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ELIMINATING FRICTION IN SMARTPHONE PATH TO PURCHASE



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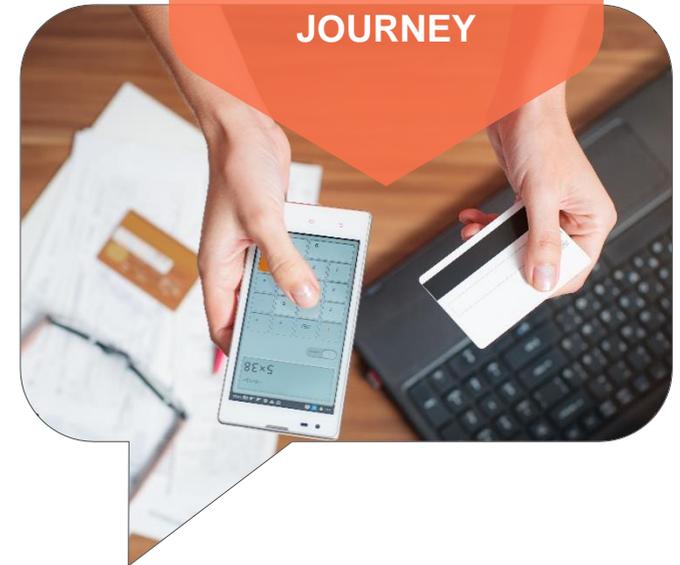
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ZERO FRICTION
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* Friction to be explained in the forthcoming chapters

EXECUTIVE SUMMARY

India, currently the second-largest smartphone market globally, is expected to have 1.4 billion distinct mobile subscribers by 2022¹. Rising disposable income, growing internet penetration and decreasing data costs are contributing to the fast-paced adoption of smartphones in the country, offering OEMs an ample opportunity to grow.

This increasing demand has attracted new players, both Indian and foreign, to offer consumers a number of options, spoiling them for choice. Purchasing a smartphone² has arguably become more important than buying a first car, as the former has transformed its usage from being just a communication device to becoming a digital wallet. It has become key to attracting consumers' attention, and their social connections — family, friends and beyond.

In this report, we identified the challenging areas of and the leading reasons behind dropouts in the path to purchase, referred to as 'friction', leading to a loss of revenue for brands. With an average person's attention span reducing, increased scope of connectivity and acceptance towards new technologies, consumers demand everything with limited efforts at a click of a button, and any change in the expectation can cause them to abandon their purchase journey.

A survey was conducted by Nielsen India, among 924 respondents across Socio-Economic Classes (SEC) A, Socio-Economic Classes (SEC) B and varied age groups. The study also entailed interactions with industry experts to obtain their perspective on the possible approaches that

could help eliminate friction and improve conversion rates.

As per the report findings:

- **Overall friction accounts for 66 per cent of consumer dropouts, while 34 per cent of consumer dropouts are attributed to media friction, leading to a loss of nearly USD22 billion in revenues**
- **Mobile influences about USD8.5 billion worth of sales of smartphones, and is expected to double its influence by 2022, leading to nearly USD15.6 billion worth of sales**
- **Consumers purchasing on mobile have a 14 per cent shorter purchase journey as compared to consumers purchasing offline**
- **Mobile has the ability to reduce friction by 5 percentage points and create nearly USD3.1 billion worth of sales opportunities for businesses**

Sources:

[1] Ericsson Mobility Report India, Indian express, June 2017

[2] Me, my life, my wallet report by KPMG International, November 2017

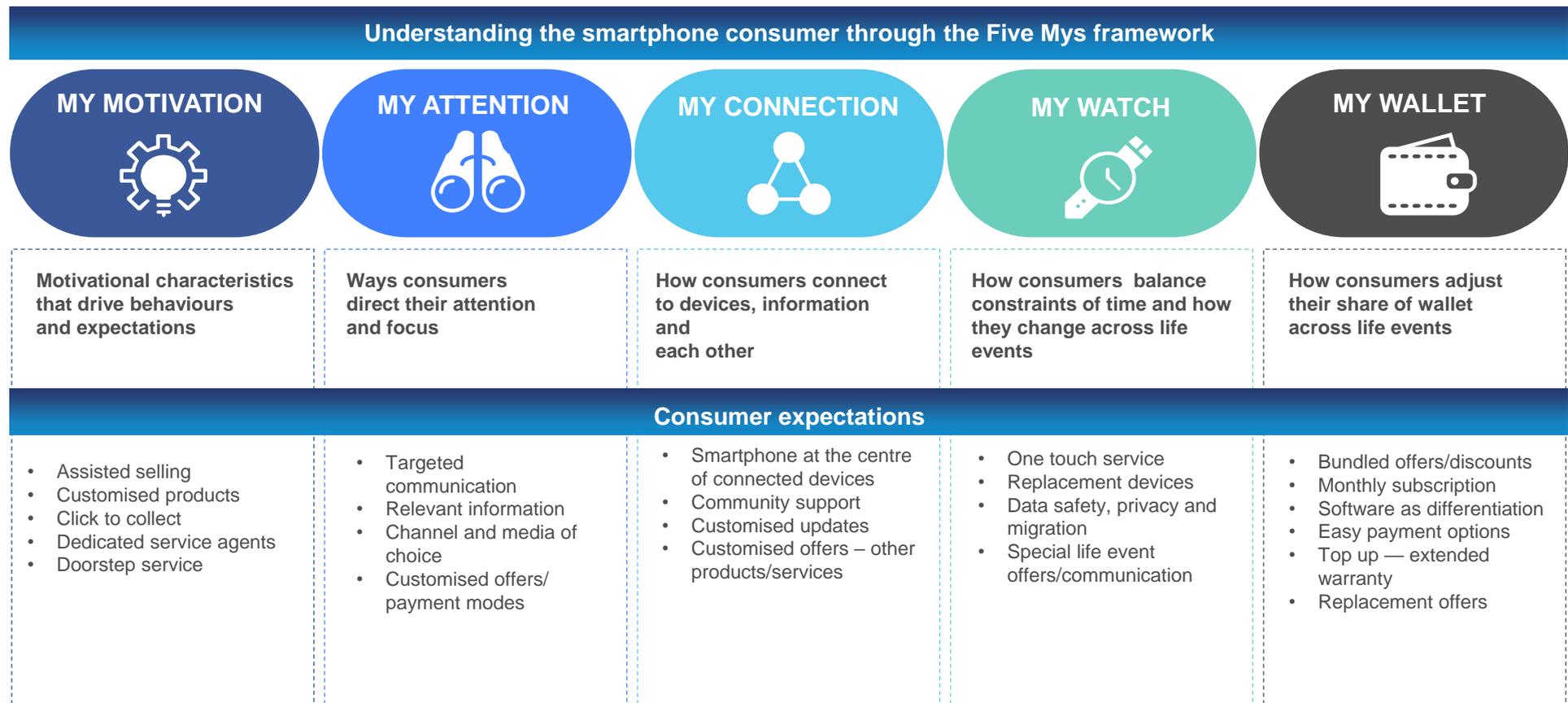




UNDERSTANDING THE MULTIDIMENSIONAL CONSUMER

Changing purchase behaviour and the need for personalisation has demanded fresh ways of thinking with reference to attracting consumers. Understanding the complex underlying drivers of human decision-making has become significantly more important with the growing scope of digital disruptions. Consumer behaviour is changing at a rapid pace; information is available at a click of a button and decision-making is no more a linear process. Consumers tend to change their mind standing at a retail store just before making a payment; both the decision-making cycle and attention span are reducing. Hence, predicting the future is not going to be easy, as age is no longer used as a proxy to understand consumers.

The 'Five Mys framework' is designed to help identify the real drivers of consumer behaviour, along with the critical trade-offs among purchase decisions across the breadth of digital wallets, leading to more targeted and contextualised experiences and products and services that would create value for both consumers and companies.



Source:
Me, my life, my wallet report by KPMG International, November 2017



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FRICTION DECODED - SCOPE OF OPPORTUNITY



UNDERSTANDING AND DEFINING FRICTION

Consumers like to follow the path of least resistance and aim to avoid anything that makes it challenging for them to move to the next step or make a purchase. The traditional paths to purchase are getting transformed with the advent of technology, smartphones and digital assistants, and are likely to get replaced by personalised journeys.

Today's consumers expect and demand convenience, speed, automation and simplicity that were absent in the purchase cycle a few years ago. Friction is therefore referred to as any unnecessary additional effort, incremental step or inconvenience which may make consumers abandon their purchase journey.

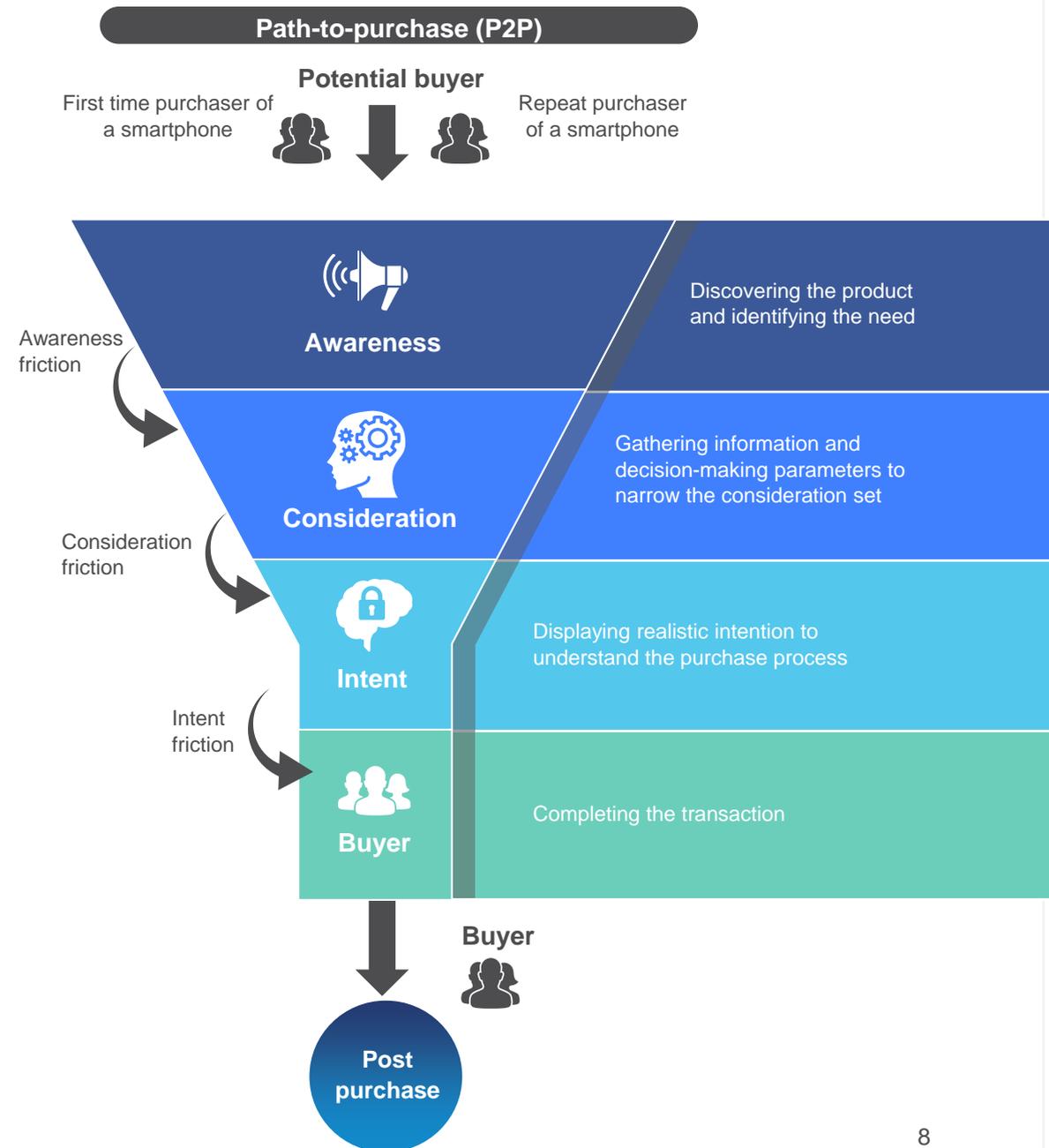
Friction may occur offline or online, which may push consumers to unnecessarily wait, queue up, click/type/tap/add information or fill contact forms. On their journey, they may also have to load, buffer, switch channels/windows or be on hold to receive service. It can hinder efficiency, impacting consumer experience as well as the purchase journey.

Research shows that consumer challenges that lead to friction can occur across three primary stages of the consumer journey: awareness, consideration and intent, as listed below. Businesses may be offering friction unknowingly, hindering the efficiency and, in turn, the consumer journey.

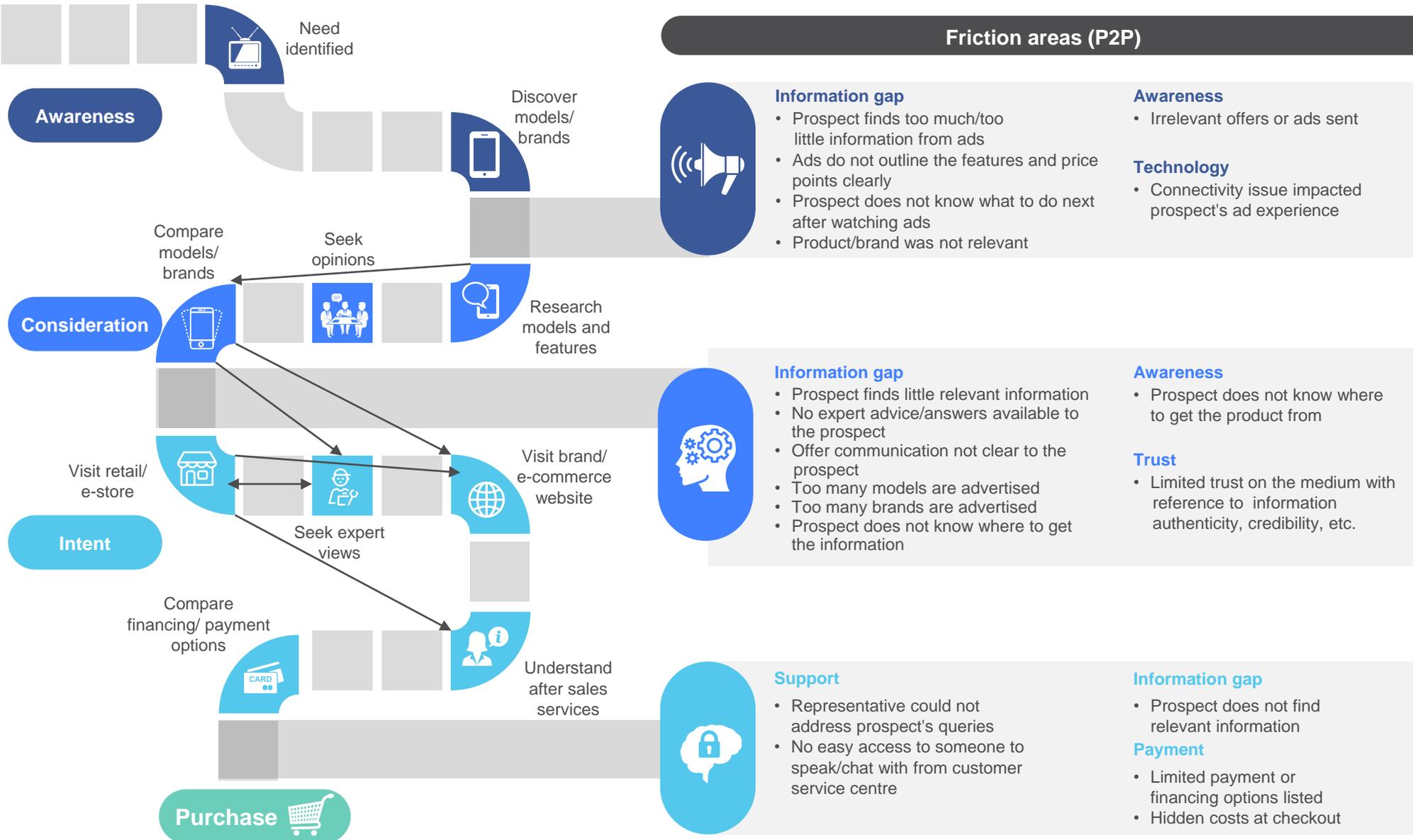
Awareness friction: Every touchpoint or missing touchpoint that requires prospective consumers to make effort to discover a brand

Consideration friction: Every touchpoint or missing touchpoint that requires prospective consumers to make effort to consider a brand

Intent friction: Every touchpoint or missing touchpoint that requires prospective consumers to make effort to purchase a brand.

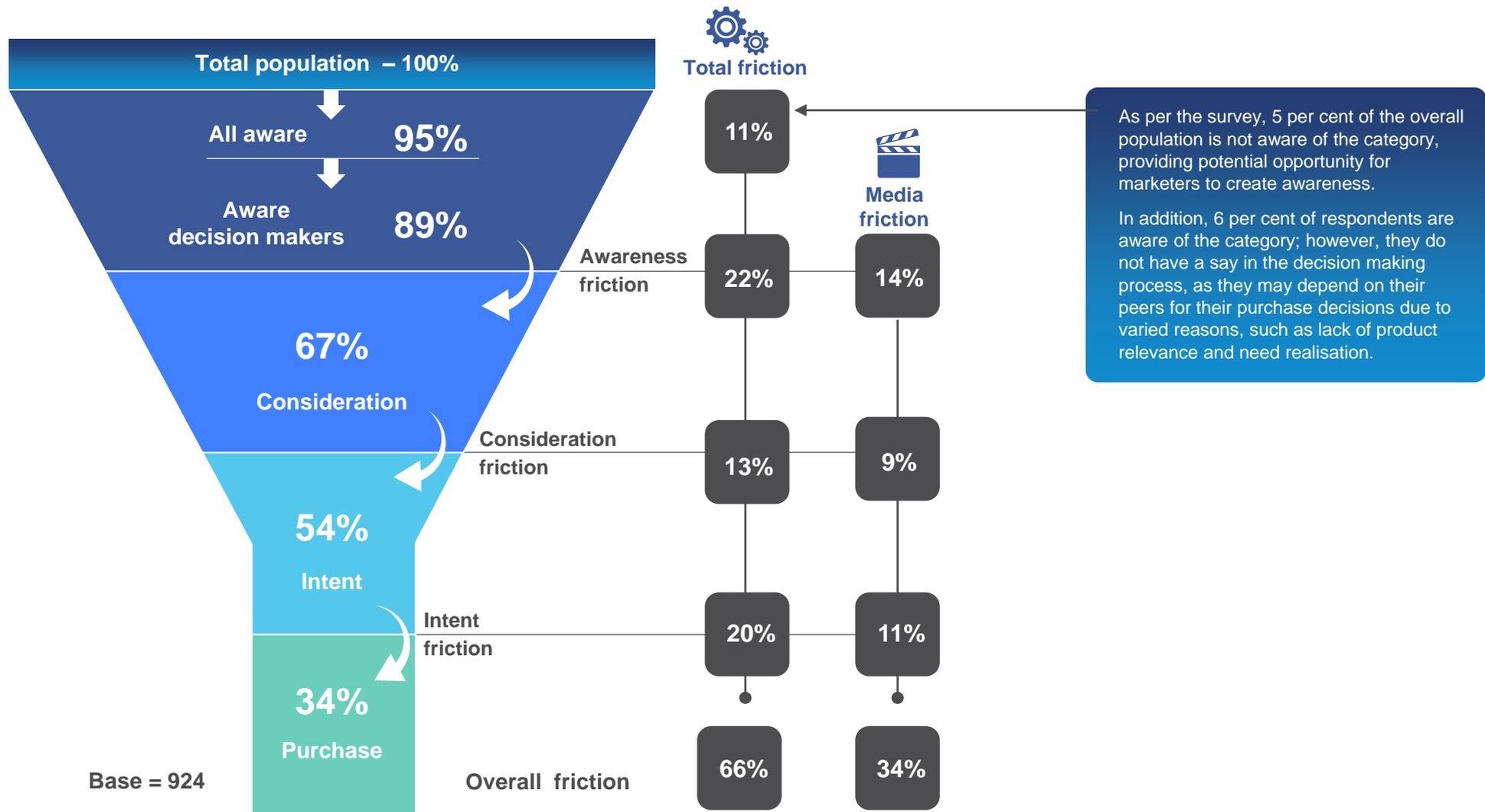


DECODING FRICTION ACROSS PURCHASE STAGES



NEARLY TWO-THIRD RESPONDENTS DROP OUT OF THE PURCHASE JOURNEY DUE TO FRICTION

Friction can also be encountered at a particular media touch-point. A lack of, or too much information, long sequences of steps, extra effort and redundant activities that result in the loss of interest and abandonment of purchase journey on account of media by a consumer is referred to as media friction.



- Deep Dive is only among 89 per cent of the population who are 'Aware decision makers' for the 'Smartphone' category
- At the intent stage, only dealers and online touch-points were evaluated in the media mix to calculate friction

- Active considerers — begun to consider in the last six months, but are yet to purchase
- Passive considerers — begun to consider in the last one year, but are yet to purchase
- Buyers — bought in the last six months

MOBILE HAS A POTENTIAL TO CREATE A USD3.1 BILLION SALES OPPORTUNITY FOR BRANDS, BY REDUCING MEDIA FRICTION

Friction can result in reduced sales, thus impacting the overall revenue for a brand. The study suggests that nearly two-thirds of the consumer dropouts of the purchase journey take place due to friction. Brands can reduce the impact of media friction by eliminating challenges; however, they can be further reduced by enhancing the media mix.

As per the estimates, mobile has the ability to reduce media friction by 5 percentage points, creating a sales opportunity of USD3.1 billion for a brand. Currently, nearly one out of two smartphone purchases is influenced by mobile, and by 2022_e nearly three out of four smartphone purchases would be influenced by mobile. Hence, it becomes imperative for marketers to improve their media mix by having a greater share of marketing activities on mobile.



By reducing media friction, brands can create a **USD3.1 billion** sales opportunity

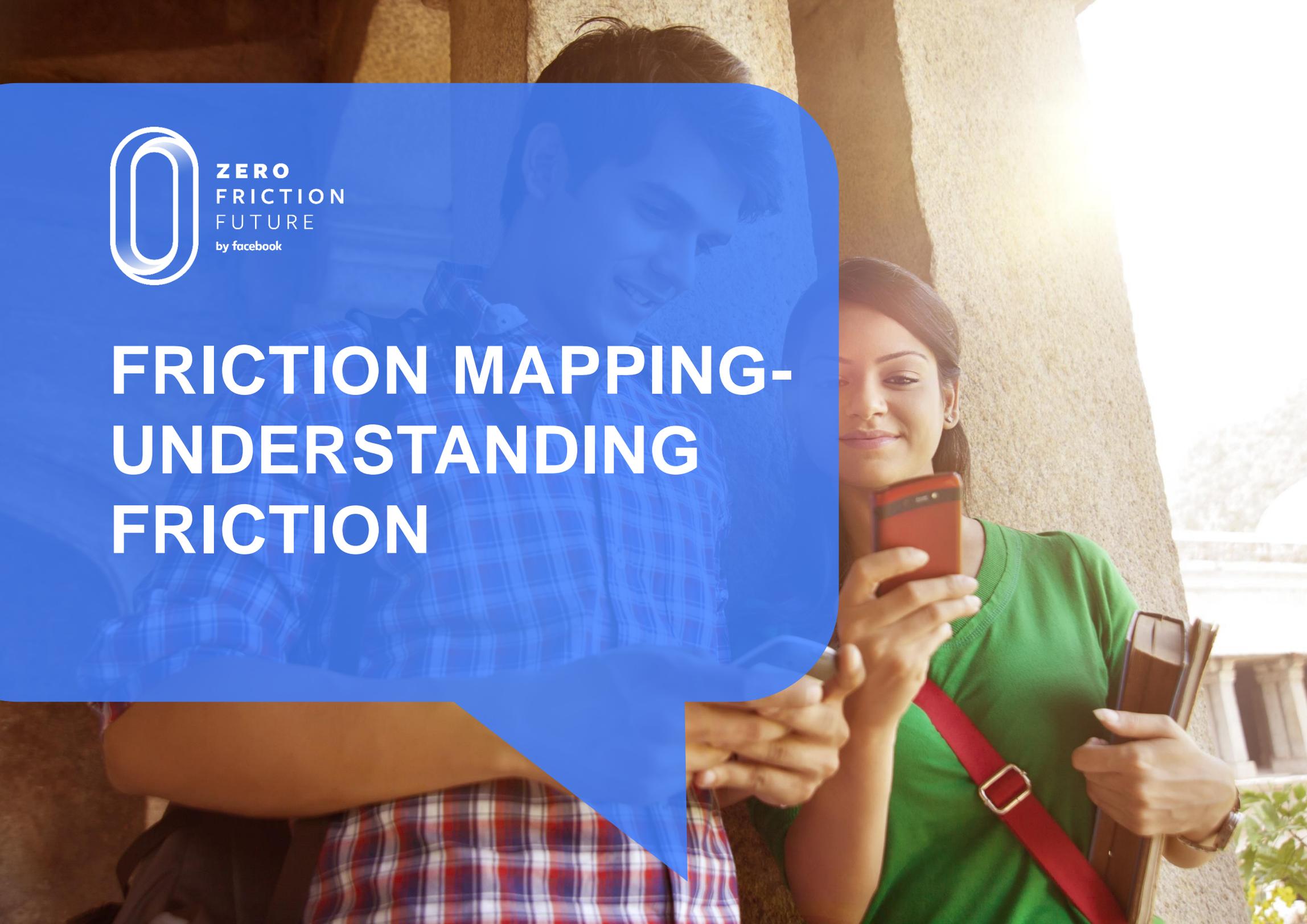
Note: Potential revenue opportunity estimation is based on the potential reduction in consumer dropout. Modelling for reduction in dropouts is based on the potential friction reduction, which may get impacted due to the usage of mobile-based media.

Source for 2017 base data: Euro monitor: Mobile phones in India Database, April 2018



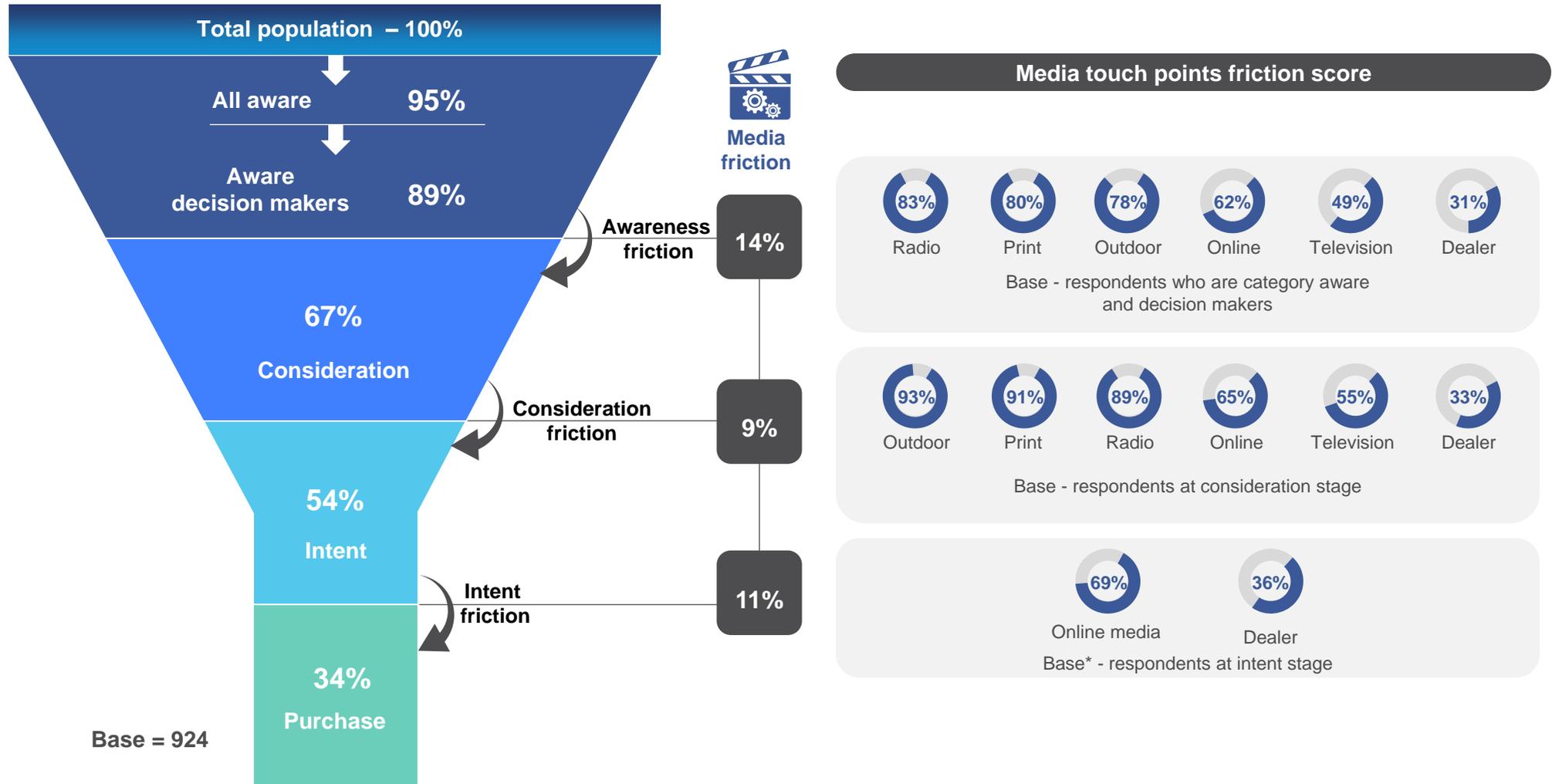
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FRICTION MAPPING- UNDERSTANDING FRICTION



NEARLY 8 OUT OF 10 PEOPLE FACE FRICTION IN THEIR PURCHASE JOURNEY ON OFFLINE MEDIA SUCH AS PRINT, OUTDOOR AND RADIO

Cost per acquisition, one of the key marketing KPIs, can increase substantially if leads generated/prospects abandon the purchase journey, leading to loss in sales revenue. It can further dent the marketing ROI, if prospects take longer to get converted into sales and spend more time at each stage of the journey. Therefore, reducing friction and providing frictionless experience not only enhances consumer experience, but also helps businesses achieve top line growth. As per the study, awareness and intent offer maximum friction, which is credited to static media touch points, such as print, radio and outdoor.

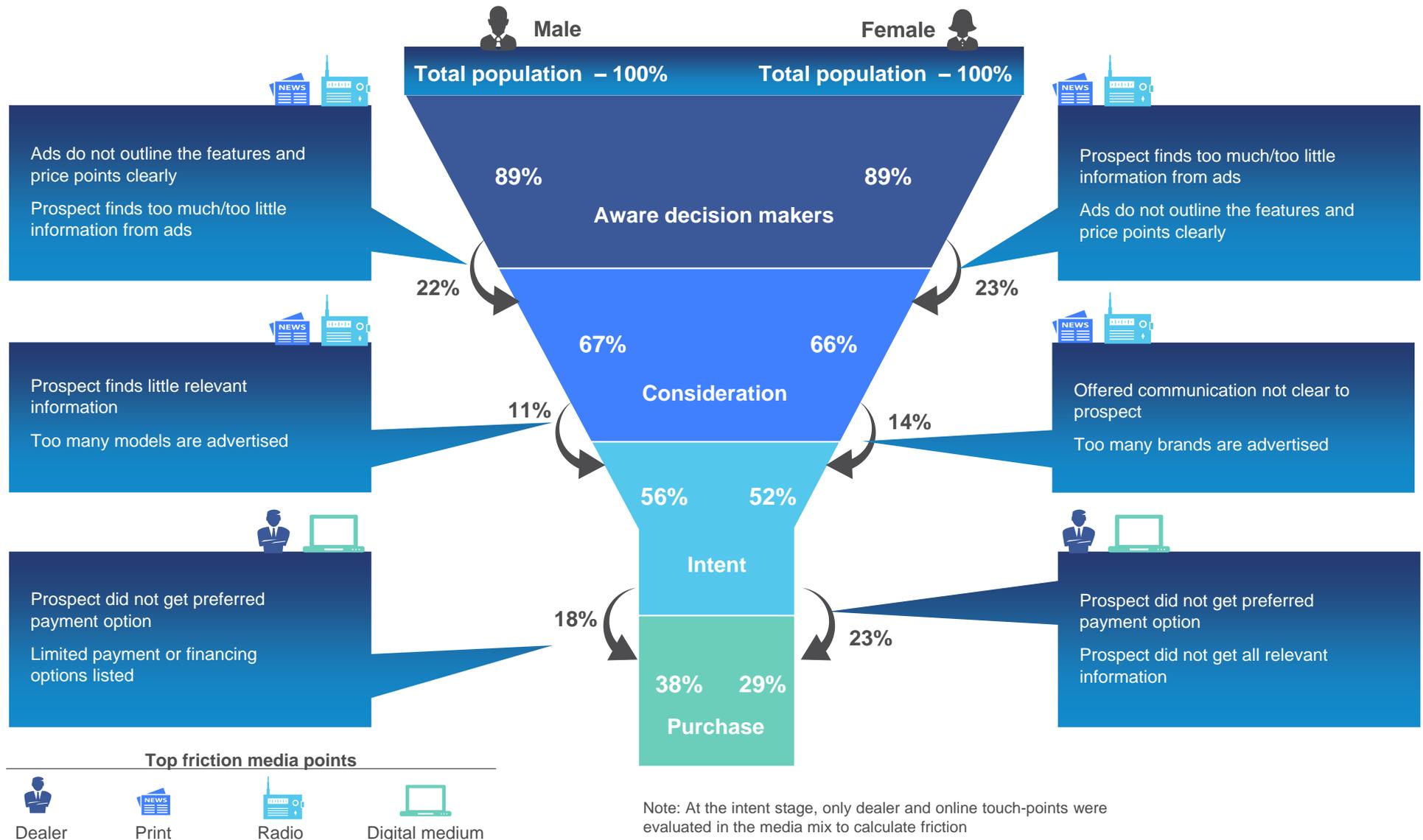


Active considerers — begun to consider in the last six months, but are yet to purchase
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Note*: At the intent stage, only dealer and online touch points were evaluated in the media mix to calculate friction

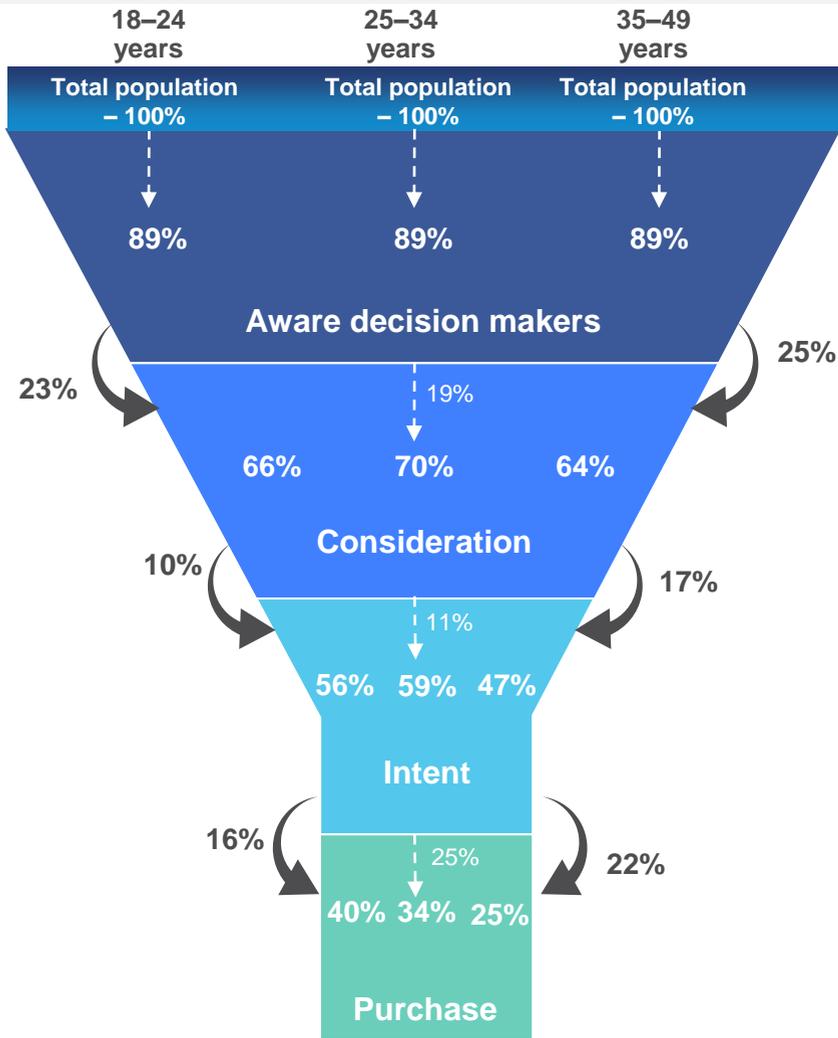
WOMEN SEEK MORE EXPLICIT COMMUNICATION, WHILE MEN DEMAND MORE RELEVANT INFORMATION

According to the research conducted, marketers need to be more fluid in their approach and target both genders differently. Women look out for more information at all stages of the purchase journey and expect clear information, while men feel that brands do not share relevant communication. Furthermore, women get overwhelmed by various brand advertisements, whereas for men, different models from the same brand hamper their experience. Businesses could take advantage of targeted marketing and build distinct communication for both men and women. Storytelling, FAQs and sequential advertisements are quick methodologies that brands can leverage.



PEOPLE OVER 35 YEARS ARE MORE LIKELY TO ABANDON PURCHASE, AS THEY ARE SENSITIVE TO INCONVENIENCE IN PATH TO PURCHASE

The study suggests, respondents over 35 years of age have less resistance to friction and are more likely to drop out. Age brings changes to one's lifestyle, needs and personal values. It further impacts the choice of brands and products. Therefore, people over 35 years do not pay much attention to advertisements and want only relevant information to be targeted at them. The younger age group, i.e., over 25 years, actively discovers information and believes that most experts are not equipped to answer their queries. Brands can try and build more trust with the older age group by targeting brands/products most suited to their needs, and could assist the younger population with technical queries through chat services and assisted sales.



Top friction media points



Friction points for 18-24 years

Ads do not outline the features & price points clearly
Prospect does not know what to do next after watching ads



Too many brands are advertised
Prospect finds little relevant information



Prospect did not want to pay additional charge
Prospect was not given all relevant information



Friction points for 25-34 years

Ads do not outline the features and price points clearly
Prospect finds too much/too little information from ads



No expert advice/answer is available
Offer communication not clear to prospect



Prospect did not get preferred payment option
Representative could not address prospect's queries



Friction points for 35-49 years

Prospect finds too much / too little information from ads
Prospect does not pay enough attention to ads



Too many models are advertised
Too many brands are advertised



Prospect did not get preferred payment option
Prospect was not given all relevant information



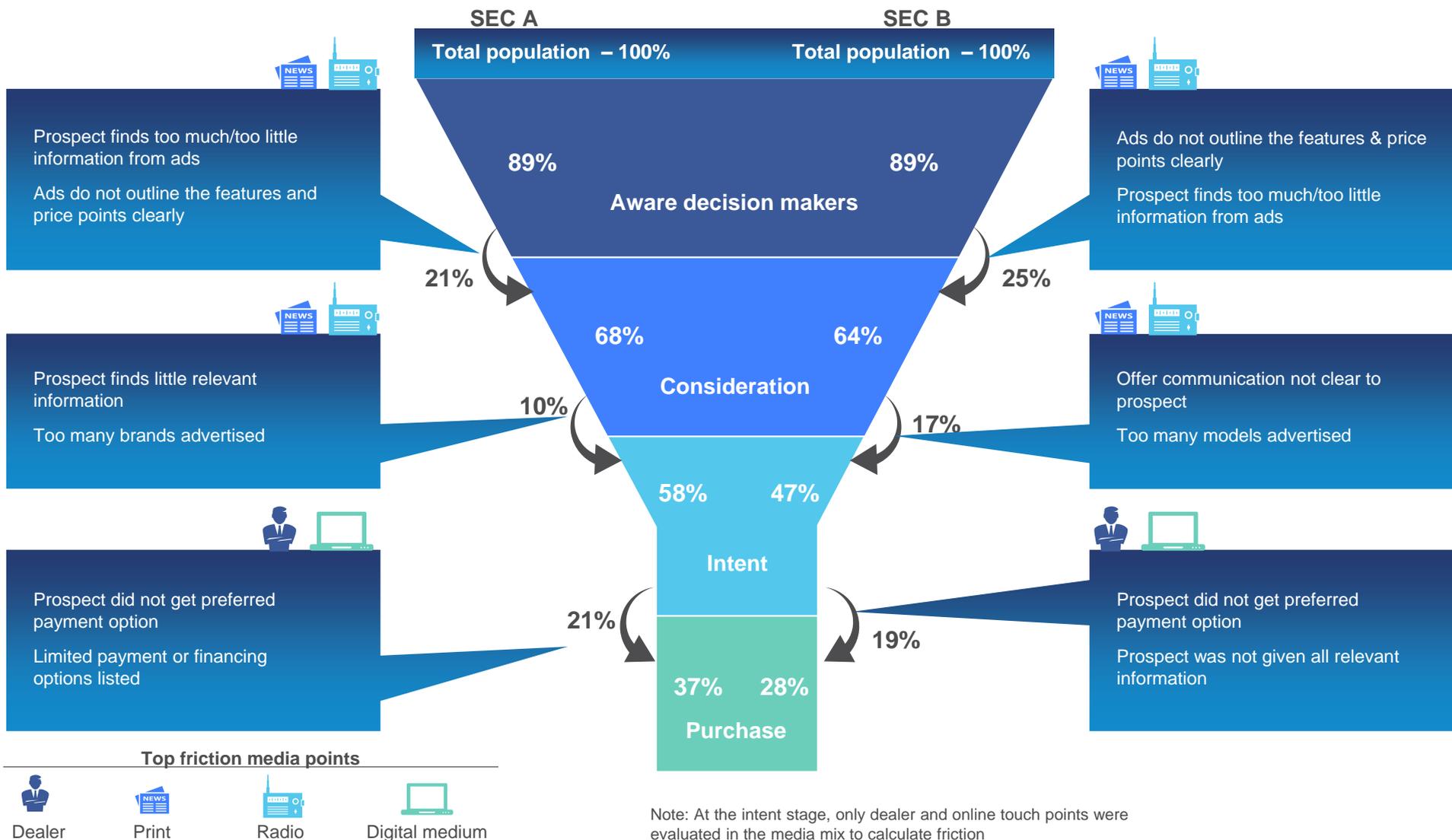
Note: At the intent stage, only dealer and online touch points were evaluated in the media mix to calculate friction

SEC B DROP OUT DUE TO LACK OF OFFERS AND INFORMATION AT THE INTENT STAGE

Nearly 72 per cent of SEC B consumers abandon their smartphone purchase, which is about 14 per cent, higher than SEC A dropouts.

SEC B consumers are more cautious in their approach, and drop out at the top of the funnel due to a lack of offer communication. Closer to the purchase, they want all their products, pricing and payment related queries being attended to, a lack of which can make them lose interest and drop out of the journey. Dealer education and lead ads can play a critical role in reducing this friction.

Businesses, thus, can reduce friction by proactively communicating bundled deals, price drops and exchange offers, motivating consumers to make a purchase.



SHARE ADEQUATE INFORMATION TO REDUCE TIME AND EFFORT

In the awareness stage, a prospect is required to make the effort to discover a brand, product and service. Any information gap or additional effort at this stage can cause the loss of the potential lead. It is not only critical for businesses to share enough and relevant information at this stage, but also make it easy for prospects to find it. They should be able to find the information they are looking for on the channel and medium of their choice.

With print, outdoor and radio offering maximum friction during the awareness stage, brands can rely on television for reach, and build engagement and generate leads through digital channels.

Brands can build an omni channel lead management mechanism to provide online leads to promoters on real time basis. They can also create brand awareness by engaging loyal consumers and fans on new product updates and offers through social media.

Awareness friction

Top media friction points	Television	Print	Outdoor	Radio	Dealer	Digital
Ads do not outline the features and price points clearly 38%	15%	32%	26%	31%	11%	21%
Prospect finds too much/too little information from ads 38%	27%	30%	25%	18%	3%	9%
Prospect does not know what to do next after watching ads 36%	7%	22%	23%	34%	7%	16%
Prospect does not pay enough attention to ads 35%	10%	17%	13%	19%	9%	15%
Price was not favorable 26%	7%	25%	14%	19%	6%	21%
Overall friction score for the medium	49%	80%	78%	83%	31%	62%



- %** Percentage of respondents experiencing the mentioned friction in respective media touch points
- Media with lowest friction for the given friction point
- Medium causing high friction
- Media with highest friction for the given friction point

COMMUNICATE PERSONALISED AND RELEVANT OFFERS, PRODUCTS AND SERVICES

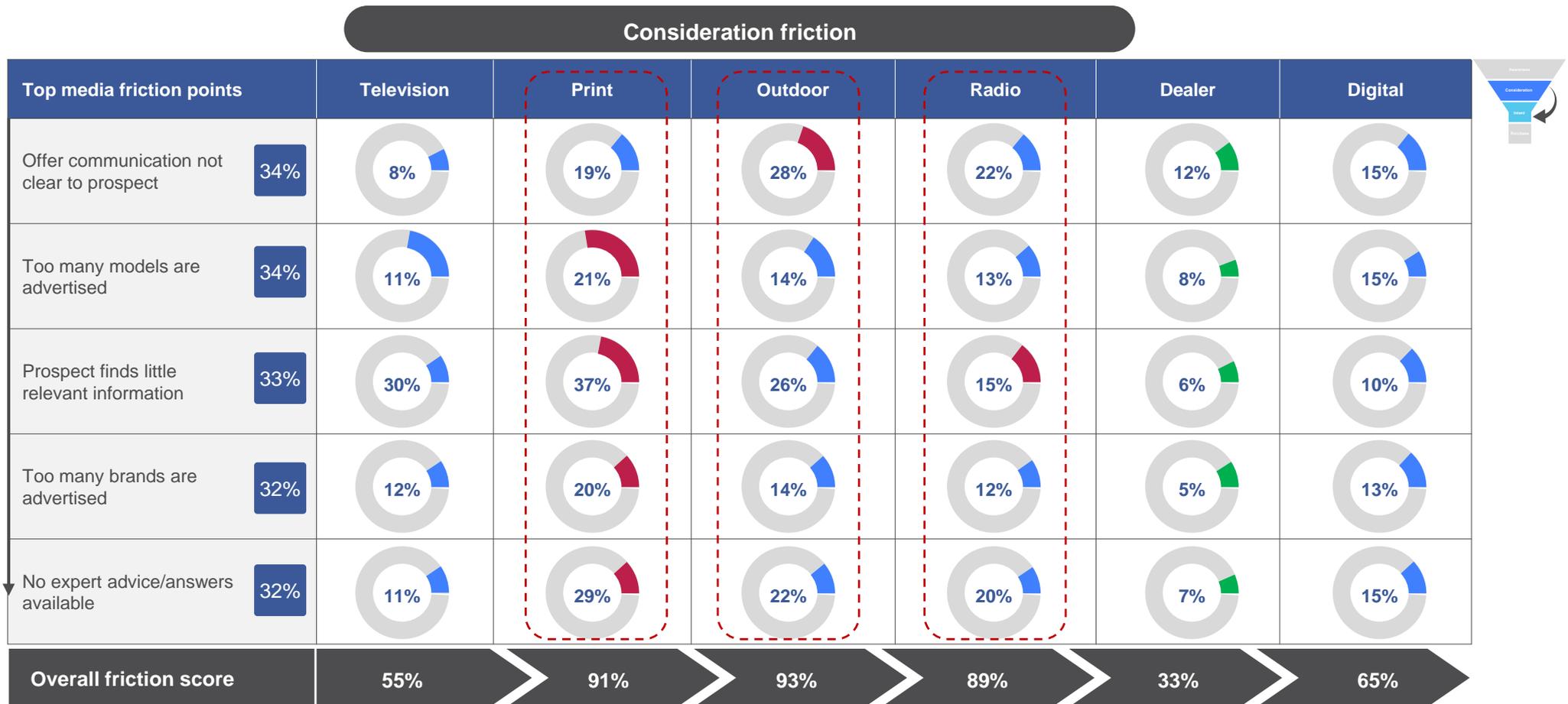
At this stage, businesses could focus on helping prospects decide on products suitable to meet their needs and spending capability.

In this scenario, businesses could avoid confusing consumers with multiple product advertisements, which lead to friction at this stage. Brands can improve experience and productivity by clearly highlighting product features, price points, deals and offers.

Offering expert opinion/advice, leveraging the power of influencers, linking product advertisements to verified digital properties, and using immersive and sequential content can play a key role in moving prospects closer to making a purchase.

Brands are actively leveraging the immersive storytelling experience through videos provided by Facebook 360 to engage with prospective consumers.¹

Digital publishers NowThis and Kleenex have partnered to create branded content stories on Facebook to engage with consumers in a better manner.²



% Percentage of respondents experiencing the mentioned friction in respective media touch points

Media with lowest friction for the given friction point

Medium causing high friction

Media with highest friction for the given friction point

Source:

[1] Facebook Business Blog

[2] Branded Content Case Study: NowThis with Kleenex, Facebook, Jan 2017

PROVIDE RESOLUTION — CONSUMER QUERIES AND PAYMENT OPTIONS

The cost of losing a lead at this stage can be significant, adversely impacting the brand's ROI.

Businesses, therefore, could make an extra effort to make the stage effortless for consumers to complete a purchase.

By adding a Facebook consumer chat plugin to the primary website, Claro Brazil could serve 30 per cent more consumers using the same technology already used by Messenger.¹ On similar lines, smartphone brands could integrate their online and offline channels to share leads and instantly follow-up through offline touch points.

With dealers and digital channels being crucial media touch points at this stage, investing in in-shop demonstrators training, and enabling them with digital devices, chat services and omni-channel play can help ease the friction by providing a quick resolution to queries.

Challenges related to payment can be addressed by leading mobile payment solutions (digital wallet, UPI, EMI, CoD, etc.) and by bringing information transparency at every point of sale. Brand can help attract their existing consumers with lucrative exchange offers during new launches using digital targeting.

Intent friction

Top media friction points		Dealer	Digital
Prospect does not find preferred payment option	52%	52%	31%
Prospect does not find relevant information	39%	5%	20%
Limited payment or financing options listed	38%	5%	21%
Representative could not address prospect's queries	36%	6%	24%
No easy access to someone to speak to or chat with from customer service centre	33%	21%	15%



Overall friction score

36%

69%

Sources:
[1] As per information provided by Facebook India Online Services Private Limited

% Percentage of respondents experiencing the mentioned friction in the intent stage

Note: At the intent stage, only dealer and online touch points were evaluated in the media mix to calculate friction

CONVENIENCE, TOUCH AND FEEL, DRIVE SMARTPHONE PURCHASES

Touch and feel remains one of the key factors influencing offline purchase. Brands, by strategically leveraging consumer-friendly technologies such as AR/VR and adopting omni-channel approach, can replicate the offline experience for consumers to amplify sales.

In addition, the study indicates that mobile purchase pathways are shorter by approximately 14 per cent, thereby helping marketers reach consumers in a cost-effective manner.

Marketers can look at options for providing demo facilities to consumers before they make a purchase.

To drive brand advocacy, businesses could actively engage with consumers after a sale and use the power of social media to spread positive sentiments for the product(s) of the brand.

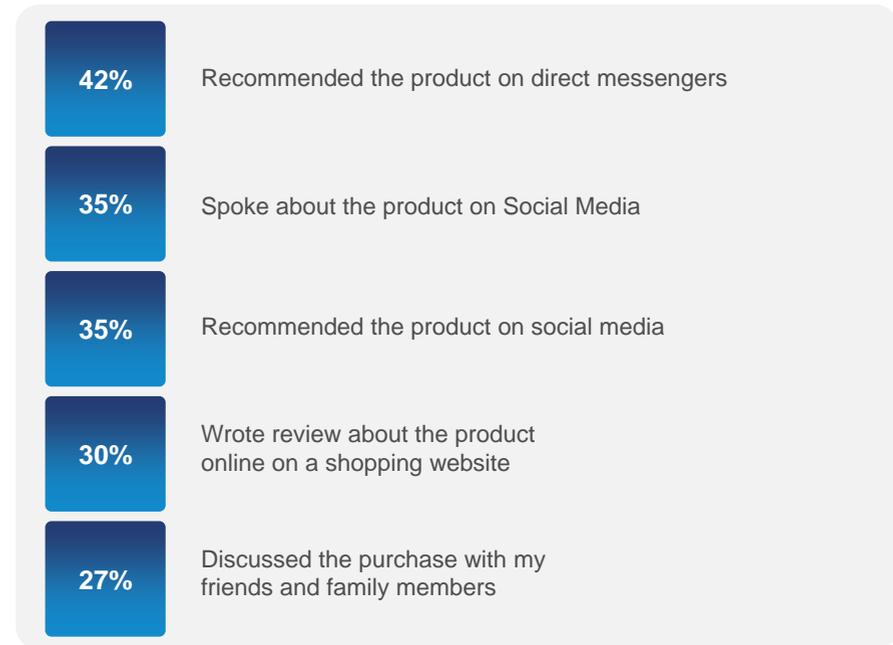
Brands can take steps to reduce purchase and post purchase friction, such as allowing consumers to book products online and collect them offline or purchase offline by paying online.

Brands can also address the issue of part replacement, a common post purchase friction factor by providing lucrative offers for part replacement in the purchase itself.

Purchase channel preference



Key activities – post purchase





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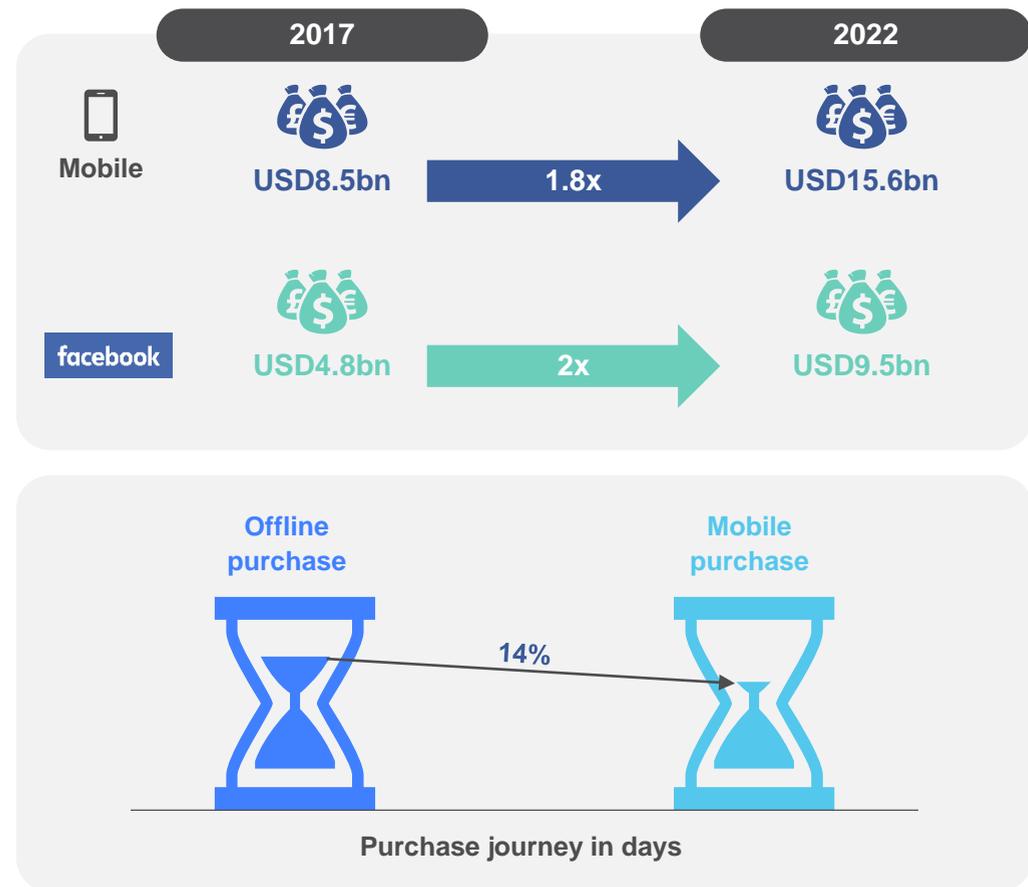
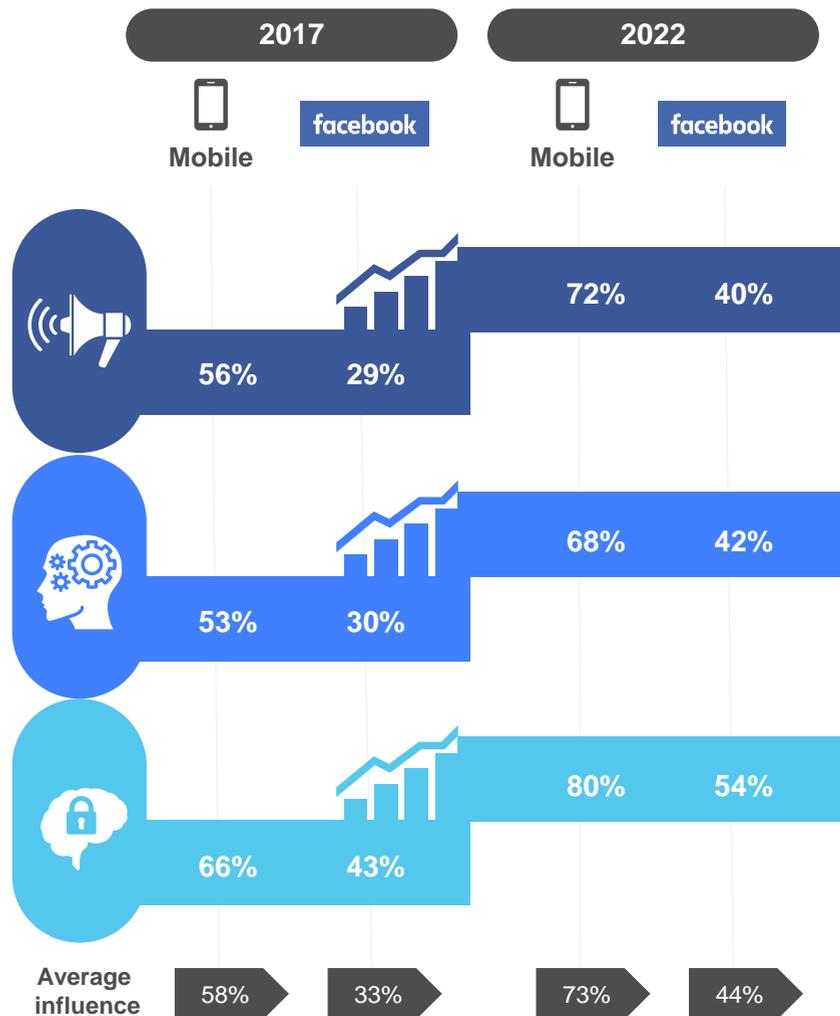
FRICION BUSTING - INCREASING SALES OPPORTUNITY WITH MOBILE



ABOUT 7 IN 10 SMARTPHONE PURCHASES IN 2022 ARE LIKELY TO BE MOBILE-INFLUENCED

By 2022, mobile internet users in India are expected to rise to 677 million, up from 420 million users¹ in 2017. Nearly three out of four smartphone purchases in 2022 are likely to be mobile-influenced, while nearly one out of two mobiles in 2022 would be Facebook-influenced. Mobile purchase pathways are also shorter, that helps marketers reach out to their consumers in a cost-effective manner.

Consumers purchasing on mobile have a 14 per cent shorter purchase journey as compared to those purchasing offline.



Sources: [1] Internet users to touch 420 million by June 2017: IAMAI report , Economic Times, May 2017
 KPMG in India's analysis, 2018 and estimates for 2022 are based on current statistics obtained from Euro monitor: Mobile phones in India Database, April 2018 database.; eMarketer Forecasts Strong Growth in Facebook Users in India, eMarketer, June 2017; Internet users in India expected to reach 500 million by June: IAMAI, Economic Times, February 2018





METHODOLOGY - FRICTION REDUCTION BY ENHANCING THE MEDIA MIX



Interpret media-related friction individually at each stage of the journey — awareness, consideration and intent



Calculate potential friction reduction opportunity for areas where mobile can help bring down friction



Calculate potential opportunity for a brand to reduce friction in future by enhancing mobile in the media mix



Recommend feasible and scalable approaches on the basis of identified friction areas and possibility of technology fitment

MOBILE HAS A POTENTIAL TO REDUCE FRICTION BY NEARLY 5 PERCENTAGE POINTS ACROSS THE PURCHASE JOURNEY



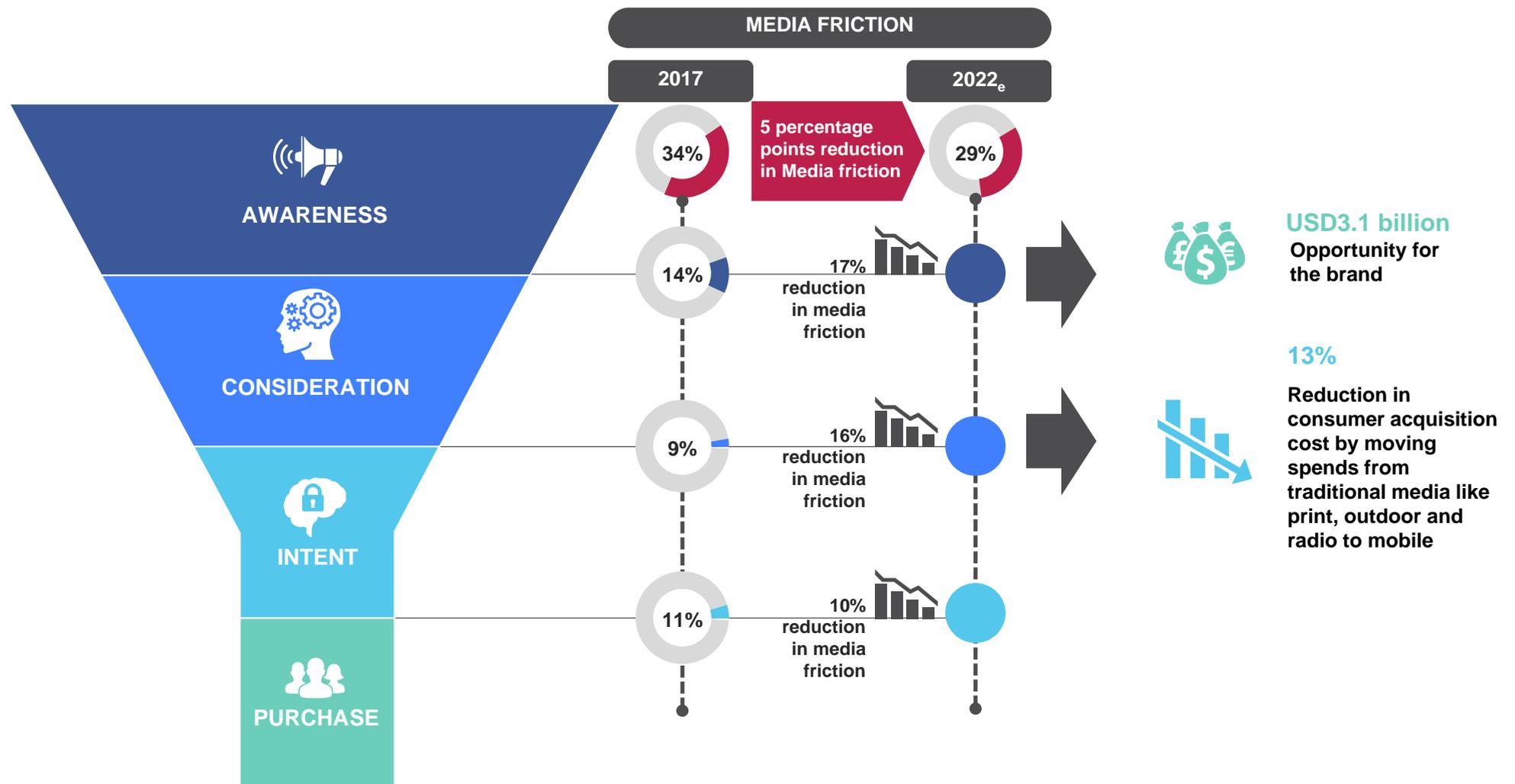
Note: KPMG in India's Analysis, 2018

For all three stages - awareness, consideration and intent - the reduction in friction on offline media is based on the weighted average of friction scores for all online media, obtained from primary research

The calculation took into account the reduction in friction that could be achieved if offline friction percentages are replaced with the weighted averages of online media. It has been assumed that the values of online media can be used as a proxy for mobiles since nearly 80 per cent of the online usage take via mobile devices

INCREASING MOBILE IN MEDIA MIX CAN CREATE A USD3.1 BILLION SALES OPPORTUNITY AND REDUCE CONSUMER ACQUISITION COST BY 13 PER CENT

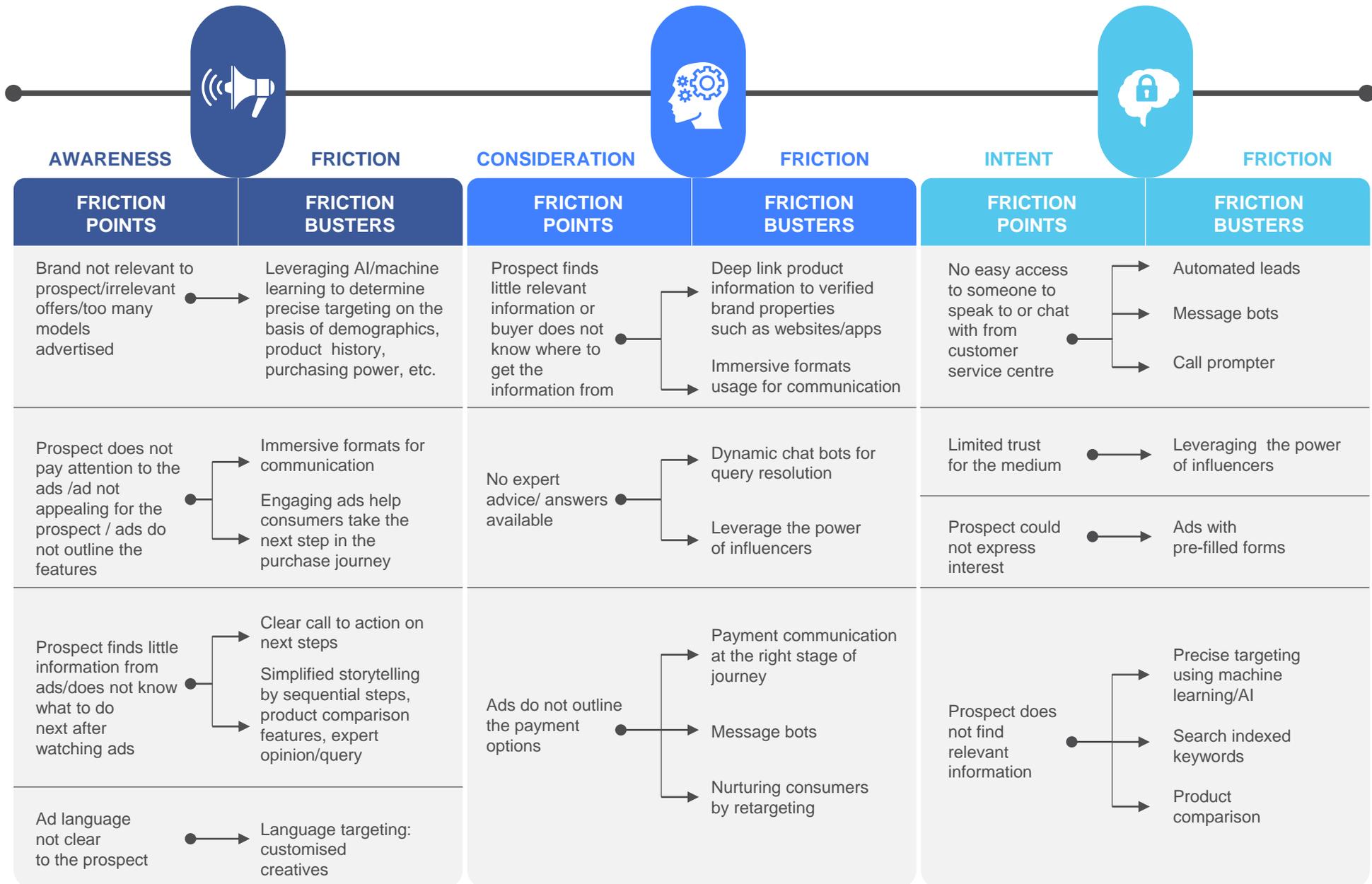
There is an opportunity to generate USD3.1 billion by replacing less efficient offline media touch points with mobile-based advertisement approaches. This can create value for smartphone marketers by reducing their average cost of acquiring consumers (CPA) by up to 13 per cent. CPA of a mobile-based digital medium is today only a fraction of traditional media. Therefore, mobile-based advertising approaches offer better experience to consumers and higher economic value to marketers.



Sources: Digital Advertising in India 2018, Dentsu Aegis Network, KPMG in India's analysis

Methodology: The projection is based on estimated ratio of the average cost of consumer acquisition for online and offline media in the telecom industry. The ratio is assumed to remain consistent in 2022 and to project incremental spend on mobile-based digital advertisement to tap the USD3.1 billion opportunity.

TO GET THIS ADDITIONAL PURCHASE CONVERSION OF 5%, BRANDS CAN BRING DOWN THE CONSUMER ACQUISITION COST BY 13% WITH MOBILE





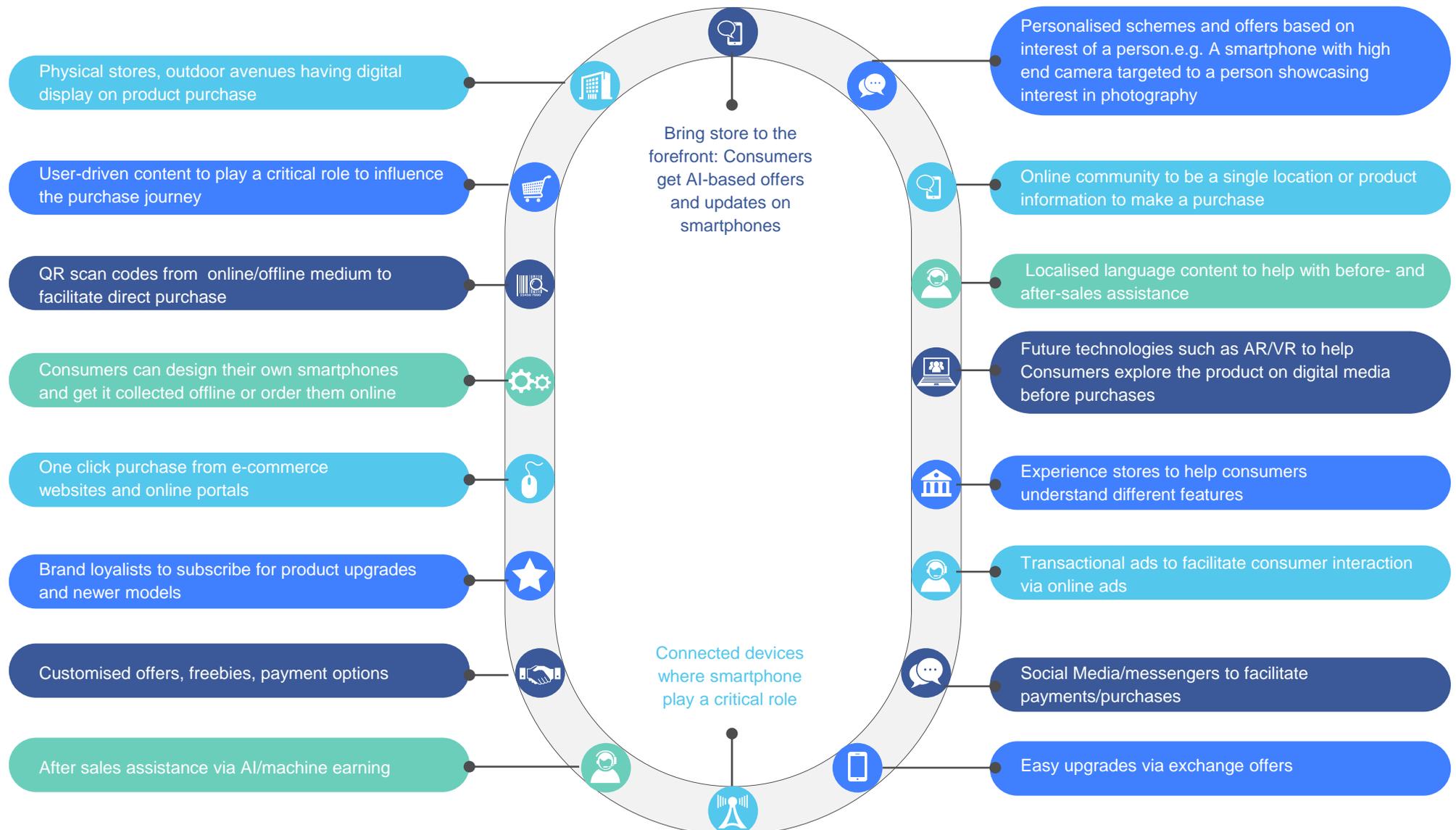
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ZERO FRICTION FUTURE - REIMAGINING THE PURCHASE JOURNEY



REIMAGINE SMARTPHONE PATH TO PURCHASE

Consumers for this category no longer belong to a homogenous segment. This has led to the emergence of different pathways, with digital playing a key role in shaping most, if not all, pathways. With increased adoption of digital and rapid enhancement in consumer-friendly technology, such as AR/VR, consumer analytics through AI, machine learning and personalised offers, the path to purchase is expected to become shorter and smooth. With this increasingly non-linear journey, the purchase cycle seems to be gearing up for a frictionless future.



METHODOLOGY

The study entails the following approach to identify in-depth understanding of the consumer purchase journey and friction areas therein

Primary research methodology

Primary research was undertaken by Nielsen India to cover the overall purchase journey of a consumer and to understand the friction points at each step of the journey. The study is based on 924 respondents split as:

Gender	Age Group(years)	NCCS*
Male: 499	18-24: 338	SEC A: 614
Female: 425	25-34: 328	SEC B: 310
	35-49: 258	

Primary interviews

Detailed interviews were conducted with sector experts to understand key industry trends, friction areas, future pathways and outlook.

Secondary research

Detailed secondary research was undertaken to understand the smartphone industry, market growth and future trends.

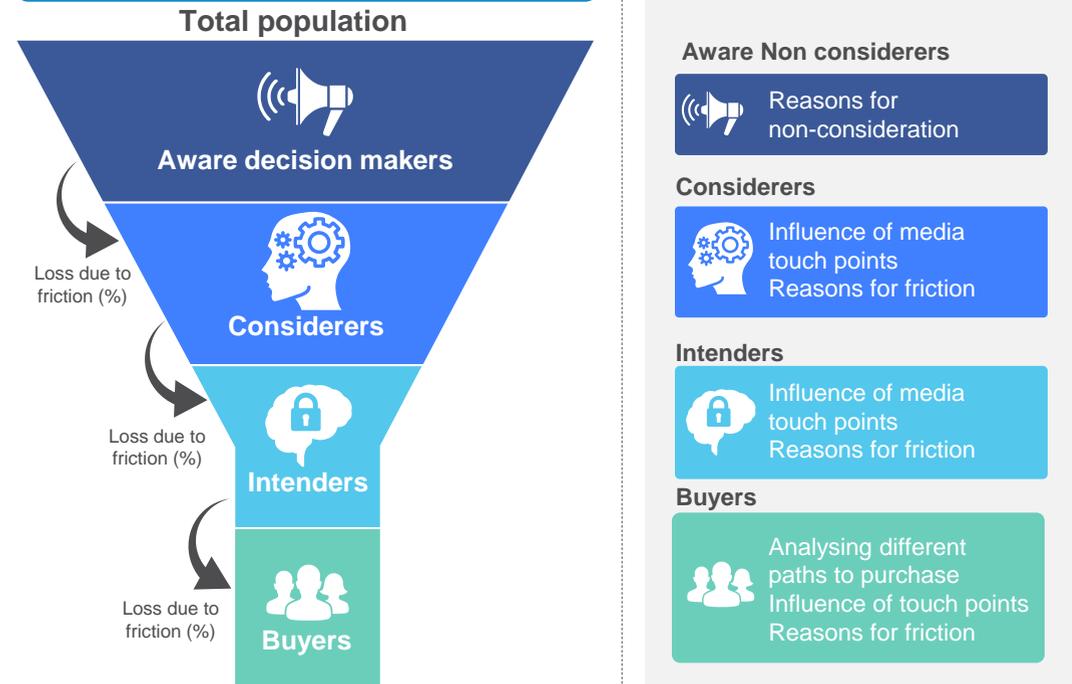
Primary research methodology

Phase 1: Listing

Phase 2: Deep dive

- Listing exercise was conducted to better understand the proportion in the universe that falls under each individual cohort at any given time and to derive the size of these cohorts to be applied in the deep dive phase
- Large scale listing study was conducted to capture incidence of respondents falling under the different cohorts of consumers i.e. Buyers, Considerers and Aware Non-considerers

- Purposive sampling to recruit respondents for each category, and each cohort
- Each cohort helped provide detailed information at different stages in the purchase journey



• NCCS — New Consumer Classification System

- Listing exercise conducted to derive the dropouts at each stage of the journey for the categories separately among randomly selected respondents
- Size of the cohorts from listing was used as weighting inputs for the outputs from the quantitative deep dive
- Base has been considered as those who are aware of the category and are either primary decision makers/have actively contributed to the decision-making process
- Active considerers — begun to consider in the last six months, but are yet to purchase
- Passive considerers — begun to consider in the last one year, but are yet to purchase
- Buyers — bought in the last six months



ABOUT KPMG IN INDIA

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Founded in 2004, Facebook's mission is to give people the power to share and make the world more open and connected. Over 2.2 billion people globally and 284 million people in India use Facebook to connect and share the things they care about and to discover what's going on in the world. Facebook for Business' Marketing Tools help businesses find new consumers and build lasting relationships with them. Whether you're just getting started with Facebook for your business, or you're ready to optimise your Facebook presence to meet specific goals, Facebook for business is here to help. Facebook IQ is a team of world's leading experts on data analysis and storytelling, who provide marketers a true understanding of people, and what drives them to stop, look, feel, share, do and buy. We then translate what these insights mean for brands.

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers watch and buy. Nielsen's Watch segment provides media and advertising clients with Nielsen Total Audience measurement services for all devices on which content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen also provides its clients with analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com



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