Data – The Big Disrupter!

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Global Datasphere

175,000,000,000,000,000,000,000 bytes

(The summation of all the global data - created, captured, or replicated)

2018 33 Zettabytes   **2021** 65 Zettabytes   **2023** 100 Zettabytes   **2025** 175 Zettabytes

(175 Trillion Gigabytes)

"If you were able to store the entire Global Datasphere on DVDs, then you would have a stack of DVDs that could get you to the moon 23 times or circle Earth 222 times"

Where will all this Data reside

Cloud is the new core: By 2025, **49%** of the world's stored data will reside in **public cloud** environments and **30%** (up from 15% in 2017) of the Global Datasphere will be **real-time**

Enterprise Data Centre: By 2021, there will be more data stored in the public cloud than in traditional datacenters. There is no growth expected through 2025 for Enterprise data centers (contribution will be flat **35-36%**).

Consumer Devices: By 2020, more bytes will be stored in the public cloud than in consumer devices. Down from 35% in 2019 to **15%** by 2025.

Source: Data Age 2025, sponsored by Seagate with data from IDC Global DataSphere, Nov 2018

5 billion+ consumers interact with data per day

World population: 7.7 Billion

Mobile subscribers: 5.1 billion (66% of the global population)

Internet users: 4.5 Billion (58% of global population)

Social media users: 3.5 Billion

"By 2025, every connected person in the world on average will have a digital data engagement over 4,900 times per day – that's about 1 digital interaction every **18 seconds**"

2010
298 digital data engagements per day

2015
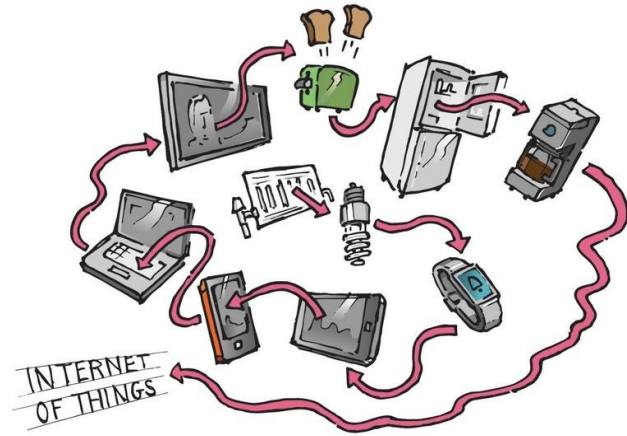584 digital data engagements per day

2020
1,426 digital data engagements per day (every minute)

2025
4,909 digital data engagements per day

Source: Data Age 2025, sponsored by Seagate with data from IDC Global DataSphere, Nov 2018

+ 41.6 billion IoT devices by 2025

The world of IoT has a huge variety of sensors and data collectors and the predictions do state that the most bandwidth-heavy applications of IoT will be video surveillance.
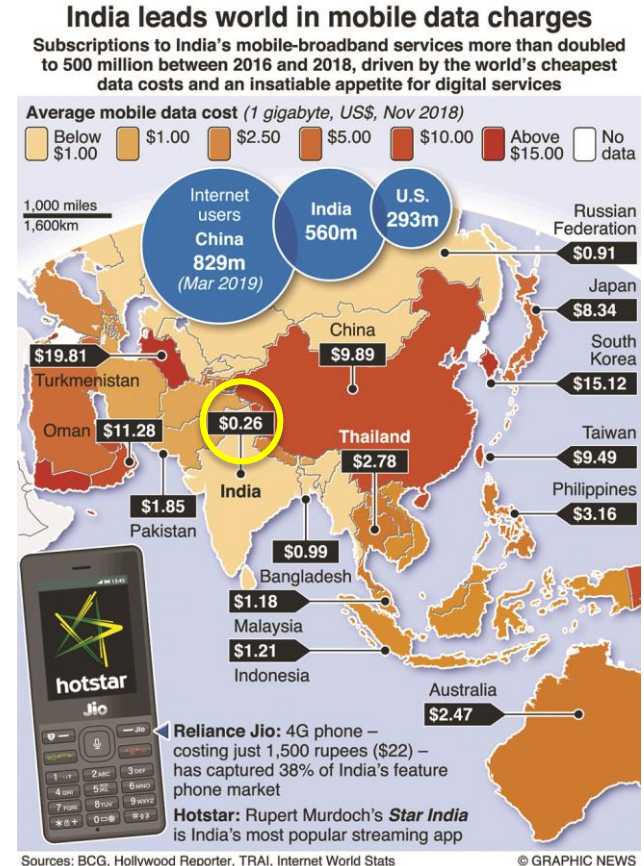
Devices will report back on its status with varying rates; a health monitor may report back every millisecond, while a smart meter may send its electricity and gas readings back every half hour.

We are looking at IoT devices using **79.4 ZB** of data by 2025 and the **networks** involved have to be ready to take on such a heavy load.

India is ready!

"Imagine what kind of information superhighway is needed to support every device.

In India, Reliance has seen the future or shall I say, creating the future. It is not just leapfrogging, but pole-vaulting to get India ready through its Jio 4G mobile data and upcoming Jio Gigafiber data network (world's largest) built to help India lead the global data race"

India leads world in mobile data charges

Subscriptions to India's mobile-broadband services more than doubled to 500 million between 2016 and 2018, driven by the world's cheapest data costs and an insatiable appetite for digital services

Average mobile data cost (1 gigabyte, US$, Nov 2018)

Below $1.00 | $1.00 | $2.50 | $5.00 | $10.00 | Above $15.00 | No data

Internet users China 829m (Mar 2019)
India 560m
U.S. 293m

1,000 miles
1,600km

Russian Federation $0.91
Japan $8.34
South Korea $15.12
Taiwan $9.49
Philippines $3.16
China $9.89
Turkmenistan $19.81
Oman $11.28
India $0.26
Thailand $2.78
Pakistan $1.85
Bangladesh $0.99
Malaysia $1.18
Indonesia $1.21
Australia $2.47

Reliance Jio: 4G phone – costing just 1,500 rupees ($22) – has captured 38% of India's feature phone market

Hotstar: Rupert Murdoch's Star India is India's most popular streaming app

Sources: BCG, Hollywood Reporter, TRAI, Internet World Stats
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From raw data, lets move to cultivated data

Cultivated data is the new gold

"Cultivated data" as existing data (i.e. ERP data, analytics data, public health data, inventory data etc.) that is analysed and developed into a more usable form than it was before. Cultivated data isn't always about volume, variety or velocity of data — it's more important for the output to be relevant and actionable.

The giants that deal in cultivated data, the oil of the digital era. These titans—Alphabet (Google's parent company), Amazon, Apple, Facebook and Microsoft—look unstoppable. They are the five most valuable listed firms in the world. Their combined revenues surge: they collectively rack up $3.5 Trillion in revenues

...more brands riding the data wave (gold wave)

Deals in the Data world (gold rush)

FIS a global leader in financial services technology, acquired **Worldpay** for **$35 billion**. Worldpay is a payments technology company that processes over 40 billion transactions annually, supporting more than 300 payment types across 146 countries and 126 currencies.

CRM leader Salesforce announced a **$15.7 billion** acquisition of data visualization leader **Tableau** and just a week after Google acquired another BI major **Looker $2.6 Billion**

BI major **Qlik** snagged **Attunity**, a company that facilitates data ingest, replication and integration of streaming and conventional data. Earlier, Qlik had acquired geospatial analytics company **Idevio** in 2017, and data catalog-focused **Podium Data** in 2018.

In another move earlier this year, Google announced its intention to acquire **Alooma**, a company that helps users migrate to the cloud and clean their data.

Stitch, an analytics firm was acquired by **Talend**, for $60 million.

Sisense, a business analytics software provider, merged with **Periscope Data**, a data visualization platform, with the goal of offering customers "a unified, end-to-end data science and business intelligence platform."

The future is data.

"Data companies and investors are looking to invest in companies that are generating valuable data around **usage patterns, customer behaviour, company information**.

The Gold Rush will continue till each and every data unit in the world is cultivated and is put to good use for **company/ industry optimization**. In the process we might shrink the overall economy of the world as all the wastage is a sizeable part of our world economy – but rest assured Data companies have only growth ahead of them"

Data | Marketing and Advertising

Data for Marketing & Advertising

Data and analytics is finally being valued and becoming mission critical: It is no longer "just another marketing tool" to have in the toolbox, but is key to a company's success.

With the market becoming more complex and customers demanding a personalized experience, data-driven marketing is the only way forward. As we head into 2020, marketers are more focused than ever on using **data-driven insights** to better understand their customers and boost their overall competitive advantage.

"People receive between **300 and 3,000 marketing messages** a day, but can only retain a maximum of three" … insights through real time and predictive data analytics is the only option for a marketer to succeed
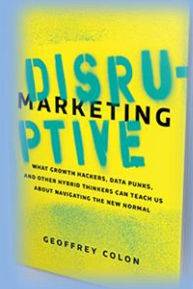
Data is the secret tool of all the Disrupters!

…a marketers mind craves data

- Sourcing the right technologies for data collection and analysis as it is the most useful tool in understanding her target customers

- Understanding customer interactions across all touchpoints

- Source cross-device ID as it is now a priority in each marketing organization

- Improving ROI measurability: #1 goal for a data management strategy

- Critical pieces of data, range from more transactional details to behavioural insights and trends. In marketers on-going quest to know customers better, brands are delving deeper: Through purchasing (47%), Browsing (31%), Histories down to devices used (30%), Social media habits (27%), Real-time geolocation (21%)

- Seek data to pinpoint the exact moment a message is most relevant to a consumer. Serving personalized content at the most relevant, receptive moment for that consumer, otherwise marketer is wasting resources and losing opportunities.

- Marketers can only personalize effectively if they know who their customers are – their information, behaviours and preferences. A CRM platform is critical in tracking and using this data.

… and thinks in terms of first party, second party and third party data

FIRST, SECOND, AND THIRD-PARTY DATA
(explained with cows)

You own a cow.

You know the cow's name.
You know what the cow eats.
You know where the cow sleeps.
You can do whatever you want
with your cow.

Delicious milkshakes for life!

Your friend owns some cows.

Your friend rents you their
cows for a fee.
You know the cow's name.
You know what the cow eats.
You know where the cow sleeps.

**You have to pay your friend
every time you need
some milk.**

**The village is full of people who
own, found, or bought cows.**

All of the cows are herded
together and processed into
many parts which they then
sell to you.

You don't know which part
came from which cow or if the
parts are actually even cow.

**You make a stew, serve it to
your friends and hope for
the best.**

First party data includes data from behaviour across your website or apps, such as subscription data or any data in your CRM. The major challenge here is scale and cost of maintenance.

Second party data is essentially someone else's first party data. Example would be targeting audiences on Facebook using their first party data like interest or demographic data or a CPG company swapping data with a food magazine publisher - both companies have the same audience, and it's mutually beneficial for them to expand their audience.

Third party data: You could simply buy a list online or harvesting cookie pools for targeting purposes and have access to new consumers. Marketer's dream, but there's relatively little competitive advantage here.

# ..and obviously even more Data deals in advertising world

The **$3.95bn** acquisition of data business **Epsilon** was completed by **Publicis Groupe**. The deal was multiple of 8.2 times the company's EBITDA based on 2018 figures. The company is a smorgasbord of data given it has more than **250 million U.S. consumers** in its database and sends over **71 billion** personalized emails each year.

IPG acquired Data Marketing Company, **Acxiom** for **$2.3 Billion**. Acxiom has a global repository of data that covers **65 percent of the world's population**. The data stack they claim to have built has been ethically sourced, meaning consumer consent has been taken.

Dentsu Aegis acquired **Merkle** in deal estimated at **$1.5 billion**. Merkle brings a powerful range of data led, fully addressable and real time capabilities. Dentsu Aegis Network later acquired majority stake in **Ugam**, a data and analytics company based in India.
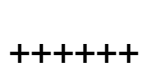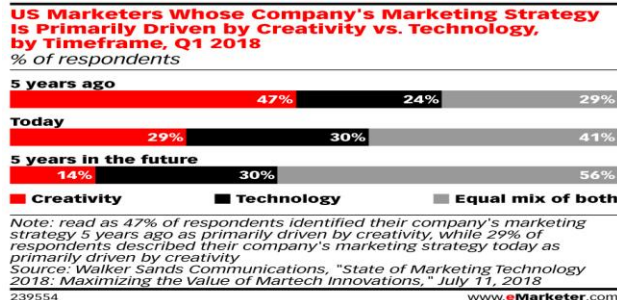
Jio ++ is ready!

While the traditional agency protocol in under a overhaul, Jio technology teams and data scientists are working hand-in-hand with agencies creative talent pool as a cohesive unit of "marketing engineers" to reinforce their **3Ps model—prediction, personalization and performance**—that are essential ingredients for campaign success in today's increasingly data-driven marketplace.

At Jio, we believe in **alchemy of creativity, data and technology** as the future of the advertising. We also believe that an overreliance on either side of the data or creativity proverbial coin is the quickest path to failure. Instead, both must learn to live harmoniously without one being sacrificed for or detracted from the other.
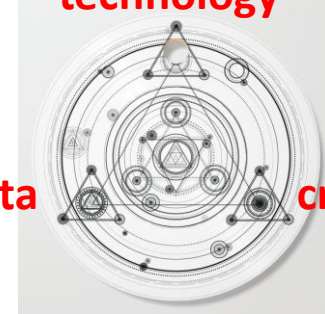

US Marketers Whose Company's Marketing Strategy Is Primarily Driven by Creativity vs. Technology, by Timeframe, Q1 2018
% of respondents

	Creativity	Technology	Equal mix of both
5 years ago	47%	24%	29%
Today	29%	30%	41%
5 years in the future	14%	30%	56%

Note: read as 47% of respondents identified their company's marketing strategy 5 years ago as primarily driven by creativity, while 29% of respondents described their company's marketing strategy today as primarily driven by creativity
Source: Walker Sands Communications, "State of Marketing Technology 2018: Maximizing the Value of Martech Innovations," July 11, 2018
239554   www.**eMarketer**.com

Alchemy

technology

data   creativity

Connect with Jio Advertising teams for <u>few</u>

Jio Advertising Case Studies:
Data + Technology + Creativity

" If we have data, let's look at data.
If all we have are opinions, let's go
with mine. "

Data – The Big Disrupter! Thank you!