Glance Digital Experience Recognized for

2021

Technology Innovation Leadership

Indian AI-based
Lock Screen Platform Industry
Excellence in Best Practices

FROST *&* SULLIVAN

Congratulations!

Frost & Sullivan is proud to present Glance with this year's Best Practices Technology Innovation Leadership Award in the India AI-based lock screen platform industry.

Frost & Sullivan's global team of growth pipeline experts continuously identifies and evaluates growth opportunities across multiple industries, technologies, and regions of the world. As part of this on-going effort, we identify companies that consistently develop new growth strategies based on a visionary understanding of the future, and thus, effectively address new challenges and opportunities. This approach involves deep strategic deliberation around best practices and the development of core analytics across the entire value chain of specific products and services. Against the backdrop of these analytics, Frost & Sullivan recognizes Glance for its valuable achievement.

Frost & Sullivan strictly reserves this recognition for companies at the forefront of innovation and growth in their respective industries. These companies consolidate or grow their leadership position by continuously innovating and creating new products and solutions that serve the ever-evolving customer needs. These companies are also best positioned to expand the market by strategically broadening their product portfolio. Driving innovation and growth is never an easy task. Still, it is one made even more difficult considering today's strategic imperatives, from disruptive technologies and value chain compression to industry convergence and new business models. In this context, Glance's recognition signifies an even greater accomplishment.

Moreover, this recognition is the result of many individuals (employees, customers, partners, and investors), making critical decisions every single day to support the organization and meaningfully contribute to its future. Frost & Sullivan enthusiastically acknowledges and celebrates the value they create.

Once again, congratulations on your accomplishments, and we wish you great success in the future. We look forward to connecting with your CEO, Board of Directors, and executive leadership team to help them leverage the full power of this recognition.

Sincerely,

Darrell Huntsman
Chief Executive Officer
Frost & Sullivan

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Glance excels in many of the criteria in the Indian AI-based lock screen platform space.

AWARD CRITERIA

Technology Leverage	Business Impact
Commitment to Innovation	Financial Performance
Commitment to Creativity	Customer Acquisition
Technology Incubation	Operational Efficiency
Commercialization Success	Growth Potential
Application Diversity	Human Capital

Smart Engagement: An Innovative AI-driven Lock Screen Platform

Frost & Sullivan identifies India as a smartphone-first market that boasts an incredible ability to adapt to digital changes and implements digital activities at a much faster pace than other emerging economies.[1] Despite creating worldwide economic impacts, the COVID-19 pandemic became an inflection point, driving digitization and changing attitudes towards technologies, even among techno-skeptics and tech-laggards. Particularly, factors such as work-from-home mandates, remote education, live streams, and remote work have generated fierce competition among device manufacturers and application (app) developers to capture consumers' interest and screen-time. In India, smartphone manufacturers such as Samsung, Xiaomi, Vivo, and Realme have a powerful presence, offering a diverse range of smartphones in terms of functionality and price. A lucrative smartphone market coupled with the low-cost data revolution has surged the user base, making India one of the world's largest smartphone and internet markets. Naturally, various Indian tech companies have come up with innovative tools and applications to enhance the smartphone user experience and provide top-notch content to users. With concerns regarding various health issues brought about by prolonged app and device usage, companies also leverage artificial intelligence (AI) and machine learning algorithms to provide short but relevant content to users.

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[1] *Technology Enabled Growth and Opportunities in India* (Frost & Sullivan, 2020).

One of the pivotal parts of a smartphone is the lock screen, which is the first screen users see. It is also the most visited real estate on the phone. On average, users go through their lock screens over 100 times per day. Till now, users have primarily utilized lock screens to surface notifications from the apps on their phones. Glance, however, re-imagined this surface to provide engaging and personalized content to users each time they unlock their phones. Glance accomplished this transformation due to a deep focus on changing the consumption habits of digital India and an AI-backed personalization engine. Launched in 2019 as a subsidiary of the InMobi group, the company recognizes India's vast language diversity and provides AI-driven vernacular content in multiple languages, including English, Hindi, Tamil, Telugu, Bengali, Marathi, and Kannada on Android smartphones' lock screens. Glance's AI curates trending content on the internet (i.e., news, pop culture, entertainment, and sports) and presents it in the form of visual stories on the users' lock screens, personalized to their specific interests

> *"Glance's AI curates trending content on the internet (i.e. news, pop culture, entertainment, and sports) and presents it in the form of visual stories on the users' lock screens, personalized to their specific interests and tastes. The uniqueness in the implementation lies in the fact that its product is not available as a stand-alone application in the Play Store; instead, it comes pre-integrated with the smartphone itself. The company achieves this feat through strategic partnerships with top smartphone manufacturers."*
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> *- Rabin Dhakal, Best Practices Research Analyst*

and tastes. The uniqueness in the implementation lies in the fact that its product is not available as a stand-alone application in the Play Store; instead, it comes pre-integrated with the smartphone itself. The company achieves this feat through strategic partnerships with top smartphone manufacturers. This strategy also allows the company to reach a wider audience and unlock a range of avenues in terms of content creation and delivery. Glance's lock screen platform uses AI to generate some of its content in the form of visually delightful cards that users can swipe to get more information on a particular topic.

**Glance Cards in Smartphone Lock screens**
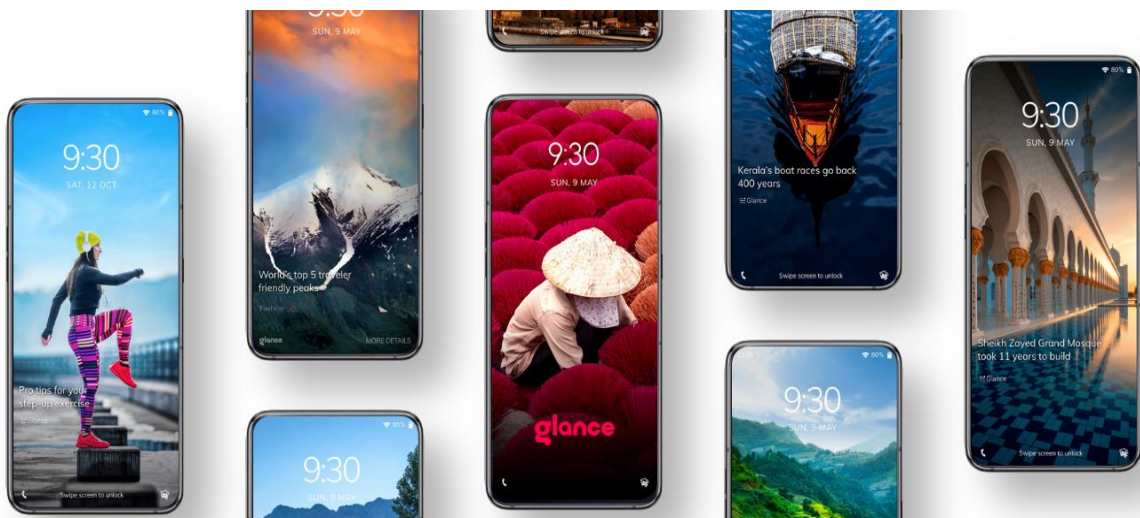

Source: Glance's Website

Its card development workflow follows the following processes:

- Candidate Stories: Glance uses a news-style application user interface to fetch trending news.
- Deduplication: The AI eliminates redundant information to create a single card for a specific story.
- Content Filtering: Glance leverages its AI and performs sentiment analysis to provide upbeat and entertaining content and filter inappropriate content.
- Content Scoring: The AI scores each candidate story based on users' post engagement patterns.
- Text Summarization and Headline Generation: Glance uses text summarization AI to generate headline and text summary for the stories.
- Image Selection: Glance uses image processing techniques to tag images based on their features (person, sunrise, etc.) and searches for the image online based on the tag.
- Smart Text Placement: Glance's AI identifies areas in the image where the text would fit the best.
- Card Generation: The AI generates the final card based on the previous processes.
- Human Review: Glance's personnel review the final card before publication.

Frost & Sullivan applauds Glance's creative and unique platform that provides personalized content to users conveniently on their lock screen by leveraging a rigorous AI-driven workflow and involving human intervention to ensure content veracity and quality.

Glance AI-based Content Generation Platform

Glance Personalization engine
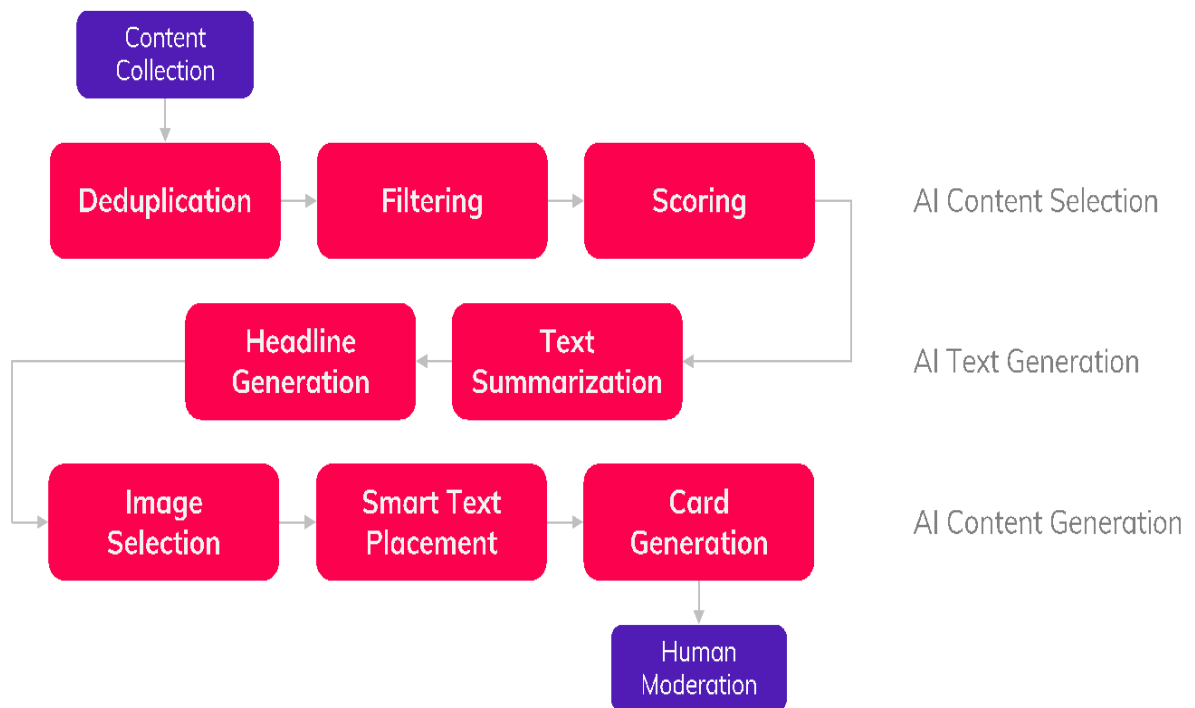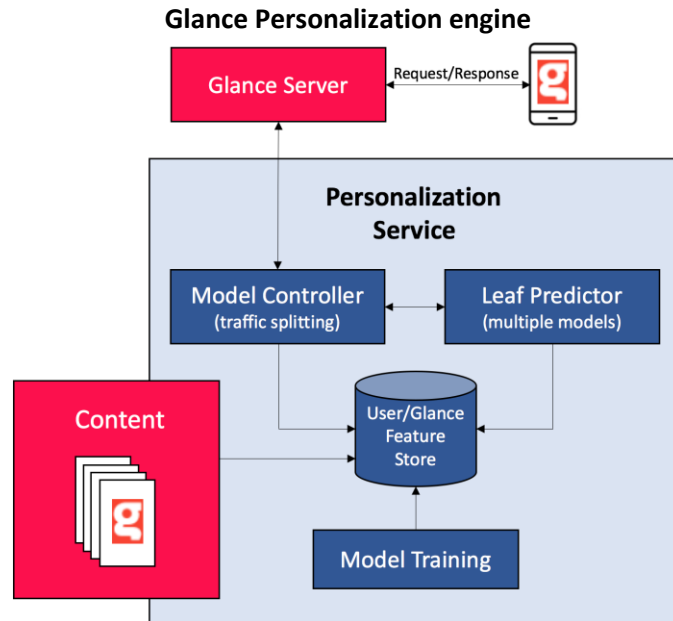
Productive Partnerships Generate Commercialization Success

Glance has positioned itself as a unique player in the Indian lock screen market by partnering with smartphone manufacturers to provide an in-built AI-driven lock screen experience to users. While most lock screen platforms are available as a downloadable app in the Android Play Store, Glance's approach has enabled an unprecedented user experience in content delivery and usage. The company's noteworthy success comes from the fact that its lock screen platform is not just a simple notification-based system, but is actually a full-fledged content discovery platform, bringing in trending content from across the internet to users in a frictionless and immersive format, from categories ranging from entertainment, sports, news, and gaming, to pop culture. Recently, Glance debuted Live Streaming on its platform, where top creators and publishers stream live and interactive shows throughout the day to engage users, converting the smartphone lock screen to a live, interactive television environment. A significant part of Glance's success is attributed to Roposo, which Glance acquired in 2019. Roposo is increasingly becoming a platform of choice for over three million monthly active creators to go live and create pop culture trends. The top creators on Roposo also get to feature on Glance, which massively amplifies their visibility. This exceptional digital harmony has allowed Glance to witness an astounding 125 million daily active users with approximately 25 minutes per day screen-time per user, across its operating regions.

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As a content gateway for smartphone users, Glance has reached almost 8% of the entire Indian population (approximately 30% of India's internet user population). This widened reach places the company right behind Facebook and YouTube in terms of daily active users in India. Besides daily usage, Glance's partnerships with top smartphone manufacturers have allowed it to become one of the fastest-growing platforms in the entire world. Glance comes pre-integrated in approximately 80% of all new smartphones sold in India. Google and Mithril Capital recognized Glance's immense potential in the content delivery and advertising space with their massive $145 million investment into the company in December 2020.

Frost & Sullivan praises Glance for its exceptional ability to partner with smartphone manufacturers to provide an in-built content-driven experience to users and leverage AI to identify users' device usage patterns and deliver relevant stories and content.

Top-notch Content-driven Experience Provides Value and Enhances Growth

Glance crossed the 100 million users mark within its first 21 months, becoming one of the fastest internet platforms globally to achieve this milestone. The company boasts partnerships with top smartphone vendors in India, including Samsung, Xiaomi, Vivo, RealMe, and Oppo, integrating its lock screen product directly into their smartphones. Glance's internal research shows that approximately 85% of Glance users believe that the product has enhanced their smartphones' functionality and that they would like to have it pre-installed in their future smartphones. Glance's popularity has allowed it to develop win-win partnerships, showcasing immense growth potential, both for Glance and smartphone manufacturers.

Likewise, Glance considers the content-driven experience, specifically live content, to be its primary value proposition. With total funding of $190 million since its launch, Glance aspires to expand the content-driven experience to multiple devices such as televisions and laptops across several geographies. Currently, the company is present in India and several South-East Asian markets, including Indonesia, Singapore, Thailand, Malaysia, Philippines, Myanmar, Cambodia, Vietnam, Laos, and East Timor. Frost & Sullivan firmly believes that Glance has exhibited immense growth potential in a short time, allowing the company to grow organically and strategically.

Conclusion

Factors such as work-from-home mandates, remote working, and remote learning, among others, have created vicious competition in the smartphone market, especially in terms of capturing users' interest and screen-time. With smartphone vendors such as Samsung, Xiaomi, Vivo, Oppo, and RealMe having a solid presence in the Indian smartphone market and offering a diverse range of products, India has become a mobile-first economy. Launched in 2019 as a subsidiary of InMobi Group, Glance developed an artificial intelligence (AI)-based lock screen platform and partnered with India's top smartphone vendors to provide an in-built content-driven experience to users. Glance's AI-based lock screen platform is available in approximately 80% of India's smartphone devices, making it one of the largest digital platforms in India and the entire world. Glance's AI automatically generates new and fresh content every day and presents them in an engaging, visual stories-like format on users' lock screens. The platform also benefits from access to top content creators from Roposo, one of India's leading community and creator-led video platforms, with close to three million monthly active creators. With productive partnerships and huge investments, the company aspires to expand across several geographies and become the world's largest content platform.

For its innovative platform and strong potential for growth, Glance earns Frost & Sullivan's 2021 India Technology Innovation Leadership Award in the AI-based lock screen platform industry.

What You Need to Know about the Technology Innovation Leadership Recognition

Frost & Sullivan's Technology Innovation Award recognizes the company that has introduced the best underlying technology for achieving remarkable product and customer success while driving future business value.

Best Practices Award Analysis

For the Technology Innovation Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization Success: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Business Impact

Financial Performance: Strong overall financial performance is achieved in terms of revenues, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Commitment to quality and to customers characterize the company culture, which in turn enhances employee morale and retention

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

The Growth Pipeline Engine™

Frost & Sullivan's proprietary model to systematically create on-going growth opportunities and strategies for our clients is fuelled by the Innovation Generator™. Learn more.

Key Impacts:

■ **Growth Pipeline:** Continuous flow of Growth opportunities

■ **Growth Strategies:** Proven Best Practices

■ **Innovation Culture:** Optimized Customer Experience

■ **ROI & Margin:** Implementation Excellence

■ **Transformational Growth:** Industry Leadership

The Innovation Generator™

Our six analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

■ Mega Trend (MT)

■ Business Model (BM)

■ Technology (TE)

■ Industries (IN)

■ Customer (CU)

■ Geographies (GE)