DIGITAL MARKETING EVOLUTION AND ITS SOCIETAL IMPACT ON INDIA'S SOFTWARE AND ALLIED INDUSTRIES

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ABSTRACT

The empirical study explores the rapid expansion of digital marketing in India, especially in software and associated line. The rapid evolution of digital marketing, in India, accelerated by the rapid internet adaptation, tele-density and systematic 4G, 5G roll out. Through a dual perspective survey of industry, sales and marketing professionals and OTT (Over the Top) consumers, we gauged the impact of various channels, underlying factors and the impact of regional and cultural composition in this industry. These factors included the local language, local customs and cultural differences and unique local festivities. The data reveals strong customer inclination towards quality of content, flexibility in payment method, stressing the requirement of regional tailored marketing strategies. This study also reveals significant correlations between marketing channels like social media, content and influencer marketing and demographic segmentation, like location, age gender, income group etc. These insights are essential for the marketers to estimate and gauge the success of their campaigns, since go-to-market in India, with western imprint, is always a challenge.

Keywords: Digital Marketing, Digital Media, Marketing, Promotions, Digital Advertising.

INTRODUCTION

The digital advertising industry has grown exponentially to ₹400Bn by 2023, according to BasuRoy T, May 2024. Digital marketing can be defined as selling or promoting the product or services through digital means, like mobile phones, internet, etc. One aspect of this is promotion-which is done through various channels, like social media, search engine optimization or through influences.

The roots of digital marketing can be traced back to 1981 when International Business Machines (IBM) introduced the first personal computer. Around this time, channel net soft advertising group pioneered digital marketing by incorporating digital tools into advertising campaigns. This marked the beginning of promotional efforts for example, reader reply cards,' (which were featured in articles) and offered consumers a floppy disk containing multimedia content as part of the advertising campaign. The illustration shows the evolution and history of 'digital marketing.' (Schwarzl et al., 2015) (Figure 1).



FIGURE 1
TIMELINE OF 'DIGITAL MARKETING' ESTIMATION

MATERIALS AND METHODS

Digital marketing encapsulates a variety of tools and strategies designed to promote products and services using the Internet. Compared to traditional marketing, it offers a broader scope of marketing techniques due to the online platforms and mechanisms. Digital marketing evolves rapidly, requiring a solid foundation in critical thinking, decision-making and innovation. The internet serves as a factor in simplifying and accelerating tasks. In today's world, digital marketing has taken on a dominant role, gradually replacing traditional marketing methods.

Jordan Turner, in March 2024, in Gartner article wrote about 3 impending technological shifts, which they called Gartner hype cycles for digital marketing. These shifts include the accelerated speed of AI adoption, additional obstacles due to Privacy concerns and super apps are making an entrance. We all know the impact the large language models are having. The trend is slowly shifting towards more specialized machine-trained models for executing various selling processes. Customer Data Platforms (CDP), enabled marketers to showcase the product, service across various social channels, are entering into the maturity phase, conversational marketing, like chatbots are replacing humans in call centers, Privacy enhancing computation is becoming popular, which incorporates privacy features, enabling effortless communication, while safeguarding privacy. The latest trend of influencer marketing platforms is growing, Extended Reality (XR)-like Augmented Reality (AR) and Virtual Reality (VR) are becoming increasing real for corporations (Kotler et al., 2017).

Online Marketing in India

According to the latest (August, 2024) PR release of TRAI (Telecom Authority of India), India had approximately 1200 million telephone subscribers, representing about 85.4% tele density (132% Urban and 59% Rural). Out of this, about 903 million were Mobile phone internet users, the digital marketing landscape is experiencing rapid growth, with industry experts noting that this expansion is reaching a critical point. In India, cash on delivery remains the most popular payment method, accounting

for 65% of e-retail transactions, according to an article by Chhapia Hemali, Times of India, in Feb 2024. Given the country's dynamic economic growth, the digital marketing sector is expected to see significant career opportunities and expansion.

The impact of online marketing trends on advertising and promotional activities has been profound. Changes in communication tools over the past year have also contributed to this growth. Previously, internet access was limited to the affluent; however, the middle class now has widespread internet access. The advent of the internet and 5G technology has significantly transformed the marketing landscape for both consumers and businesses (Satinder, 2015).

Recent surveys indicate the following about the digital marketing industry in India:

Statista predicts that, as of third quarter 2023, 35.2% of internet users discovered a brand through digital means. Also, 30.5% of internet users surveyed used search engine to discover a brand.

Brand Equity. Com, on their survey on the state of digital marketing in India, between 2023-24, estimates that, an exponential growth in digital ad spending from ₹31500 Cr in 2023 to ₹41000 Cr in 2024. Of the industries adopting this trend, 60% come from e-commerce and FMCG (IPSOS and Brand Equity, 2023).

In 2024, the Gartner Chief Marketing Officer (CMO) survey pointed out that a substantial chunk of total advertising will be spent on digital channels, though the growth of allocation will reduce than in earlier years. Presently digital means account for 57% of marketing budgets. Through this allocation, the CMO survey reports a scarcity in allocation, with only 24% of CMO's reports adequate allocation. (Gartner, 2024)

In her article on impact of e-commerce on Indian rural market, Dr. Kanica Sharma, highlights the barriers of e-commerce in rural India, due to barriers in English proficiency among the users and lack of digital skills. She also highlighted those limitations hindered rural population to participate in the economic opportunities in e-marketplace. However, she reported gradual and unidirectional progress (Chaffey et al., 2019).

Objectives of the Study

The purpose of this study includes:

- **Obj 1:** Analysis the role of digital marketing in the Indian context.
- **Obj 2:** Identify the various factors-initiatives influencing the growth of this marketing field.
- **Obj 3:** To examine the perspectives of two key stakeholders, consumers, companies, regarding the expansion of digital marketing.

Hypotheses of the Study

The hypotheses for this study are:

- **H**₁: The growth of digital marketing is positively correlated with increased internet usage.
- **H₂:** Like traditional marketing, there is a strong relationship between companies and consumers
- **H**₃: The expansion of digital marketing is remarkable and essential in the current era of globalization.

	TABLE 1 REVIEW OF LITERATURE						
S. no.	Author(s)	Year	Title	Key findings			
1	Sharad Madhukar Dashaputre	2011	'A study of the growth of internet marketing in the Indian scenario'	Increased internet and mobile use boosts internet marketing. Internet awareness is crucial and online marketing may eventually overshadow traditional marketing.			
2	Susanne Schwarzl, Monika Grabowska	2015	'Online marketing strategies: The future Is here'	Understanding customer behaviour in online and offline channels is essential. Effective marketing and brand definition attract customers. Companies should have an online department to establish a web presence.			
3	Niharika Satinder	2015	'A study on internet marketing in India: challenges and opportunities'	Online marketing provides effective customer data gathering, shaping shopping habits due to conveniences like credit card transactions.			
4	Vladislav Yurovsky	-	'Pros and cons of internet marketing'	Internet marketing allows precise targeting, costeffectiveness and relationship building but faces drawbacks like ad clutter and technological dependence.			
5	D.K. Gangeshwar	2013	'E-commerce or internet marketing: A business review from the Indian context'	Projects growth in Indian internet users, benefiting e-commerce opportunities for businesses.			
6	Dr. Amit Singh Rathore, Mr. Mohit Pant, Mr. Chetan Sharma	2017	'Emerging trends in digital marketing in India'	Digital marketing techniques like SEO and SEM accelerate shopping; social media			

				boosts consumer
				engagement.
7	Kapoor et al.	2018	'Study on social media's role in marketing in India'	Over 90% of Indian businesses with an online presence utilize social media and regional content enables targeting of diverse demographics.
8	Gupta et al.	2022	'Study on AI-driven marketing strategies in India'	AI and data analytics improve personalized marketing, enhancing customer segmentation, engagement and conversion rates.
9	Bansal et al.	2019	'Study on the Indian E-commerce sector'	Digital marketing is essential to e- commerce growth (e.g., Flipkart, Amazon). Digital payments and government support (digital India) boost growth.
10	Sinha and Dey	2021	'Study on digital divide and challenges in digital marketing'	The rural-urban digital divide in India limits digital marketing reach; data privacy concerns are rising due to new regulations.
11	Sen and Singhal	2020	'Study on influence of marketing on Indian consumers'	Influencer marketing significantly impacts consumer decisions, especially among millennials and Gen Z, boosting brand trust and engagement.
12	Agarwal K and Joshi P	2023	'The role of augmented reality in enhancing digital marketing experiences in India'	AR integration in digital marketing creates immersive experiences, especially in retail and e-commerce.

Research Methodology

The study on digital marketing considers the perspectives: consumers and companies. In order, to concentrate on digital services industry, in India, we had restricted the study to the digital marketing in SaaS industry and OTT platform. We thus ensured that we approached the businesses and consumers of the same segment. Separate questionnaires were developed for each group, focusing on their attitudes towards digital marketing, factors driving this growth and its impact on company turnover (Kotler 1999).

Data Collection

A sample of 301 sales and marketing professionals from various Indian software and associated services industries were surveyed using structured questionnaire. The study targeted sales and marketing professionals of different companies, from software sector, also from other SaaS sectors. Based on turnover, 18% had revenues up to ₹5 crores, 51% between ₹5 crores and ₹50 crores, 31% above ₹50 crores. The Cronbach's alpha of this survey was 0.87 (Evans, 2021). 61% were from the information technology domain and the rest were from computer software. 41% were from the age group of 18-29 & 46% were from 30-44 age range.

Another survey was conducted among consumers who purchased an OTT subscription in the last 1 year. We asked them to rate the impact of content richness, brand value, ease of payment, availability of multiple payment options (schemes), specific period based (like festival period), and overall experience.

Since in the consumer survey, the responses were collected for different companies, (like Netflix, Amazon Prime, Zee5, Disney Hotstar, Sony Liv, etc.) the initial Cronbach's Alpha was 0.95. For each question, subgroup mean and median were calculated. The Cronbach's Alpha for mean data was 0.94-which was not considered. For median data, the Cronbach's Alpha was 0.91-which was considered for further study (Gangeshwar, 2013). Considering that ordinal data collected from the survey was not normalized, the median data was more resistant to outliers. Also 0.91 Cronbach's alpha is more acceptable as a statistical value.

RESULTS AND DISCUSSION

The data was collected using a structured survey. The surveys were shared randomly to known/unknown responders. While filling up, qualification criterion kept weeding out not qualifying respondents (Tuten, 2023). Analysis was based on the 5-point Likert scale system (Table 2).

TABLE 2 LIKERT SCALE SYSTEM					
Responses	Points				
Strongly agree	5				
Agree	4				
Neutral	3				
Disagree to some extent	2				
Strongly disagree	1				

We asked about the cultural factors affecting services adoption and adaptation of digital trends from the company executives (Figure 2).

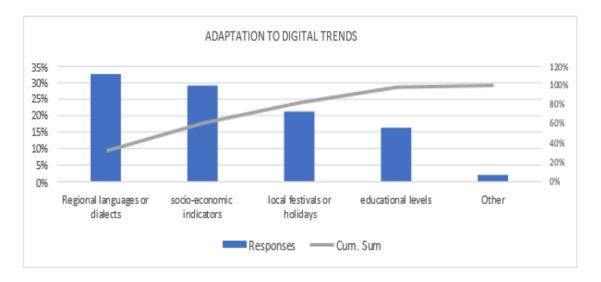


FIGURE 2 ADAPTATION TO DIGITAL TRENDS

- Over 30% of sales and marketing professionals highlight the impact of regional languages, showing the utility of language for reaching the consumer mind. It also highlights the limitation of English language as a universal medium for communication.
- Around 30% highlighted the socio-cultural indicators, like accessibility, affordability and relevance. This causal factor shows the necessity for tiered pricing, local discounts and free trials to reach customers (Rathore et al., 2017).
- Above 20% of respondents pointed to the local festivals as an important contributing factor. While 16% pointed towards the education level as an important determinant (Figure 3).

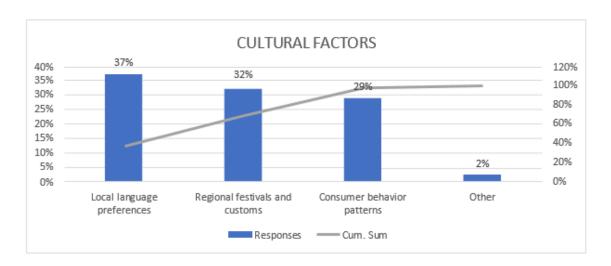


FIGURE 3
CULTURAL FACTORS IMPACTING THE MARKET

The other question was on the cultural factors affecting the marketing endeavors. Over 35% of the respondents highlighted the local language preference, while over 30% stressed the importance of regional festivals and customs and around 30% spoke of consumer behavior patterns.

From these two insights, the role and contribution of regional language, regional cultural imprint and importance in marketing outreach can be well understood (Alves et al., 2016).

32% respondents highlighted regional festivals as an important cultural factor. Perhaps the timing of the schemes is key to winning the customer mind. In the consumer survey it shows the promotional period being key to customer buying decisions. Marketers can consider aligning marketing campaigns with local cultural events to the way to customer Mindspace.

Understanding customer behaviour patterns and linking to the causal factors like education level, age, gender etc. is key. In consumer study overall experience shows a wider interpretation of consumer thought on the buying decisions. And this might have been impacted by the onboarding and post purchase customer experience. The importance of onboarding support, and timely customer support and feedback can help in retaining the customers.

We also surveyed the consumers in the same industry (OTT subscribers). The respondents were paid subscribers in the last 1 year. The survey responses can be seen below (Figure 4).

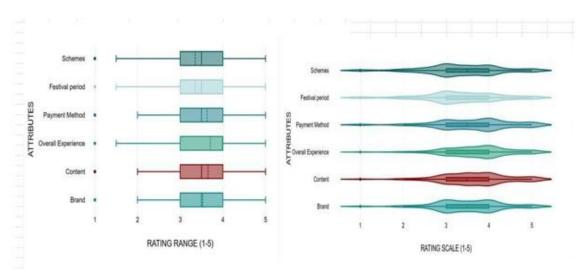


FIGURE 4
OTT SUBSCRIBER RESPONSES ON THEIR PURCHASE DECISION

Data Interpretation

- **Content:** A key influencing factor content shows a narrow distribution of ratings between 3-4 with a lower distribution. There are very few lower tail data, showing that buyers view content as an essential factor for purchasing decision.
- **Payment Method:** Shows a consistent mid-range 3-4, indicating that standard payment methods are satisfactory.
- Influence of festivals and promotional schemes both trends highlight a wider distribution across the scale, highlighting a mixed response, while promotions impact the customer decision, but they are less important than content and payment method.
- **Brand Influence:** The influence of brand exhibits a balanced response.
- Overall Response: The overall response shows a widespread in the violine plot, indicating a mixed response and highlights the impact of maintaining a high quality and service is critical (Kapoor et al.,

2018).

Together: What does it Mean?

- Local language and cultural customs are essential elements for Go-to Market (GTM) success. Content quality, festivities leading to promotions and schemes have important implications for customers.
- Socio economic and regional adaptation socio economic and regional factors are key GTM. The important need for flexible pricing and adaptation of the product to suit the local needs is important (personalization). The factors like payment methods, Schemes find importance for the customers.
- Customer experience and satisfaction understanding customer behavior patterns and linking to the causal
 factors like education level, age, gender etc. is key. In consumer study overall experience shows a wider
 interpretation of consumer thought on the buying decisions. And this might have been impacted by the
 onboarding and post purchase customer experience. The importance of onboarding support and timely
 customer support and feedback can help in retaining the customers.
- **Promotions and Timing:** 32% respondents highlighted regional festivals as an important cultural factor. The timing of the schemes is key to winning customer mind. In the consumer survey it shows the promotional period being key to customer buying decision. Marketers can consider aligning marketing campaigns with local cultural events to the way to customer mind space (Gupta et al., 2022).

Effectiveness of Marketing Channels across Demography

Content marketing, social media marketing, video marketing (especially short form) are the most popular. Search engine optimization, online public relations and Influencer marketing follow closely (Figure 5).

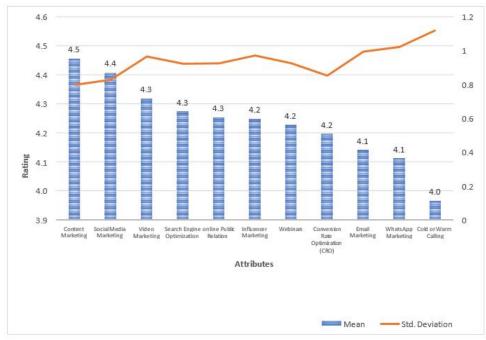


FIGURE 5
DIGITAL MARKETING CHANNELS

We checked the various marketing channels against age (For kids, age 18 to 30 years, 30 to 50 years, 50 and above), gender (Male, female, will not divulge), location (North India, South India, East India, West India, All over India and export). We also took the responder inputs for various digital marketing channels, in Likert scale, like video marketing, content marketing, webinars, social media marketing, search engine optimization, email marketing, cold or warm calling, Conversion Rate Optimization (CRO), WhatsApp marketing, online public relations and influencer marketing (Bansal et al., 2019).

From the dataset, we looked at the correlation between the demographic profile and the digital channel rating (Table 3). The correlation data is tabulated here.

TABLE 3 PEASON'S CORRELATION									
Channel	Location Income Age								
segment	of market	Gender segmentation	segmentation	segmentation					
Video									
marketing	0.037	-0.329	-0.035	-0.011					
Content									
marketing	-0.002	-0.223	-0.09	-0.112					
Webinars	-0.104	-0.186	-0.1	0.025					
Social media									
marketing	-0.012	-0.248	-0.126	-0.08					
Search engine									
optimization	0.043	-0.272	-0.054	0.014					
Email									
marketing	0.045	-0.295	-0.104	-0.09					
Cold or warm									
calling	-0.015	-0.227	-0.256	-0.054					
Conversion									
Rate									
Optimization									
(CRO)	0.096	-0.246	-0.048	0.006					
WhatsApp									
marketing	0.017	-0.223	-0.06	-0.101					
online public									
relation	0.109	-0.251	-0.095	-0.093					
Influencer									
marketing	0.044	-0.318	-0.059	0.03					

Data Interpretation

Social media marketing and Influencer marketing are negatively correlated with gender segmentation. While designing such strategies, the content and channel need to be A/B tested for optimum gender acceptability (Sinha et al., 2021). Even video marketing, has a strong negative correlation with gender segmentation and so was content marketing, social media marketing, search engine optimization, email marketing and conversion rate optimization (Table 4). We then reconfirmed the assumption using T Test confirmation.

TABLE 4 T-TEST FACTORS INFLUENCED BY GENDER SEGMENTATION							
t df p Mean difference							
Gender segmentation	38.911	285	< 0.001	1.899			
Social media marketing	90.084	285	< 0.001	4.406			
t df p Mean diffe							
Gender segmentation	38.911	285	< 0.001	1.899			
Influencer marketing	73.899	285	< 0.001	4.248			
Note: For the student T-test, the alternative hypothesis specifies that the mean is different from 0.							

In both cases, p value is <0.01 thereby signifying the mean-difference.

There is a significant negative correlation of Income segmentation on cold and warm calling. While cold calling, companies must check the income distribution, before enlisting this strategy, especially for high income groups. This is confirmed with a T Test (p < 0.01) (Table 5) (Sen et al., 2020).

TABLE 5 IMPACT OF INCOME SEGMENTATION						
t df p Mean Difference						
Income segmentation	29.058	300	<.001	2.807		
Cold or warm calling	59.691	285	<.001	3.965		

Note: For the students t-test, the alternative hypothesis specifies that the mean is different form 0; Students test.

Age segmentation on content and WhatsApp marketing-there is weak negative correlation between age and WhatsApp and content marketing, which can be validated by a T-Test (Table 6) (Agarwal, 2023).

TABLE 6						
IMPACT OF AGE DISTRIBUTION						
t df p Mean differer						
Age segmentation	33.312	300	< 0.001	5.9		
WhatsApp marketing	67.957	285	< 0.001	4.112		

Note: For the students t-test, the alternative hypothesis specifies that the mean is different form 0; Students test.

A weak positive correlation between the location and online public relations exists (Table 7) (Sharma et al., 2023).

TABLE 7 LOCATION SEGMENTATION						
t df p Mean differen						
Location of market	39.291	285	< 0.001	2.727		
Online publication relation	77.73	285	< 0.001	4.252		

Note: For the student T-test, the alternative hypothesis specifies that the mean is different from 0.

While designing social media, influencer campaigns, online public relations, content or WhatsApp marketing or for warm or cold calling, the marketers must evaluate their offering to tune up to ensure that

there are no negative impacts (Verma et al., 2024).

Regression

An attempt was made to check on what extent the key dependent metric of 'lead to conversion ratio' can be explained by the approaches of digital marketing channels (Table 8) (Khan et al., 2022).

TABLE 8 MODEL SUMMARY LEAD TO CONVERSION							
Model R R ² Adjusted R ² RMSE							
M_0	0.000	0.000	0.000	0.849			
M_1	0.053	0.306	0.212	0.754			

Note: M₁ includes content marketing, video marketing, webinars, influencer marketing, social media marketing, search engine optimization, cold or warm calling, Conversion Rate Optimization (CRO), WhatsApp marketing, online public relation, email marketing, location of market, gender segmentation, age segmentation, income segmentation.

This shows that 21% of the lead to conversion ration can be explained by these factors. However, ANOVA shows that the contribution is statistically significant (p<0.01) (Brown et al., 2008).

TABLE 9 ANOVA								
Mode	l	Sum of squares	df	Mean square	F	P		
M_1	Regression	62.915	34	1.85				
Residual		142.707	251	0.569				
	Total	205.622	285		3.255	< 0.001		

Hence the p value shows that the correlation between lead to conversion ratio and digital channels is significant (R^2 =0.212). R^2 explains only 21% of the channel strategy, while 79% remains unanswered. This might be since critical areas like pricing, brand equity or app UX have not been adequately explored here. However, the observation shows the key linkages, to the extent of 21%.

Regression Equation for Lead-to-Conversion Ratio (YYY)

 $Y=0.023+(0.118 \times content marketing)+(0.011 \times video marketing)+(0.004 \times webinars)-(0.093 \times influencer marketing)+(0.169 \times social media marketing)-(0.067 \times search engine optimization)+(0.176 \times cold or warm calling)+(0.029 \times conversion rate optimization)-(0.108 \times WhatsApp marketing)+(0.071 \times online public relations)+(0.120 \times email marketing).$

Additional Demographic Segmentation Coefficients

For specific demographic segments, add the following terms to the equation: (these are ordinal data)

- Location of Market (e.g., Location 2, 3, etc.) has varied coefficients, such as -0.199-0.199-0.199 for Location 5 (Menon et al., 2022).
- **Gender Segmentation:** For example, Gender (2) has a coefficient of 0.1230.1230.123.
- **Age Segmentation:** Includes coefficients like 0.7820.7820.782 for age segment (2), 1.2641.2641.264 for age segment (6), etc.

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• **Income segmentation:** Includes coefficients like -0.132-0.132-0.132 for Income Segment (2) (Chopra et al., 2024).

Final Insights

- Regional languages, festivals and local customs shape customer choices. Over 30% of professionals link language use to better reach. Festive promotions grab attention at key times.
- Gender and income groups respond differently to channels. Social media and influencer marketing show a clear drop in appeal among certain segments. Cold calling loses impact with higher earners.
- Direct calling, Content marketing, email marketing and social media lead in engagement. WhatsApp Marketing and influencer marketing follow closely.
- Our regression model explains 21% of the variance in lead-to-conversion rates. T-tests confirm segmentation effects are statistically strong (p<0.01).

Research Gaps

This is a general study, which highlights the impact of regional and cultural impact in this industry. A more structural and deeper study can be undertaken to explore the causal factors (Rao et al., 2024). Also, the longitudinal impact of digital marketing trends and regional adaptation, can be taken up. The study lacks data and structured surveys in this regard. Another aspect is the technological adaptation in digital marketing strategies (Bose et al., 2023). While we have found that companies are incorporating newer technologies aimed to reduce the cost of GTM and improve efficacy, while addressing the budget constrained highlighted in the 2024 CMO report. The aspect of consumer data privacy and trust is another aspect that needs to be studied in view of the various new legislations in this regard (Das et al., 2022).

CONCLUSION

In India, the digital marketing is intricately linked with the accessibility of internet and penetration of mobile communication among Indian population and the awareness is only growing. The regional and local cultural elements are pivotal for companies for their go-to-market strategies and for market penetration. Being nimble footed with flexible pricing and being aware of regional expectations are key for the marketers; coupled with supportive onboarding, prompt customer support and festival centric promotions. Cold/Warm calling, content marketing, email marketing and social media marketing are the most popular ones, while we have seen significant negative correlation among gender, location, income and age distribution. For the success of digital marketing, the corporations must incorporate local nuances and customer centric approaches.

RECOMMENDATIONS FOR FURTHER STUDY

The following are the additional study recommendations:

Regional Adaptation Strategies: how the cultural nuances and language and festivities impact. This is critical, since many of the promotions are centralized, due to heavy investment need (Malhotra et al., 2024).

Effectiveness of Festivities Centered Campaigns: The areas of local festivities and regional expectations, which can be filled by the corporations with the programs to meaningfully adopt the cultural attitudes, while communicating and serving the consumers (Chhapia Hemali, 2024).

Impact of Influence on Marketing on Gen Z Customers: The uniqueness of thinking of the newer consumers, needs to be studied further for communication impact assessment and enhancement (Ipsos et al., 2023). This is especially true, since within the next few years, this generation will determine significant purchasing power (Gartner, 2024).

Cross Cultural Composition within India: we can investigate how the digital marketing can align with the cross-cultural evolution and we see as an enhancer rather than inhibitor or challenger, to reduce negative public relation (Sharma, 2024; Basu, 2024).

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