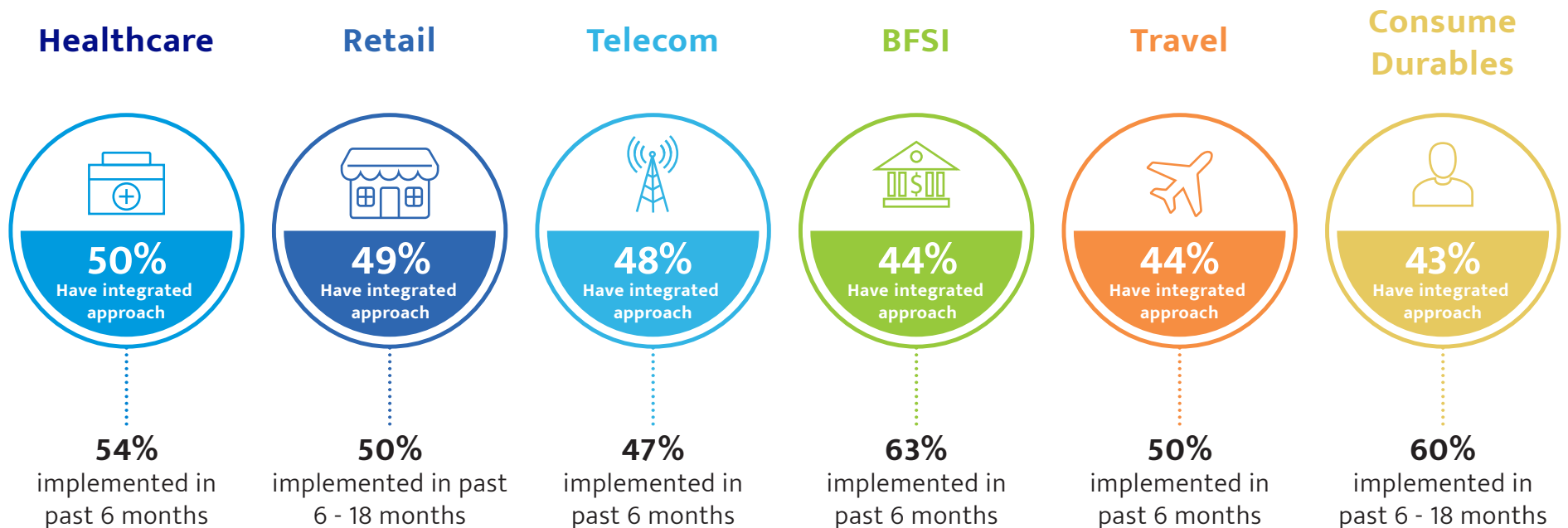


Figure 8: Presence of an integrated approach to customer engagement and implementation timeline by business sector

Six of the seventeen sectors covered in the study lead the implementation of an integrated approach to omnichannel customer engagement. Between 43% and 50% of the marketers, in each sector, have already completed the implementation.

The earliest adopters of the integrated approach – those businesses that implemented more than 18 months ago – constitute a minority in their sectors. Nearly 50% or more of the marketers in each sector have implemented the approach in the past 6 to 18 months.

Contribution of the integrated approach to marketing goals

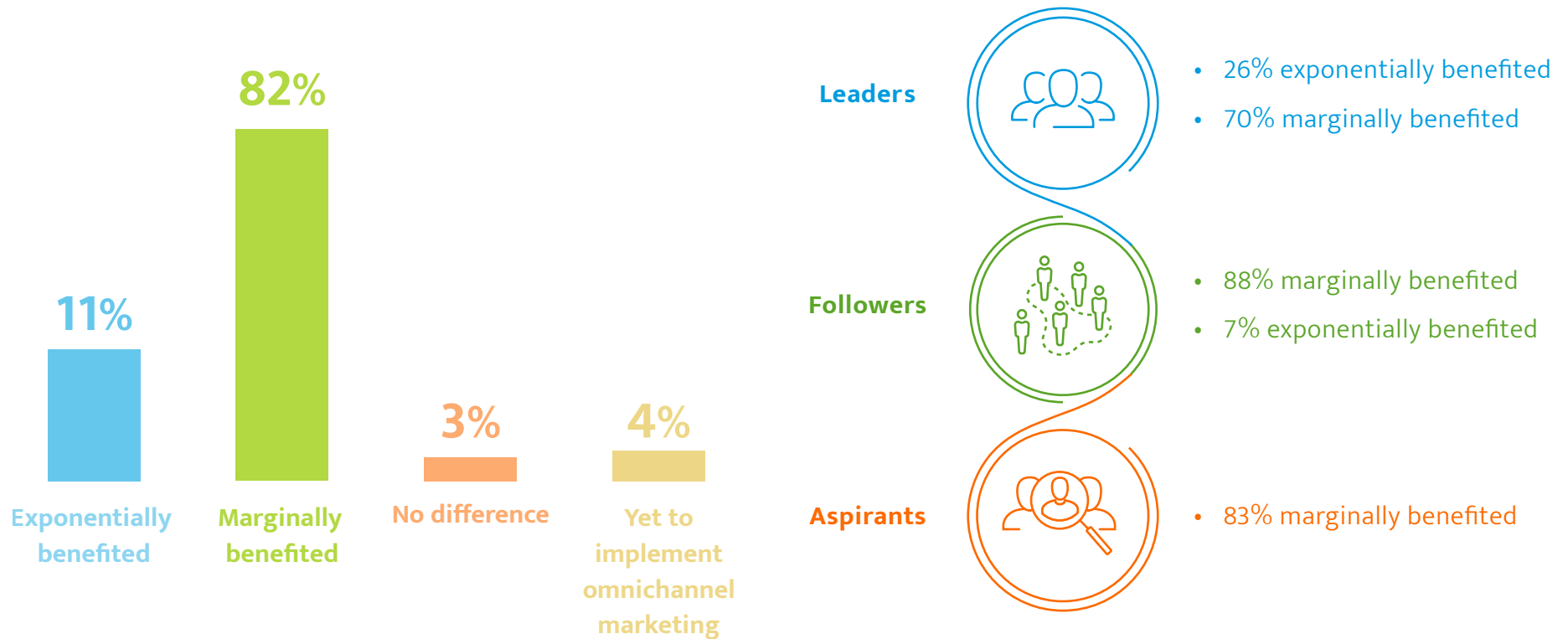


Figure 9: Degree of contribution of the integrated approach to marketing goals - by stage of omnichannel maturity

Considering the narrow timespan of implementation of the integrated approach in India, its exponential contribution to the marketing goals of about one in ten implementers is a promising sign.

Slightly more than one in four leaders have benefited exponentially from implementing an integrated approach to omnichannel customer engagement. Most followers (88%) and aspirants (83%) have derived marginal benefits. In all, 93% of total implementations delivered some degree of benefit indicating it may well be a worthwhile marketing investment.

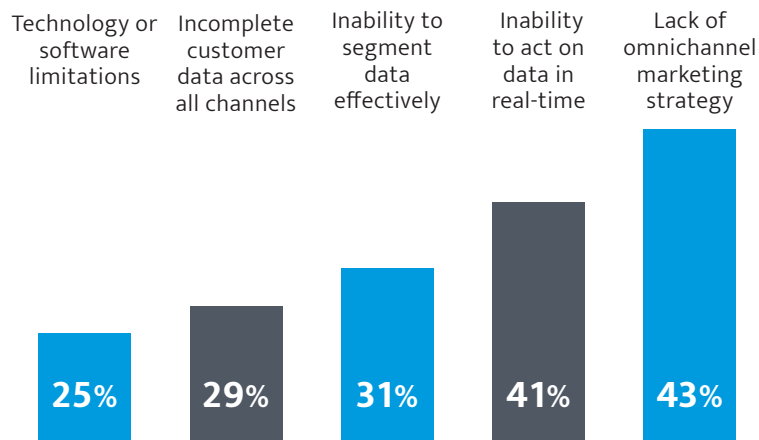
Key takeaways

- Almost 2 in 5 marketers have already implemented an integrated approach while 54% of marketers are inclined to implement it soon.
- Of all the marketers who have accelerated implementation efforts over the past 6 to 18 months – half are leaders and followers and comprise nearly half of the marketers in each sector.
- Leaders were the earliest to implement the approach, more than 18 months ago.
- Within a narrow implementation timeframe, the integrated approach has contributed exponentially to the marketing goals of about one in ten implementers.

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5. Challenges and priorities for the Indian marketer

Challenges in implementing omnichannel marketing initiatives



The lack of an omnichannel marketing strategy and an inability to act on data in real-time are the challenges nearly two in five of all marketers, or more, face. Leaders face two more equally formidable challenges – incomplete data across the many diverse channels they leverage for omnichannel customer engagement and lack of analytics and insights.

33% leaders face twice the number of challenges as compared to followers and aspirants. Apparently, the gains from omnichannel maturity also bring with them pains that the currently deployed technologies fall short of addressing.

Figure 10: Challenges in implementing omnichannel marketing initiatives

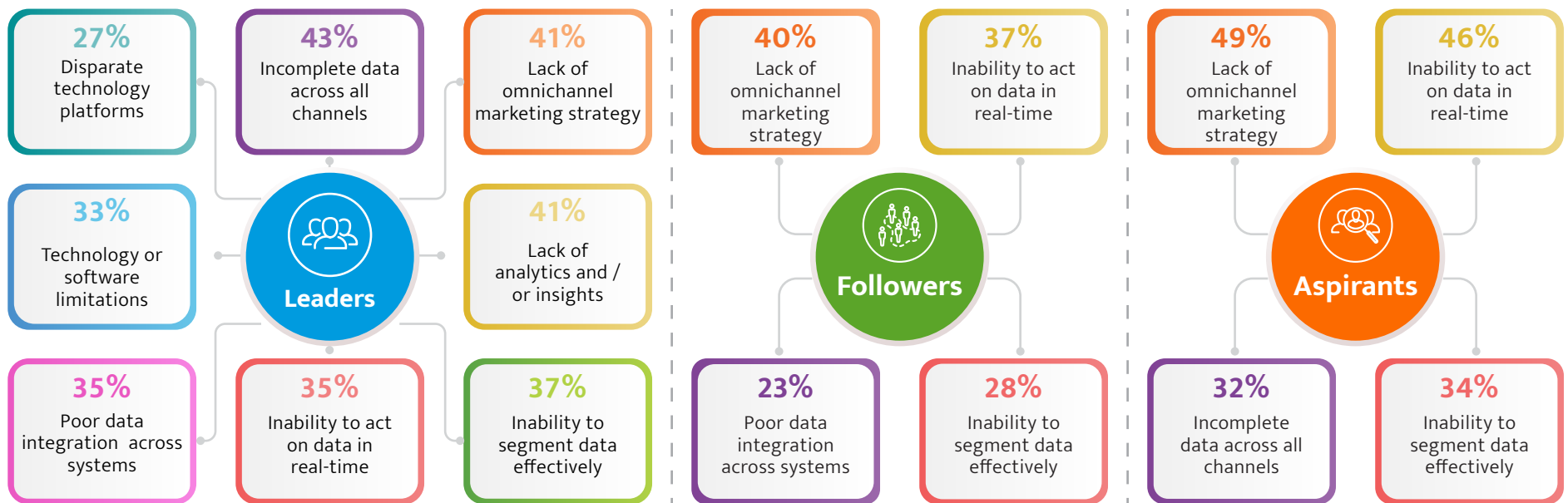


Figure 11: Challenges in implementing omnichannel marketing initiatives by stage of omnichannel maturity

Priorities for the next three years



Figure12: Priorities for Indian marketers over the next three years by stage of omnichannel maturity

Nearly 50% of all marketers have identified marketing automation as the top priority over the next three years. A majority of leaders (63%) prioritise better analytics well ahead of other plans. However, having progressed a fair distance in their omnichannel journey, most leaders seem inclined to focus on an even more engaging omnichannel customer experience, while those at a relatively early stage focus on getting the initiative rolling.

Analytics is, indeed, a priority for slightly more than two in three followers and about a third of both the aspirants and marketers in general. A slightly higher proportion of followers (53%), aspirants (38%), and marketers in general (41%) would first want to get data integration right.

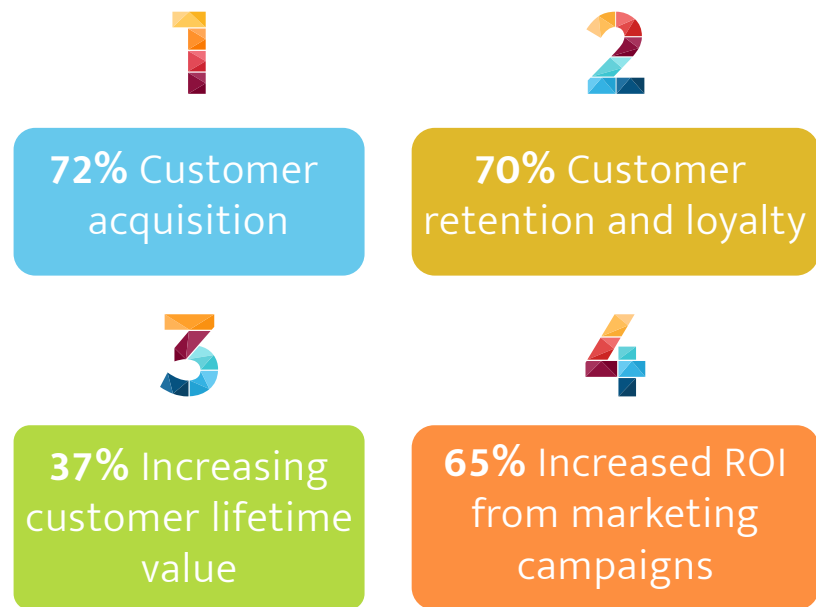
Key takeaways

- Nearly 40% of all marketers are challenged by the lack of a omnichannel marketing strategy and the inability to act on data in real time.
- Technological challenges are hindering marketers on the way to their omnichannel journeys. A third or more of the leaders face twice the number of challenges that an equal proportion of followers and aspirants face.
- Marketing automation is the top priority, over the next three years, for nearly half of all marketers. For about two in three leaders, however, better analytics is a top priority.
- Nearly 50% of all followers and 40% of aspirants and general marketers have prioritised data integration over other initiatives for the next three years.

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6. Outcomes, expectations and investment plans

Outcomes expected over the next three years



Two in three marketers, or more, expect a set of key business outcomes, in a staggered order, over the next three years. The outcomes rated are in sequential order of the customer lifecycle – customer acquisition, customer retention and loyalty, and increased returns on investment. Nearly two in five marketers rate increasing customer lifetime value as a fourth outcome.

Outcome expectations seem to correlate well with the stage of omnichannel maturity. A good majority of leaders (85%) seek increased returns on their investments over customer acquisition (65%) and retention (72%). A similar proportion (85%) of followers put customer retention and loyalty on top and followed closely with increased returns on investments (81%). Aspirants' expectations broadly toe the line of the overall trends.

Figure 13: Outcomes expected over the next three years

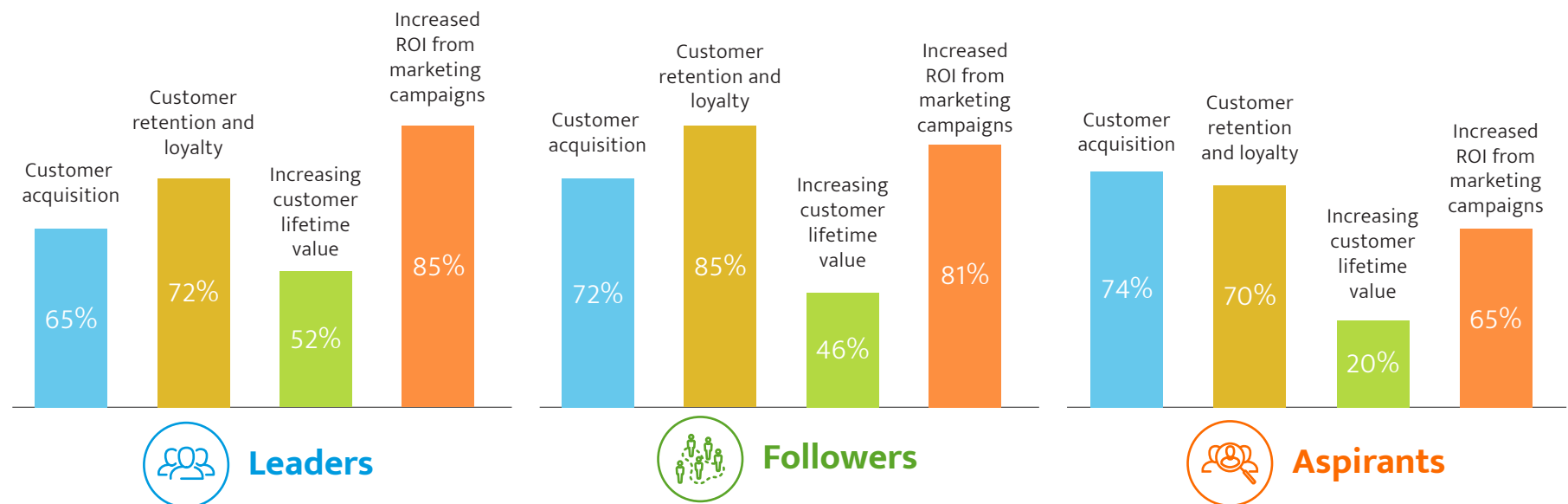


Figure14: Outcomes expected over the next three years by stage of omnichannel maturity

Outcomes expected over the next three years - by industry

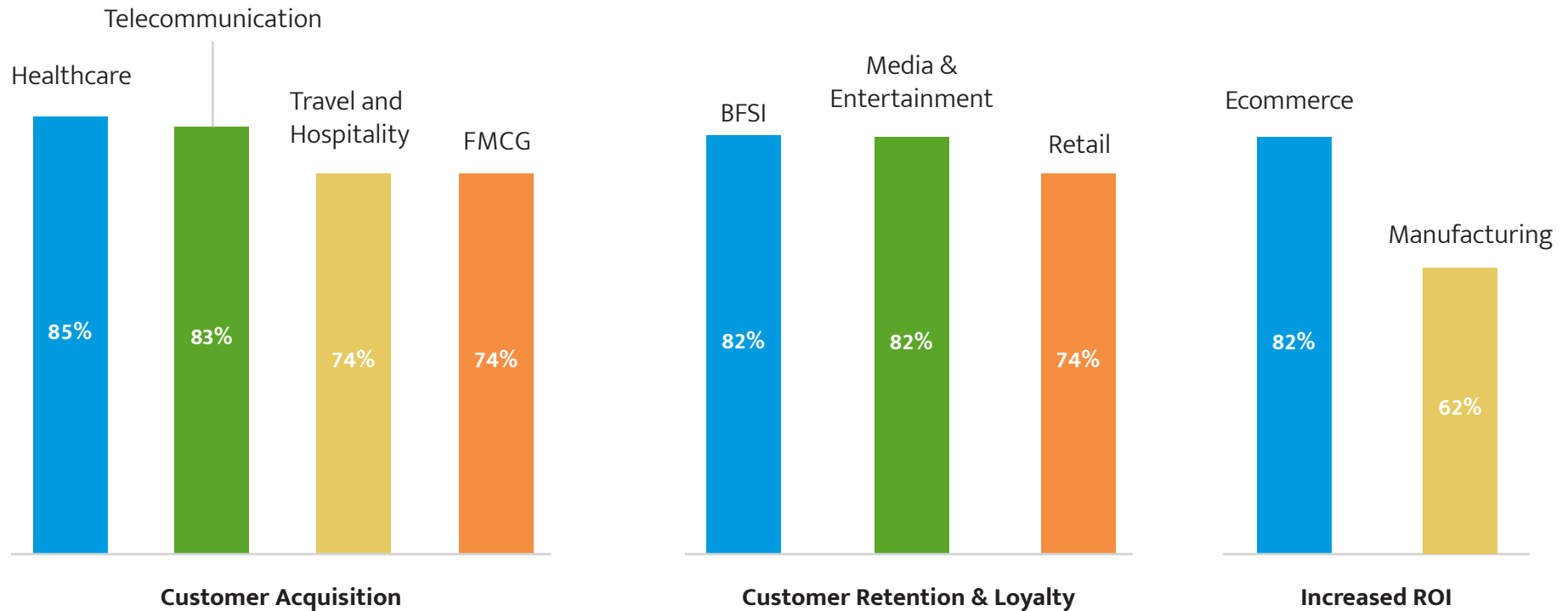
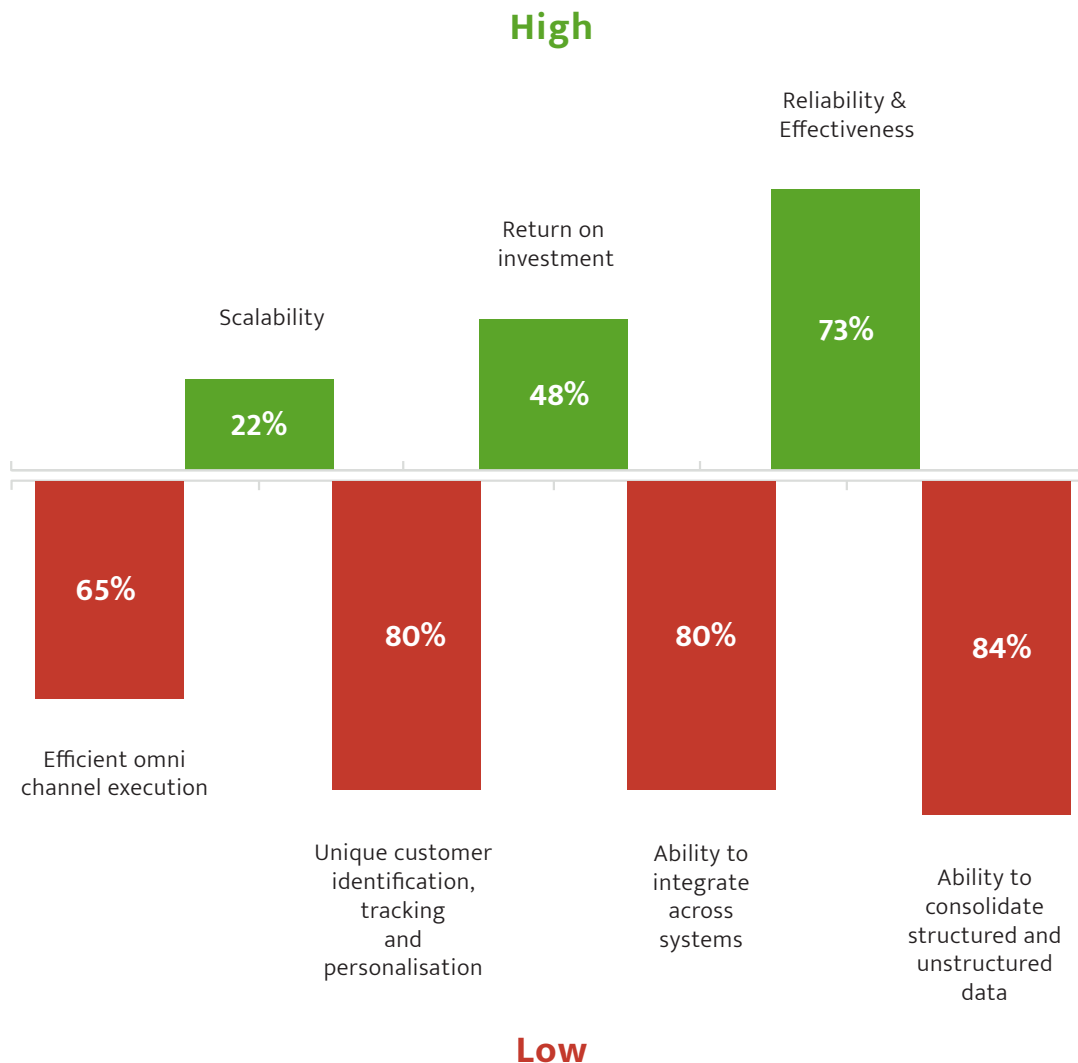


Figure 15: Outcomes expected over the next three years by business sector

The stage of expected outcomes varies by business sector and is correlated with omnichannel maturity. A majority of marketers (74% or more) in the travel and hospitality, FMCG, healthcare, and telecommunications sectors expect their businesses to acquire more customers in the next three years over other outcomes. A similar proportion of marketers in the retail, BFSI, media and entertainment sectors have customer retention and loyalty as the top expected outcome.

Most ecommerce businesses (82%) and nearly a third of the businesses in the manufacturing sector expect increased returns on their investments as the top outcome.

How marketers rate their existing platforms



For Indian marketers, limitations of existing marketing technology platforms far outweigh their advantages.

Eight in ten marketers, or more, identify three areas in which their platforms underperform:

- The ability to consolidate diverse data types
- To integrate across systems
- To identify and track unique customers

66% marketers also rate their platforms low on efficient multichannel execution.

On the contrary, reliability and effectiveness are the only factor rated high by marketers for their existing platform. Whereas only 48% and 22% of marketers rate their platforms high for ROI and Scalability factors respectively.

Figure 16: Respondent rating of existing marketing technology platforms

* Existing platform refers to all the point and integrated marketing automation platforms

How marketers rate their existing platforms




	High rated capabilities	Low rated capabilities
Leaders 	65% Reliability & effectiveness 49% ROI	69% Unique customer identification, tracking, and personalisation 63% Accurate multi-touch attribution 58% Ability to consolidate structured and unstructured data
Followers 	84% Reliability & effectiveness 42% ROI	91% Ability to consolidate structured and unstructured data 84% Ability to integrate across systems 78% Unique customer identification, tracking, and personalisation
Aspirants 	77% Reliability & effectiveness 51% ROI	89% Ability to consolidate structured and unstructured data 88% Ability to integrate across systems 88% Unique customer identification, tracking and Personalisation

Figure 17: Respondent rating of existing marketing technology platforms by stage of omnichannel maturity

The ratings accorded to existing marketing technology by leaders, followers, as well as aspirants, mirror the overall opinion, although leaders are a bit of an exception. Far fewer leaders (65%) rate the reliability and effectiveness of their existing platform high, and fewer leaders (between 58% and 69%) are as harsh on their existing platforms as the rest.

* Existing platform refers to all the point and integrated marketing automation platforms

Capabilities important for an omnichannel platform

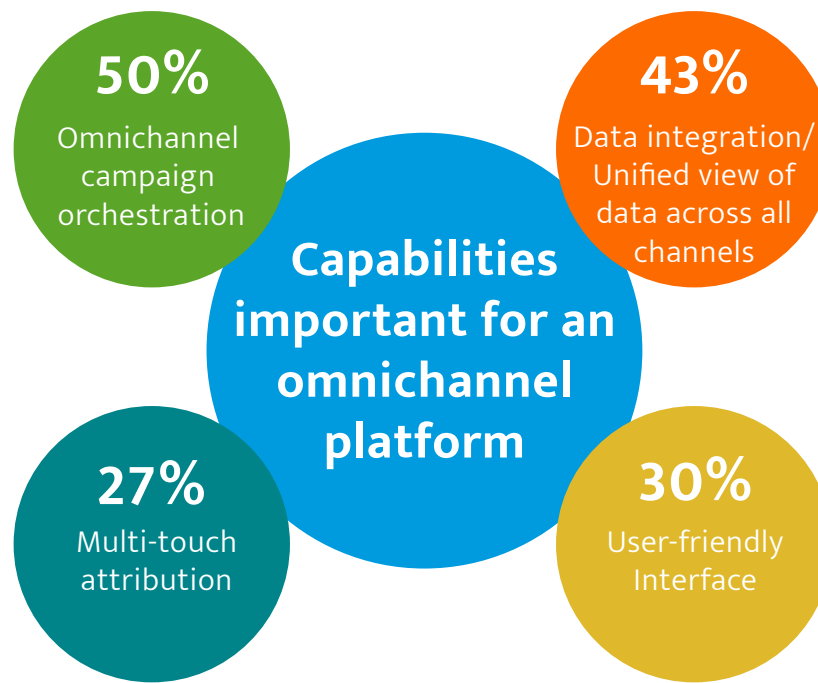


Figure 18: Respondent rating of omnichannel platform capabilities

Indian marketers' wishlist of omnichannel platform capabilities mirrors the very ones on which their existing platforms fall short. Omnichannel campaign orchestration is the top feature that 50% of marketers expect from an omnichannel platform. Slightly more than 40% want data integration capabilities.

Considering that those two capabilities—omnichannel campaign orchestration and data integration—are key to superior omnichannel performance, the findings point to a clear unmet need in the Indian market. Nearly three in ten marketers identify a user-friendly interface and multi-touch attribution as the other highly desirable features in an omnichannel platform.

Capabilities important for an omnichannel platform

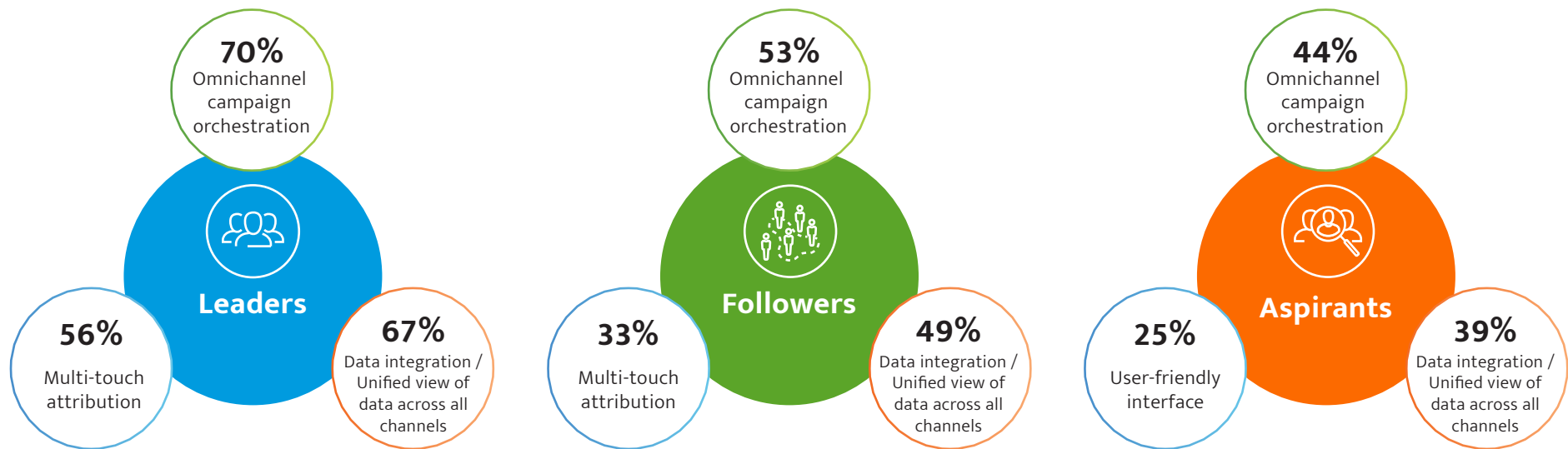


Figure 19: Respondent rating of omnichannel platform capabilities by stage of omnichannel maturity

Indian marketers have understood the need for Omnichannel consumer engagement as Leaders (70%), Followers (53%) and Aspirants (44%) have responded that “Omnichannel campaign orchestration” is the most important capability for a marketing automation platform.

While Leaders and Followers look for multi touch attribution and data integration/unified view of data across all channels capabilities in a platform, Aspirants give more importance to user friendly interface along with data integration capabilities.

Budget allocation towards omnichannel customer engagement

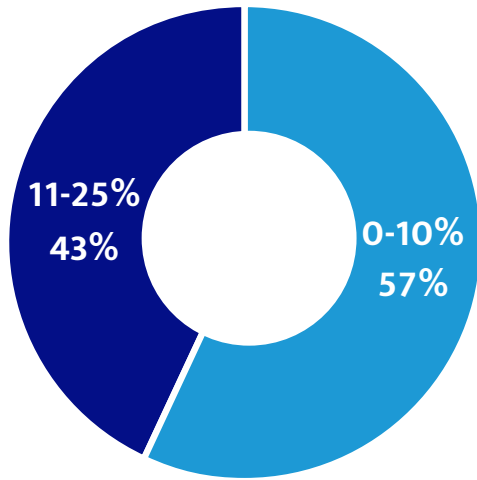


Figure 20: Budget allocated for omnichannel initiatives as a percentage of marketing budgets



Figure 21: Outcomes expected for investments by stage of omnichannel maturity

More than two in five marketers have set aside a significant proportion (11% - 25%) of their marketing budgets for omnichannel customer engagement. These include 75% leaders and more than 50% of all followers. The remaining, about three in five, have budgeted up to 10%.

One in three businesses, all identified as leaders, plan to increase investments in omnichannel customer engagement and expect an increase in customer lifetime value. A fourth, all followers, expect their increased investments to help retain existing customers and increase returns on investment.

Investments planned by Indian marketers

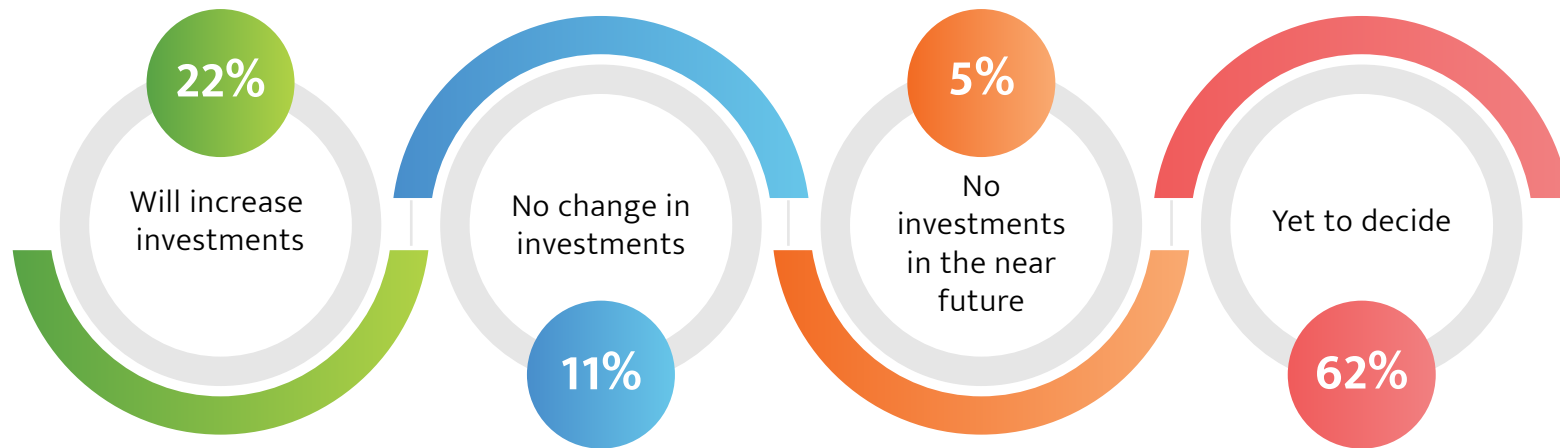


Figure 22: Investment plans of marketers

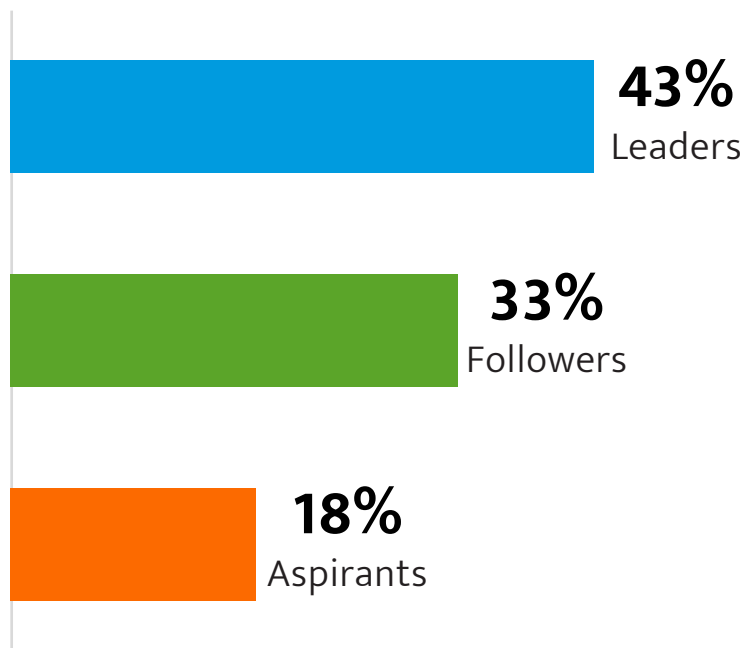


Figure 23: Percentage of leaders, followers, and aspirants who will increase investments

Marketers in India appear optimistic about the transformational impact of their omnichannel marketing investments. Slightly more than one in five marketer plan to increase investments, including 43% of leaders, a third of the followers, and nearly a fifth of the aspirants.

More than three in five marketers are yet undecided. The indecision could be related to multiple factors about lack of knowledge in implementing omnichannel initiatives and the lack of a omnichannel strategy which is the top most challenge for marketers. Helping them resolve this challenge could be a possible route to marketers loosening their purse strings.

Key takeaways

- Marketers are looking to implement omnichannel marketing initiatives to achieve business outcome i.e. Customer acquisition, customer retention and loyalty, increased ROI and increasing customer lifecycle value.
- Increased return on investments tops expectations for nearly all leaders (85%) followed by customer retention (72%) and customer acquisition (65%). Customer retention and loyalty and increased return on investment are top expectations for more than 80% of all followers.
- Marketers feel they lack the ability or capability to consolidate diverse data types, integrate across systems, and identify and track customers uniquely to deliver personalisation.
- One in two marketers place multichannel campaign orchestration at the top of their wishlist for desired features of an omnichannel platform. Slightly more than 40% of marketers want robust data integration capabilities in the new platform.
- More than one in five marketers are optimistic about their omnichannel marketing investments and plan to increase investments. This category comprises 43% of leaders, a third of the followers, and nearly a fifth of the aspirants.

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7. Recommendations

Recommendations

Foster a data driven organisational culture as a first step to the journey towards omnichannel customer engagement.

The Indian consumer is digitally savvy and able to navigate multiple channels. The ability to identify and track customers and to collect relevant data at each touch point are prerequisites to effective omnichannel marketing.

Let your business goals determine your marketing automation platform requirements.

The lack of a multichannel strategy has long been the bane of many Indian marketers. They would serve their companies well by articulating desired business outcomes while planning systems and data integration for omnichannel initiatives.

Take a phased approach to implementing new-age digital channels.

The perceived superiority of conventional communication channels among many Indian marketers is a myth. The consumer has moved on to digital channels creating the need to methodically adding new-age channels to the mix.

Recommendations

Map customer journeys effectively by leveraging an optimal mix of conventional and advanced channels of communication.

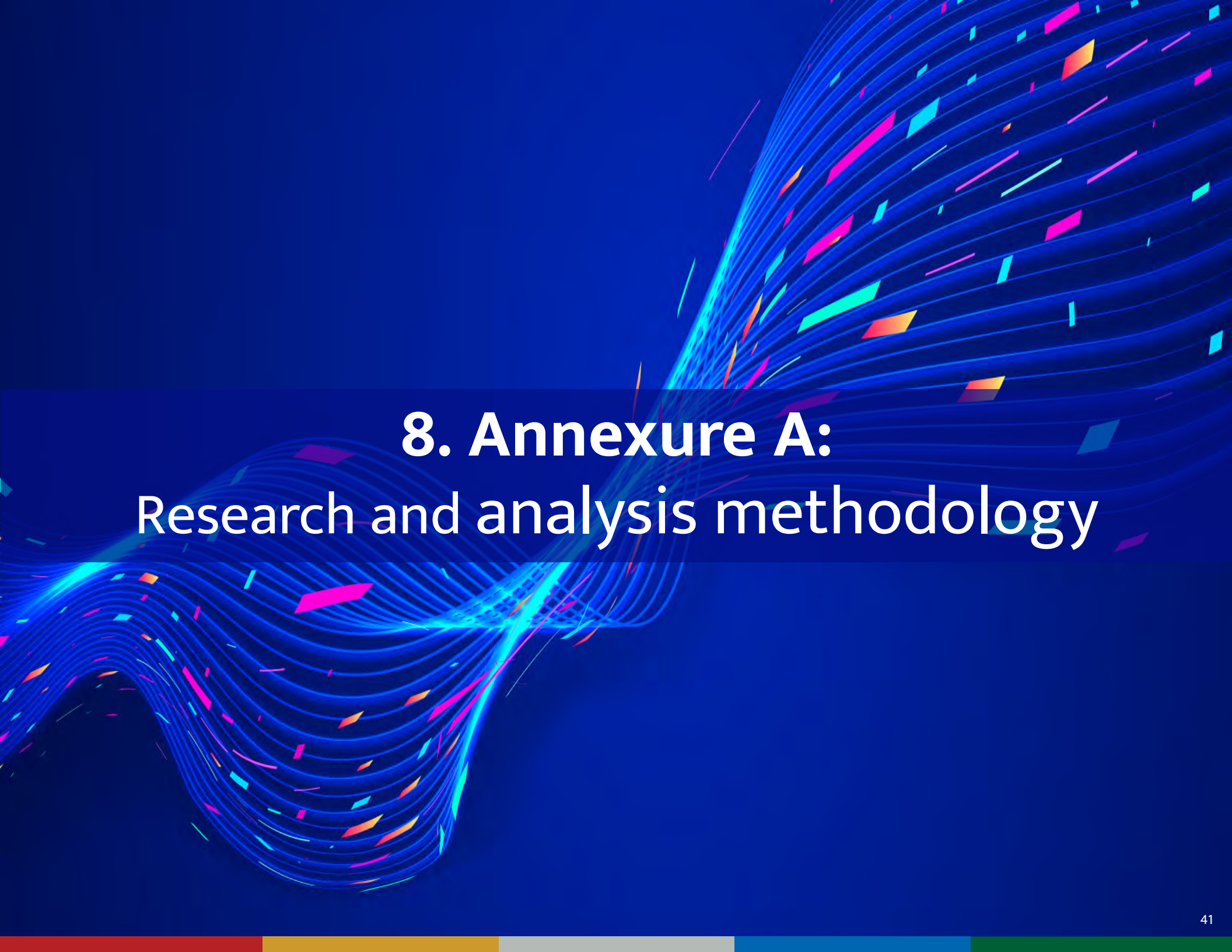
An omnichannel marketing approach efficiently follows the data “bread crumbs” that customers leave behind along the path to conversion. Realizing this value, marketers should optimize the mix of both conventional and modern channels.

Choose a partner who can synthesize a holistic solution for a complex market environment and deliver true business value.

Marketers need to get the business and technology handshake right for omnichannel investments to pay off handsomely. Marketing technology providers with deep insights into the rapidly evolving Indian market are essential to enable this synergy.

Estimate a reasonable gestation period for omnichannel initiatives that balances future readiness with financial outcomes.

Payback from omnichannel investments has the potential to be sizeable and quick. However, calibrating the technology’s capability to evolve with the market is an equally important consideration in the long run.

The background features a dark blue field with dynamic, glowing blue wavy lines that sweep across the frame. Interspersed among these lines are numerous small, colorful geometric shapes, including rectangles and parallelograms in shades of magenta, cyan, and orange, creating a sense of motion and digital energy.

8. Annexure A: Research and analysis methodology

Research methodology: Survey design

- **Quantitative research methodology**
- **Sample size: 414 respondents**
- **Topics covered in questionnaire:**

- | | | | |
|---|--|----|---|
| 1 | Critical initiatives for customer engagement | 7 | Overcoming challenges / prioritization of initiatives |
| 2 | Primary channels of customer communication | 8 | Business outcomes over the next three years |
| 3 | Integrated approach to customer engagement | 9 | Attributes of the existing platform |
| 4 | Adoption of the integrated approach | 10 | Omnichannel marketing platform capabilities |
| 5 | Contribution of approach to marketing goals | 11 | Marketing budget for omnichannel initiatives |
| 6 | Challenges in implementing omnichannel initiatives | 12 | Investment in omnichannel customer engagement |

Research methodology: Sample design

Respondent Demographics

Designations	No of responses
Vice Presidents	69
Head of Marketing	107
Senior Managers	238
Grand Total	414

Sector	No of responses
Automobile	8
Banks, Financial Services, Insurance	50
BPO / ITeS	7
Construction and Real Estate	9
Consulting / Professional Services	12
Consumer Durables / Consumer Electronics	23
Ecommerce & Tech Startups	22
Educational Services	16
Fast Moving Consumer Goods	35
Healthcare and Pharmaceuticals	26
Manufacturing and Engineering	37
Marketing and Advertising	16
Media & Entertainment	34
Personal Care / Beauty / Wellness	6
Retail	45
Telecommunications	36
Travel and Hospitality	32
Grand Total	414

Business Categorization

Size and Focus

Size [Annual Revenue]	No of responses
Mini (INR 10 – 50 Cr)	84
Small (INR 50 – 100 Cr)	55
Medium (INR 100 – 250 Cr)	97
Large (More than 250 Cr)	176
Not disclosed	2
Grand Total	414

Business Focus	No of responses
B2B	110
B2B2C	167
B2C	132
B2B2B	1
Mixture of above	4
Grand Total	414

Methodology: classification by maturity of omnichannel readiness

Classification carried out by allocating weights for the response options of each question based on their importance to the context and summarization

Primary channels for your customer communications today

- Respondents scored and classified as
 - **Leaders** : score > 9.9
 - **Followers**: score between 7.4 and 9.9
 - **Aspirants** : score between 5.0 and 7.4
 - **Others**: score < 5.0

Channels	Weights
Website	0.05
Email	0.05
SMS	0.01
Social media	0.17
Physical (newsletters, flyers) / Print media	0.01
In-store / Branch personal interactions	0.03
In-store / Branch digital interactions	0.2
Ecommerce	0.15
Web / Mobile push notifications	0.03
Augmented Reality / QR Codes / Beacons	0.1
Digital assistants (chat bots and voice assistants)	0.2


Methodology: classification by maturity of omnichannel readiness

Availability of integrated approach to customer engagement across various online and offline channels leveraging 1st-, 2nd- and 3rd-party customer data?

Yes we do, and we are able to achieve personalisation and 360-degree customer views	2
Yes we do, and we are able to achieve personalisation and 360-degree customer views	1.5
No we don't but we are considering its implementation	0.5
No we don't but we are getting there	0.5
No, we don't	0

Since when have you adopted / planning to adopt the integrated approach?

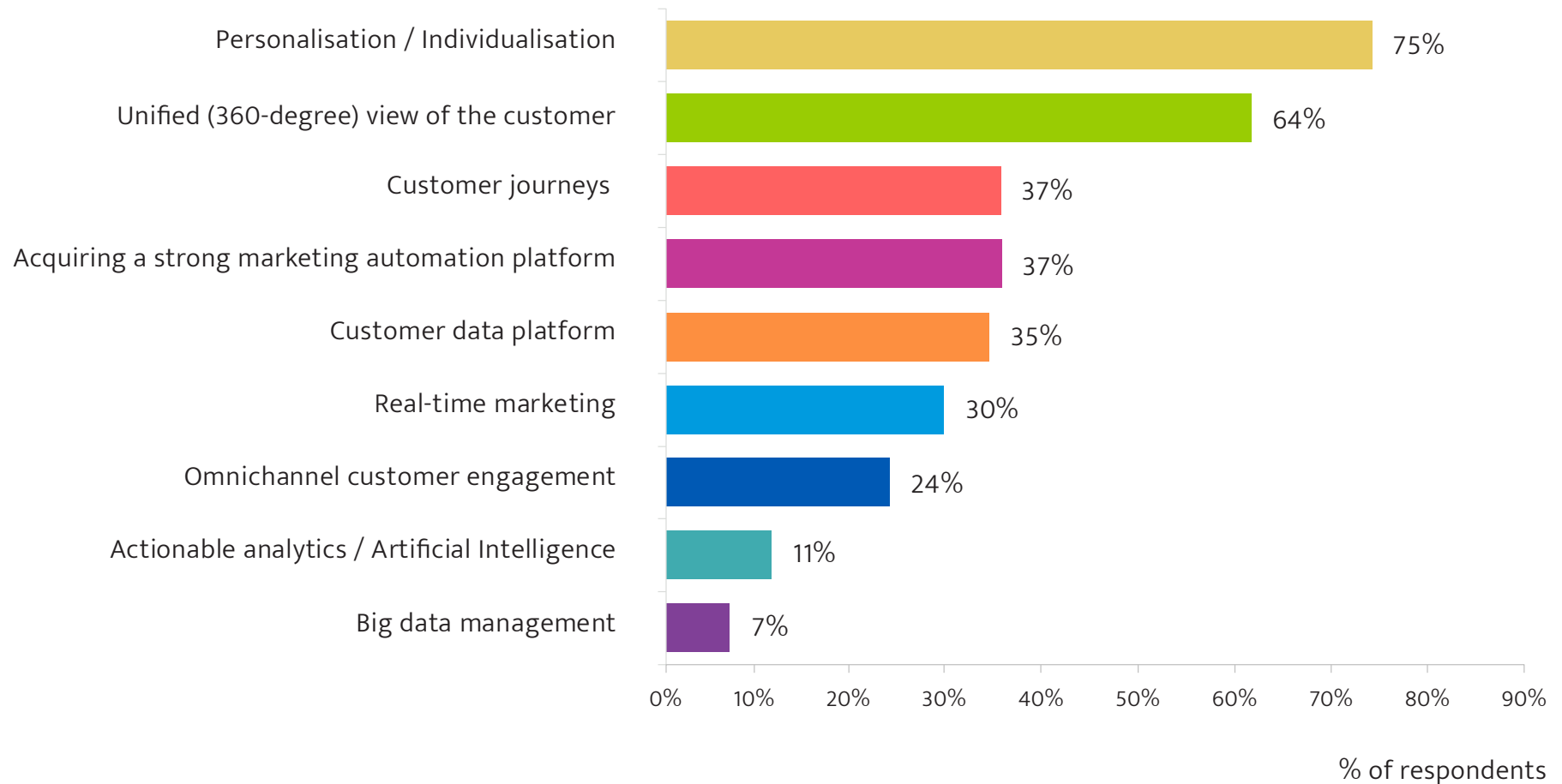
	Weights
We have implemented for more than 18 months	2.5
We have implemented in past 6 to 18 months	2
We have implemented in past 6 months	1.5
Will adopt in next 12 months	1
Will adopt in next 12 to 18 months	0.5

The background features a dark blue field with dynamic, glowing blue wavy lines that sweep across the frame. Interspersed among these lines are numerous small, colorful geometric shapes, including rectangles and parallelograms in shades of magenta, cyan, and orange, creating a sense of motion and data flow.

8. Annexure B: Select survey findings

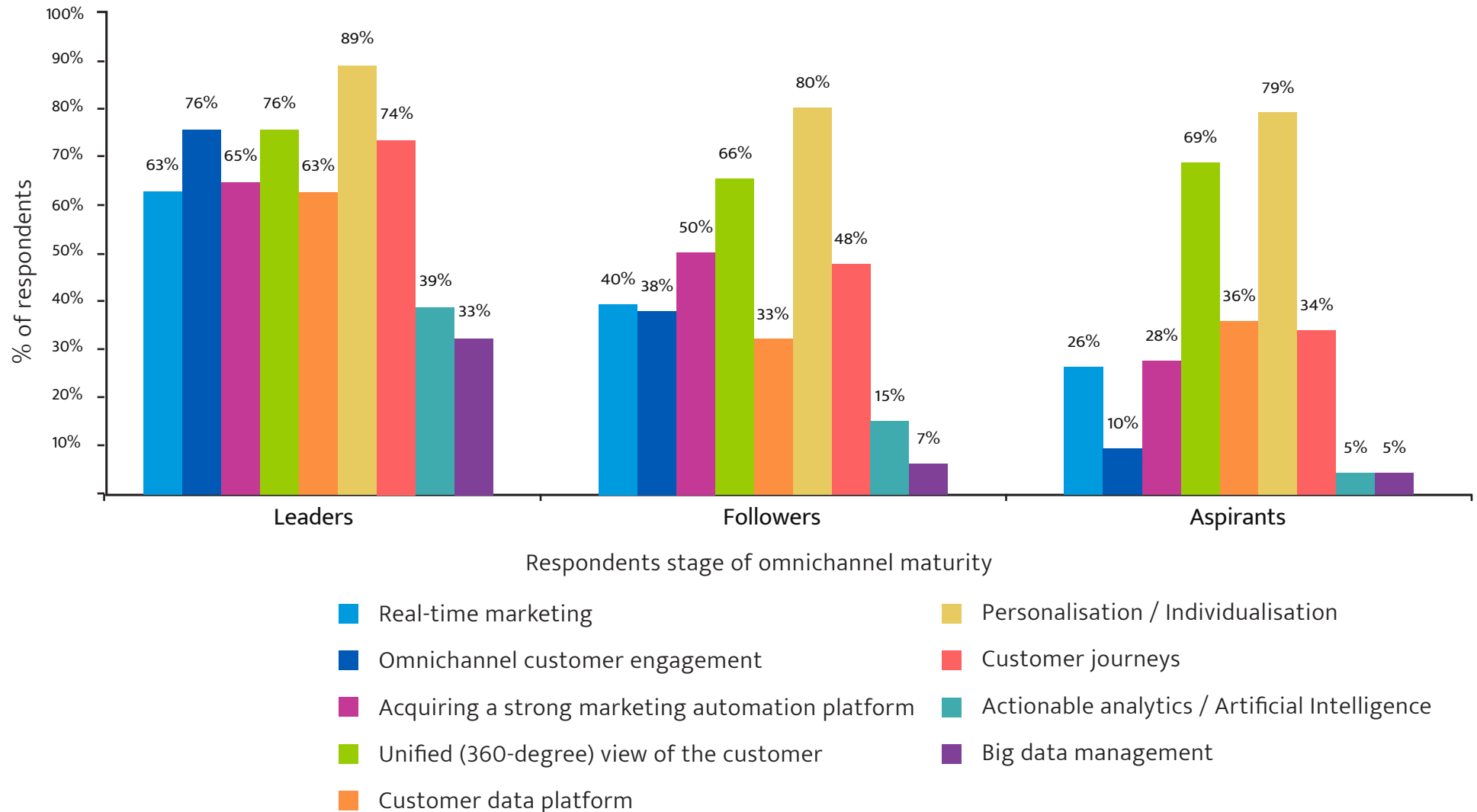
Select survey findings

Respondent rating of initiatives critical for customer engagement



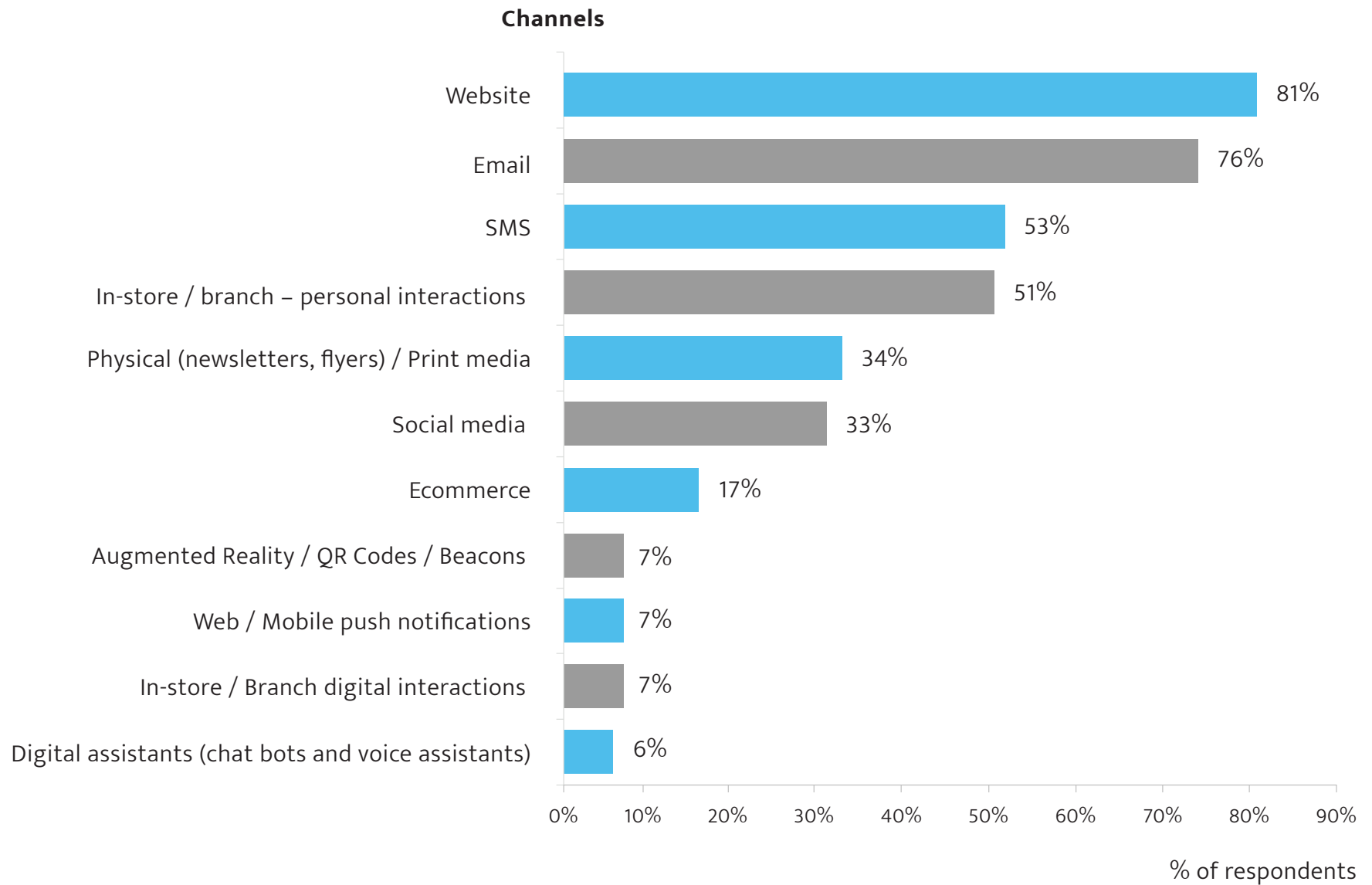
Select survey findings

Critical initiatives for customer engagement by stage of omnichannel maturity



Select survey findings

Primary channels for customer communication

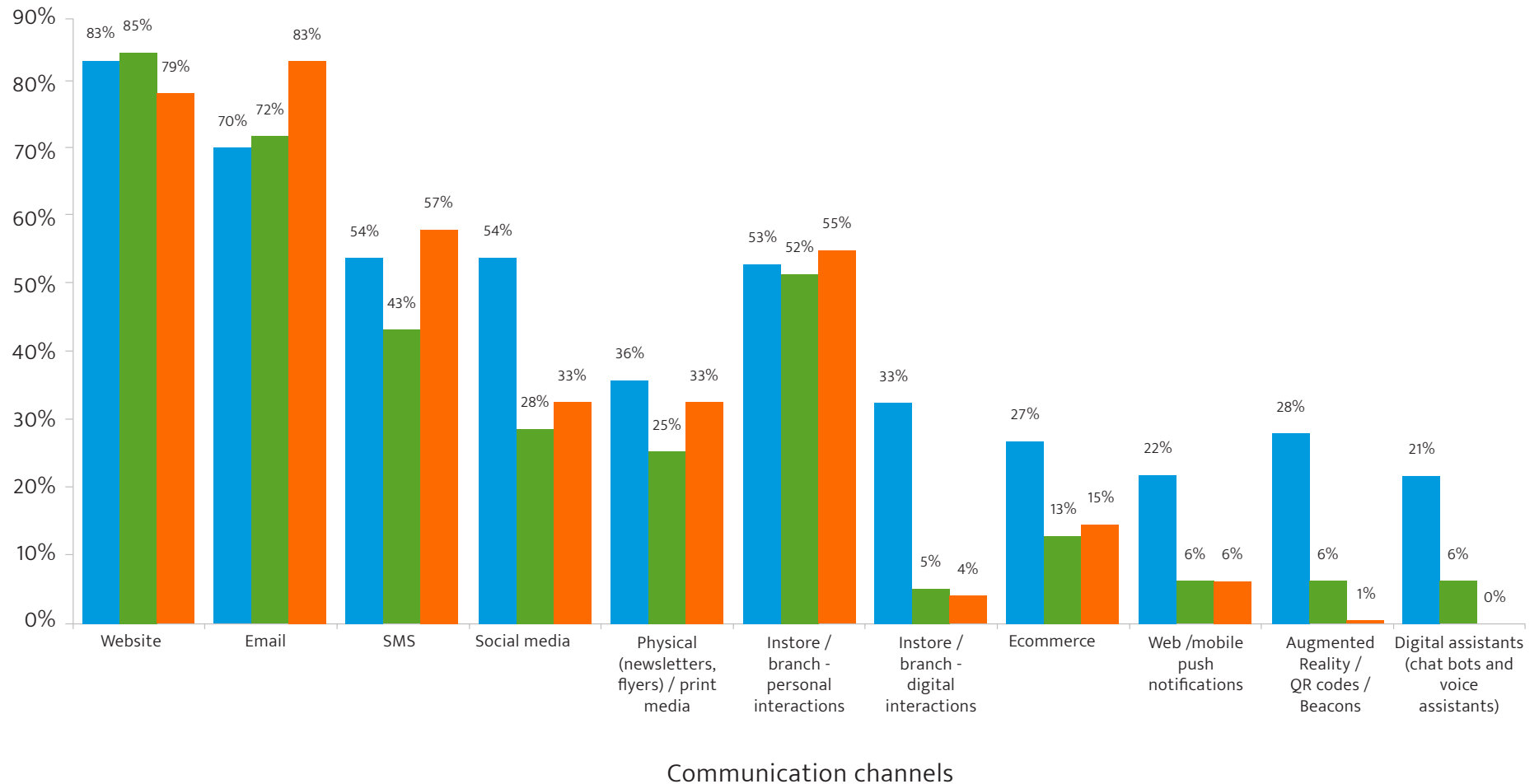


Select survey findings

Primary channels of communication by stage of omnichannel maturity

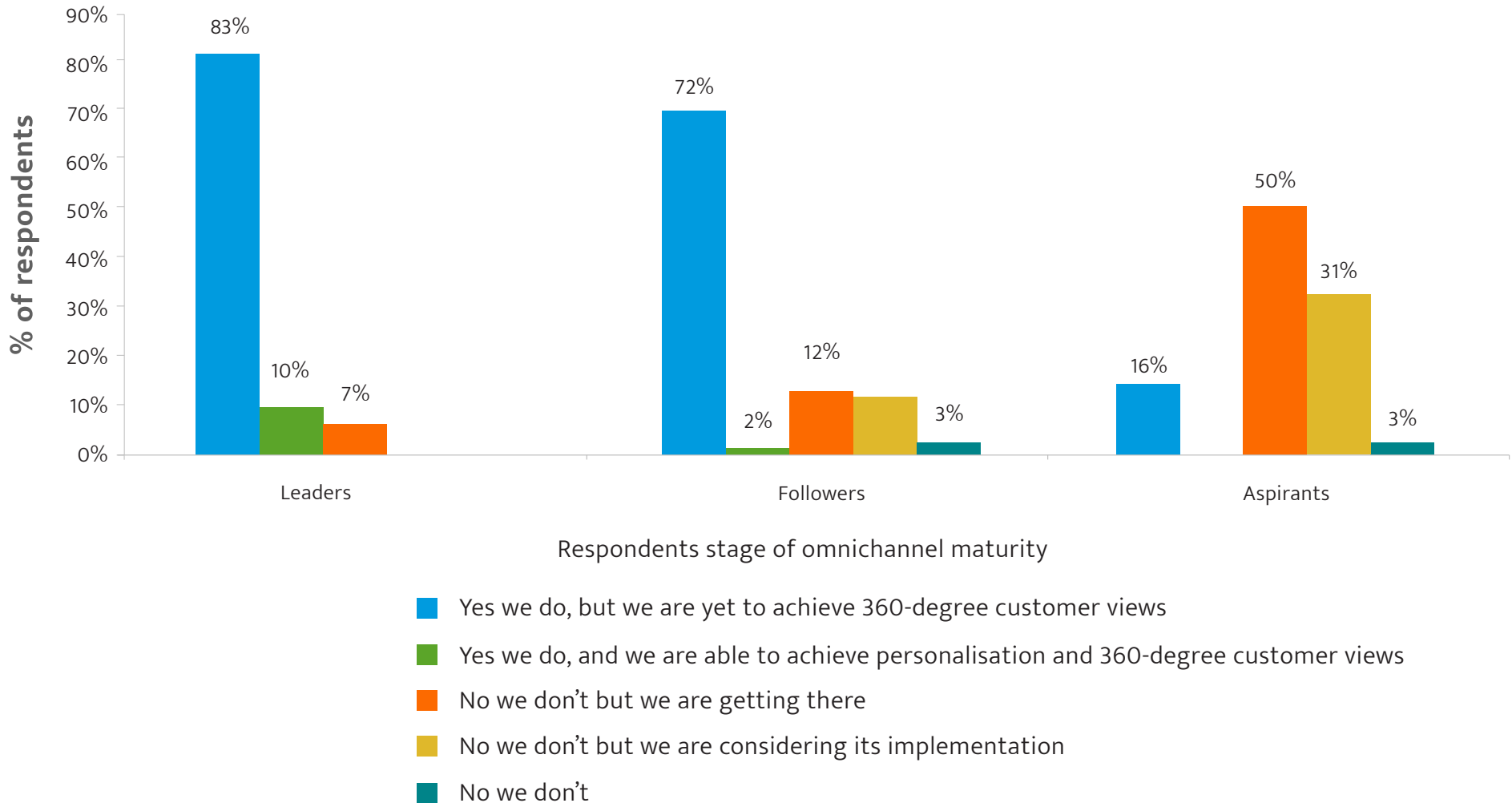
% of response (top box rating 4 & 5 on a scale of 5)

Leaders Followers Aspirants



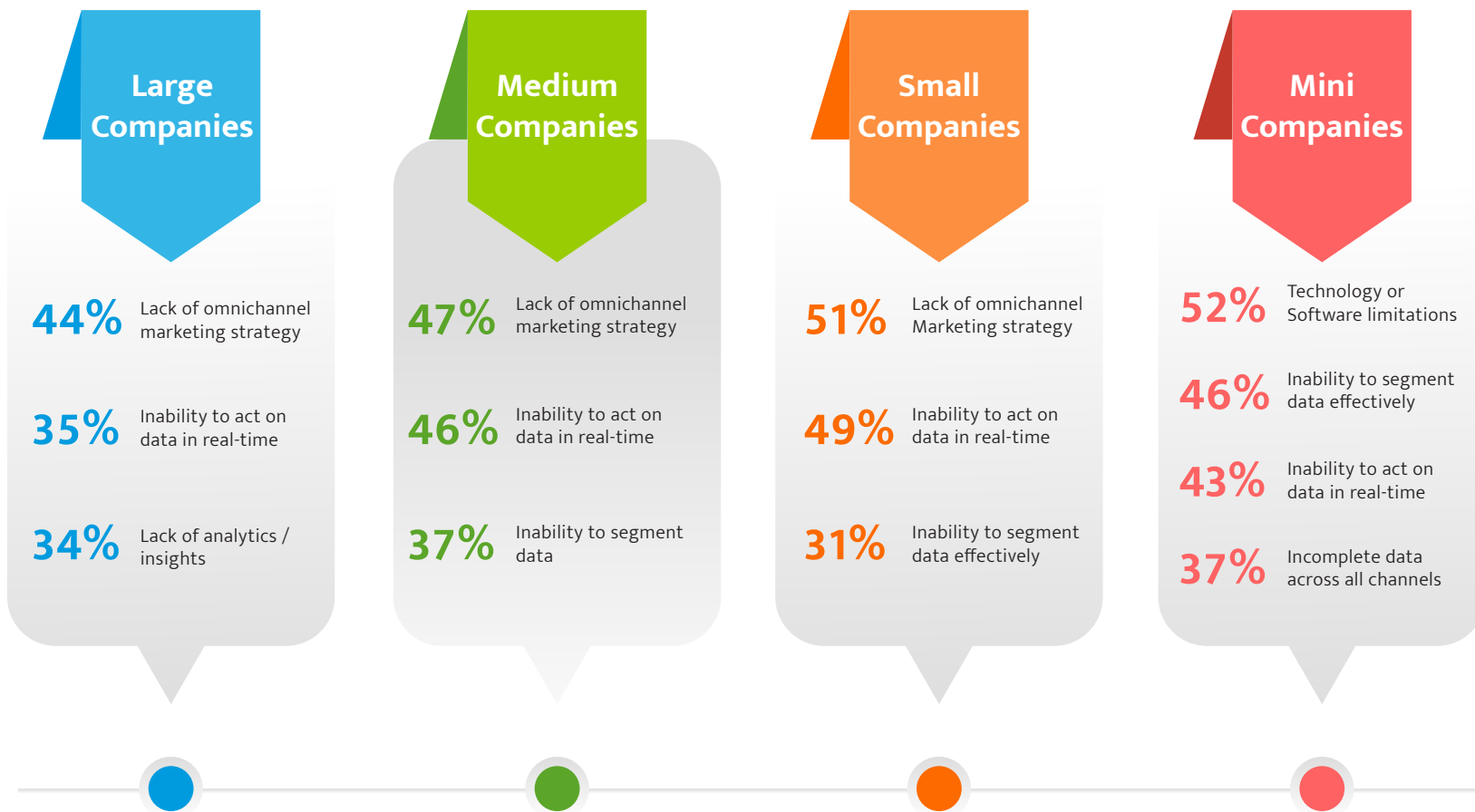
Select survey findings


Adoption of integrated approach by stage of omnichannel maturity



Challenges in implementing omnichannel marketing initiatives

Business sector

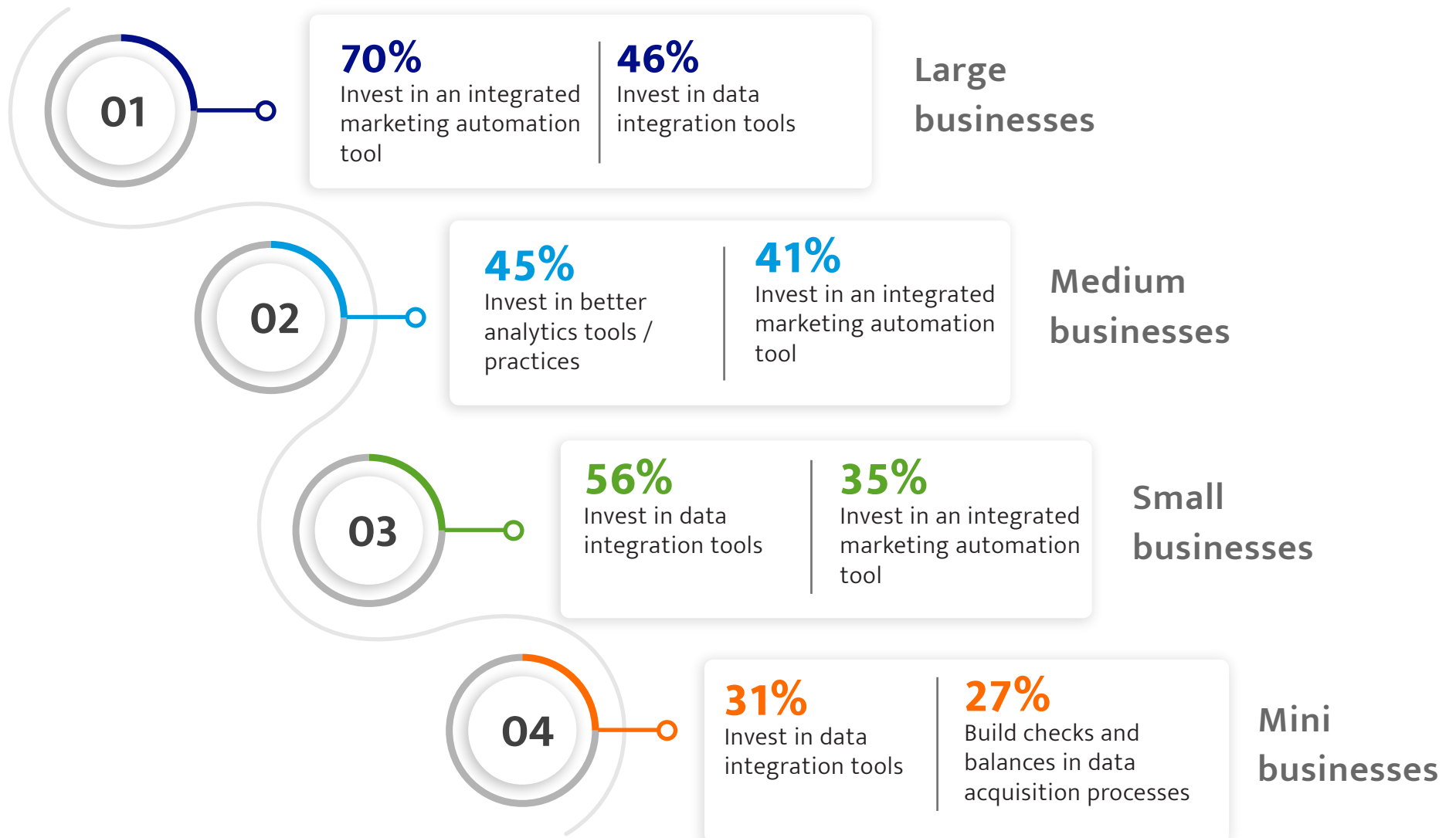


The background features a dark blue field with dynamic, glowing blue wavy lines that sweep across the frame. Interspersed among these lines are numerous small, colorful geometric shapes, including rectangles and parallelograms in shades of magenta, cyan, and orange. The overall effect is one of motion and digital energy.

8. Annexure C: More insights

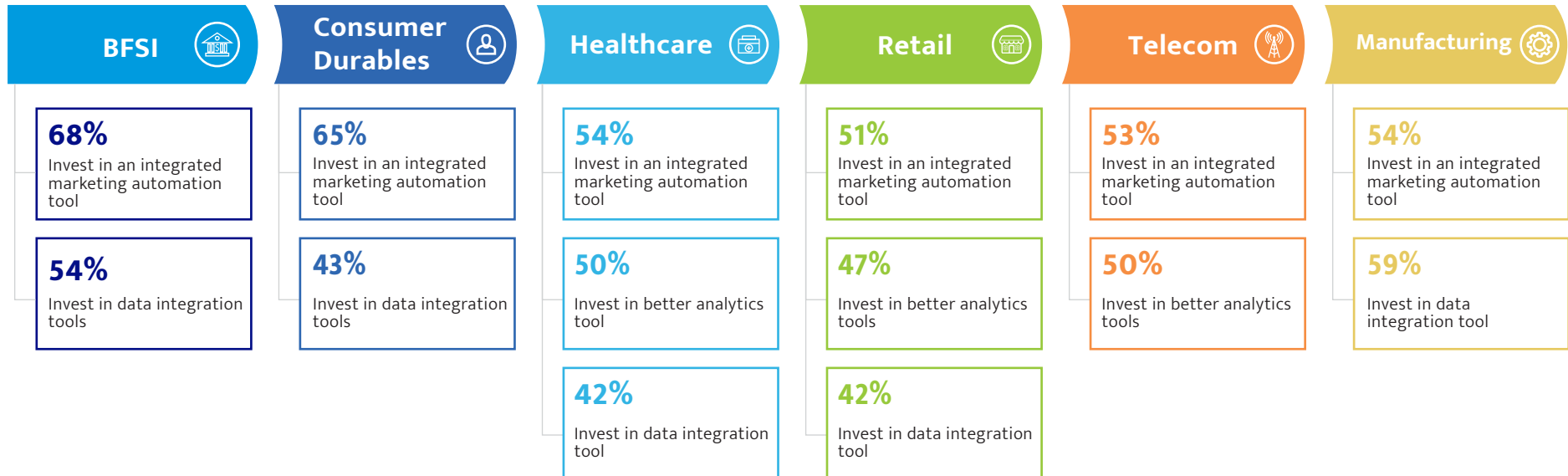
Priorities for the next three years

Business size



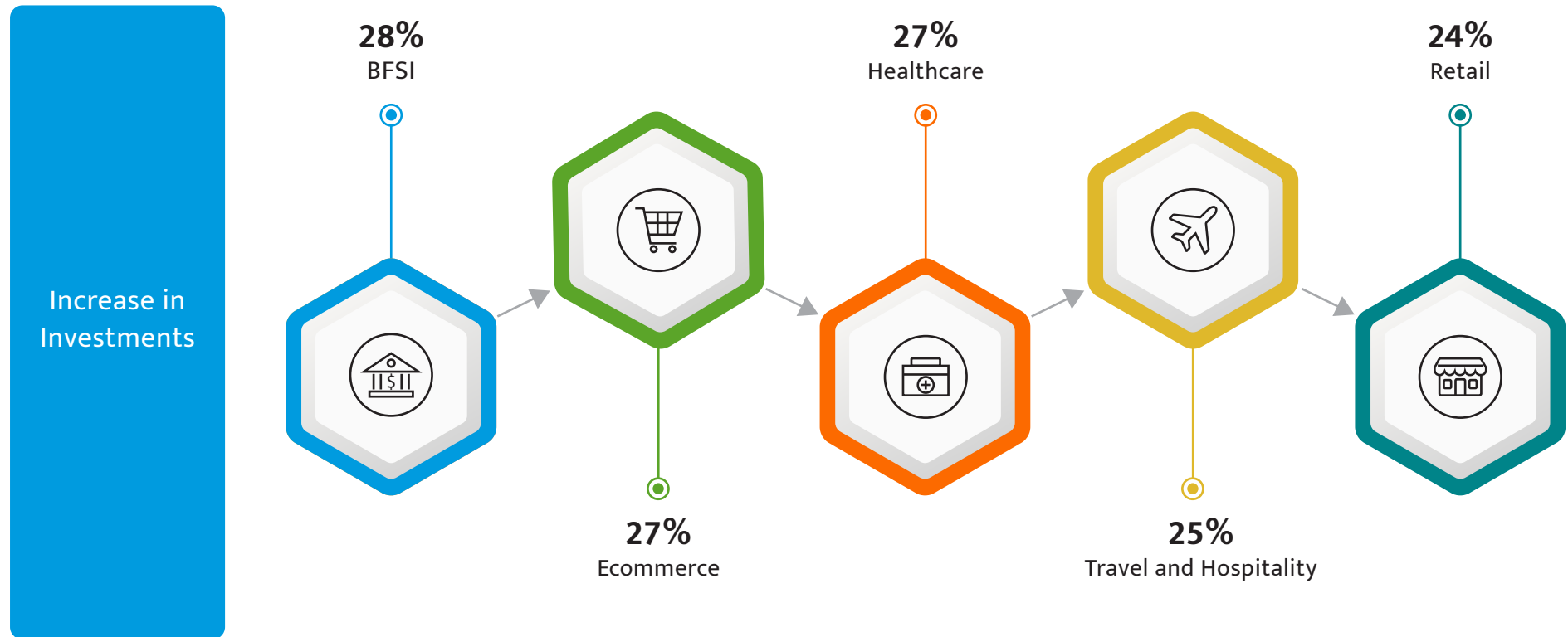
Priorities for the next three years

Business sector



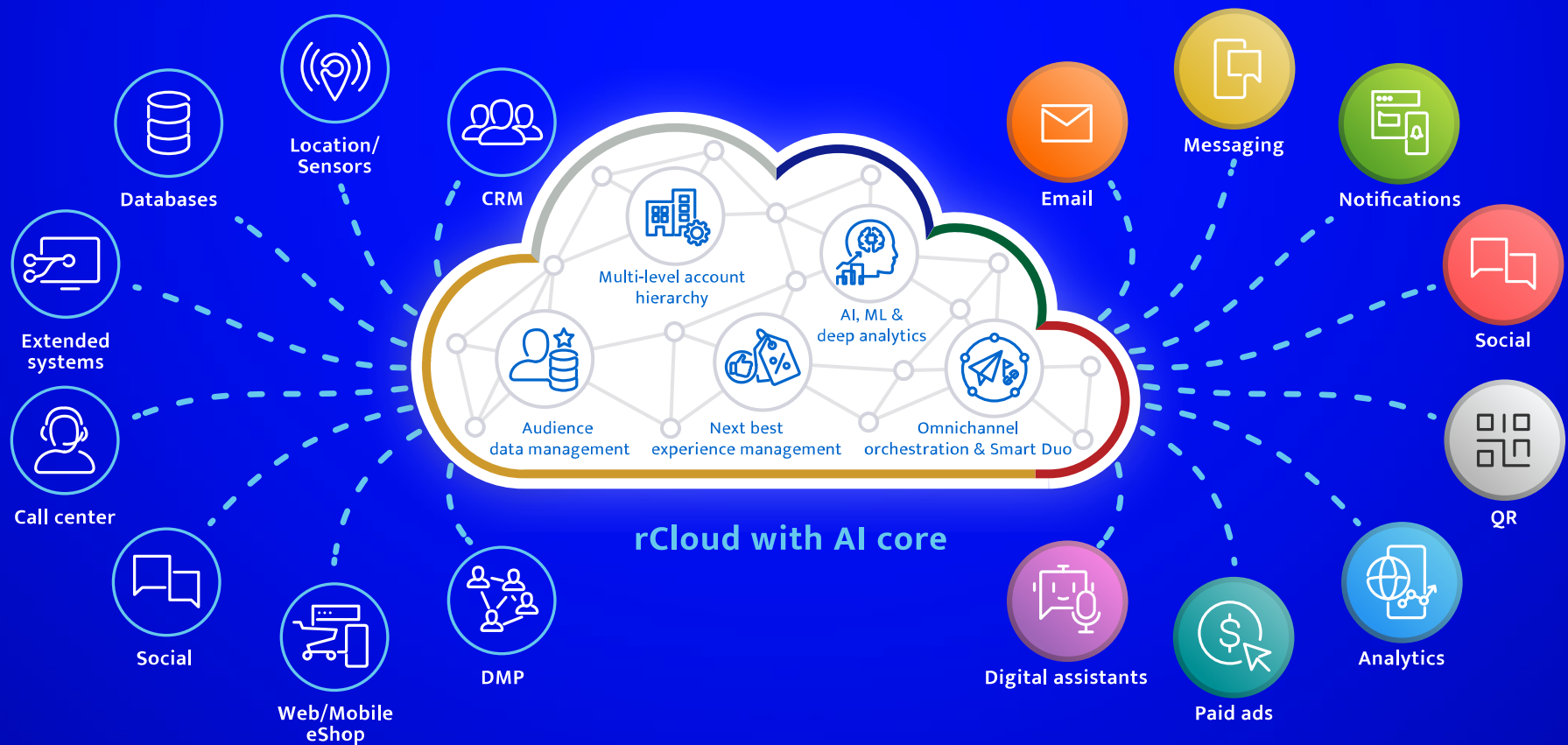
Investments planned by Indian marketers

Business sector



9. About Resulticks

Resulticks is a real-time, big-data-driven marketing cloud solution built from the ground up by experts in marketing, technology, and business strategy to deliver top-line growth. Outcomes-focused and enabled by the world's first customer data blockchain, Resulticks equips brands to make a transformational leap to true omnichannel engagement. With its AI-powered, customer-centric approach and attribution at the segment-of-one level, Resulticks is changing how brands worldwide reach, acquire, and retain satisfied customers.



10. About Valuvox



Data-driven thought leadership

Valuvox brings together mobile-social survey technology, exploratory research, and predictive analytics to deliver compelling stories for its clients in the talent management and customer marketing domains.

Over 10 years, Valuvox has delivered data-driven research reports for clients across India, the United States, Canada, and the Middle East. Its short format survey technology, designed for quick-and-easy primary research, and its advanced analytics capabilities are unique ingredients for storytelling.

Valuvox specializes in the areas of market sizing, customer and talent insights, economy and employment, skills, and compensation.

Thank you!



For more information,



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