



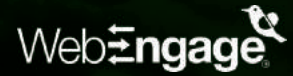
# India MarTech & CommerceTech Report 2024

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## Mihir Karkare

Managing Director, Mirum India

*mirum*

# Foreword

The MarTech landscape has undergone rapid evolution in recent years. Since our inaugural MarTech report in 2020, the industry has made significant strides amidst a world in transition.

In response to the evolving landscape, we have broadened our scope to include CommerceTech - a pivotal domain shaping the future of commerce across various industries. You will see an entire section dedicated to this in the current edition. This year's report also provides an insightful industry split, shedding light on the unique approaches taken by different industries as regards MarTech and CommerceTech.

A standout revelation from this year's findings is the widespread adoption of MarTech tools across companies of all sizes and industries. With over 60% of brands now extensively using these

tools in their organizations, and a staggering 95% planning to increase spending on MarTech tools, it is clear that the MarTech landscape has matured significantly.

The report also tries to look at the future. We have heard so much about GenAI in the past year. But are these technologies being used by organizations? And if so, how? You will find some insights on this as well. All through, the report is peppered with some thought-provoking interviews with industry leaders.

I invite you to read this report and contemplate what these trends mean for your industry, your organization and even your role therein. As always, we would love to hear what you think!





**Amit Gupta**

Managing Director, VML Commerce



# Foreword

In a 3.73 trillion-dollar economy like ours, where over 60% of the population owns a mobile phone, the digital landscape is ripe with opportunities. Research says that India boasts the third largest online shopper base globally, with 180-190 million shoppers in 2021. These staggering statistics underscore the undeniable importance of digital commerce in our nation's economy.

Today, the act of 'add to cart' has transcended mere convenience; it has become the cornerstone of modern commerce. This, corroborates with the data revealed in our latest report indicating CommerceTech has evolved beyond its roots in Ecommerce, emerging as a strategic growth driver for businesses across diverse industries. With 95% of respondents acknowledging its pivotal role, the potential of CommerceTech to revolutionize traditional business models is undeniable.

Another notable insight highlighted in the report is the ongoing experimentation with various technologies within the MarTech and CommerceTech cohorts. While Personalization and CDP technologies emerge as the most effective, with over 40% of brands confirming their effectiveness, conversational technologies such as Voice have also seen an upward trend since last year.

The report is filled with insights from different industries, how different roles perceive and respond to different facets of the ecosystem, and more. With some great conversations with some of the marketing leaders, alongside the quantitative research, the report attempts to capture this transition holistically.

I invite you all to explore the report further, you'll uncover a wealth of captivating insights.










# India MarTech & CommerceTech Report 2024

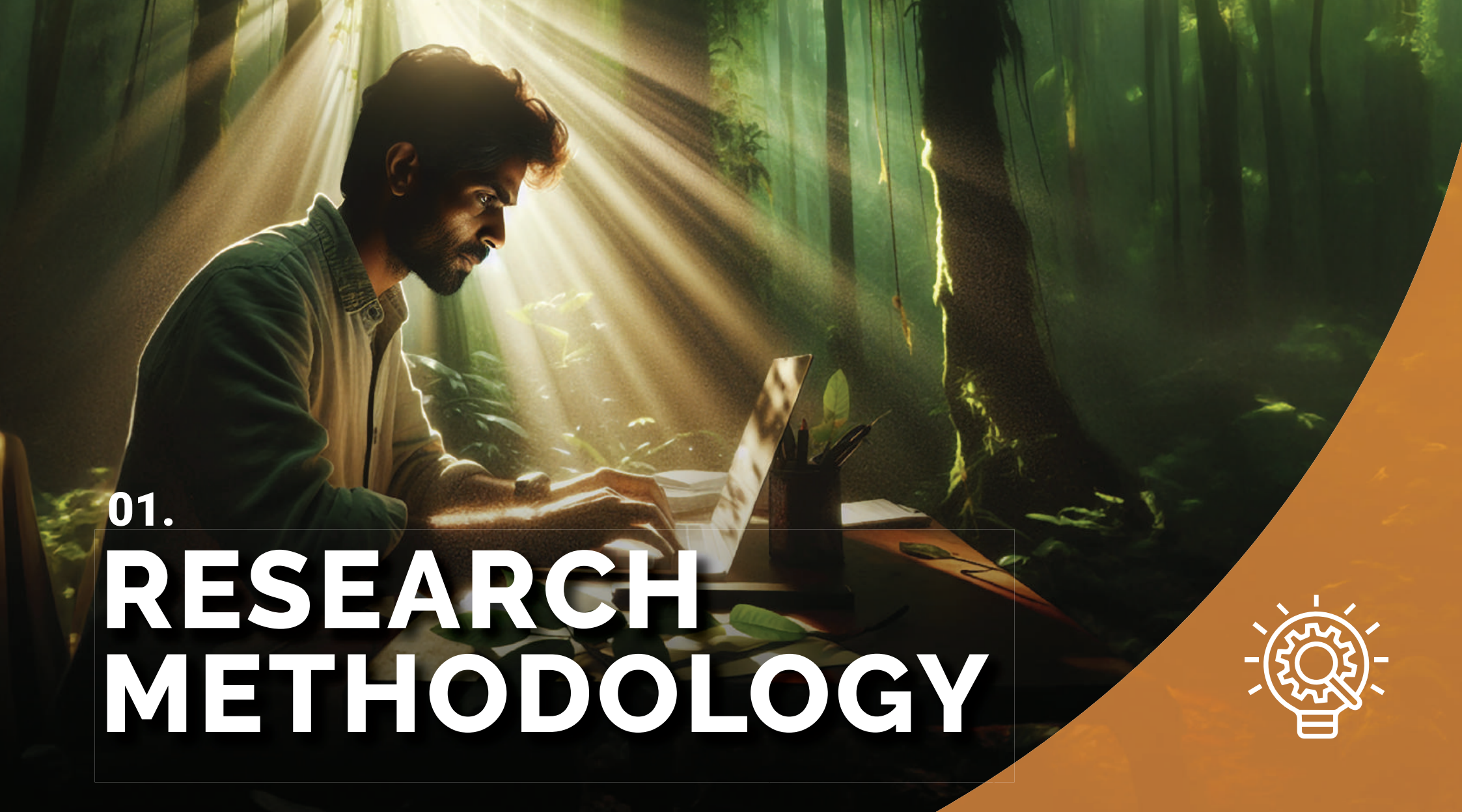
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# Contents



- 01  Research methodology
- 02  MarTech landscape
- 03  Objectives & challenges
- 04  Technology & team
- 05  CommerceTech landscape
- 06  Future outlook
- 07  About us



01.

# RESEARCH METHODOLOGY





## Research methodology



# Objective

To provide a comprehensive overview of the MarTech and CommerceTech landscape in India, encompassing its current state and anticipated evolution over the next three years. One of the observations from the previous edition was that online commerce was playing a significant role in organizations. This pushed us to expand the scope of the MarTech report to CommerceTech as well. The report connects insights from the previous editions to deliver an understanding on how the MarTech ecosystem is progressing. Through this analysis, our report aims to equip the MarTech ecosystem stakeholders with actionable insights to navigate the rapidly evolving MarTech and CommerceTech landscape effectively.

## Methodology

- Self-administered online survey
- Questionnaire purposive sampling methodology
- Duration of the survey: 6 mins

## Sample size

250+  
Sample coverage spread across India

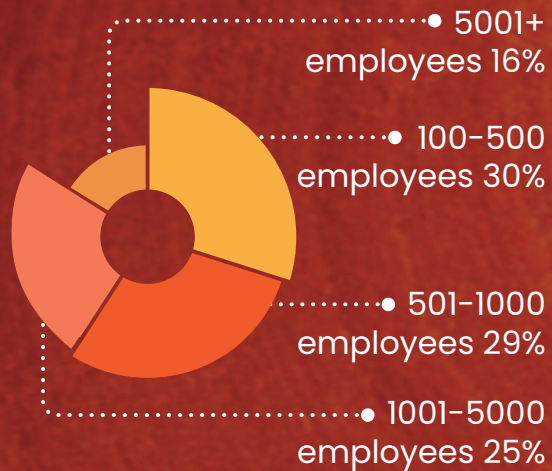
## Industries covered

BFSI, Education/EdTech, Retail, Ecommerce, Consumer Durables, FMCG, Food & Beverage/Food Tech, IT/Tech, Healthcare/Health Tech, Media & Entertainment, Automobile

Research methodology



# Profile - Who did we talk to?



Employee strength

Strong influence in the decision making process 6%

One of the key decision maker 27%

One of the key influencers 4%

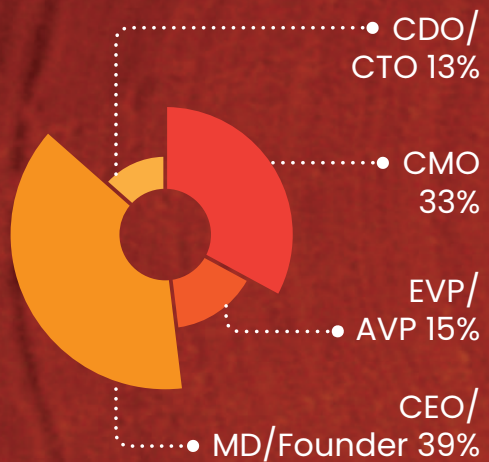
Main decision maker 63%



Role to decide MarTech

Q: How many number of employees do you have in your organization (India)?  
 Q: If your organization were to decide on 'the type of technology' to adopt for your enterprise, which of the following would best describe the role you will play?

## Research methodology

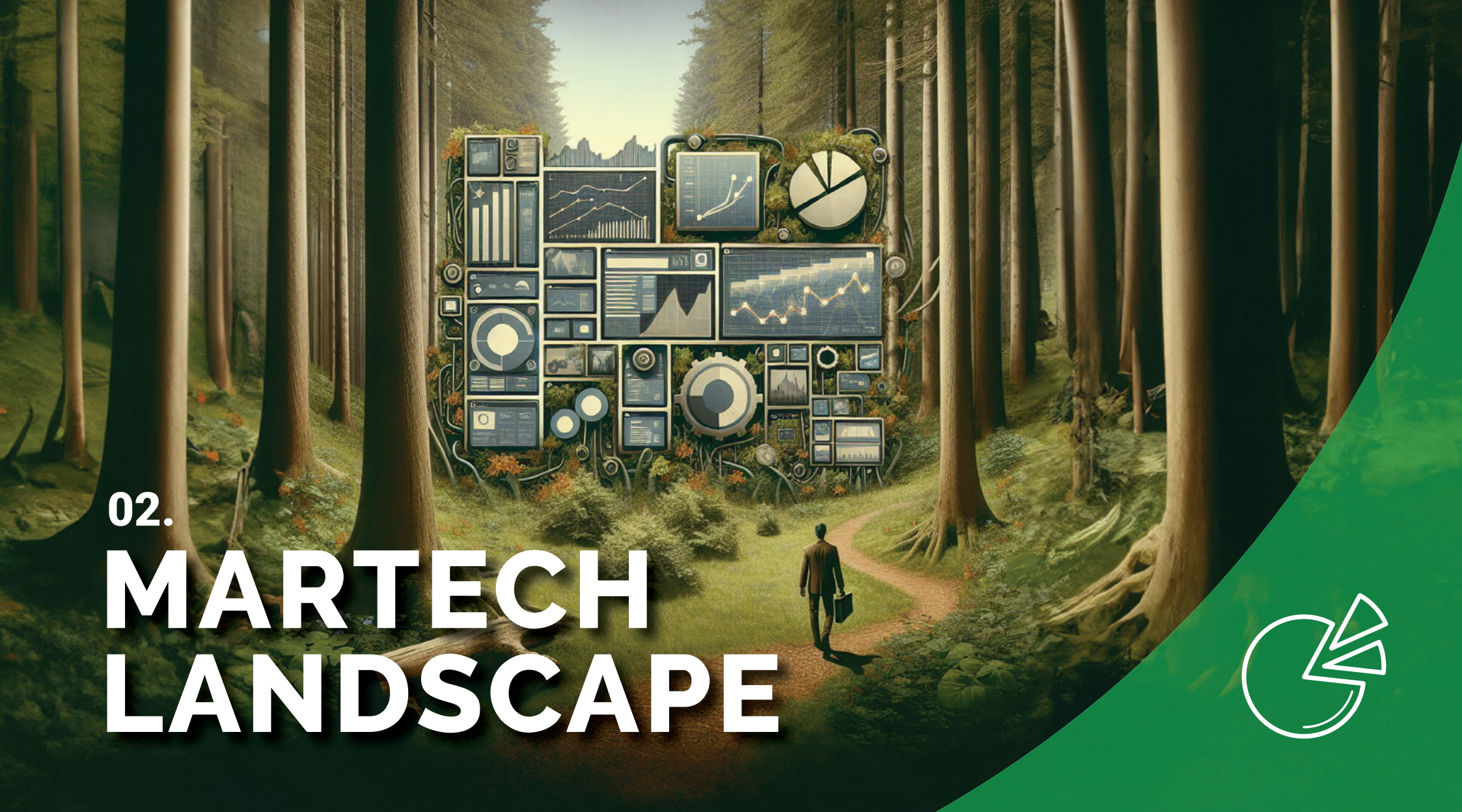


**Job title**

Industry	Respondents
Healthcare/Health Tech	11%
BFSI	9%
Consumer Durables	9%
Ecommerce	9%
Education/EdTech	9%
FMCG	9%
Food & Beverage/Food Tech	9%
IT/Tech	9%
Retail	9%
Media & Entertainment	9%
Automobile	8%

**Industry mix**

Q: Which is closest to your job title?  
 Q: Which industry best describes the nature of your business?



02.

# MARTECH LANDSCAPE





## MarTech landscape



Look at it from any lens, there are multiple proof points indicating MarTech has matured over the years



With 65%+ respondents spending over 16% of their marketing budgets on MarTech, as against 18% respondents doing the same in 2023, a strategic prioritization of MarTech seems to have happened across organizations and industries.

A clear indication that MarTech is no longer just a novelty - it's gone mainstream!

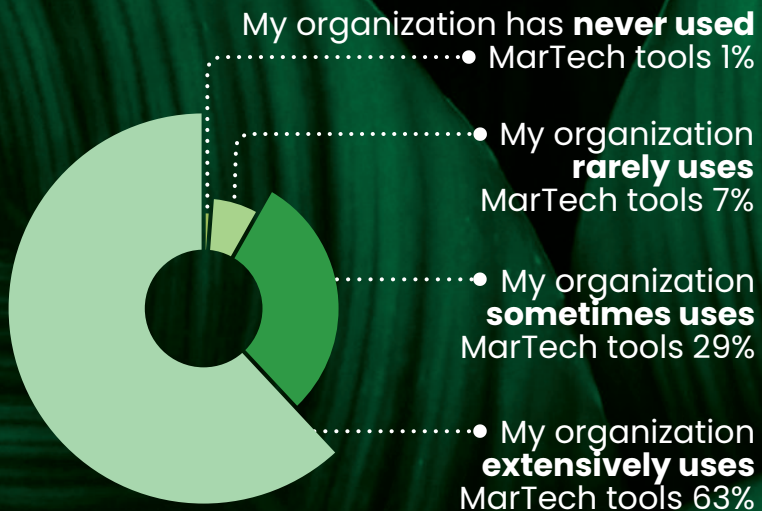
# Proof point 1: MarTech spending is poised to increase across company sizes and sectors, indicating MarTech as a high-priority growth area in the coming years



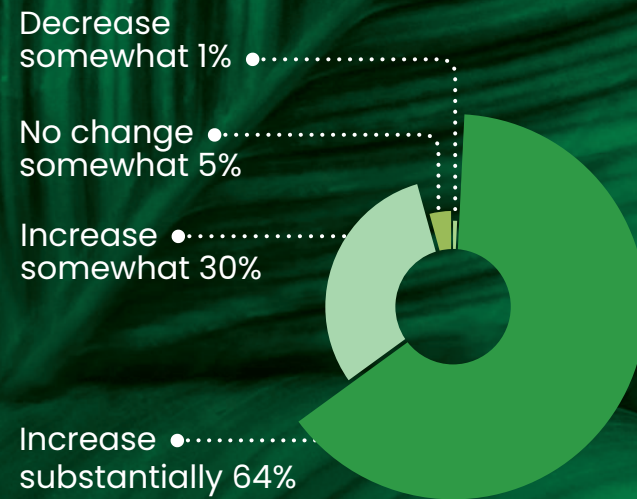
## MarTech landscape



63% respondents extensively use MarTech tools in their organizations, and a whopping 94% expect to increase their MarTech spends over the next 3 years.



Usage of MarTech tools



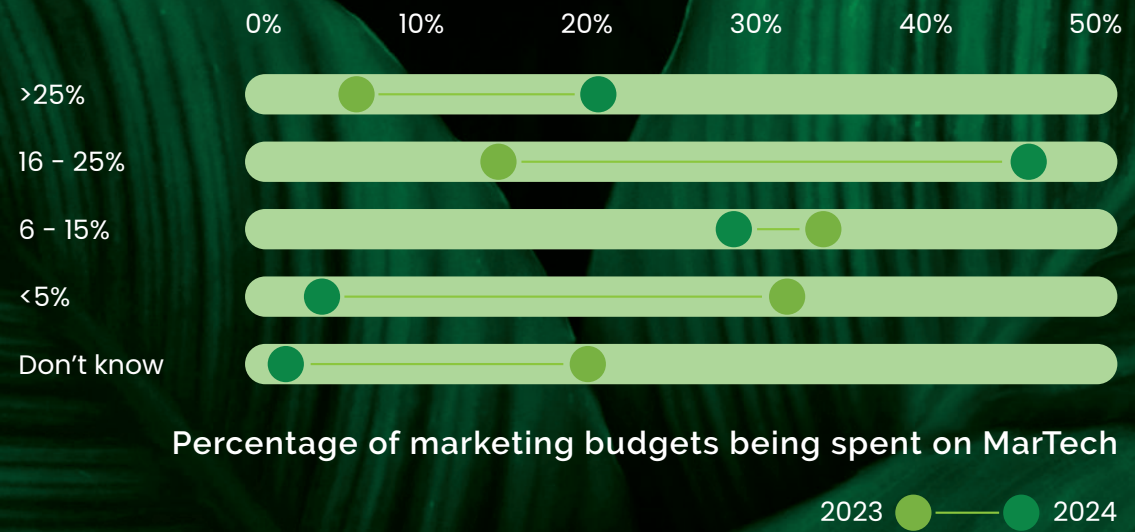
Change in MarTech spends over the next three years

Q: Which of the following best describes your organization's usage of MarTech?  
 Q: How do you expect spends on MarTech in your organization to change over the course of the next 3 years?



# Proof point 2: More respondents spending a larger part of their budget on MarTech indicates strategic prioritization of MarTech organization-wide

## MarTech landscape



65%+ respondents are seen spending over 16% of their marketing budgets on MarTech, as against 18% respondents in 2023.

Globally\*, MarTech spends are estimated to be 30% of the average marketing budget. While India still remains behind the global averages, the growth since last year indicates that the gap now seems to be diminishing.

\*Source: State of Martech and Marketing Operations 2023/24 By LXA Hub

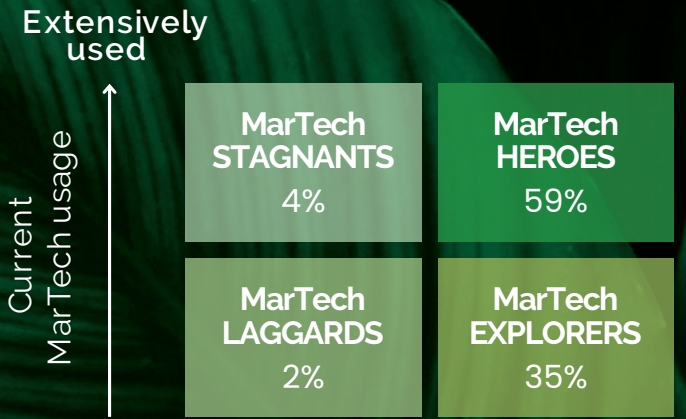


**MarTech landscape**



# Proof point 3: If we look at the Mirum MarTech Quadrant, MarTech HEROES and MarTech EXPLORERS constitute the vast majority of all the respondents

Given this trend, we might have to retire the Mirum MarTech Quadrant next year.



MarTech spends over the next 3 years

**Mirum MarTech Quadrant**

**MarTech HEROES**

These companies are extensive users of MarTech tools currently and will increase their spendings substantially in the next three years.

**MarTech STAGNANTS**

These companies are extensive users of MarTech tools currently, but their spends will either decrease or not change in the next three years.

**MarTech EXPLORERS**

These companies have sometimes, rarely or never used MarTech tool, but will increase their spending substantially or somewhat in the next three years.

**MarTech LAGGARDS**

These companies have sometimes, rarely or never used MarTech tool, but will either decrease or not change in the next three years.



A green-tinted illustration of a forest scene. In the foreground, a wooden bench sits on the left, a shopping cart on the right, a smartphone in the center, and a camera on the ground to the right. The background is a dense forest of tall trees with hanging moss.

"Understanding consumer needs & behaviour, crafting compelling value propositions, understanding & leveraging segmentation, and targeting & positioning, form the bedrock for creating successful and enduring marketing strategies."

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**Asha Kharga**

Chief Customer & Brand Officer  
Mahindra Group



## Amit Doshi

Chief Marketing Officer



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# In conversation

## Organizational approach to integrating different marketing technologies

Britannia focuses on three pivotal components within our marketing technology stack. Firstly, securing and intelligently managing consumer data in a manner that is intelligent to retrieve and build useful segments. Secondly, automation becomes the driving force, allowing the activation of these intelligent segments differentially. The third crucial element centres around social media automation, consolidating knowledge and actions amid the dynamic conversations fueled by agencies and consumers.

## Marketing budget spent on MarTech tools

I would say a small percentage, but it's a vital investment to be made. A lot of marketers look at marketing technology or automation costs as expenses, but I would argue and encourage them to

look at marketing technology and automation costs as investments to improve your overall productivity and outcomes. As far as Britannia is concerned, we are very focused on the areas in which we want to automate, where we want to build, and improve effectiveness and productivity. And we will continue to make choiceful investments as we go.

## Advice for businesses to create seamless omnichannel experiences that keep customers engaged across multiple touchpoints

What one needs to first do is with your product/service category you need to figure out what is the role of every channel in your shopper's life, why is it that these shoppers visit those specific channels with respect to their category and then you need to have a clear footprint for each of these channels, depending on the shoppers mission, what is the assortment you want to have in that environment, how do you want to

**"Testing new strategies and fostering a culture of continuous learning within the marketing team are essential for success in the marketing environment."**

activate, which brands or which SKUs will take the lead and finally you need to measure your return of investment as far as all of these channels are concerned. So omnichannel is nothing but managing the portfolio of channels to deliver great shopper outcomes, much like managing your product portfolio to deliver great and profitable consumer outcomes.

**Leveraging GenAI in marketing strategies, and its impact on customer engagement or other KPIs**

Britannia stands out as an early adopter and in incorporating GenAI into our marketing strategies. We have conducted several experiments to understand GenAI's impact on consumer engagement and production cost efficiency. The outcomes have been promising, with innovative social media content and enhanced cost efficiency in production. While it's acknowledged that we are in the early stages of exploring GenAI's potential, Britannia remains committed to continued experimentation, learning, and integrating successful practices into our marketing strategies.

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## Asha Kharga

Chief Customer & Brand Officer

**mahindra** *Rise*

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the full article



# In conversation

## MarTech budget allocation and future outlook

Currently, our MarTech expenditure is mapped to business outcomes, and we anticipate a potential increase to further enhance customer engagement. As we continue to see promising results, we are proactively aligning our budget to accommodate the growing importance of digital interactions with our customer base.

## Integrating sustainability and eco-friendly practices into marketing

At Mahindra, our marketing strategies are deeply ingrained in sustainability, reflecting our commitment to environmental responsibility. Across various sectors, from electric SUVs to eco-friendly buildings and renewable energy solutions, we prioritize offering consumers desirable products while staying committed to sustainability. Our approach involves integrating

sustainability seamlessly into product excellence.

## Ensuring data privacy compliance and building customer trust

We prioritize data privacy, fostering a culture that deeply values customer confidentiality. Our compliance strategy involves three key steps to build consumer trust:

**Obtain explicit consent:** Our processes under DPDP prioritizes explicit customer consent, emphasizing clear communication about data usage and providing customers the choice to opt-in or opt-out of marketing communications.

**Transparent data practices:** Across all business units, transparent data practices are maintained, outlining clear procedures for data collection, storage, and usage.

"Our marketing strategies are deeply rooted in sustainability, reflecting our commitment to environmental responsibility."

**Customer communication frequency guidelines:** Internally, we enforce policies for effective online customer relationships, limiting WhatsApp communications to once every two weeks. This approach has resulted in a remarkable unsubscribe rate of less than 0.01%, surpassing industry standards.

**What makes a better marketer - A person that has multiple skills or a marketer who brings expertise in one particular skill set**

Both types of marketers have their

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strengths, and the effectiveness of each depends on the context and objectives of the marketing efforts. A marketer with multiple skills can offer versatility and adaptability, with the ability to handle various aspects of marketing campaigns and strategies. On the other hand, a specialist with expertise in one particular skill set (e.g., SEO, content marketing, data analytics) can bring valuable insights to deal with challenges within that domain.



03.

# OBJECTIVES AND CHALLENGES





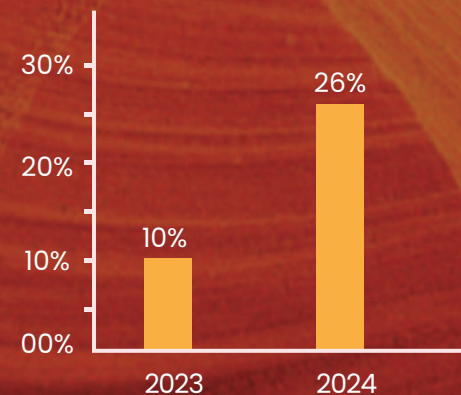
## Objectives & challenges



# 26% > 10%

While over 50% respondents confirm that their marketing strategy is driven by an equal mix of technology and creativity, it is interesting to note that this number was close to 70% last year.

**Technology, as an answer, seems to have made an upward shift by 16% as compared to last year.** Perhaps, technologies such as GenAI, that are known to make wonders using prompts have brought this change.



Marketing strategy driven by Technology

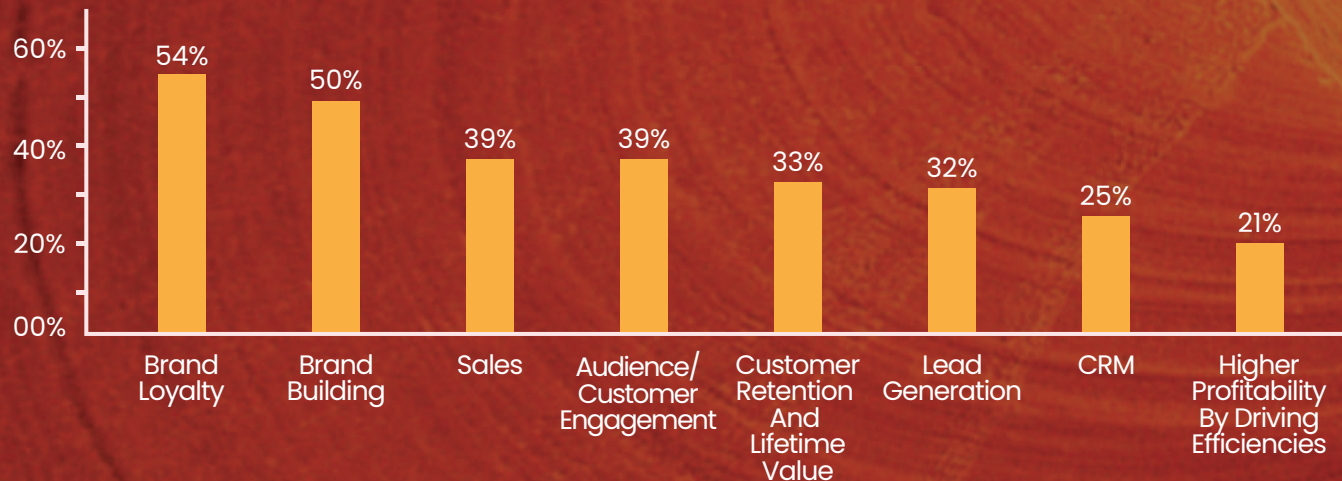


## Objectives & challenges



# Brand loyalty and brand building are the top business objectives to be achieved using MarTech


Over 50% of the brands looking at brand loyalty and brand building as the top objectives to be achieved using MarTech may be due to these objectives being closely mapped to the marketing leaders' KPIs.



Top business objectives to be achieved using MarTech

Q: Which are the top business objectives that you think you will achieve using MarTech in your organization over the course of next 3 years?



A surreal illustration of a jungle path. The scene is bathed in a warm, golden-brown light. In the foreground, a large, gnarled tree root lies across the path. To the left, a shopping cart is filled with various items, including a smartphone and a pair of headphones. To the right, another shopping cart is empty. In the center, a smartphone stands upright. The background is filled with tall, slender trees and dense foliage, creating a sense of depth and mystery.

"In today's marketing landscape, prioritizing brand loyalty has taken precedence, with customer retention serving as an essential building block. Engaging with customers through personalized experiences, AI driven data analytics, predictive segmentation and contextual engagement are the key steps in an impactful customer retention strategy. This is where MarTech assumes a pivotal role in enabling scalability."

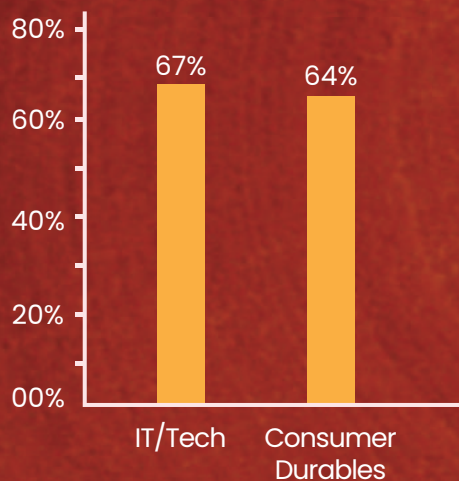
**Apoorv Sood**

Vice President of Global Business Development and Partnerships  
WebEngage

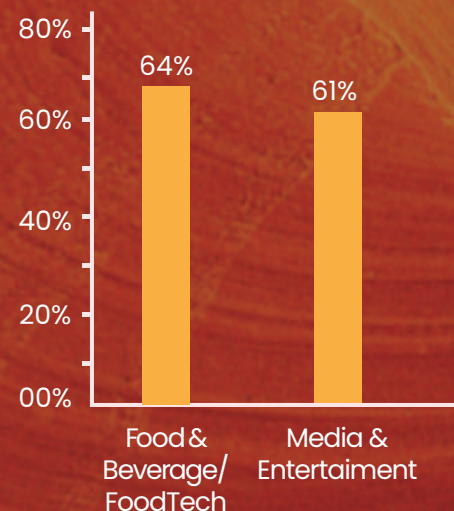
# Top business objectives differ on the basis of the nature of the business - whether it is transactional in nature or it thrives on a loyal customer base



## Objectives & challenges



Top two industries with Brand loyalty as the top objective to be achieved

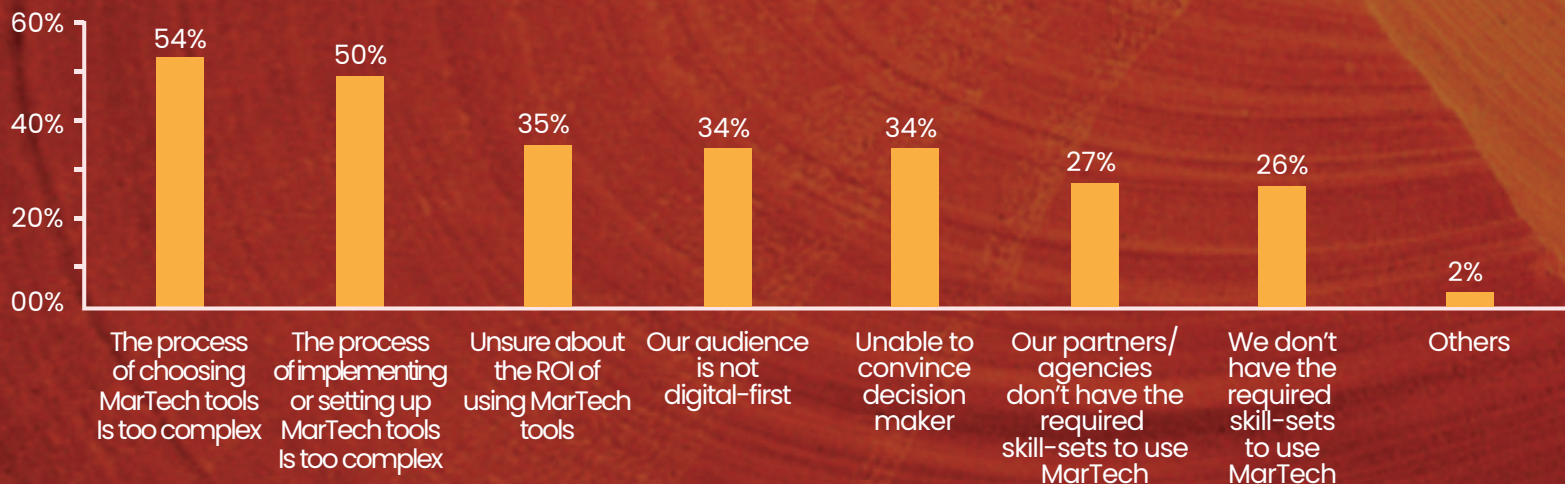


Top two industries with Sales as the top objective to be achieved

Q: Which are the top business objectives that you think you will achieve using MarTech in your organization over the course of next 3 years?

# Uncertainty about the ROI of using MarTech tools is no more the biggest hindrance in the adoption of MarTech. It is the process of choosing MarTech tools that brands find overwhelming

Over 50% brands find the process of choosing and implementing MarTech too complex. This was a trend that was observed with MarTech STAGNANTS and MarTech LAGGARDS last year. With the abundance of tools available in the market, it's time for the MarTech partners to step-up and simplify it for the customers as per their business need.



Biggest challenges in adopting/using MarTech tools

Q: What are your biggest challenges or hindrances when it comes to adopting/using MarTech tools?



## Objectives & challenges



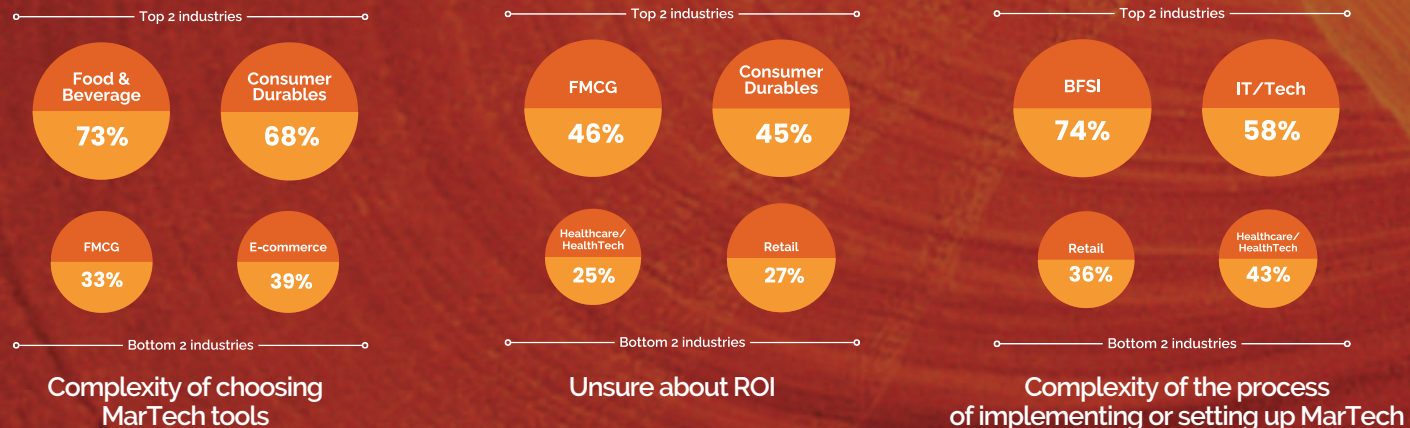
# Looking from an industry-wise lens, industries struggling to get PII might think differently

Interestingly, complexity of choosing MarTech tools is what FMCG industry finds the least challenging, with only 33% of respondents' hinting towards such a response. Whereas being unsure about the ROI of MarTech tools is the highest. Perhaps, difficulty of getting personal identifiable information (PII) could be one of the reasons for being unable to prove the ROI.

In terms of complexity of process of implementing MarTech and uncertainty about the ROI of MarTech tools, Healthcare/HealthTech and Retail rank the lowest. This puts these industries in a sweet spot.



## Objectives & challenges



## Biggest challenges in adopting/using MarTech tools - Industry view

Q: What are your biggest challenges or hindrances when it comes to adopting/using MarTech tools?



“Selecting the right MarTech platforms involves a customized approach, as there's no one-size-fits-all solution. Brands should begin with a thorough assessment of their current digital maturity, aligning business goals with the desired state.”

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**Kalpesh Patel**

Vice President - MarTech  
Mirum India



## Punit Dharamsi

Sr. VP Marketing & Investor Education



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# In conversation

## Experience of selecting, implementing, and utilizing MarTech platforms

Our experience with selecting, implementing, and using MarTech platforms reflects the dynamics of an arranged marriage. The initial decision-making phase is a brief window where compatibility is assessed, leading to a commitment that progresses rapidly. Once committed, implementation reflects the journey of making a marriage work, with aspects that seamlessly align and others requiring significant time and effort investment to meet objectives. Like any partnership, successful utilization of MarTech platforms requires dedication and mutual effort to achieve desired outcomes.

## Approach to MarTech integration and its impact

In keeping pace with the ever-evolving marketing technologies, AMFI prioritizes

staying informed through research, networking, and engaging with new partners in the industry. This approach ensures that we remain updated on the emerging platforms and applications. When integrating these technologies, we emphasize compatibility with existing systems, opting for cloud-based solutions that facilitate seamless communication through API integration.

However, the primary challenge lies in achieving smooth interoperability, given that these are the systems developed by different vendors using different technologies. Despite this hurdle, the integration process enhances efficiency, reducing both time and costs. The true value, however, lies in gaining a comprehensive understanding of consumer behaviour. By integration, we obtain a clearer view how our consumer responds to messaging, enabling us to refine our strategies and achieve a higher return on investment.

**“In the ever-evolving landscape of marketing technologies, staying informed through research and networking is key to our approach, ensuring we remain updated on emerging platforms and applications.”**

### **Overcoming internal hurdles in proving tech stack ROI**

Proving the ROI of our tech stack internally poses a common challenge for marketers, particularly in our case, where our focus is more on branding than performance campaigns. Convincing management requires utilizing various references, attribution models, and unconventional metrics alongside performance indicators. However, a positive shift is noted in management attitudes, with an increased acceptance of experimentation. This evolution allows us to navigate the challenge more effectively and underscores the

importance of adapting to the dynamic marketing landscape.

### **Integrating sustainability into AMFI's marketing landscape**

We recognize the environmental impact of our digital communications and are actively working to minimize our carbon footprint. We prioritize accuracy in messaging to reduce the need for repetitive emails and WhatsApp messages. While these efforts represent initial measures, we believe they contribute to making a positive impact in minimizing our ecological footprint.



## Babita Baruah

CEO, VML India



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# In conversation

## Impact of emerging technologies

There are so many trends right now from GenAI to trends in e-commerce and they are just a few, these capabilities are important but to me what's more important is business centricity. If we don't understand what the business problem is, what are we trying to solve, and therefore what technology can help us achieve that, we may propose technology-led solutions that may not be relevant for that problem or for that client's business. While being aware of technological capabilities is important, maintaining the focus on the client and business needs ensures relevance and effectiveness in marketing strategies.

## Crafting a marketing setup in the era of technological advancements

It has evolved, and it is still evolving, in fact, it's always been an evolving team mix over time and if I dial back from radio to television to the internet, we

have always seen these moves. The marketing team setup today revolves around a purpose-driven approach rather than a contractual arrangement with an agency. This setup entails pulling together a team with a diverse range of capabilities, including technology skills. At VML India, we have integrated capabilities from customer experience (CX), CRM, shopper, retail, digital and social capabilities with talent in business understanding and strategic planning. What binds this team together are shared organizational values, such as empathy and a focus on productivity through integrated solutions. Ultimately, a productive agency team comprises a balanced mix of capabilities, technology, and set of values.

## Opportunities and challenges in adopting AI-generated content

The widespread adoption of AI-generated content presents both opportunities and challenges. I feel there's a perception challenge



**"While technology is essential, it should be balanced with technological advancements and maintaining a people-centric and client-centric mindset."**

regarding AI's potential to replace creativity, it's more about complementing and enhancing creative outputs. Instead, it should be seen as a partner, augmenting creative processes. However, legal complexities surrounding ownership rights and usage rights remain a significant challenge. Once these are clarified, it can transition into an opportunity. However, as brand-specific AI solutions emerge, there's a potential for safer experimentation and broader adoption.

### **Marketing strategy is driven by - creativity or technology**

Both creativity and technology are important in marketing, akin to asking whether people are more critical than technology. I believe the initiative for a creative solution typically originates from a creative individual. However, it's crucial that creativity works closely in tandem with technology, such as GenAI. Embracing creativity is imperative for the future of any organization, but it must work in harmony with technology.

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04.

# TECHNOLOGY & TEAM





Technology  
& team



# 8 / 11 industries

utilise almost all technologies at least in some capacity

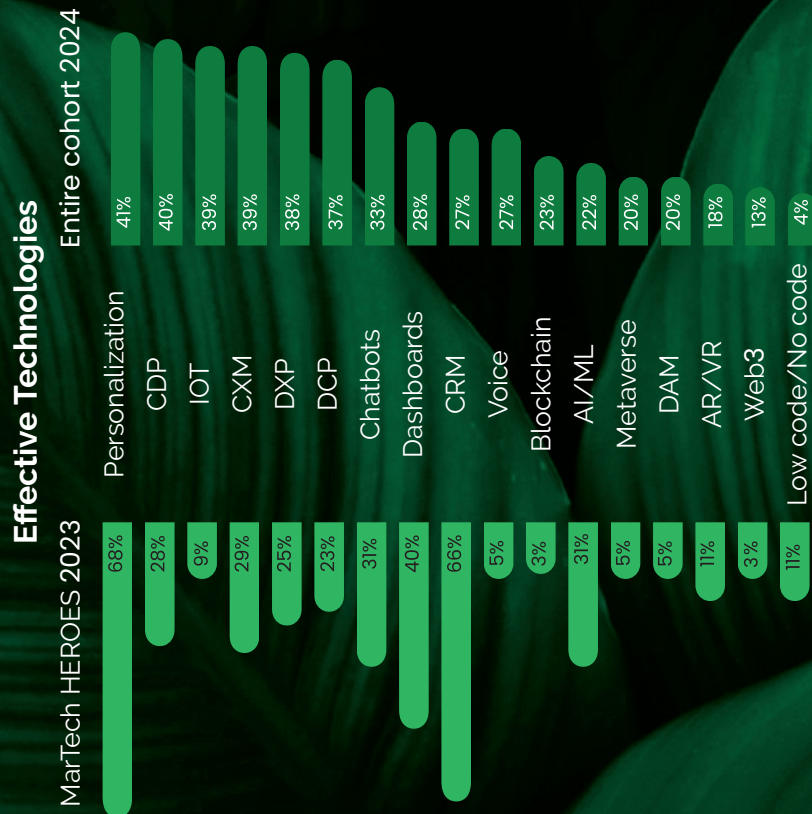
With MarTech HEROES and MarTech EXPLORERS being the dominant cohorts within the respondents, the trend of using a significantly wider range of technologies to drive effectiveness has spread across the entire respondent group.

Last year, this behaviour was only shown by MarTech Heroes.

# Personalization continues to be the most effective technology, next-gen platforms are gradually gaining visibility



## Technology & team



**Personalization and Customer data platforms rank the highest with over 40% respondents**, indicating the importance of using data to tailor experiences and offers to customers' preferences and contexts.

On the other hand, interactive technologies such as Voice, jump by double digits. Customer Experience Management platforms (39%), Digital Experience Platforms (38%), and Internet of Things (39%) are also rated very effective by over third of respondents.

Q: Which technologies do you feel are very effective in helping you achieve your marketing goals?

# Top effective technologies vary by industry



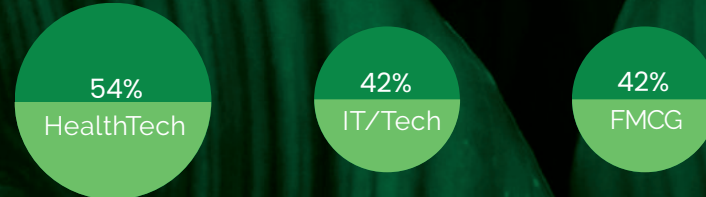
## Technology & team



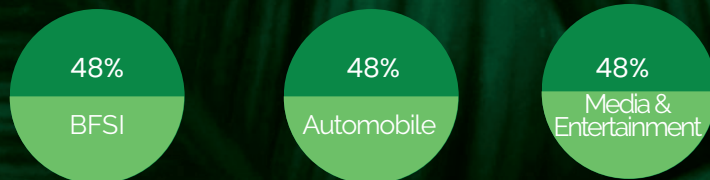
### Personalization



### CDP



### IOT



### Effective Technologies

Personalization is ranked very highly by BFSI (61%) and Retail (50%) respondents perhaps owing to the high value placed on customized offers and experiences.

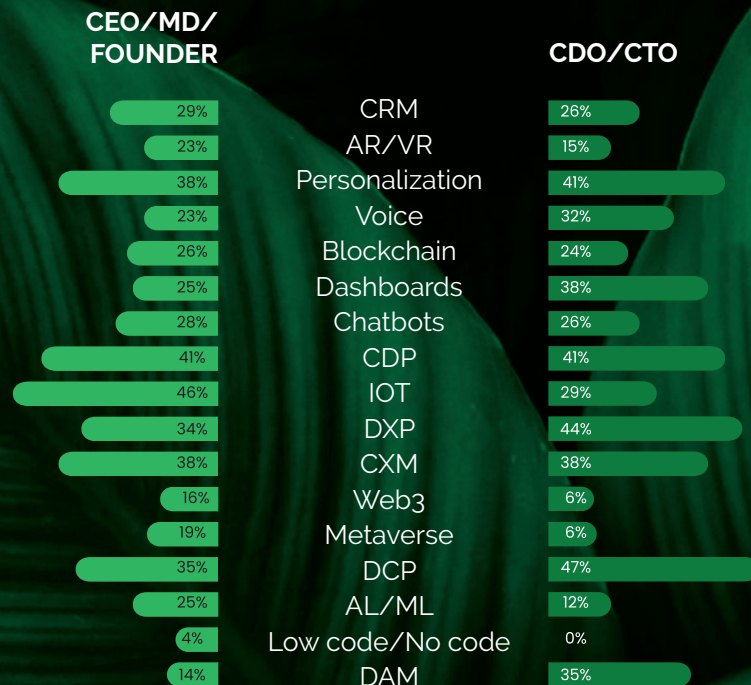
The ranking for CDP is highest in the Healthcare/HealthTech industry at 54% - possibly because it plays a vital role in eliminating data silos. This is followed by IT, FMCG and Edtech all three standing at 42%.

Perhaps because of connected experiences and automating of certain operations along with other benefits, IOT stands to be the most effective technology amongst BFSI, Automobile, and Media & Entertainment industries (each at 48%).

# The CDO/CTO cohort tends to differ from the CEO cohort when it comes to perceived effectiveness of certain technologies



## Technology & team



Effective technologies - CEO vs. CDO viewpoint

**CDOs/CTOs cite the effectiveness of Dashboards and DAM platforms at 38% and 35% respectively.**

The CEOs, however, differ significantly, with the corresponding percentages being only 25% and 14% respectively for these two technologies.

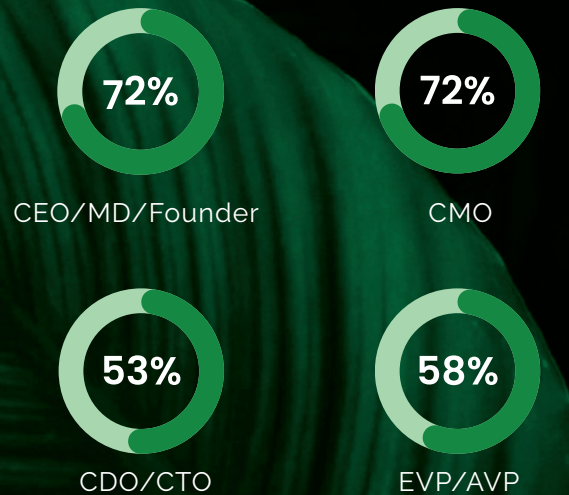
There seems to be some room for alignment between different executive roles, on the effectiveness of different technologies.

Q: Which technologies do you feel are very effective in helping you achieve your marketing goals?

# CEO, CMO are aligned on the approach for selecting marketing technology, while CDOs/CTOs think differently





## Technology & team



Role-wise approach for selecting marketing technologies

While 72% CEOs and CMOs prefer a MarTech tool that is a part of an integrated suite, this number is 53% for CDOs/CTOs.

This difference of opinion likely contributes to one of the key challenges in selecting MarTech tools identified earlier – complexity of choosing the right MarTech tools.

-  Prefer a MarTech tool that is part of an Integrated Suite
-  Prefer a MarTech tool that is Best-of-Breed

# Creativity, and Data & analytics take the top two positions when it comes to skills respondents look for in their teams, indicating these two skills go hand-in-hand; a good left and right brain balance



## Technology & team



### Preferred team skill sets

**Creativity (58%) and Data & analytics (50%) rank the highest in most important skills in MarTech teams.** This is a good combination to have in teams since Analytics empowers teams with data-driven insights that gives direction to creativity.

**Brand strategy (41%) and Social media (40%) are also rated highly,** suggesting MarTech teams emphasize on brand building - one of the top priority areas for organizations, as seen in the earlier sections.

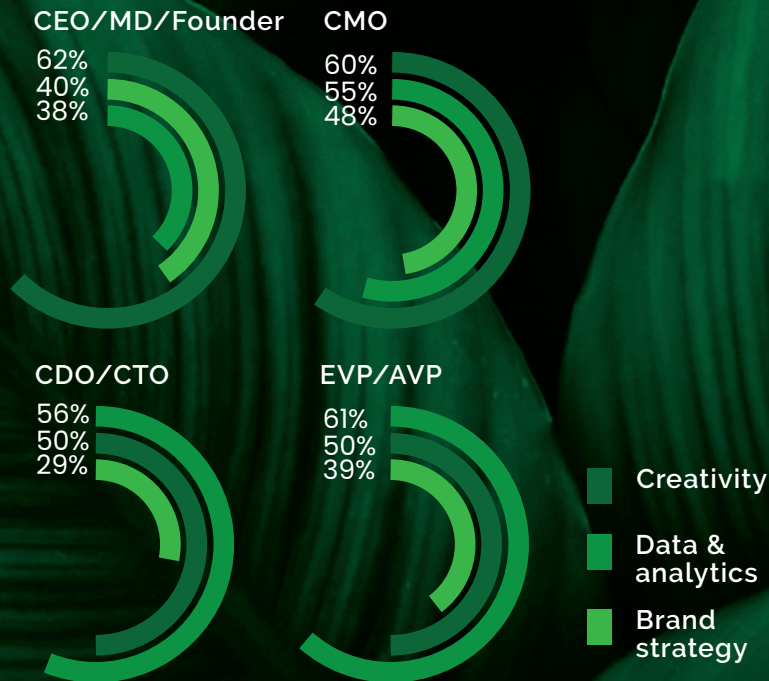
Q: Which are the top 3 skills you would look for in a new hire that joins your organization's MarTech/CommerceTech team?



# Different roles tend to emphasize on different skill sets required in the MarTech teams, implying how priorities differ between different executive roles



## Technology & team



Preferred skill sets - Role-wise preference

**CEOs (62%) and CMOs (60%) rate Creativity as a top skill**, indicating these strategic roles recognize creativity essential for developing breakthrough ideas and experiences critical for driving brand differentiation and growth.

Whereas, **EVPs/AVPs (61%) and CDOs/CTOs (56%) emphasize on Data & analytics**, suggesting these leaders rely heavily what are considered as traditionally 'left brain' skills.

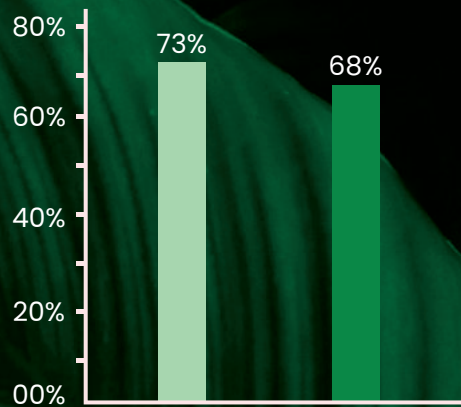
Brand strategy also remains a priority for CEOs and CMOs but not so much of emphasis is given by CDOs/CTOs.

Q: Which are the top 3 skills you would look for in a new hire that joins your organization's MarTech/CommerceTech team?

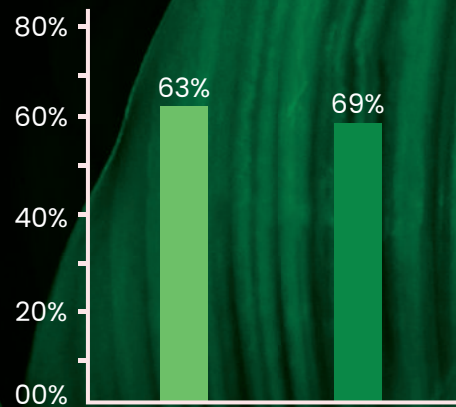
# Creativity and Data & analytics are neck and neck when it comes to desired skills



## Technology & team



Creativity



Data & analytics

Preferred team skill sets - Industry-wise view

Food & Beverage/FoodTech (73%) and Retail (68%) rate Creativity as a highly important skill to have in the MarTech team, implying consumer-focused industries require strong creative marketing capabilities to deliver innovation, that resonates emotionally with customers.

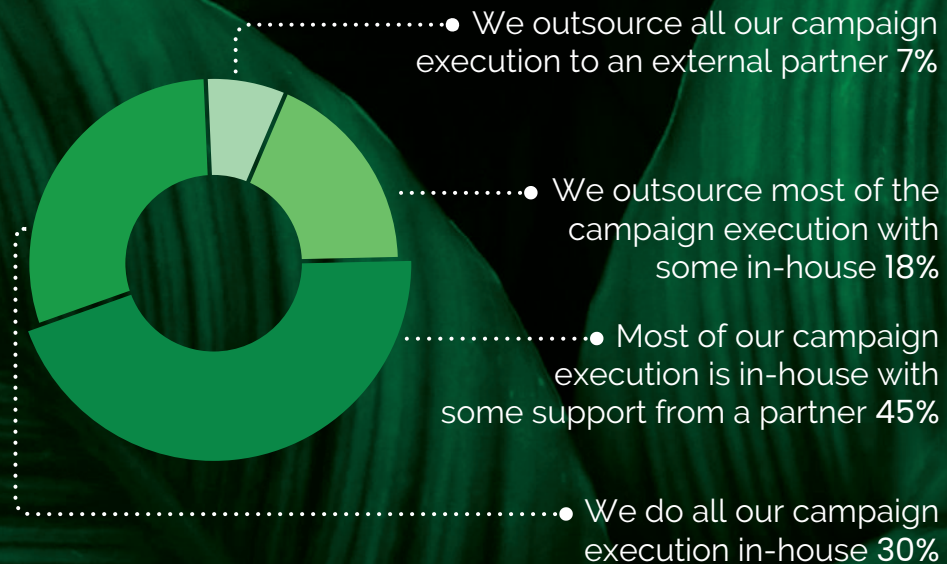
IT/Tech (63%) and Retail (59%) emphasize Data & analytics skills.

**With Retail being in the top for both Creativity, and Data & analytics, the industry seems to have found a strong left brain - right brain balance.**

# Most organizations rely on the external partners to bring in marketing expertise



## Technology & team



Marketing campaigns execution

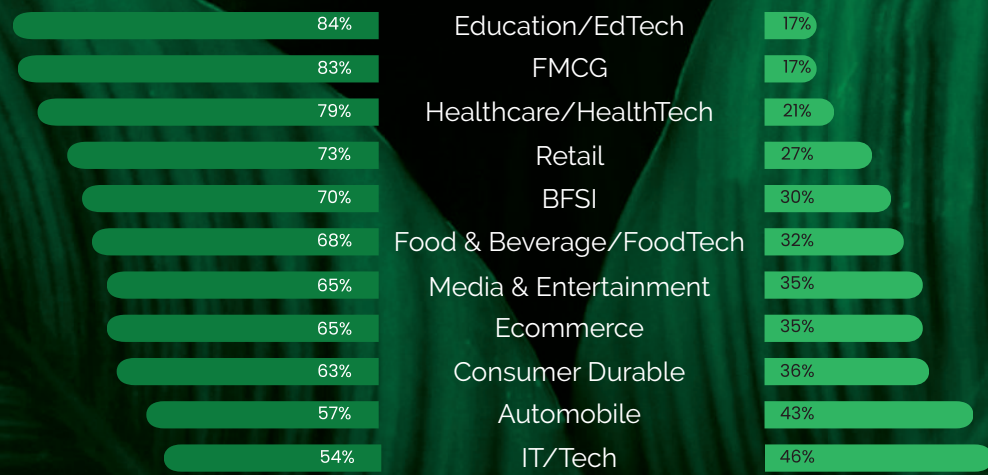
**7 out of 10 organizations work with external partners in some or all capacity,** underscoring the need to work with experts to achieve MarTech success.

Q: Which of the following best describes how your marketing campaigns are executed?

# Most industries outsource some or all of their campaign execution, so they can focus on their core product or service



## Technology & team



Outsource full or some campaign execution to partner

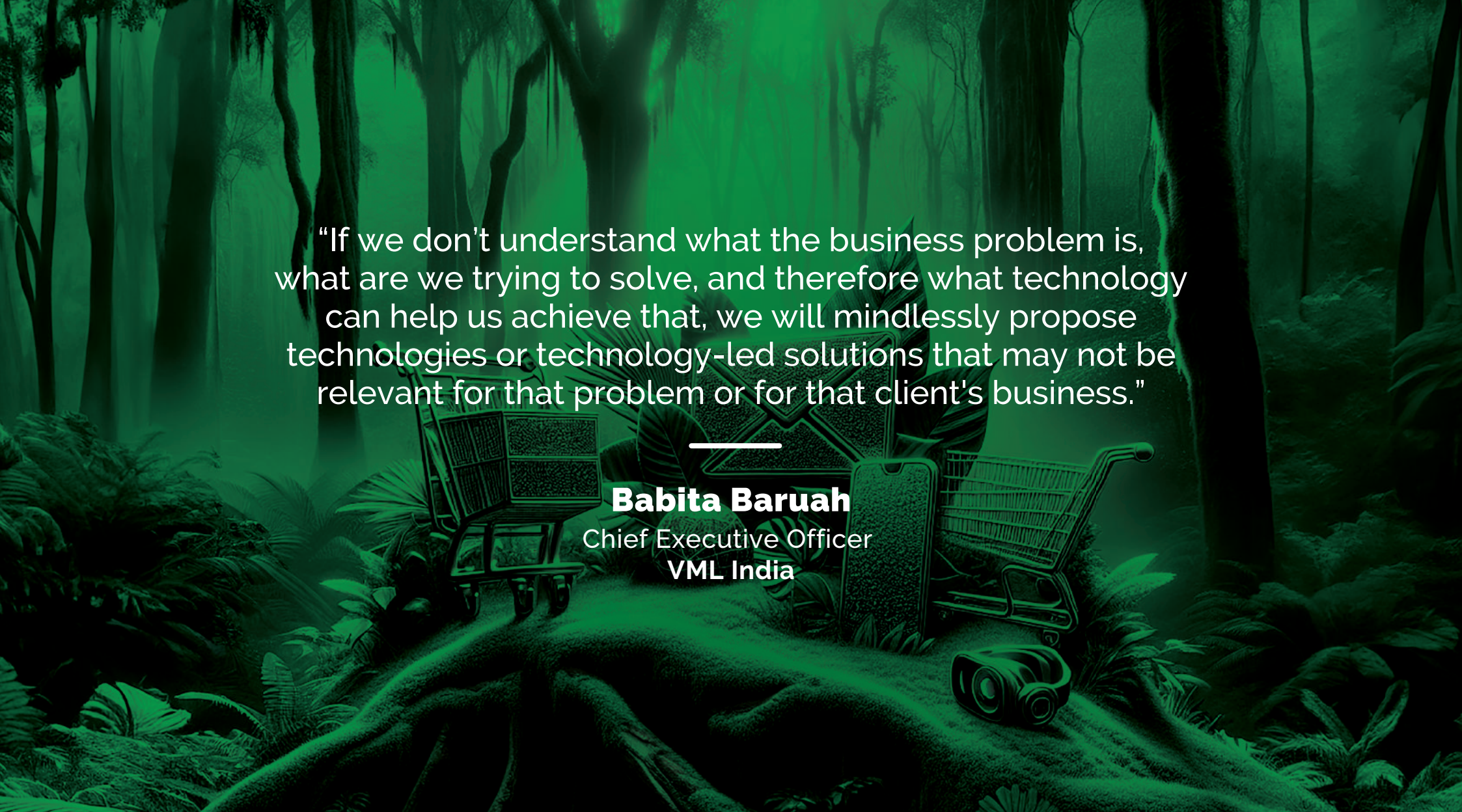
Most or all campaign execution in-house

### Marketing campaign execution

The majority of industries rely heavily on outsourcing MarTech execution, ranging from **54%** to as high as **84%**.

This indicates most sectors would rather concentrate on their core expertise and work with external partners to build great campaigns.

Sectors like EdTech (**84%**), FMCG (**83%**) and Healthcare/HealthTech (**79%**) lead the pack when it comes to working with external partners.

A green-tinted illustration of a forest scene. In the foreground, a wooden bench sits on a large tree stump. To the right, a shopping cart is positioned next to a smartphone and a camera. The background is filled with tall, thin trees and dense foliage, creating a misty atmosphere.

“If we don’t understand what the business problem is, what are we trying to solve, and therefore what technology can help us achieve that, we will mindlessly propose technologies or technology-led solutions that may not be relevant for that problem or for that client’s business.”

---

**Babita Baruah**

Chief Executive Officer  
VML India



## Avlesh Singh

Co-Founder & CEO



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# In conversation

## Seamless omnichannel experiences for sustained customer engagement

In today's consumer-centric landscape, regardless of whether a business is digital-first or traditional, customers interact across various touchpoints. However, these interactions often occur in silos, hindering a cohesive understanding of the customer journey. Our goal at WebEngage is to help organizations achieve true multi-channel engagement, where channels are seamlessly integrated. In essence, omnichannel engagement means prioritizing the customer journey over individual channels. By adopting this approach, businesses can leverage various channels interchangeably to enhance customer experience and drive ROI.

## Use data-driven personalization for retention, while balancing privacy concerns

Due to impending restrictions on

third-party cookies, the reliance on ad networks for revenue is diminishing in the evolving landscape. This shift challenges CMOs in their marketing strategies. The spotlight is now on first-party data, despite its complexity requiring alignment across tech, product, and leadership. As organizations pivot towards prioritizing first-party principles, adaptation becomes essential. While this transition poses challenges, it offers significant potential benefits. By embracing first-party data, companies can navigate the evolving marketing landscape more effectively and capitalize on opportunities for growth and enhanced customer engagement.

## Evolution of marketing technology in the next few years

The focus is shifting towards first-party data, which is expected to drive significant growth within organizations approach to data analysis and engagement.

**"Omnichannel  
engagement means  
prioritizing the customer  
journey over individual  
channels, enhancing the  
overall customer  
experience and driving  
ROI."**

Additionally, AI is set to revolutionize marketing teams' approach to data analysis and engagement. While challenges persist, frameworks and models are emerging to streamline processes and enhance efficiency. As AI solutions become more accessible, the manual and mental workload of marketing teams is expected to decrease, paving the way for more advanced and insightful engagement strategies. Overall, the convergence of AI-driven personalized engagement and precise first-party database targeting is anticipated to shape the future of marketing strategies.

### **Ensuring compliance with data privacy laws**

We've been serving a global clientele with WebEngage, ensuring compliance with laws like GDPR. With the arrival of the DPDP act in India, we're now focused on understanding our responsibilities as a data processor. Going forward, consent management will be key, empowering users to opt in and out seamlessly. At WebEngage, we're committed to building tools that not only comply with regulations but also assist our customers in collecting data responsibly. This is a significant focus area for us.



## Nawal Ahuja

Co-founder



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# In conversation

## Innovative strategies that you advocate for building customer loyalty and retention

Prioritizing long-term customer relationships is essential for business success, as loyal customers contribute to increased revenue, reduced acquisition costs, and serve as influential brand advocates. To achieve this, businesses need to shift their focus towards retention-based initiatives. This means investing in seamless customer experiences and actively working to understand and meet customer needs. Marketers prioritize personalization, community building, gamification for engagement, and proactive issue resolution. Co-creating with customers builds shared brand ownership, fostering deep loyalty and long-term benefits for businesses.

## Ensuring compliance with regulations such as GDPR or DIGITAL PERSONAL DATA PROTECTION (DPDP) act while still effectively utilizing customer data

## for personalized marketing effort

Business organizations now prioritize a delicate balance between personalized marketing efforts and respecting customer privacy rights. They view compliance with regulations like the GDPR and DPDP as table stakes. To ensure effective use of customer data, they develop and implement robust systems for obtaining explicit consent, conducting regular data audits, and maintaining secure data storage protocols. We need to embrace a user-centric approach, prioritizing customer needs within the bounds of their consent.

Our privacy policy should be accessible and transparent, clearly outlining how we collect and use data. Customers must be able to retain full control over their data, with easy options to update preferences, access personal information, or request deletion. Any updates to on data policies or potential security incidents should promptly be



**“Staying agile in the ever-evolving social media landscape requires a continuous learning mindset, data-driven strategies, and a culture of experimentation.”**

shared with one's audience. Through these efforts, we aim to nurture lasting relationships with customers who trust us with their data.

**If you could bring back one thing from the olden days of marketing, what would it be?**

If I could bring back one element from the golden days of marketing, it would be the emphasis on strong storytelling. In the past, marketers excelled at building compelling narratives that resonated with audiences on an emotional level.

---

This focus on storytelling is vital because it makes campaigns memorable, builds emotional connections between brands and consumers, encourages organic sharing, and ultimately contributes to building strong brand trust. Integrating storytelling into modern marketing involves strategies such as encouraging user-generated content, showcasing behind-the-scenes insights, utilizing visual and video elements, and highlighting customer successes through detailed case studies.



05.

# COMMERCE TECH LANDSCAPE





## CommerceTech landscape



# 95%

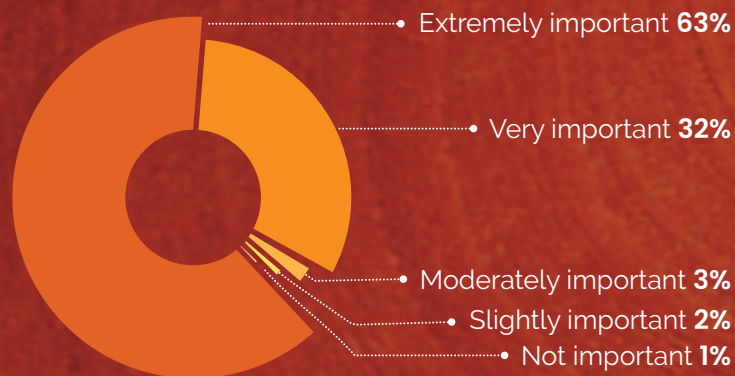
respondents view CommerceTech as a strategic growth driver

Look at it from any lens, there are multiple proof points that CommerceTech is no more strategically important just for the Ecommerce industry, it's now recognized as a pivotal lever for growth across sectors.

# Proof point 1: From a good-to-have capability to an indispensable growth engine, digital commerce is now a strategic growth driver for most organizations



## CommerceTech landscape



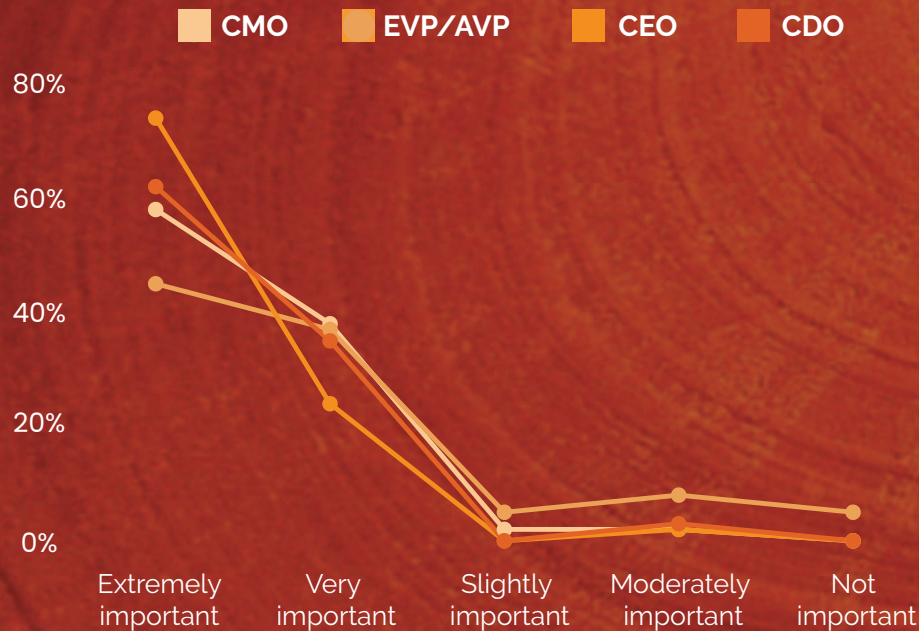
Importance of digital commerce as a strategic growth driver

**95% respondents view CommerceTech as a strategic growth driver** for their organizations, underscoring how CommerceTech has graduated from an optional capability to being an indispensable growth engine.

# Proof point 2: Almost all stakeholders across functions, view digital commerce as an important strategic growth driver



## CommerceTech landscape



Add the numbers any way, **all the organizational leaders find digital commerce an important strategic growth driver to their organizations, CEOs being the highest with a whopping 98% confirming it being either extremely important or very important.**

Role-wise perceived importance of digital commerce as a strategic growth driver

Q: How important is digital commerce as a strategic growth driver for your organization?

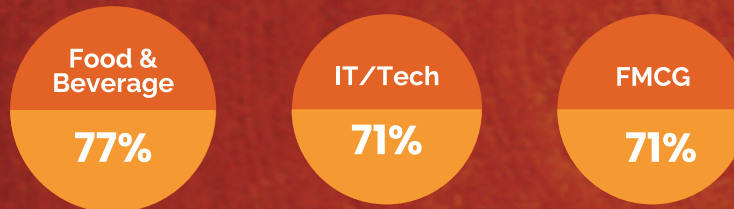
# While the importance is significant to most of the organizations, product-driven businesses are more aligned with digital commerce as a strategic growth driver



## CommerceTech landscape



### •..... Top 3 industries .....•



**Food & Beverage/FoodTech tops the list at 77%, followed by IT/Tech and FMCG, both at 71%.** This seems aligned to their product-driven business models which require robust ecommerce capabilities.

### •..... Bottom 3 industries .....•



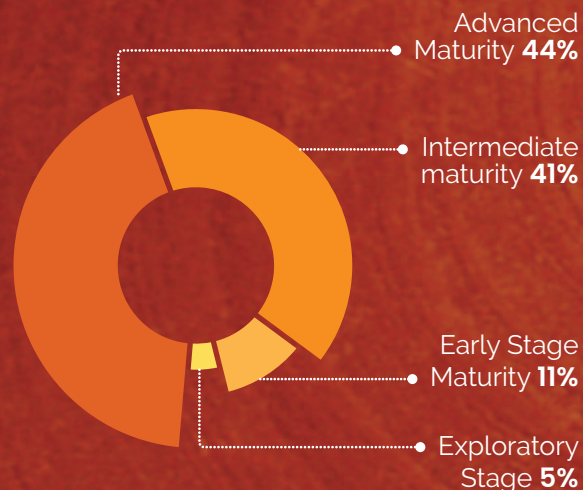
Meanwhile, industries dependent on in-person experiences like **Education/EdTech (46%), Healthcare/HealthTech (54%), and Retail (55%) are at the bottom three**, mostly because of the need to focus on physical channels.

Digital commerce is extremely important

# While important to most respondents, organization-level digital commerce capabilities are yet to evolve



## CommerceTech landscape



Organization's perceived level of digital commerce maturity

**44% respondents rate themselves at advanced maturity**, indicating nearly half see their capabilities as highly evolved.

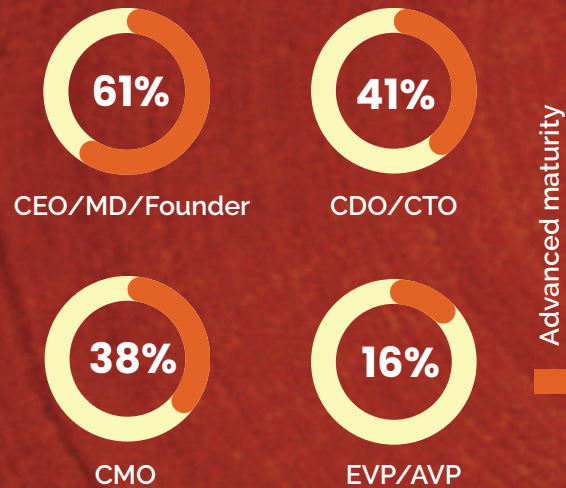
**41% respondents perceive their organization's digital commerce maturity at an intermediate level**, suggesting digital commerce initiatives are in place, but are still evolving.

Interestingly, none of the respondents reported having no initiatives at all.

# Most CEOs are much more likely to think that their organizations have more advanced maturity compared to CDOs and CMOs who still have a higher self-perception of advanced maturity compared to EVPs



## CommerceTech landscape



Organization's perceived level of digital commerce maturity - Leadership perspective

Over 60% CEOs perceive their organization to be at an advanced level of digital maturity – they perhaps have a broader view of the industry, and hence are able to place themselves better on a comparative scale.

With almost 40% CMOs and CDOs/CTOs confirming to advanced maturity, their seems alignment between these two roles, but there is some level of disconnect with the CEOs.

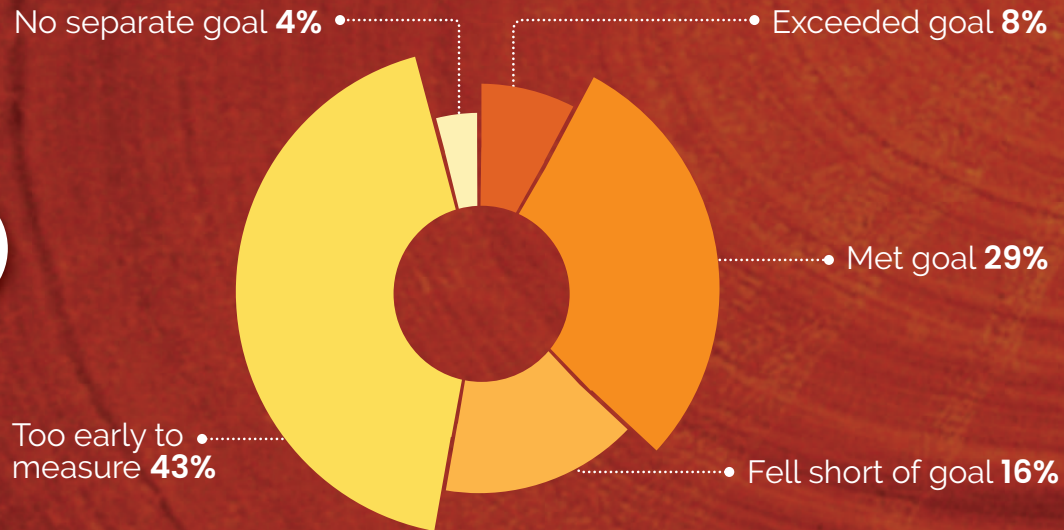
Interestingly, only 16% EVPs/AVPs see their organization at an advanced stage when it comes to digital commerce maturity, hinting they are more restricted to their immediate functional area.



# If we compare responses for digital maturity question and digital commerce performance, some level of dichotomy is evident – Is it misplaced optimism in the first part and do organizations need external experts to help them navigate this question effectively?



## CommerceTech landscape



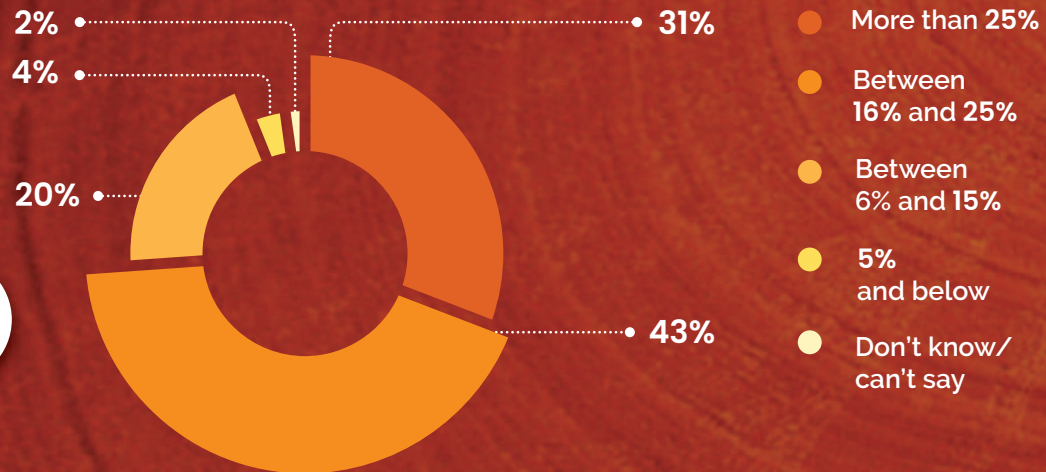
Organization's digital commerce performance

When asked about organizational digital commerce maturity, respondents seem to indicate their organizations are quite mature. However, **when asked about whether they're reaching goals, close to 45% say it's too early to measure while 16% said they fell short of goals** – In scenarios like these, there might be room for expert partners to help organizations effectively navigate these questions.

# More respondents deriving larger part of their revenue from CommerceTech indicates strategic organization-wide prioritization of CommerceTech capabilities



## CommerceTech landscape



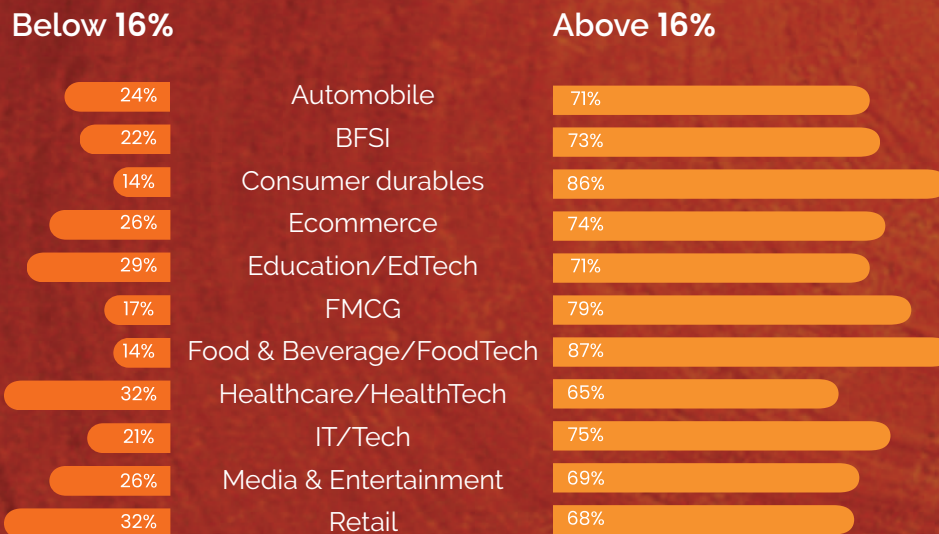
Overall revenue from online commerce channels

**7 out of 10 respondents deriving over 16% revenue from online commerce channels is indicative of how organizations are now focusing on newer methods.** However, 20% are still in early stages, with just 6-15% online revenue share, indicating significant improvement for growth.

# Data reveals some interesting industry dynamics in the proportion of revenues derived from online channels



## CommerceTech landscape



Overall revenue from online commerce channels - Industry view point

Looking at industry-wise data, the Food & Beverage/FoodTech and Consumer durables industries stand out with around 87% and 86% respondents respectively deriving over 16% revenue from online commerce channels.

On the contrary, Healthcare/HealthTech and Retail industries rank the lowest, with 32% respondents from these industries deriving less than 16% revenue from online commerce channels.

# When it comes to Go-to-Market (GTM) strategies, organizations take a blended approach across channels, with pure play marketplaces being the least preferred



## CommerceTech landscape



Go-to-Market approach to expedite online presence

**Direct-to-customer and social commerce are the leading GTM approach with 43% and 42% respectively**, indicating both organic branded and social commerce being the key strategies.

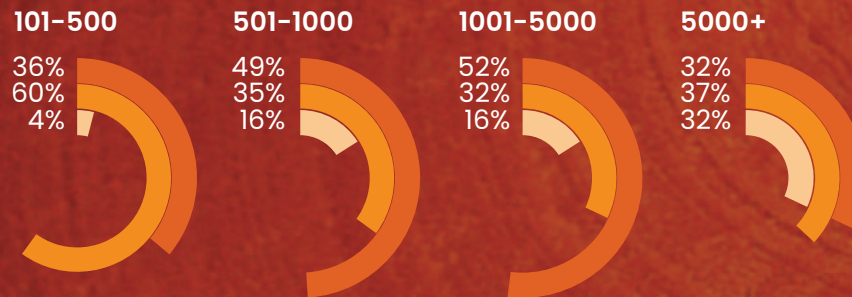
**Pure play marketplaces (15%) lag behind, indicating third-party platforms are not the dominant choice to enable online presence.**

Q: Which of the following Go-to-Market approach did you (or have plans to) take to expedite your online presence?

# Company size dictates optimal strategies for establishing online presence and sales channels, however, direct-to-customer stays vital across segments



## CommerceTech landscape



- Direct-to-customer/Business channel
- Social commerce
- Pure play marketplaces

Company (size) wise preferred Go-to-Market approach

Given the lower barriers to activate branded profiles and larger reach, **60% companies under 500 employees strongly favor social commerce**, versus building owned infrastructure. Social commerce is looking like a launchpad for majority of smaller organizations.

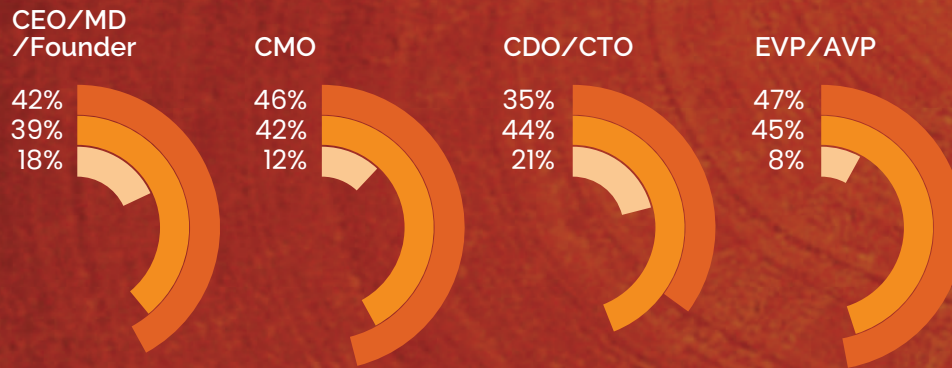
**Larger corporations over 5000 employees, since they have the tools and resources, seem to be strategically investing, with the split in all three channels being more than 30%.**

Q: Which of the following Go-to-Market approach did you (or have plans to) take to expedite your online presence?

# While pure play marketplaces is the less preferred GTM channel, CDOs seem to have shown considerable interest in driving their GTM approach through this channel



## CommerceTech landscape



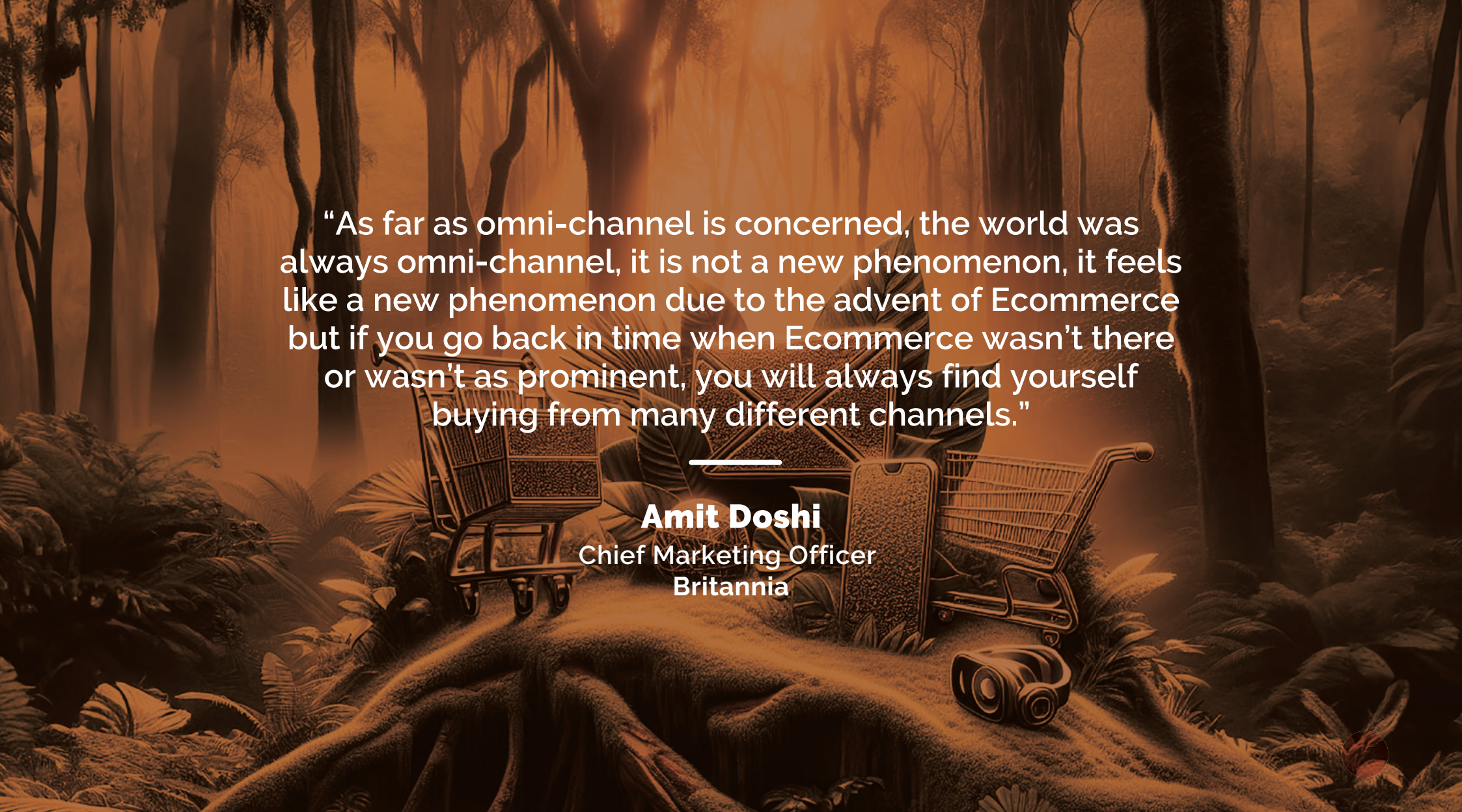
- Direct-to-customer/Business channel
- Social commerce
- Pure play marketplaces

Go-to-Market approach to expedite online presence - Role-wise preference

CDOs, at 21%, seem to be gradually investing in pure play marketplaces. They are also seen to be investing strategically in the other two channels, indicating a knack for experimenting and driving revenue through various online channels.

On the other hand, EVPs/AVPs, at 8%, seem to be the least focused on pure play marketplaces, followed by CMOs at 12%.

Q: Which of the following Go-to-Market approach did you (or have plans to) take to expedite your online presence?

A surreal illustration of a dense forest with large tree roots and various shopping carts and devices. The scene is bathed in a warm, golden light. In the foreground, a large tree root lies on the ground. To the left, a traditional wooden shopping cart is filled with small, dark items. In the center, a modern shopping cart is also filled with similar items. To the right, a modern shopping cart is empty. In the foreground, a pair of headphones lies on the ground. The background is filled with tall, thin trees and dense foliage.

“As far as omni-channel is concerned, the world was always omni-channel, it is not a new phenomenon, it feels like a new phenomenon due to the advent of Ecommerce but if you go back in time when Ecommerce wasn't there or wasn't as prominent, you will always find yourself buying from many different channels.”

---

**Amit Doshi**

Chief Marketing Officer  
Britannia



## Vishal Subharwal

Group Head Strategy & Chief Marketing Officer



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# In conversation

## Aligning technology and proactive communication for a unified omnichannel experience at HDFC Life

At HDFC Life, we prioritize delivering a seamless omnichannel experience for our customers. We recognize the importance of blending the physical and digital worlds to meet customer expectations. Despite organizational structures, customers expect consistent service across branches, websites, mobile apps, and partner platforms. Our approach involves leveraging technology to ensure information accessibility through various channels, be it our website, mobile app, or intermediary platforms like banks and agents. From a marketing perspective, we focus on unifying customer data and making it available through a centralized platform for effective customer relationship management. Proactive communication plays a pivotal role in orchestrating this omnichannel experience, emphasizing our commitment to meeting customer needs across different touchpoints.

## Emerging trends in CommerceTech marketing that you find interesting, and plans to incorporate these trends into future marketing strategies

I can potentially call it a trend but the move towards data privacy and the cookie-less world is set to alter marketing practices significantly. As a result, the importance of first-party data will increase notably. This means having your own data platform and gathering consumer data from various sources. Using this data to gain unique consumer insights will give you an edge over competitors. Incorporating these insights into marketing campaigns, including creative and brand initiatives, as well as performance marketing efforts, will become crucial at different stages of the marketing funnel. While these changes will transform marketing, fundamental principles like brand awareness and providing excellent



**"The holy grail of marketing lies in achieving a personalized approach at an individual level."**

customer experiences will remain essential. However, adhering to data privacy regulations will become increasingly important for organizations of all sizes worldwide in the future.

#### **GenAI: Early explorations and future paths in marketing**

HDFC Life is exploring the integration of GenAI in marketing strategies. Currently, we utilise AI and machine learning algorithms in performance marketing. However, building a robust Gen AI platform is going to take some time and effort, and the technology is still in its

early stages. While we haven't observed significant impact on key performance indicators (KPIs) yet, we are experimenting with Gen AI applications.

One area of focus is enhancing information accessibility for our insurance products using Gen AI. Internally, it functions like a ChatGPT, providing accurate responses to queries. Extending this capability to external customers requires time, effort, and adherence to emerging regulations as discussions about AI regulation are underway.

---



**Jon Lee**

CEO, VML Tech & Commerce India



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## In conversation

### **VML's integration of eco-friendly practices in CommerceTech and marketing**

At VML, we prioritize sustainability throughout our CommerceTech and marketing strategies by integrating sustainable practices into our processes and service offerings. We leverage automation to reduce compute power usage and utilize cloud technology to minimize on-site compute power. Our dedicated team is committed to implementing sustainable practices at every level of our operations.

### **VML's strategic implementation of GenAI and measuring impact on customer engagement and key performance indicators**

GenAI is revolutionizing our marketing strategies by enabling content creation at scale and delivering it to our customers efficiently.

At VML, we leverage GenAI to achieve unprecedented results in content generation and delivery. This has opened new possibilities that were previously unattainable, showcasing the transformative impact of AI in our marketing strategies.

### **More important when it comes to marketing - creativity or technology and why**

Both creativity and technology are important in marketing. Creativity is essential for unlocking the full potential of technology, whether in creative branding or technical delivery. The collaboration of creativity and technology results in a more impactful and visible consumer experience. Without technology, creative ideas cannot be effectively delivered to the audience.

**“At VML, our top tools in the MarTech and CommerceTech stack revolve around automation and personalization, leveraging best-in-breed solutions for seamless marketing and commerce experiences.”**

### **Role of modern marketer in recent years**

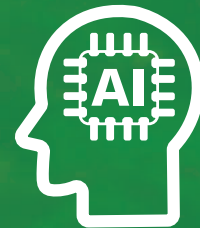
The role of the modern marketer has evolved significantly in recent years, with an increase in technical proficiency. Unlike in the past, relying solely on offline techniques is no longer viable. Today's marketers are compelled to integrate technology comprehensively into their strategies, aligning with the widespread impact of technology on consumers' lives.

### **MarTech and CommerceTech tools enhancing client excellence and business advancement**

Our selection of tools to address a particular aspect is primarily driven by our clients' specific goals. When we opt for top-tier solutions, we rely on our trusted automation partner. Leveraging their capabilities enables us to seamlessly integrate marketing and commerce efforts, providing comprehensive end-to-end solutions for our clients.

06.

# FUTURE OUTLOOK





## Future outlook



Close to

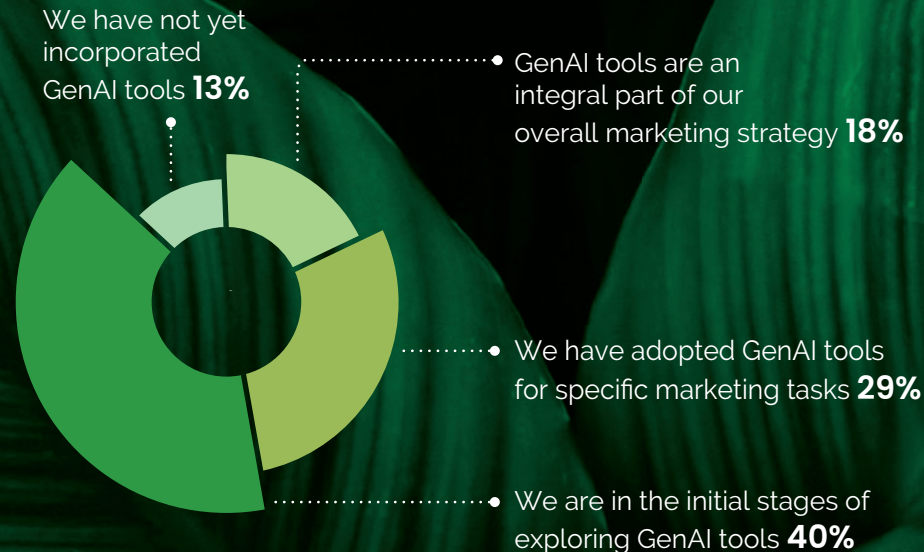
# 50%

respondents use GenAI in some or full capacity, indicating GenAI is seen as a pivotal tool in organizations growth journey

# GenAI sees gradual adoption with close to 20% respondents considering it integral to their overall marketing strategy



## Future outlook



Current usage of GenAI tools

While 1/5<sup>th</sup> respondents have already fully adopted GenAI, a substantial chunk of **close to 70% are still either exploring GenAI capabilities or have adopted it for specific marketing tasks.**

This suggests many are still educating themselves and experimenting to identify potential applications. What this means is - there is potential now to build fully integrated plans that leverage GenAI capabilities for maximum impact.

Q. Which of the following best describes your current usage of GenAI tools in your marketing technology stack?

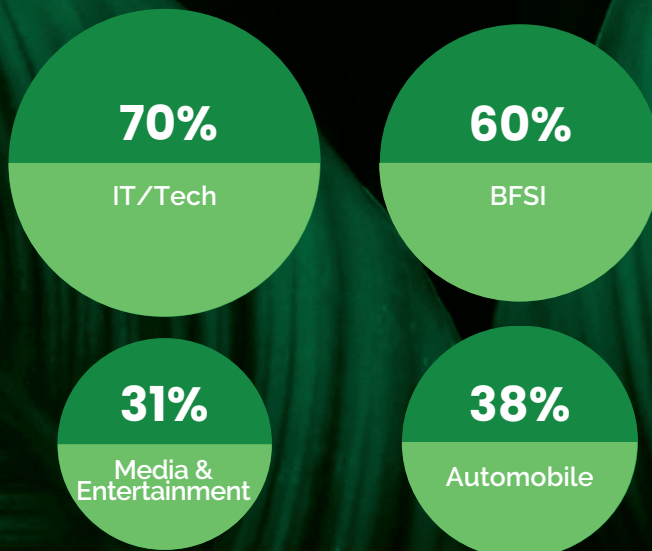
# Industries inherently comfortable with cutting-edge technologies are moving quickly to implement GenAI



## Future outlook



•..... Top 2 industries .....•



•..... Bottom 2 industries .....•

Current usage of GenAI tools - industry-wise view

The IT/Tech industry leads in the adoption of GenAI tools with close to **70%** respondents confirming its usage either for specific tasks or in full capacity. Interestingly, with over 60% respondents using GenAI tools, the BFSI industry is also moving quickly up the GenAI curve.

In contrast, Media & Entertainment is at the bottom of the curve, with only 31% respondents using GenAI tools, followed by Automobile industry, with the usage at 38%, implying a slower pace of adoption. It seems these industries also have some catching up to do.

Q: Which of the following best describes your current usage of GenAI tools in your marketing technology stack?

# Large organizations are most likely to consider GenAI integral to their marketing strategy, indicating they have the scale, resources and appetite to pursue full strategic adoption and gain a first-mover advantage



## Future outlook



<100  
employee size



● Use GenAI either for specific marketing tasks or in full capacity

5000+  
employee size



● Not yet incorporated GenAI tools or are in initial phase

### Current usage of GenAI tools as per company size

Enterprises lead in GenAI adoption with over **65%** respondents using GenAI in either specific marketing tasks or in full capacity, versus smaller companies, with only **30%** confirming to have adopted GenAI in some or full capacity.

This stark difference implies larger companies have greater resources, talent, and appetite to pursue full strategic GenAI adoption to leverage GenAI holistically.

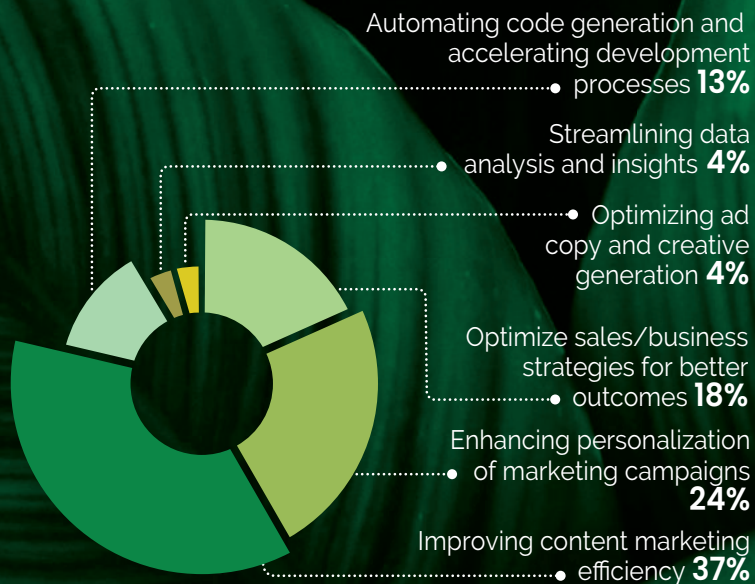
Q: Which of the following best describes your current usage of GenAI tools in your marketing technology stack?



# GenAI is much more than a tool to 'improve content marketing efficiency', but the use-cases are not very popular, thanks to conversational prompt-based content generation tools that gained fame overnight



## Future outlook



Primary reason for adopting GenAI

For over 35% respondents, improving content marketing efficiency is the most sought-after reason for adopting GenAI tools. Prompt-based AI tools gaining popularity in the GenAI industry could be the reason for more organizations trying out what's trending.

Q: What will be the organizations primary reason for considering or adopting GenAI tools in your MarTech strategy?

# While BFSI leads GenAI adoption for content marketing, it's the Ecommerce and Retail industries that seem to be making more strategic, long-term investments in GenAI tools



## Future outlook



Primary reason for adopting GenAI - industry-wise view

- Optimize Sales/business strategies for better outcomes
- Improving content marketing efficiency
- Optimizing ad copy & creative generation
- Enhancing personalization of marketing campaigns
- Automating code generation & accelerating development processes
- Streamlining data analysis & insights

With 57% respondents, BFSI seems to be heavily focused on improving content efficiency using GenAI tools.

On the flipside, the Ecommerce industry seems to be more focused on automating code generation, with 30% respondents prioritizing this driver. They also seem to be sensibly focused on optimizing sales/business strategies as well as enhancing personalized campaigns.

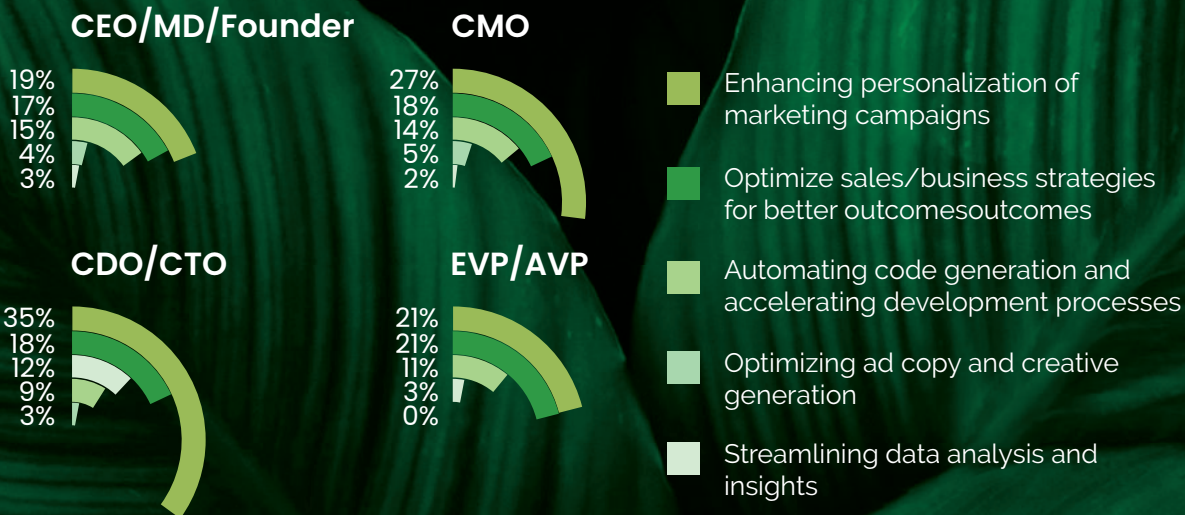
Retail industry shows a similar trend with an equal focus on enhancing personalization campaigns and optimizing sales/business strategies followed by 18% respondents prioritizing improving content marketing. It seems, these two industries have realized the benefits that GenAI brings to the table and have begin strategically moving in the direction.

Q: What will be the organization's primary reason for considering or adopting GenAI tools in your MarTech strategy?

# While content marketing efficiency remains popular across roles, CDOs/CTOs have more preference for use-cases beyond content marketing efficiency



## Future outlook



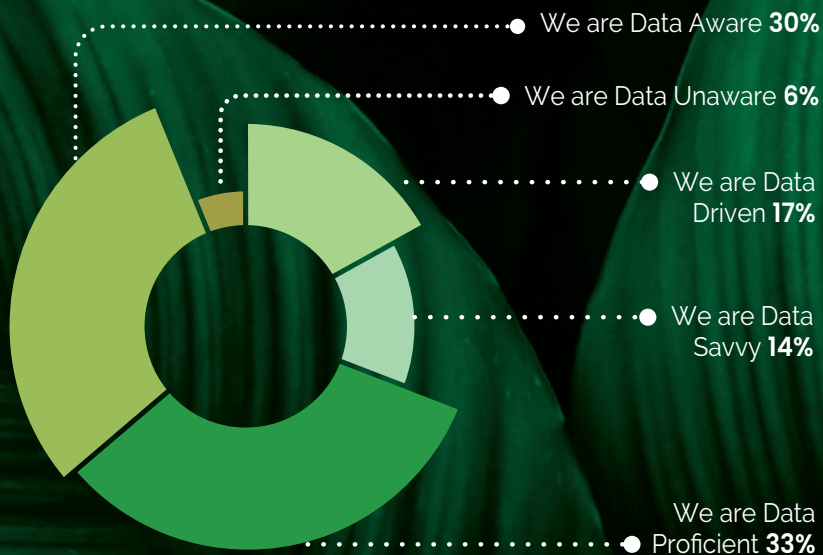
About 70% CDOs/CTOs seem to prefer other use-cases of GenAI tools, perhaps because they are more exposed to all the various use-cases of GenAI other than the popular ones.

Primary reason for adopting GenAI - Role-wise preference

# Data-driven and Data-savvy organizations that constitute about 31% of the entire cohort tend to have a data edge over other organizations



## Future outlook



Data maturity of organization

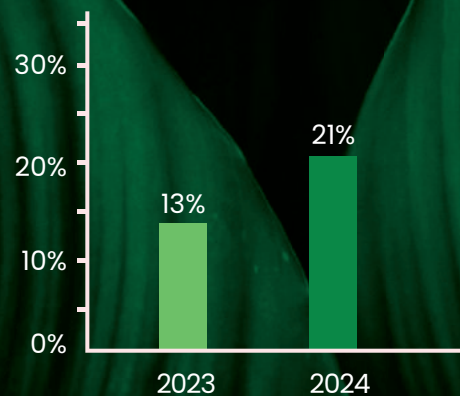
**With the growing need for connected and secure experiences that customers look for, it is imperative for organizations to embed data into critical processes if not all.**

While data showcases the other side of the picture, with over 35% respondents not using data to its full potential, looks like there is a lot of catching up these organizations need to do.

The growth in complete customer data unification nearly doubling year-over-year is a good sign, however, there still remains a larger cohort that need to bring in a holistic data fluency



Future  
outlook



State of customer data unification: 2023 vs 2024



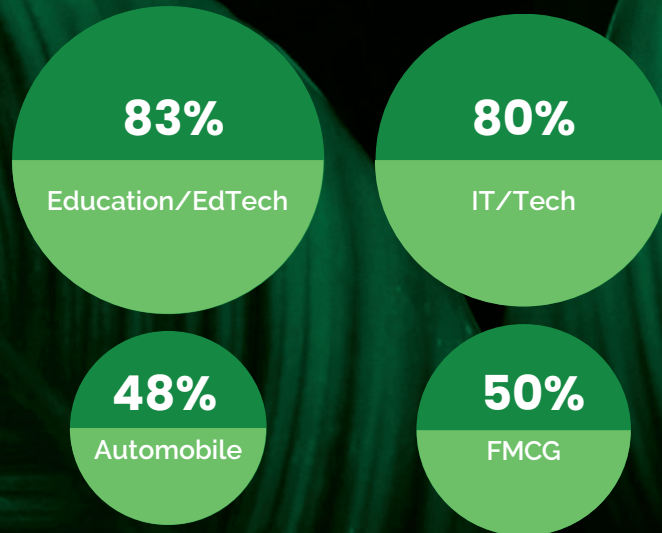
# Education/EdTech and IT/Tech are ahead when it comes to data unification, while Automobile and FMCG seem to be lagging behind



## Future outlook



..... Top 2 industries .....



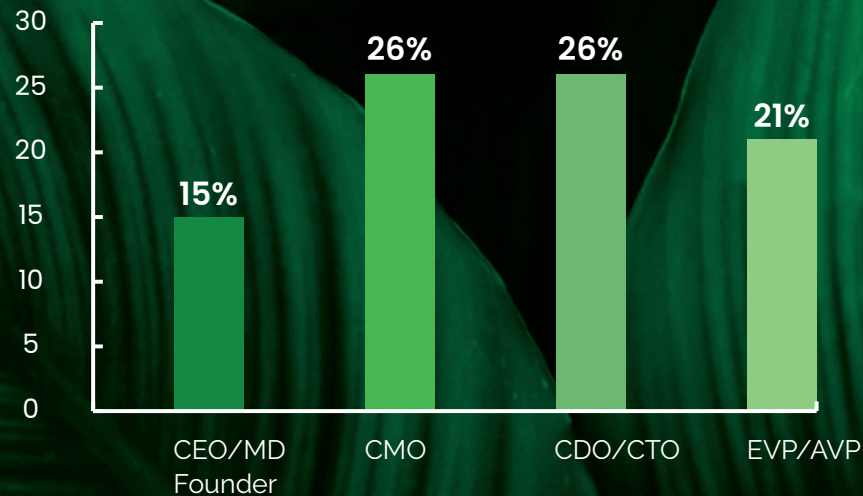
..... Bottom 2 industries .....

Industry-wise current state of customer data unification

The Education/EdTech and IT/Tech industries lead when it comes to data unification, with **83%** and **80%** respectively.

Meanwhile, the Automobile and FMCG industries rate themselves the lowest when it comes to data unification. Perhaps it is time for these industries to invest more in integrated data architectures and mindsets to drive data unification across organizations.

# CEOs seem to be taking a more critical approach to data unification as compared to other roles



Only 15% CEOs cite complete data unification is done in their organization.

Similar to the trend seen last year, CEOs seem to be far more critical of data unification as compared to other roles, probably because they have a holistic view of their organization's current state of customer data unification.

## Future outlook

Complete data unification done - CEO vs other roles' view point





## Kalpesh Patel

VP – MarTech

*mirum*

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# In conversation

## The top tools in your MarTech stack, and why are they best for the client businesses

In our MarTech stack, there isn't a single tool that we consider the best for client businesses. Unlike many service providers who push tools based on their expertise, we adopt a platform-agnostic approach at Mirum. Our focus is on solutions rather than specific tools, ensuring that clients receive strategies without force-feeding unnecessary customizations. It's not about one tool but a multitude of tools and platforms that collectively contribute to achieving our clients' diverse business goals.

## MarTech partners helping brands perform better using MarTech tools

I think it's a two-phase approach, the first phase is just about implementing the marketing tools.

Most of the agencies are very good at implementing MarTech tools, you tweak it and there you go the platform is ready. The second phase is a more consultative approach where the brands have to go beyond just implementation and actually try and map the business goals. The trick is in using the tools effectively through a consultative approach on whether the MarTech tools are helping brands achieve their business goals. For example, a marketing automation tool will have features to send personalized messages but what is the content you are sending, to whom are you sending, what time are you sending, and what is the best channel to reach out to that customer a deep understanding of the customer is required there, that is exactly what brand's consultative approach should tackle.



**“Agencies play a crucial role in helping brands leverage MarTech tools effectively. Beyond tool implementation, agencies must adopt a consultative approach to ensure that MarTech tools align with the brand's business goals.”**

### **More important when it comes to marketing - creativity or technology and why**

Well, it is more than exciting it's very controversial. Now coming from a technology background, as much as I want to say technology, over the last few years I have realized that creativity is equally important, creativity helps you dream the impossible, and technology platforms help you execute those dreams.

I think it's only at the cusp of creativity and technology that we ignite wonders. Overall, both have to go hand in hand, one cannot exist without the other. So, for any given brand on any day, creativity and technology must co-exist.

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07.

# ABOUT US



# Mirum India



Mirum India, a VML company, is a digital agency with expertise in MarTech. Having worked with B2B and B2C clients like KFC, Manyavar, McDonald's Philippines, Mahindra, Byju's, etc. from across the globe and a wide range of industries, we boast of successfully delivering 100+ MarTech projects.



Mirum also offers a bouquet of digital services across digital strategy, media planning, creative services, healthcare marketing, technology solutions, and social listening & ORM.



## VML



At VML, we provide our client partners with a fully integrated offering across brand experience, customer experience and commerce practices - powered by deep data and technology experience.



We are a beacon of innovation and growth. Our heritage is built upon over 300 years combined experience and expertise, where creativity meets technology, and diverse perspectives ignite inspiration. With the merger of VMLY&R and Wunderman Thompson, we have forged a new path as a growth partner that is equal parts creative agency, consultancy, and technology powerhouse.



## About us

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