

afags! Reporter

March 1-15, 2020

Volume 8, Issue 17 ₹100

Q&A

THE
PLANNER'S
special

Interviews with the
top media agency
executives of India

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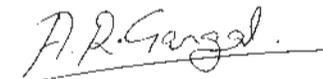
EDITORIAL

I have a confession to make. We at afaqs!Reporter have, in the recent past, published several special issues of this magazine, to explore different aspects of the media business – marketing, advertising, digital – but have never studied the media planning and buying space in detail. To recapitulate, a year ago, we interviewed 40 heads of different types of agencies, but only a third were media planners, and their input sat alongside that of creative and digital agency heads. Then, over the last three years, we published three specials around the marketing heads of brands across product groups; in 2019, we interviewed 59 CMOs, in 2018, 55... and in 2017, 49. We call this the annual 'CMO Special'. Before that, we've published several year-enders and specials around ad-men and women, about their work.

Clearly, media planning and buying has emerged as the most under-represented function in our magazine, historically. Which is why, you're holding a copy of the very first edition of The Planner's Special, an issue dedicated to media agency executives, keepers of the client's wallet. We spoke to 31 heads of media agencies across all major networks, and what a ride it's been. It's incredible how a templatised set of questions can yield such varied answers. The process of editing these interviews was like a masterclass in the business of media planning.

We asked them about the work they're proud of, global practices, ad fraud, consumption trends across urban and rural markets, skill-sets of the future, the agency-client relationship, and, of course, the economic slump and the product segments that are likely to be most –and least– affected by it. While the anxiety quotient varies from person to person, I am heartened to report an overarching sense of optimism.

Other key takeaways: Media agencies want to be business partners to their clients, the "outcome" of a campaign outranks the "output", the lack of a common measurement metric on digital is flagged as urgent, as is the lack of consensus on viewability. The industry needs more "data scientists". Lastly, the intangible "effectiveness" of a media investment always trumps its financial "efficiency".



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Source: IRS 2019 Q3

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Q&A

THE
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"Most brands tend to view ad fraud through the lens of fear"

PRASANTH KUMAR

CEO,
GroupM, South Asia

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Q In 2020, what is that big trend that ought to concern or excite media agencies?

There are quite a few trends to watch out for in 2020. Many things are dynamic today irrespective of the medium. We will see some significant changes. One trend we're seeing for sure is the utility of content. It's interesting to see how brands can co-exist by creating powerful engagement; I believe

that's one area where a substantial amount of power lies, if you can crack it. Multiple content creators are available in the market right now so we see opportunities there.

This is not exactly a trend, but outcome-based, data-led marketing is also very interesting. It has become the norm for us. Usually, there are multiple sources of data. It comes down to how we marry this data into the entire consumer journey, through the purchase funnel.

Actually, the way the entire digital space is evolving is exciting. There's an e-commerce aspect coming up, a performance aspect coming up, an influencer aspect coming up... it's a very exciting time. The challenge lies in getting the most out of the creative assets that we have for our brands.

It's not about agitation or intimidation... no trend intimidates me as such because we're now used to working this way. Every trend comes with its own learning. Even if it's a speed-breaker for a campaign we're working on, it's still a learning experience.

“The way the digital space is evolving is exciting. It has an e-commerce aspect, a performance aspect and an influencer aspect”

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

We can learn how to ideate and execute strategies better. There's a lot to learn from global examples in that context. The thing with the digital space is, you don't have to wait and experiment and then learn. You can learn from what is happening in other markets... lessons can come from analysing content and technologies such as AI and analytics.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

It depends on the size of the category. Different product groups will be affected differently. Some categories have shown almost 26-28

per cent growth this year whereas other categories have only grown by two or three per cent.

It also has a lot to do with the context of demand and supply, and aspects of business growth. Each category has got a different demand and supply ecosystem. Even the type of consumers differ across categories. Whenever there is more supply and less demand, we see a slowdown. Even when there's an inflation, creating business growth becomes difficult.

In the next 12 months, the solution to the digital ad fraud menace will come from...

Digital ad fraud has become a subject in itself. In the advertising space, it's been evolving with a width and depth greater than anything we've ever seen. It's a perennial topic and we need to keep learning more about the subject. We follow strict guidelines and

rules for all of our clients but it's a constant battle. There's always a new technique, a new feature or something new, that we need to be wary of. Because of this constant evolution, there's a tendency for brands to view ad fraud through a lens of fear. But it's not always about fear, it's about tackling it smartly. We need to figure out a solution collectively. ■

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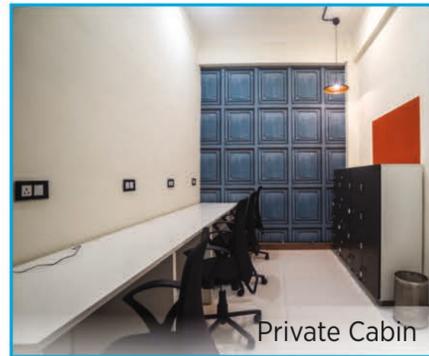
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JYOTI KUMAR BANSAL

CEO, PHD India

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Q What, in your view, was your agency's best campaign of 2019? What about it impressed you? There are many, from 'Skobot' (AI powered chat bot for Skoda) to 'Chasing the Sun - Dong Valley' for Volkswagen, to the deep data-driven marketing work for HP. My personal favourite was conceived in 2019 but will come to life in this year – watch out for it.

In 2020, what is that big trend that ought to concern or excite media agencies?

If the last couple of years have been about video, the next big wave is voice – be it in a new smartphone, gadget or in an AI-enabled avatar. PHD's book Sentience had projected that voice-enabled assistants will permeate our lives in multiple ways by 2020. And today, our homes are being Alexa-fied/Google-fied/Siri-fied. Just as Millennials and Gen-Z can't imagine a world without mobile phones, people born in this decade won't understand a world without voice-commanded devices.

My seven-year-old daughter thinks nothing of talking to the search bar in her tablet to find the video she wants to watch, or telling Alexa to play a song she wants to dance to, or discovering that she can listen to bedtime stories at her command, or telling Miko to help out with her homework. A whole generation is growing up talking to machines and gadgets as naturally and comfortably as they talk to human beings. So the question is: Are marketers ready to leverage this?

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

The collision of OTT, CTV (connected TV) and linear TV is creating a new world of planning, buying and selling. The opportunities and challenges that come with this are exciting. Addressability and precision marketing are going to challenge us to create new ways of defining and reaching people. This new world will belong to brave advertisers who don't get stuck in TV rating-based transactions and metrics.

From a media spend perspective, which product groups do you

suppose will be most affected by the economic slowdown that has crept up on us – and least?

Products that people can defer purchasing, or reduce their consumption of, will be affected much more than those that are 'immediate' and utilitarian. As technology changes the way people eat, shop, browse and consume content, product groups that enable these behaviours will see an upsurge in spending. Segments like education, online shopping, and content consumption have been on a growth trajectory, and are upending categories that have traditionally been high spenders.

And within that, what consumption trends are you seeing in rural versus urban markets?

The mobile screen is narrowing the gap between urban and rural markets; intent and desire are similar across the two, and are constrained only by the availability of disposable income. Across brands, while urban and higher income audience segments continue to hold strong, growth trends are coming from farther out. As e-commerce players enable rural Indians to buy the same product at the same price as their counterparts in large towns, the democratisation of consumption will soon be a reality.

“A whole generation is growing up talking to machines and gadgets as naturally and comfortably as they talk to human beings”

In the next 12 months, the solution to the digital ad fraud menace will come from...

A mix of technology and human vigilance. Technology will provide the tools. At the human level, having a deeper understanding of this technology will allow us to take quick action, and put the cost associated with deploying such technology into perspective.

What kind of specialisation/talent is missing in media agencies today?

Truly creative digital talent is definitely missing in media agencies. Also missing are creative technologists and people who can unleash the power of AI and machine learning for agencies and advertisers. We also need to upgrade investment teams and bring in a mix of Spock and Captain Kirk – immensely logical, yet focused on humans... in a data-driven world it is easy to lose sight of the humans who generate all that data in the first place. ■



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Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?

All our campaigns were very special to me. However, if I have to highlight one, it would be our work on Philips Hue Lighting. For this, we associated with Cricket Live during the ICC World Cup. What impressed me about the campaign was the ROI it generated for our client.

In 2020, what is that big trend that ought to concern or excite media agencies?

Consolidation of services is something that I expect in 2020. We have already consolidated all our offerings under Havas Village. This is a trend that I expect to see across other groups as well. The thin line between creative and media is blurring, especially given the digital/content touch-points we have today. We will still need specialists; however, the overall client approach will become more integrated and inclusive.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

India is catching up with all global trends fast. The latest example is the OTT revolution. However, if we look at the overall digital consumption, penetration, reach or media spend in India, we'll find that each one is still lower than it is in many global countries. I would be happy if we could catch up with the global trend of 'digital first' in the Indian context.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

The auto category has been under pressure this year and I expect this to continue in the first quarter of 2020. Other infrastructure related categories, like housing, real estate, trucks and developmental equipment, etc., will also continue to be under pressure. Alcoholic beverages is the least affected category.

And within that, what consumption trends are you seeing in rural versus urban markets?

As digital penetration improves in 2020, rural markets will see

higher adoption of e-commerce, mobile wallets and OTT platforms.

In the next 12 months, the solution to the digital ad fraud menace will come from...

I don't think there will be a complete solution soon. However it's time all clients and agencies started deploying tools like IAS, which are able to highlight ad injection, ad stacking, auto refresh, and bot traffic. Brands today are selective about using these services, but if it is made mandatory, media owners will be more accountable. Another such tool, Nielsen DAR, ensures there is a demographic fitment to planned campaigns. This could also help fight ad fraud.

What kind of specialisation/talent is missing in media agencies today?

More than talent, I would say it's an attitude that is missing – an attitude of rigour. I feel the new generation – (and many from the old generation!) – has started seeing, evaluating and working at the surface level of things. I am an old school professional; for me, rigour plays a very important role in whatever I do.

I wish clients would...

... start viewing creative and media agencies as their brand and marketing consultants, the way they view Accenture, EY and others. ■

"I'm an 'old school' guy, so more than talent I would say it's an attitude of rigour that's missing in media agencies today"

planning



"Advertising sufficiency allows for robust consumer sentiment"

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PRITI MURTHY
CEO, OMD India

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No.1 Bhojpuri General Entertainment Channel

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Q **What, in your view, was your agency's best campaign of 2019? What about it impressed you?**
 Our campaign for Renault 'Triber', for which we used the 'demonstration' route to bring the brand to life, stands out. Equipped with the insight that almost every household owns a television set and most families end the day watching their favourite shows, the creative idea was to capitalise on this popular mass entertainment space, through daily soaps and high-impact shows.

The scripts were meticulously prepared, and the storylines and protagonists of the shows were identified bearing in mind the product offering and target audience. The project gathered pace as these daily soaps were used to map the entire consumer journey, from awareness to consideration to purchase.

The high-impact shows helped create immediate awareness, and our spatial demonstrations highlighted the product as the living embodiment of space, modularity and flexibility.

To create buzz through print – historically, the most powerful medium for the automobile category – we explored an industry-first format of integrating the masthead in leading dailies. For example, a flap on the front page of The Times of India newspaper made consumers read the masthead as 'TRIBER of India'. Additionally, large format ads were splashed across the front pages of leading publications.

In 2020, what is that big trend that ought to concern or excite media agencies?

Precision marketing that allows brands to make better decisions, faster. Leveraging data to help brands play and interact with consumers throughout their journey is a reality and an expectation now. We do this through our Omni platform, which delivers a single view of the consumer that can be dynamically tracked and shared across all marketing practices.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Real-time, data-led planning and buying that delivers precision marketing for brands. Digital is standing its ground as digital-only

campaigns are now more than just experiments; brands are being launched through digital-only efforts.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

We have seen it affect automobile and premium FMCG brands. However, we're also seeing the value equation of products counter-ing this trend. Advertising sufficiency allows for robust consumer sentiments.

And within that, what consumption trends are you seeing in rural versus urban markets?

Rural India is getting more 'short-term' – that is, we're seeing smaller purchases that take place daily or weekly. Hence, more recency in advertising is the norm.

“Rural India is getting more and more 'short-term', which is why we're seeing small purchases that take place daily or weekly”

In the next 12 months, the solution to the digital ad fraud menace will come from...

Increasingly sophisticated technology and the skills to navigate it. Understanding the ecosystem while staying on top of the latest developments will enable the industry to

mitigate this problem. It needs to be a collective effort – for the benefit of the entire trade, we should all come together to form a coalition and tackle this.

What kind of specialisation/talent is missing in media agencies today?

We, as an industry, are becoming a lot more data-focused and outcome-oriented. Therefore, we will see an increasing breadth of roles in this space as it continues to evolve.

I wish clients would...

... continue planning for the long term, while keeping an eye on the short term. ■

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“Media agencies have been elevated to consultancies today”

SHASHI SINHA

CEO, IPG Mediabrands

**MASTI KE RANG,
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Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?

2019 was a stellar year for IPG Mediabrands India and its agencies – Lodestar UM, Initiative, Interactive Avenues and Rapport. It's difficult to choose one campaign. In 2019, we created a Guinness World Record with our campaign for Too Yumm! at Ardh Kumbh Mela; the account is handled by Initiative and Rapport. Initiative also launched Mission Paani for Reckitt Benckiser; it's a campaign close to my heart. The agency continues to do well on the Amazon business, which we have been handling since its launch in India.

I am proud of the work Lodestar UM is doing for Samsung, Spotify, Amul, Tata Motors, Mahindra & Mahindra, Johnson & Johnson and so on. Interactive Avenues won the IAMA Agency of the Year award for the sixth consecutive time. As a network, in 2019, we won 42 gold, 39 silver and 38 bronze awards.

In 2020, what is that big trend that ought to concern or excite media agencies?

I think it's an exciting time for media agencies. They've been elevated to play the role of consultancies today. Clients look at media agencies as extensions of their marketing teams – extensions that will help them solve business problems. We are moving from serving to solving. Media agencies play a pivotal role in building and growing the client's business, and to my mind, that's the single biggest transformation we have undergone in recent years.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Gone are the days when global headquarters used to introduce new services that we would then replicate. We are completely aligned to all our global best practices, tools and services. Moreover, media solutions are all about building strategies and solutions that are custom-made for the client's business problems.

For instance, J&J India's media solutions will be different from those in other global markets. We recently launched Spotify in India; the idea, strategy and execution factored in cultural nuances and local challenges.

What consumption trends are you seeing in rural versus urban markets?

Despite the steady rise of digital, television remains the key medium for advertisers targeting rural markets. FMCG categories like personal care and food and beverages continue to focus a large part of their rural outreach on TV, accounting for a dominant share of TV spends. The medium delivers a potential 70 per cent of rural audiences, supported by robust viewership measurement from BARC.

With easy accessibility of free-to-air channels and headroom for growth, TV will stay at the centre of the action for rural advertisers in the future. While TV also delivers cost-effective reach in urban homes, consumers are more evolved in these markets and media habits are fragmented.

In urban markets, advertisers have several screens on different platforms to target these audiences through. The key to connecting

with urban audiences is identifying and participating in the genres they follow. Besides FMCG, auto, consumer durables and telecom also drive urban media spends.

In the next 12 months, the solution to the digital ad fraud menace will come from...

...increasingly sophisticated brand safety solutions and greater focus on transparent, named inventory sources by agencies and clients.

"Gone are the days when global headquarters used to introduce new services that we would then replicate; today, we're aligned"

What kind of specialisation/talent is missing in media agencies today?

Now that the role of the media agency has evolved to that of a consultancy, clients are looking for business solutions which are media agnostic. We are focused on upscaling our mainline teams digitally. While other networks are focused on creating specialists, our teams are fluid and can seamlessly work on all mediums including digital. For most major clients across the IPG Mediabrands India network, we have offline-online integrated teams. Our endeavour is to bridge this gap through continuous training and to work more collaboratively.

I wish clients would...

...not compromise on the quality of work just because some agency is offering a lower commission. ■

JAZBATON KI MEHAK SE MEHKEGI ZINDAGI.



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“Publishers should open themselves to third party monitoring”

VIKRAM SAKHUJA

Partner & Group CEO, Madison
Media & OOH

MASTI KE RANG,
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KE SANG.





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Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?

My top pick would be the 'Missing i' campaign that we did for Tata Salt to bring out the importance of iodine deficiency; we wiped out the letter 'i' from all text the consumer read. It was done at scale, it was optimised for multiscreen presence, we utilised partnerships to make it work, and also used contextual triggers. That's how we found the right consumer insights.

The other campaign we are very proud of is the BJP 2019 Lok Sabha campaign. It comprised seven mini campaigns, each corresponding to a phase of the elections. It involved planning and scheduling of several hundred creatives across TV and print, customised to different markets, while maintaining very strict implementation guidelines. This was operational excellence at its best.

In 2020, what is that big trend that ought to concern or excite media agencies?

Fraud and lack of viewability of digital media. Digital is a powerful medium that's growing very well. Malpractices have the risk of eroding trust. And when you lose trust, the fall is off a cliff. Publishers should open themselves to third party monitoring. It's equally important for advertisers to get agencies to invest in these tools.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Using data to deliver insight. Currently, DMPs are the new toy and we are mining data to target better. But the trick lies in uncovering an insight based audience profile rather than an affinity based one.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us – and least?

Everybody is affected. The issue seems to be a combination of consumer demand and inadequate liquidity in the system. The FMCG segment is impacted relatively less. High outlay categories, where purchase can be postponed, are affected more.

And within that, what consumption trends are you seeing in rural versus urban markets?

Earlier, rural was growing much faster than urban. But in the downturn, rural is probably impacted a bit more than urban. That said, it is still performing a tad better than urban.

In the next 12 months, the solution to the digital ad fraud menace will come from...

I would love to say that digital majors will open themselves to third party measurement, and that it will become the standard, but they will resist it. Ultimately, advertisers have to put their foot down. It is their money. They have to be reassured that their communication is being seen by the right people and being reported correctly. If a critical mass of advertisers, as a group, stands up to the giants, I am sure they will be listened to.

What kind of specialisation/talent is missing in media agencies today?

The combination of EQ, traditional planning skills, and digital planning skills is missing. Currently they operate in silos.

I wish clients would...

... spend more time asking how to spend marketing money more effectively, rather than wondering how to save marketing money. Which means, I wish they prioritised effectiveness over efficiency. ■

“Malpractices have the risk of eroding trust, and when you lose trust the fall is off a cliff”

JAZBATON KI MEHAK SE MEHKEGI ZINDAGI.



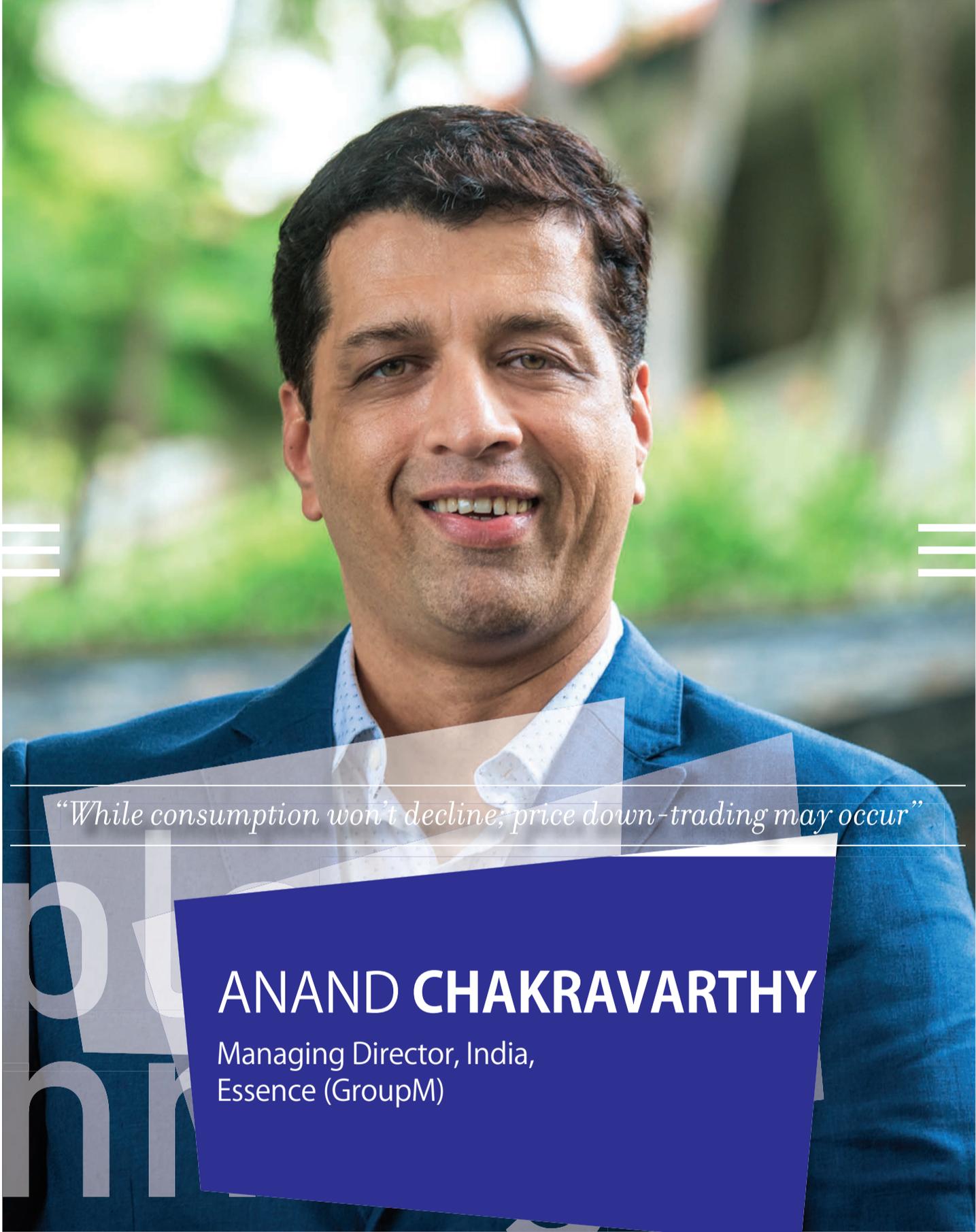
ज़िंदगी की मेहक

Ab Bhojpuri Mein

MON-FRI 9 PM



No.1 Bhojpuri General Entertainment Channel



“While consumption won’t decline, price down-trading may occur”

ANAND CHAKRAVARTHY

Managing Director, India,
Essence (GroupM)

MASTI KE RANG,
BADE SITARON
KE SANG.





No.1 Bhojpuri General Entertainment Channel

Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?
 I would go with the 'shoppable television content' campaign that was created for Flipkart during the Big Billion Days sale. We made content 'shoppable' by designing and executing a smart integration for Flipkart on television. With a strong insight and user-friendly participation, the campaign moved beyond brand metrics to drive actual sales, and was the first such innovation on TV.

Often, consumers want to buy the clothes/products they watch protagonists wear/use on general entertainment channels. In partnership with Zee TV, we curated two special stores on Flipkart, which featured fashion products and smart kitchen appliances, respectively. The products were part of special episodes of Zee TV's leading shows - Tujhse Hai Raabta and Kundali Bhagya. Scanning the QR code that appeared on their television screens led consumers to the relevant store on Flipkart, where they could purchase the products they saw on screen.

In 2020, what is that big trend that ought to concern or excite media agencies?

The implementation of the new Personal Data Protection Bill will have an impact on the way digital campaigns are measured. As data privacy laws come into play, marketers and their agency partners need to think about how they measure campaigns and manage their data analytics in a new regulatory ecosystem. The influence of digital platforms on consumer behaviour is going to accelerate in 2020. Smart TV penetration in India will get real scale this year as prices continue to fall. More services and utilities will go online.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

There is just not enough focus on brand safety, ad fraud and viewability (BAV) in India. This area is largely ignored. Often, cost is cited as the rationale behind the lack of investment in available solutions. The mindset needs to change.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

We know that consumers make specific choices across and within product categories in an economic slowdown. There's down-trading in the consumer packaged goods category, and a shift from premium brands to mass premium brands. Consumption of essential goods will not decline, but a down-trading in price may occur. Lifestyle categories could also get affected - especially the replacement segment, as consumers may put off replacing an existing product with a new one. Other sectors that could potentially see a slowdown include white goods, mobile phones and auto. Categories that are unlikely to be affected are typically non-negotiable ones like education, pharmaceutical products and religious tourism.

And within that, what consumption trends are you seeing in rural versus urban markets?

It is too early to talk about consumption trends in urban versus rural markets.

"As data privacy laws come into play, marketers and their agency partners need to think about how they will measure campaigns"

In the next 12 months, the solution to the digital ad fraud menace will come from...

Prevention, by deploying available technological solutions equipped to detect ad fraud, is important. The solution will come from the adoption of basic hygiene practices, like ensuring

new publishers are whitelisted through a test campaign before a large amount is spent on them. Publishers, agencies and clients must come together and work towards a solution. We see this kind of collaboration in the West.

What kind of specialisation/talent is missing in media agencies today?

The agencies of the future will need to have structures that are skewed differently - the bulk of agency talent needs to be in business planning, strategy, digital activation, analytics and measurement. Operations and execution need to be automated as much as possible. This way, more 'manpower time' will be given to clients and their business needs. Agencies will need to hire data scientists, technology engineers, business analysts, consultants, and process management experts.

I wish clients would...

... facilitate greater collaboration between their partners, such as creative and media agencies. ■

JAZBATON KI MEHAK SE MEHKEGI ZINDAGI.



ज़िंदगी की मेहक

Ab Bhojpuri Mein

MON-FRI 9 PM



No.1 Bhojpuri General Entertainment Channel



“On TV we’re still planning on the basis of extrapolated data”

RAJNI MENON

CEO, Carat India

**MASTI KE RANG,
BADE SITARON
KE SANG.**





No.1 Bhojpuri General Entertainment Channel

Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?
 It was the one we did for Philips Air Purifier. It was contextual, relevant, and we delivered it in a very short span of time. It was not a 'single media touch-point' based campaign; we used real-time data, out-of-home... and print, at a time when it is considered a medium that does not deliver anymore. The campaign fetched business results, something I was thrilled about.

In 2020, what is that big trend that ought to concern or excite media agencies?

Something we have to start preparing for is a time when Google – and everybody else – stops all third-party cookie data. Digital has always been about measurement and being able to track audiences across all the environments, except a few walled gardens. The third-party cookie is obviously one way to do it. Without cookies, advertisers will be forced to re-think their digital strategies, and so will we. Hence, first-party data will become all the more critical and clients will need to invest in this.

“The ‘media agency’ - a standalone entity that delivers what a client needs - does not really exist anymore”

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Non-digital programmatic planning - it is already in place with out-of-home, there is an ongoing discussion around TV... that is the next stage in the process of evolution. About 50 to 60 per cent of the ad investment is going on TV, a medium you still plan demographically. But there is no authenticity about whether your audience has really seen it. On digital, we're tracking whether someone has actually clicked on an ad, but on television we're still planning on the basis of extrapolated data, passive or semi-passive viewing. Programmatic on TV is something I would like to see very fast.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

Real estate and auto (because of economic indicators as well as the rise of Ola, Uber) have slowed down. Necessities like food,

eating out and FMCG are still seeing a steady rate of growth. Financial products that offer long-term security are something that people are spending on. Any purchase which is not a necessity is impacted by the slowdown.

In the next 12 months, the solution to the digital ad fraud menace will come from...

We have all been battling this for the last couple of years and I don't see a huge new solution coming in. A lot of us already have ad-fraud tracking solutions, like IAS (Integral Ad Science) or DoubleVerify, in place. Also, publishers today are a lot more stringent because now they know that clients are willing to stop investments when faced with fraud of any kind – fraudulent impressions, wrong geography, bot traffic, unsafe content, etc.

To fight ad fraud, advertisers need to realise that they too must

have security protocols in place, such as having the right tags, etc. We all talk about how AI and blockchain will help us make inventory safer, but it is still far away. Theoretically, there are many things we can do, but for the immediate future, it's best if we work closely with publishers and put pressure on them to create a safer environment.

What kind of specialisation/talent is missing in media agencies today?

The 'media agency' - a standalone entity that delivers what a client needs - does not really exist anymore. It is more about network solutions and network strengths that come into play whenever you are looking at a client. No agency as a single entity can deliver everything that a client needs, and that is very difficult in a converging world. That's how it is in the context of media, data and technology. Smart advertisers are not looking at buying and deploying media; instead, they are looking at smart marketing plans that deliver business results.

I wish clients would...

I hope advertisers don't start moving to very short-term marketing strategies. While discounts, vouchers, and other sales oriented initiatives might deliver some up-lift in sales in the short-term, they can erode brand equity in the long-term. ■

JAZBATON KI MEHAK SE MEHKEGI ZINDAGI.



ज़िंदगी की **मेहके**

Ab Bhojpuri Mein

MON-FRI
9 PM



No.1 Bhojpuri General Entertainment Channel

#StarFlowFest 2020

Here's how the second edition of the marketing festival unfolded

How to manufacture desire?

The second edition of Star FLOW – The Change Festival by The Times of India kick-started on February 19, 2020, at The Leela Ambience, Gurugram. The first session of the event – ‘How to manufacture desire?’ by Nir Eyal, author of ‘Hooked’ and ‘Indistractable’ began with him sharing how the idea of his book ‘Hooked’ cropped up. He mentions that it came out of the class that he taught at the Stanford School of Business.

“I didn’t write this book for companies like Facebook or Google, I wrote it for you. It was to democratize the techniques that use the very same psychology that keeps us glued to our phones,” Eyal stated.

In his session, he talks about the deep patterns behind how these products, that keep us glued, are designed. He began by asking – what is a habit? The definition he shared was, it’s the impulse to perform a behaviour with little or no conscious thought. “About half of what you do every single day is done through a habit,” he said.

He further explains that the building blocks of how to build a habit-forming product. He said, “This is how – it’s called the ‘Hooked Model’. It is defined as an experience to connect your user problems to your product with enough frequency to form a habit.”

Every ‘Hook’ has four steps: Trigger, Action, Reward, and Investment.



Nir Eyal



An initiative by THE TIMES OF INDIA

Trigger: A trigger is a called action that tells us what to do next. It is of two types – external trigger (something in our environment that gives us a piece of information about what to do next) and internal trigger (information about what to do next is informed through an association in the user’s memory). Negative emotions are powerful internal

triggers.

Action: It is defined as the simplistic behaviour

performed in the anticipation of a reward. A quick Google search is an example of the action performed in the anticipation of results (the immediate reward).

According to BJ Fogg, founder and director of Behaviour Design Lab, for any behaviour to occur, we need motivation (the energy for action), ability (capacity to do a particular action) and trigger (either external or internal).

Reward: It is where you get what you asked for. Psychologist James Olds and neuroscientist Peter Milner discovered the reward mechanisms in the brain involved in positive reinforcement, and their experiments led to the conclusion that electrical stimulation could serve as an operant reinforcer. The way the brain gets us to act is not through the pleasure per se, but it’s about stimulating the itch that we seek to scratch.

There are three types of variable rewards – tribe (search for social reward), hunt (search for resources), self (search for self-achievement). The variable rewards are not a free pass. Your product must address the itch that one seeks. There should always be a connection between the variable reward and the internal trigger.

Investment: The last step of the Hook model is ‘Investment’ which is also the most overlooked phase of the four steps. This is where users invest in future benefits. The point of the investment phase is to increase the likelihood of the user passing through the hook in the future.

The investment phase does it in two phases: by loading the next trigger and by storing value.



An in depth to and fro on sustainability and the circular economy - (L-R) Santosh Iyer, Chandra Bhushan, Prabodha Acharya and Ritesh Ghoshal



Sandeep Bhushan’s session on connecting in a culture of expression



A session by Patrick Renvoise, co-founder and chief persuasion officer, SalesBrain, on ‘Is there a buy button inside our brain’



Richard Shotton speaks on the impact of behaviour on marketing



A panel on Brand Building vs performance marketing - (L-R) Shripad Nadkarni, Rajeev Karwal, Chandrasekhar Radhakrishnan, Tapan Singhel and Hitesh Oberoi

“Convenience makes us trust too much”: Philipp Kristian Diekhoner

In his session at the second edition of Star FLOW, Philipp Kristian Diekhoner, trust futurist and innovation strategist, author of The Trust Economy, spoke about making trust your superpower in the digital age. In the beginning he mentions that trust is often daunting and uncomfortable. But he says this can be changed. “When people trust your stories, everything changes. And that is what marketers should do – tell simple and interesting stories. But don’t tell stories you can’t own,” he said.

Trust allows one to do extraordinary things. High trust sets apart the most innovative, high performing people, and team. “Trust isn’t everything, but without it, everything is truly nothing,” he told.

Speaking of how to make trust an advantage he pointed out that our lives are based on assumptions. “More important than you telling the right stories is that when people retell your stories, it is told in the right way. And for that, your story has to be compelling and simple,” he added.

Trust isn’t good or bad per se but it simply drives behaviour and value and, in turn, behaviour drives choices. He also said that trustworthy is different from trusted, it has to be both. A brand

that is trusted will still do well in the market even if it isn’t trustworthy.

Philipp shared that the world’s most trusted brands and businesses monopolise our minds. He categorised trust in three types – transactional trust (hygiene factor), contextual trust (expert knowledge) and universal trust (unique preposition).

Shedding light he said that tech companies are especially good at gaining trust. Tech and data are far superior to paper and stamp administration. He also clarified that increasing business complexity is paralysing existing company structures. According to him, no company should afford to ignore this dramatic technology shift.

In the digital age, the trust economy is overtaking the distrust economy. The distrust economy is driven by Gen X and baby boomers, enforced by rules, institutions, and central bureaucracy. Digital trust is changing the way we trust. It is making us trust by default. Scaling trust digitally collapses the cost of trust many businesses rely on. It concentrates the power in the hands of the very few.

He said if you want to be both trusted and trustworthy you have to change the way of trust-building because digital empowerment is shifting



An initiative by THE TIMES OF INDIA



Philipp Kristian Diekhoner

behaviour. Productivity suffers when common ground (trust) is missing.

Here’s how different generations trust:
Gen X: rules as norms, tech as a toolset, data as insurance

Gen Y: Google first, think second, tech as enabler, data as currency
Gen Z: digital equals first reality,

tech as infrastructure, data is context
He emphasised that whenever trust leaves, value leaves with it. Everything we now take for granted was once a trust leap. He concluded that one can be a successful marketer by helping customers become the best version of themselves.



A panel discussion on what will it take to succeed in a difficult economic scenario – (L-R) Hemant Malik, Subodh Bhargava, Girish Agarwal and Rohit Saran



Erich Joachimsthaler reveals the perfect mix for a strong brand architecture



Marty Neumeier sheds light on the new brand model



Charles Leadbeater speaks on innovation amidst uncertainty



A panel discussion on how brands think about marketing on digital in innovative ways - (L-R) Shveta Singh, Meera Iyer, Praveen Sharma and Sunil Suresh

“Simplicity is the best way to live”: Sonam Wangchuk

One of the major highlights of day two of the second edition of Star FLOW was the stand-alone session by Sonam Wangchuk, innovator, education reformist and inspiration for the film ‘3 Idiots’. In an almost hour-long session, Wangchuk talked about how simplicity delivers beyond tech solutions.

“I come from a very different world than yours. I am more in the social entrepreneurship sphere where the impact is more important than income. But we share a big common ground, that is, solving the problem with innovation,” he began.

He went on to share his own story of his work in Ladakh, which is where he comes from. He said that his work is more about selling good ideas than about making money. “Being a minority is a big challenge particularly for children who go to school. My journey started when I saw the status that through the 1980s and 1990s, 95 per cent of Ladakhi students used to fail in matric exams. We began to train teachers and villagers to demand good education along with their other demands. We realised when they change their priorities, the government changes its priorities,” he said.

Wangchuk revealed that he then started focusing on failing students

and created a school in 1999 where admission was granted on the criteria that ‘you have failed’. “Since they were failing to learn the way we were teaching, we thought to teach them in the way they learn,” he mentioned.

Nobody is too poor to afford soil or sun or ice or foil, Wangchuk opined. It is around these things that he based his innovation on. “This science is new. We wanted to build on what our ancestors had. We went to them to learn. We made the mud building, naturally heated it and lived in harmony with nature,” he added.

Further, speaking of Leh, he mentioned that development there was on the same road as any other part of the country. People with the mud building felt small in this town and so they moved to concrete houses. They then had to invest a huge chunk of their earning to keep the concrete buildings warm during winters.

Wangchuk took a lesson from this transformation in Leh and back in Ladakh, along with his students. He went on to build high-end contemporary buildings with natural heating. Inspired by it, 10 years later, people started looking back at earth buildings.

In the case of water solutions, glaciers are of course melting. In sprintime, when farmers in Ladakh need water, they get only a trickle and have



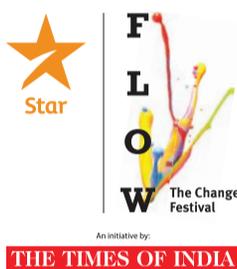
Sonam Wangchuk

to fight over it. Whereas in summers, there are floods. “People laughed at us when we said we will freeze the winter water, when nobody is farming, and melt it in spring when farmers need it. But we did succeed. We made a pyramid of ice that lasted till the end of August,” he mentioned. Wangchuk put flags around it and marketed these pyramids in a spiritual manner in an attempt to save them.

Today there are ice stupa

building competitions around the globe. This idea also won the Rolex Award. Wangchuk also devised another crowdsourcing movement - #LIVESIMPLY Movement.

Sonam who had walked on the stage in a shirt which was donated by a volunteer and stitched to make it wearable and trousers bought in a flea market was greeted with a standing ovation as he descended the stage.



An initiative by **THE TIMES OF INDIA**



Ajay Agarwal, Design Thinking – Practice Lead, KPMG India, conducted a workshop in Star FLOW fest 2020 on Design thinking and how it relates to brand building and marketing strategies



Shreya Kapoor, head of marketing, Chakr Innovation, gave her inspirational talk on ‘Turning pollution into art’. Shreya delved into issues like pollution management and how it can be maneuvered into a more productive entity



Alakshi Tomar, co-founder, Trucup, delivered her inspirational story in which she touched multiple topics from menstrual hygiene to sustainable hygiene



Anoop Khanna, founder, Dadi ki Rasoi, delivered an inspirational speech at Star FLOW Fest 2020 on the topic ‘The Importance of Giving Back’



Richard Shotton, Founder, Astroten Consultancy, conducted a workshop on ‘Behavioural science in marketing’ in which he discussed possible ways of leveraging human behaviour to become better marketers



Jaspreet Bindra, founder, Digital Matters, conducted a workshop on Blockchain in marketing. Bindra shared some crucial insights on the relevance of Blockchain marketing in modern marketing.

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MAINTAINS ITS LOYAL READERSHIP IN
THE HINDI HEARTLAND OF UTTAR PRADESH



Amar Ujala maintains its strong readership base in IRS Q3 over Q1(AIR), whereas both Dainik Jagran & Hindustan lost 21 Lakh(-17%) and 23.6 lakh(-23%) readers respectively.

*Source- IRS Q1 and Q3-AIR, comparison between main publication.



PRINT | TELEVISION | RADIO | ONLINE | OTT

TAKE A LOOK AT WHAT WE WILL BE DISCUSSING...

- **THE NATURE OF ENTERTAINMENT**
Consumers expect some form of entertainment from all media. How varied are their expectations from each?
- **AD RATES: MORE OR LESS?**
How much do ad rates in any media vary from state to state? Are the disparities wide? And are the rates fair? A panel of media buyers and sellers delves into history – and the future to find if equilibrium is being reached.
- **OTTS: NATIONAL OR REGIONAL?**
In there merit in launching an app in a specific language? Or will a single all-language app suffice?
- **POWER OF LANGUAGES**
One of India's best-known ad men talks about his experience of the power of the local idiom.
- **THE CONTINUING PROMISE OF PRINT**
Regional print brands continue to grow. What makes them resilient?
- **HOW INDIA SHOPS**
Few things tell us more interestingly the story of India's regional diversity than the way Indians shop. A top executive with a large retail chain reveals the picture of regional preferences and what that says about local cultures.
- **REGIONAL DRAMA**
Indian TV continues to grow strongly, driven almost entirely by regional GEC channels. Where is the growth coming from? Can it be hastened?
- **CONTENT DISCOVERY**
The sheer volume of content available keeps ballooning. How can tech and design help the consumers find what they want?
- **THE BUSINESS OF TV NEWS**
How different are the promise and challenge of the news business in the different regions?
- **THE FUTURE OF VOICE**
An expert talks about the role voice will play as even more Indians come online.
- **ECOSYSTEM CHALLENGES**
Twenty years after the internet's coming, have all the major tech issues of language publishers been sorted?

* Note: Tentative agenda subject to change.



PRASOON JOSHI
McCann World Group



VISHNU MOHTA
Hoichoi



MONICA NAYYAR PATNAIK
Sambad Group



RAVISH KUMAR
Viacom 18



BASANT RATHORE
Jagran Prakashan



ABHISHEK REGE
Endemol Shine India



APARNA ACHAREKAR
ZEE5

MEET OUR SPEAKERS



VAISHALI VERMA
Initiative India



VARGHESE CHANDY
Malayala Manorama



ASHISH SEHGAL
Zee Entertainment Enterprises



MADAN MOHAPATRA
Future Group India



SIDHARTH SHAKDHER
Hotstar



KEVIN VAZ
Star India

and many more...



MARCH 26, 2020 | TAJ MG ROAD, BENGALURU





"Media agency business margins will continue to be a concern"

HIMANKA DAS

Chief Executive Officer,
Vizeum India, Dentsu Network

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DIGIES
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Aims to celebrate creative marketing
communication initiatives by
Agencies, Brands, Production Houses, Design Studios,
Creative Studios and Content Creators

Q **What, in your view, was your agency's best campaign of 2019? What about it impressed you?**
It was our award-winning 'Festive Treat' campaign for HDFC. Despite the media-cluttered festive season and challenging macro environment that dampened all 'festive purchases', this campaign led to 15 per cent growth in the assets business and over 25 per cent growth in card spends.

In 2020, what is that big trend that ought to concern or excite media agencies?

Media agency business margins will continue to be a concern. In a digital economy, the excitement lies in empowering our people and brands, and in transforming our business through the intelligent application of talent, technology and scale.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

We have the best and most competent talent here. The work done by our Indian leaders has been acknowledged and they've been assigned global roles. Having said that, I'll add - we need to catch up fast in our ability to package our communication framework as world-class.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

Consumption is one of the key growth drivers of the economy. When discretionary spends start to go down during a slowdown, categories that could get affected are real estate, auto, premium mobile phones, and consumer durables, as they come with much higher price tags and are often linked to non-banking financial companies (NBFCs), that are now staring at a liquidity crunch.

And within that, what consumption trends are you seeing in rural versus urban markets?

Rural consumers strive to purchase branded, high quality products. India's rural consumer markets are expected to grow faster than urban consumer markets. Various studies and reports clearly show that rural consumers are evolving towards a broader

notion of 'value', which is essentially a combination of price, utility, aesthetics and features. This hasn't happened by chance; it's the result of the conscious effort taken by the Government of India to improve the infrastructure in rural areas. Consequently, there's more movement of goods and services across these regions, which, in turn, improves the earning potential of people in rural areas. As a result, consumption increases.

In the next 12 months, the solution to the digital ad fraud menace will come from...

Digital fraud occurs when, using bots and fake users, the impact of a campaign is inflated and advertisers are charged unjustified fees. In India, mobile apps are the biggest contributors to fraud, accounting for 85 per cent of the total damage. And as video formats gain traction, fraud is becoming even more rampant. Viewability re-

mains a problem too, because we don't have a common industry currency to measure a 'view' against; we still haven't agreed upon what duration qualifies as 'a view'. Solutions to these problems will come when we deploy technology to prevent ad fraud.

What kind of specialisation/talent is missing in media agencies today?

The concept of 'offline' and 'online' has jeopardised the industry and has confused talent hunters. A hybrid skill-set is extremely valued in the emerging media agency ecosystem. Although specialists, connectors, and soloists can excel too, it's versatility that will help us tap into the drivers of customer behaviour. We need people who can make inferences from multivariate data sources. Next-gen professionals will be adept at emerging core disciplines like mobile, analytics, social, web, search, and content.

I wish clients would...

We have to conduct ourselves in a manner that makes clients want to embrace us as true business partners. ■

"In India, mobile apps are the biggest contributors to fraud, accounting for 85 per cent of the total damage"

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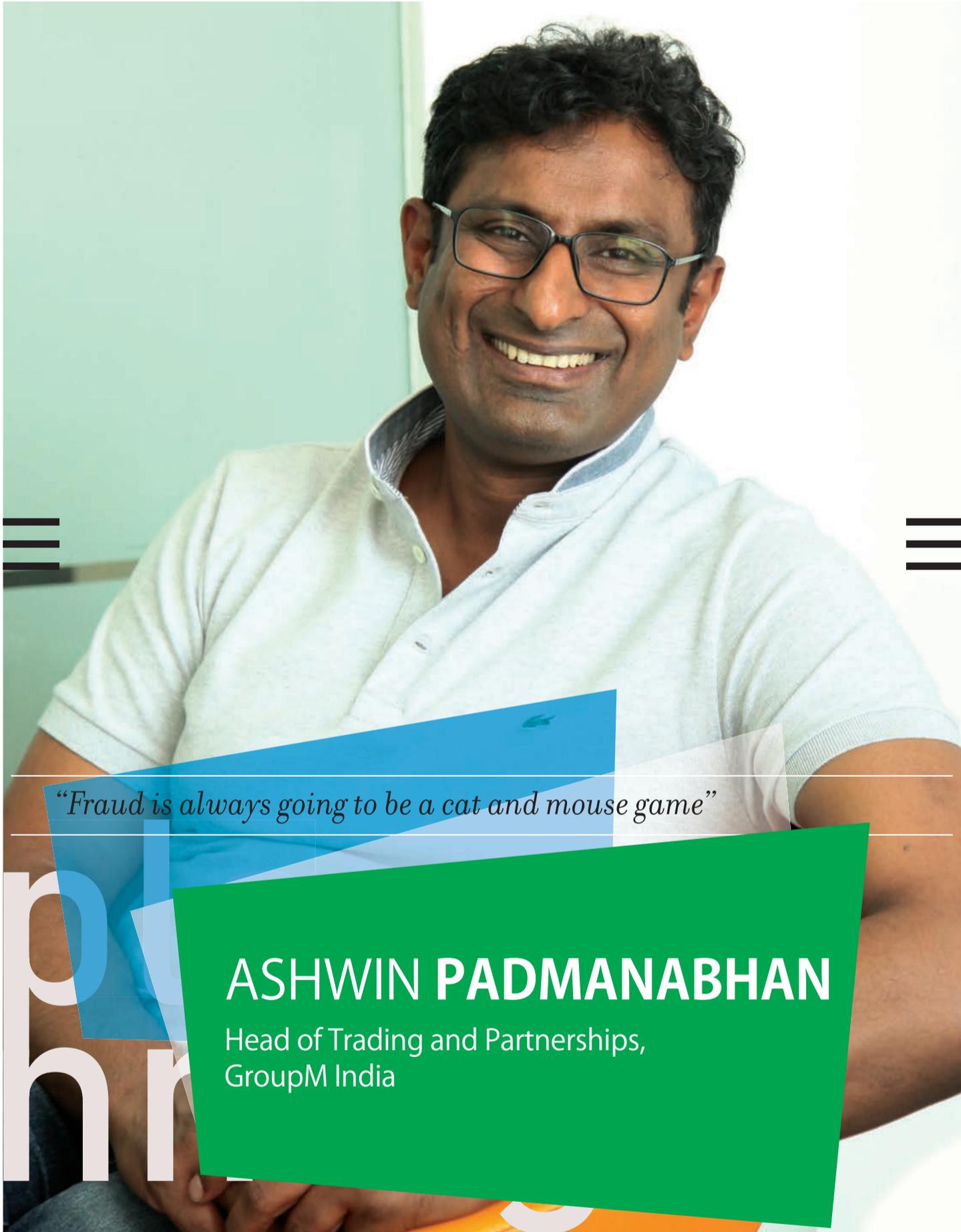
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“Fraud is always going to be a cat and mouse game”

ASHWIN PADMANABHAN

Head of Trading and Partnerships,
GroupM India

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Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?

One is the ongoing Myntra campaign, which is not a 'campaign' in the traditional sense. We created content and produced a reality show with Myntra, in which designers competed with each other to create new looks and styles, that were then amplified by influencers. This campaign used content to engage with consumers, as opposed to traditional forms of advertising. Similarly, the 'Big Billion Days' campaign for Flipkart was supremely successful.

From the P&G portfolio, Ariel's 'Share the Load' campaign made waves. In fact, we're seeing that grow into a bigger theme. It's an example of a campaign that's changing and creating culture.

In 2020, what is that big trend that ought to concern or excite media agencies?

Addressability is a big trend, not only with digital consumers but in the non-digital space as well. Second is the role content is going to play. I strongly believe advertising is going to move away from its traditional forms to resemble content pieces. It's not about doing four campaigns a year; it's about working together to create exciting content.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

India will be one of the fastest growing markets in terms of ad spends. As an industry, we have leapfrogged two to three generations and are far ahead of other markets in terms of spending on digital. Focus is going to be on reaching the large volumes of people who are online today.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

No product group is unscathed, but there are some that are less affected, like the FMCG sector which has remained relatively stable. But for other consumer groups like consumer durables, auto, tel-ecom, etc., it has been a bloodbath.

But instead of looking at product groups, if I look at 'Indian

companies versus foreign multinationals', I think Indian companies are more stable right now. Indian corporations are aggressively maintaining their spends and are continuing to acquire more customers. Their inherent belief in the economy is stronger.

And within that, what consumption trends are you seeing in rural versus urban markets?

Let me take the example of our client Emami - mid to smaller towns is their key market. Despite all the economic stress, they've still maintained reasonable growth. The space is so large that we've been working continuously to grow different markets. Overall, strategy and execution are going to be critical for growth.

In the next 12 months, the solution to the digital ad fraud menace will come from...

We've been extremely paranoid about ad fraud. Brand safety is a big one for us, globally. We've partnered with multiple agencies and third party tech providers to ensure we provide the safest environment for the brands we manage.

We've launched an influencer marketing tool called INCA, which uses AI to find out which influencers

have a genuine following and detect which ones are sourcing followers through bots and fraudulent sources. We as a group are investing in technology to fight ad fraud.

You have to constantly play this game. You'll innovate to beat fraud, then the guys who want to carry out the fraud are going to innovate further... so it's always going to be a cat and mouse game. ■

"Indian corporations are aggressively maintaining their spends and are continuing to acquire more customers"



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“We need to focus on outcome, rather than output”

DINESH SINGH RATHOD

CEO, Madison Media Omega



News | Health | Gadgets | Money | Sports

खबरें काम की! कहानियाँ कमाल की!

हर सुबह 6-10 बजे तक लगातार

शुरु कीजिए अपना दिन नमस्ते भारत के साथ. खबरों का फटाफट अपडेट्स, एक्सपर्ट्स की राय और हमारे दिग्गज रिपोर्टर्स जो बताएंगे बड़ी खबरों के पीछे की पूरी कहानी!



Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?

It was a campaign for Sporto, an active-wear brand. Cricket was an obvious choice, but there is a cost attached to being on the biggest show on Indian television. We did this, within the budget. With 'Closer to Live', we managed a continuous presence for the brand throughout the IPL. Across 60 matches, we delivered an equal number of GRPs and three times the reach as compared to brands that invested twice as much as us.

In 2020, what is that big trend that ought to concern or excite media agencies?

Content, for sure. Given the affordability of data, on-demand content is on the rise; consumers are inundated with content, which they want to view at their convenience.

Marketers are always looking for those extra 10 seconds to tell their product story. Media agencies and clients are yet to exploit the opportunity this brings. As long as viewers find the content relevant, brands will be able to put their proposition forward. The lack of third party measurement, that could bring more accountability to digital platforms, is a concern.

"Time-strapped consumers in urban markets are increasingly getting into the 'convenience economy'"

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

An emerging trend is an increased focus on business outcomes, as opposed to mere media output. Our group CEO Vikram Sakhuja has championed the 'Outcomes Planning Framework', which delivers measurable business results, by enabling us to allocate media investments across various touch-points in the consumer journey.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

Product groups which usually see high demand from rural markets will continue to feel the pinch, whereas new-age businesses, fueled by the digital explosion, will continue to invest.

And within that, what consumption trends are you seeing in rural versus urban markets?

Time-strapped consumers in urban markets are increasingly getting into the 'convenience economy', fuelled by apps for every need. People are stepping out of their homes less frequently, because a lot of their needs are met through apps, for instance, food delivery apps. Small towns and rural markets are seeing huge growth in data consumption on the back of regional language content and apps like TikTok. The aspirations of consumers across markets are the same, and this is reflected in the growth of categories like beauty parlours, English-medium schools, automobiles, packaged food, etc., across non-urban markets.

In the next 12 months, the solution to the digital ad fraud menace will come from...

We need to focus on outcome, rather than output. The metrics for evaluation will need to move beyond impressions and CTRs to actual engagement across the consumer journey. Analytics will be instrumental in judging the effectiveness of platforms and ad formats. Even in the world of 'influencer marketing', brands will have to turn to analytics to distinguish between real

influencers and those who artificially increase their social media presence.

What kind of specialisation/talent is missing in media agencies today?

To leverage the opportunities in the content space, media agencies need specialists – including talent that will add value to the brand, and not just plug or slot a product. Excessive focus on data can sometimes become a barrier to innovative strategy. We need more 'strategic thinking' experts in media agencies.

I wish clients would...

... focus more on outcomes and not be overly obsessed with efficiency. I also wish they would be more willing to take some calculated risks, step out of their comfort zones, and look at agencies as true business partners – not vendors. ■



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“We’re moving into an era when creativity and data will co-exist”

TUSHAR VYAS

President, Growth and Transformation,
GroupM, South Asia



ACCURACY BUILDS CREDIBILITY

ABP News' exit poll predictions were the closest to the Delhi Assembly Elections result.

Exit Poll Predictions

AAP 51-65	BJP 3-17
CONGRESS 0-3	

Declared Result

AAP 62	BJP 8
CONGRESS 0	



Source : ABP NEWS - C Voter Survey

Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?

I'd like to name a campaign we did for Unilever's Lifebuoy. We used what is called a 'data lighthouse'. We wanted to target tier III cities and small villages. To facilitate this, we started collecting data from public health centres, at the village and district level. We identified the diseases prevalent in each village and based on that information, we started localising our message.

As part of the brand communication, we gave them tips and guidelines on how they can protect themselves from diseases. Many of these problems tend to be very hyper-local in nature, so we tailored the messaging accordingly.

In 2020, what is that big trend that ought to concern or excite media agencies?

Attention to engagement is something that worries, concerns and challenges us. Modern consumers live in a hyper-communicative market and are exposed to so many different types of media, daily. This means there are both distractions and opportunities. Standing out and engaging the consumer with the right kind of content, in the right context, is the challenge.

Many brands are doing a great job of overcoming this, but it has to happen at scale. The messaging, content, and communication are all important because personalisation with a human touch is what we need. This will drive engagement in the future.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Each market is unique so I am not sure if we should be playing catch up. Our growth will be more inclusive and the media sector has grown in India. This could be because of our diversity and vast geography.

What consumption trends are you seeing in rural versus urban markets?

Urban has grown.

In the next 12 months, the solution to the digital ad fraud menace will come from...

The problem is multi-layered. There is a technical type of ad fraud for which commercial solutions are already being designed. However, in the case of ad fraud, the problem keeps evolving. Technological solutions have started coming in but what is missing is the brand context, of the different types of vulnerabilities that each type of ad can have. For example, a consumer facing brand might have a particular threshold to resist ad fraud, a security brand might have a different threshold, and so on.

What kind of specialisation/talent is missing in media agencies today?

We're moving into an era when creativity and data will co-exist. We need deeper understanding of what it means to be a data-savvy consumer. We also need to invest in deeper technical knowledge.

I wish clients would...

I don't wish for anything specific. We are at the forefront of a digital transformation, led by data and creativity. Being socially responsible is an aspect of that journey, and that's what agency-client relationships are

"A consumer facing brand might have a particular threshold to resist ad fraud, different from that of a, say, security brand"

all about these days. ■



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Source : ABP NEWS - C Voter Survey



“Spending has not really dropped, but is now rationalised”

MAMATHA MORVANKAR

Chief Investment Officer,
Omnicom Media Group India



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Monday – Friday | 8 PM

Q **What, in your view, was your agency's best campaign of 2019? What about it impressed you?**
On the one hand, we witnessed new, high impact, multimedia product launches. On the other hand, there were several test-and-learn opportunities across brands in digital media, that helped us better understand the business. Creating content to amplify brand stories was an initiative we undertook. We created some unique, compelling content associations too.

In 2020, what is that big trend that ought to concern or excite media agencies?

Today, society and technology are evolving faster than our ability to exploit them, and all businesses are impacted by this. Predicting consumer interest and trends is still a big challenge. Consumers today are impacted by so many touch-points, in so many ways, that it is becoming difficult to understand their triggers and actions! In India, we have consumers in various stages of digital adoption; this can be both exciting and a concern for media agencies.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Programmatic buying is the one practice that will gain strong momentum for us in India. With the internet soon reaching a billion users through mobile, targeting the right audience at the right time, with the right creative, will become imperative for marketers.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

While almost all segments have been impacted, spends have been rationalised within categories. In FMCG, spends are focused on key mass brands and less on premium brands. In auto, spends have been driven predominantly by new players and around new launches. New model launches in the mobile phone category have seen huge success, especially among the top players. Ecommerce spends continue to accelerate in the festive season! Spending has not really

dropped, but is now rationalised, as even in a downturn brands need to spend in order to be remembered.

And within that, what consumption trends are you seeing in rural versus urban markets?

The slowdown has impacted rural India too. Within FMCG, product categories that are most impacted are packaged foods such as atta, refined oil and impulse categories like biscuits, chocolates and personal care products.

In the next 12 months, the solution to the digital ad fraud menace will come from...

The digital ad ecosystem has multiple players with diverse connections (DSP, SSP, ad exchanges, publishers, agencies and advertisers) that interact in real time. The connections are not necessarily direct and are potentially anonymous. This creates conditions for lack of visibility and transparency, which can lead to fraud in extreme cases.

The solution is ad and traffic compliance. It's a prudent strategy to have an always-on approach to combating ad fraud, led by experienced people who are empowered by sophisticated

technology. Adding human intervention to machine-led safeguards allows companies to discover, identify and flag misrepresented inventory. It also helps us identify technology that may be exploiting vulnerabilities in newer ways.

What kind of specialisation/talent is missing in media agencies today?

Structures in the advertising industry are constantly evolving; up-skilling is the new norm. New talent that will be embedded in teams will include digital marketing solution experts, data visualisers, AI specialists, web analytics experts, content developers and consumer analytics experts.

I wish clients would...

...work with us as true partners for their businesses, collaborate more on new ways to drive real business outcomes for their organisations, and push less to deliver against unrealistic

"Today, society and technology are evolving faster than our ability to exploit them"



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"The rural market is mirroring the urban market..."

RAJUL KULSHRESHTHA

CEO, Platinum Media

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Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?
I think there were three campaigns that impressed me: first, our Max Life campaign titled 'You are the Difference'. This was impressive because it achieved all the KPIs that it set out to. Similarly, our campaigns for MagicBricks and Domino's were also highly visible. Both these campaigns had fresh communication that the audience needed to see – and, indeed, they did see it.

I wish client would...

I wish they'd start looking at agencies as partners rather than as vendors. ■

In 2020, what is that big trend that ought to concern or excite media agencies?

I hope we see an integrated approach to media, going forward.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Buying GRPs upfront, perhaps?

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us – and least?

The automobile segment for sure is the most affected – and it will continue to be so. The food segment, however, will be unaffected to a large extent, I think. That's because people have to eat.

“Looking at media in an integrated manner is an approach that's missing today”

And within that, what consumption trends are you seeing in rural versus urban markets?

The rural market is mirroring the urban market, albeit in a smaller manner. They are, however, more cautious and need that extra push to make it happen.

In the next 12 months, the solution to the digital ad fraud menace will come from...

Strict legislation and execution of the same.

What kind of specialisation/talent is missing in media agencies today?

Looking at media in an integrated manner is an approach that's missing today.



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“I call it ‘economic correction’, not a slowdown”

**SATHYAMURTHY
NAMAKKAL**

Executive Director, DDB Mudra Group
and President, OMD Mudramax

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Q What in your view was your agency's best campaign of 2019? What about it impressed you?

Any investment to reach out to or engage with customers should impact the client's business directly. While I can give you a long list of impressive campaigns, one recent example is our work for Gulf Lubricants – a campaign called 'Suraksha Bandhan'. The delivery of an emotional advantage to a low involvement, functional, engine oil brand gives joy to all stakeholders.

In 2020, what is that big trend that ought to concern or excite media agencies?

Agencies should be concerned about the extent of data fraud, in terms of measurement, that exists today. From audience impressions to social engagement to customer reviews, the loss of honesty is a massive area of concern. What's exciting is new-age fraud control, and emerging elimination technology that uses AI, blockchain and newer encryption algorithms.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

They include integrated planning and delivery of solutions, and the adoption of one, unified view of the consumer from a media delivery lens. We should have been there already. Operating in silos is history. Clients need to integrate their mandate with one or two agency partners and not flirt with multiple relationships. This will help minimise silos. Agencies need to demonstrate value for money, delivered through a high caliber talent pool.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

I call it 'economic correction', not a slowdown. You can't generalise anything. Some categories, which are not necessities, will get deferred in terms of purchase. Few things were ballooned and projected, but now we are seeing real numbers. As in the past, we will find smarter solutions to this temporary phase, which will pass soon. Only one word of caution – clients and agencies should not

panic and adopt short term, tactical, sales-led activities at the cost of long term brand equities.

And within that, what consumption trends are you seeing in rural versus urban markets?

Video content is becoming the next big thing across the country, including smaller towns and rural regions. Meanwhile, urban audiences are getting into interactivity. Gaming will take off again in a newer, fresher avatar, especially in urban/semi-urban markets.

In the next 12 months, the solution to the digital ad fraud menace will come from...

The solution will always be work-in-progress. Ad fraud intelligence will always be creating the next big fraud and the good guys will be working on the antidote. It's not going to end anytime soon. In fact, it will spawn a whole new industry.

What kind of specialisation/talent is missing in media agencies today?

An 'ears to the ground' approach is missing in the industry at large. Ironically, most agencies are happy being 'implementation partners' of clients and not strategic solution providers. But efficiency and effectiveness

begin at the strategic planning level and end with smart implementation solutions.

I wish clients would...

...pay us more... and pay for performance, that is, pay us more when we surpass expectations, and penalise us when we don't – it's only fair. Also, clients should resist the temptation to conduct frequent reviews and pitches, and resist the pressure applied by the 'procurement team' to do so. ■

"Gaming will take off again in a newer, fresher avatar, especially in urban/semi-urban markets"

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"I wish clients would set joint KPIs and work collaboratively"

VANITA KESWANI
CEO, Madison Media Sigma

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Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?

The 60-year Fevicol campaign was one of the most memorable ones because of the way we approached it from a media point of view. We had long duration 90 second and 60 second ad films. Digital platforms were used innovatively and effectively. We showcased the ad films as OTT content rather than as advertising. The click through rates, performance and post campaign results surpassed our expectations.

In 2020, what is that big trend that ought to concern or excite media agencies?

In 2020, media agencies must be excited to excite advertisers about their media plans through transformation, which includes digital transformation and integrated communication planning. It is getting increasingly important to excite advertisers with new media thinking and prove that it works.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Agencies would do well to embrace digitisation more holistically through training, insight development and partnerships.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us – and least?

'Want' (versus 'Need') product categories are most affected by the economic slowdown. Overall, high luxury sub-categories are more affected, for example, the high value homes category is losing but low value homes are gaining within real estate.

And within that, what consumption trends are you seeing in rural versus urban markets?

In the last seven years, this is the lowest (consumption) we are seeing from a rural growth perspective. Secondly, we have always seen so much potential coming in from rural, from a commodity and branding perspective; rural always used to outpace urban from a growth point of view. This is the first time we are seeing otherwise.

In the next 12 months, the solution to digital ad fraud menace will come from...

I'm not too sure... I know we need a third party measurement solution, but how the resistance from publishers will give way is a wait-and-watch situation.

What kind of specialisation/talent is missing in media agencies today?

Two types of talent are a rarity: First, integrated thinking and understanding. Second, storytelling. Traditional and digital operate in silos most of the time, and storytelling can make a huge difference to media plans with data and analysis being a constant across the two.

I wish clients would...

...set joint KPIs and work collaboratively towards achieving them. ■

"It is getting increasingly important to excite advertisers with new media thinking"

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"An emerging trend is the birth of the 'Integrated Planner'"

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Q **What, in your view, was your agency's best campaign of 2019? What about it impressed you?**
While we had some fantastic campaigns over the year, my personal favourite is our #ShavingStereotypes 'Barbershop Girls' campaign for Gillette; it is our effort to empower girls to take up a 'male' profession and become role models for the nation. India needs more gender neutral roles and this is a step in the right direction.

In 2020, what is that big trend that ought to concern or excite media agencies?

A big emerging trend is the birth of the 'Integrated Planner'. I think the digital versus non-digital divide within agencies will need to disappear. Agencies have to be ready for this change by up-skilling or re-skilling their current employees. I know for a fact that most agencies are far from ready and need to be concerned and excited about this change that's coming.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

I think the dominance of programmatic, in the way campaigns are being delivered, will catch up fast. This is led by advanced data and machine learning, as more and more people are getting into the digital space.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

I would say any high involvement category, where the average cheque size required to fulfil the purchase is large, has been affected by this slowdown. So, categories like auto, real estate, luxury goods, etc. are among the ones affected. On the other hand, categories like FMCG (with GST rationalisation), online companies (with new startups and funding), and education (fuelled by the aspirations of the middle class), are the ones driving growth.

And within that, what consumption trends are you seeing in rural versus urban markets?

Rural India has slowed down in consumption as compared to urban

India. Farm distress and stagnant incomes have eroded demand. However, this is expected to be reversed early this year.

In the next 12 months, the solution to the digital ad fraud menace will come from...

The solution will continue to come from tools like IAS, MOAT, Double Verify, etc., and their upgraded versions.

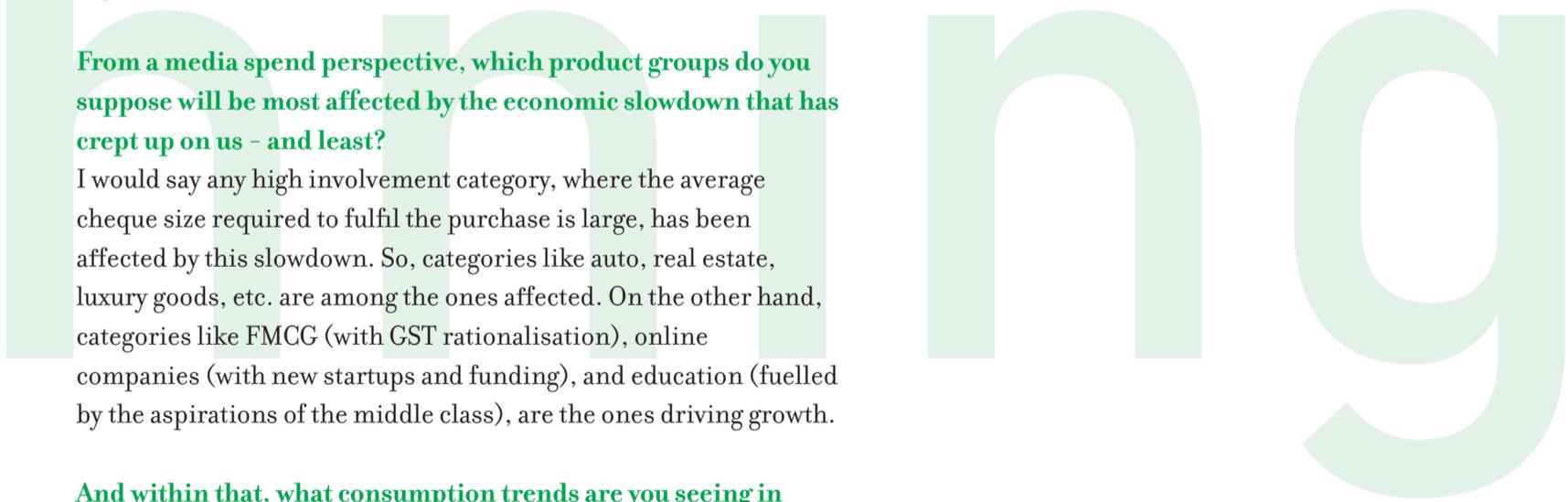
What kind of specialisation/talent is missing in media agencies today?

We need media agnostic, integrated account planners, who can give a holistic solution across all media touch-points. We have more specialisations today and we need to integrate our skillsets.

I wish clients would...

...always motivate the agency to put in 150 per cent effort and recognise the business results that follow. ■

"Clients should always motivate the agency to put in 150 per cent effort and recognise the business results that follow"



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Saffola World Heart Day. While it's done every year, Saffola highlighted the importance of a healthy heart and, importantly, made people take the 'heart ka exam' test on the brand's live portal. This gave them the real picture of their 'heart health'. OTT platforms actually went ahead and asked audiences

not to skip their sleep to binge-watch content, as lack of sleep is one of the key reasons for heart problems. Also, a moment of experience was created on newspaper jackets in HT, when readers were asked to choose lifestyle habits using a toothpick!

In 2020, what is that big trend that ought to concern or excite media agencies?

Consumption of content on digital. There is a rapid change in the way content is being consumed on digital; OTT platforms are the new TVs. With superior content and customised screens, media agencies will have to look at a new planning paradigm.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Multi-screen planning and buying. How do we establish a single currency across various screens to normalise viewing? This is something we have to crack at the earliest as agencies could lose potential audiences especially on OTT media.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us – and least?

Telecom, definitely, as the industry is going through a very rough patch due to losses, taxation, etc. Also, the auto segment will not continue to see the momentum of spends it did in the last five to six years. FMCG will continue to spend as there will be volumes to garner. And new categories, like OTT, will also invest for higher subscriptions and eyeballs.

And within that, what consumption trends are you seeing in rural versus urban markets?

Rural markets are impacted most due to weather conditions and

crop failures. They have driven consumption until now but that has slowed down considerably. While we're hopeful that rural markets will recover, it will take some time. For the economy to recover rural has to drive consumption; urban markets have, maybe, reached a level of saturation.

In the next 12 months, the solution to the digital ad fraud menace will come from...

I think a consortium of publishers will have to come forward and invest in solving this menace. The only solution is to develop high-end technology to control this phenomenon.

What kind of specialisation/talent is missing in media agencies today?

Two types: One is strategic brand understanding. I believe the

brand planner is almost a marketing resource for the brand and has to be as close to the brand as the marketing manager is. That talent needs to be revived. The second is medium-neutral brand custodians. We need talent that can look at the entire gamut of media and not just approach it as traditional versus digital. That bifurcation should end.

"I wish clients would look at partner agencies for business growth and not just from a commercial value perspective"

I wish clients would...

... look at partner agencies for business growth and not just from a commercial value perspective. Also, I wish freedom of creativity to deliver more effectiveness is encouraged. ■

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“There’s no economic slowdown – it’s temporary sluggishness”

ASHISH BHASIN

CEO APAC and Chairman India,
Dentsu Aegis Network

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Q **What, in your view, was your agency's best campaign of 2019? What about it impressed you?**
I'd like to name a campaign we did for Unilever's Lifebuoy. We used what is called a 'data lighthouse'. We wanted to target tier III cities and small villages. To facilitate this, we started collecting data from public health centres, at the village and district level. We identified the diseases prevalent in each village and based on that information, we started localising our message. As part of the brand communication, we gave them tips and guidelines on how they can protect themselves from diseases. Many of these problems tend to be very hyper-local in nature, so we tailored the messaging accordingly.

In 2020, what is that big trend that ought to concern or excite media agencies?

Attention to engagement is something that worries, concerns and challenges us. Modern consumers live in a hyper-communicative market and are exposed to so many different types of media, daily. This means there are both distractions and opportunities. Standing out and engaging the consumer with the right kind of content, in the right context, is the challenge.

Many brands are doing a great job of overcoming this, but it has to happen at scale. The messaging, content, and communication are all important because personalisation with a human touch is what we need. This will drive engagement in the future.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Each market is unique so I am not sure if we should be playing catch up. Our growth will be more inclusive and the media sector has grown in India. This could be because of our diversity and vast geography.

What consumption trends are you seeing in rural versus urban markets?

Urban has grown.

In the next 12 months, the solution to the digital ad fraud menace will come from...

The problem is multi-layered. There is a technical type of ad fraud for which commercial solutions are already being designed. However, in the case of ad fraud, the problem keeps evolving. Technological solutions have started coming in but what is missing is the brand context, of the different types of vulnerabilities that each type of ad can have. For example, a consumer facing brand might have a particular threshold to resist ad fraud, a security brand might have a different threshold, and so on.

What kind of specialisation/talent is missing in media agencies today?

We're moving into an era when creativity and data will co-exist. We need deeper understanding of what it means to be a data-savvy consumer. We also need to invest in deeper technical knowledge.

I wish clients would...

I don't wish for anything specific. We are at the forefront of a digital transformation, led by data and creativity. Being socially responsible is an aspect of that journey, and that's what agency-client relationships are

"There are bigger issues than ad fraud. If you don't have standardised measurement what are you measuring the fraud against?"

all about these days. ■

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"I want clients to involve outdoor agencies at the stage of annual planning"

DIPANKAR SANYAL

CEO, Platinum Outdoor

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Identifying and celebrating extraordinary initiatives by all media brands across all platforms



Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?

It's difficult to pick one, but I will take the liberty of mentioning our Vodafone Idea 'Clean Air' campaign in UP, which was done post-Diwali. It was done at the right time, when the pollution in North India was a hot, highly debated topic. The work garnered immense media coverage. The second campaign I'll name is our Gandhi Jayanti campaign for Tata Salt. It was a very engaging campaign that connected with people and questioned those who walk regularly on MG Road whether or not they really follow Bapu's path and teachings.

In 2020, what is that big trend that ought to concern or excite media agencies?

Digital integration and destinations are the two trends that will be important going forward. Ambient media, DOOH (digital out of home), and transit will play a critical role in campaign planning.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

The fragmentation of media is a challenge that we all face in a country like ours. Also, limited digital assets are available. One key global practice which we should look at developing is a syndicated measurement system for traditional OOH and DOOH.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us – and least?

Services and high involvement/high investment product groups like automobiles, mobile handsets, retail, clothing, and jewellery are most affected, as consumers will tend to be more conscious about their spending pattern.

And within that, what consumption trends are you seeing in rural versus urban markets?

There has been a dent in the upsurge in rural consumption that we saw over the last few years.

In the next 12 months, the solution to the digital ad fraud menace will come from...

It is not really an issue from an out of home perspective as of now.

What kind of specialisation/talent is missing in media agencies today?

OOH requires more youngsters with a marketing specialisation and a basic understanding of digital media.

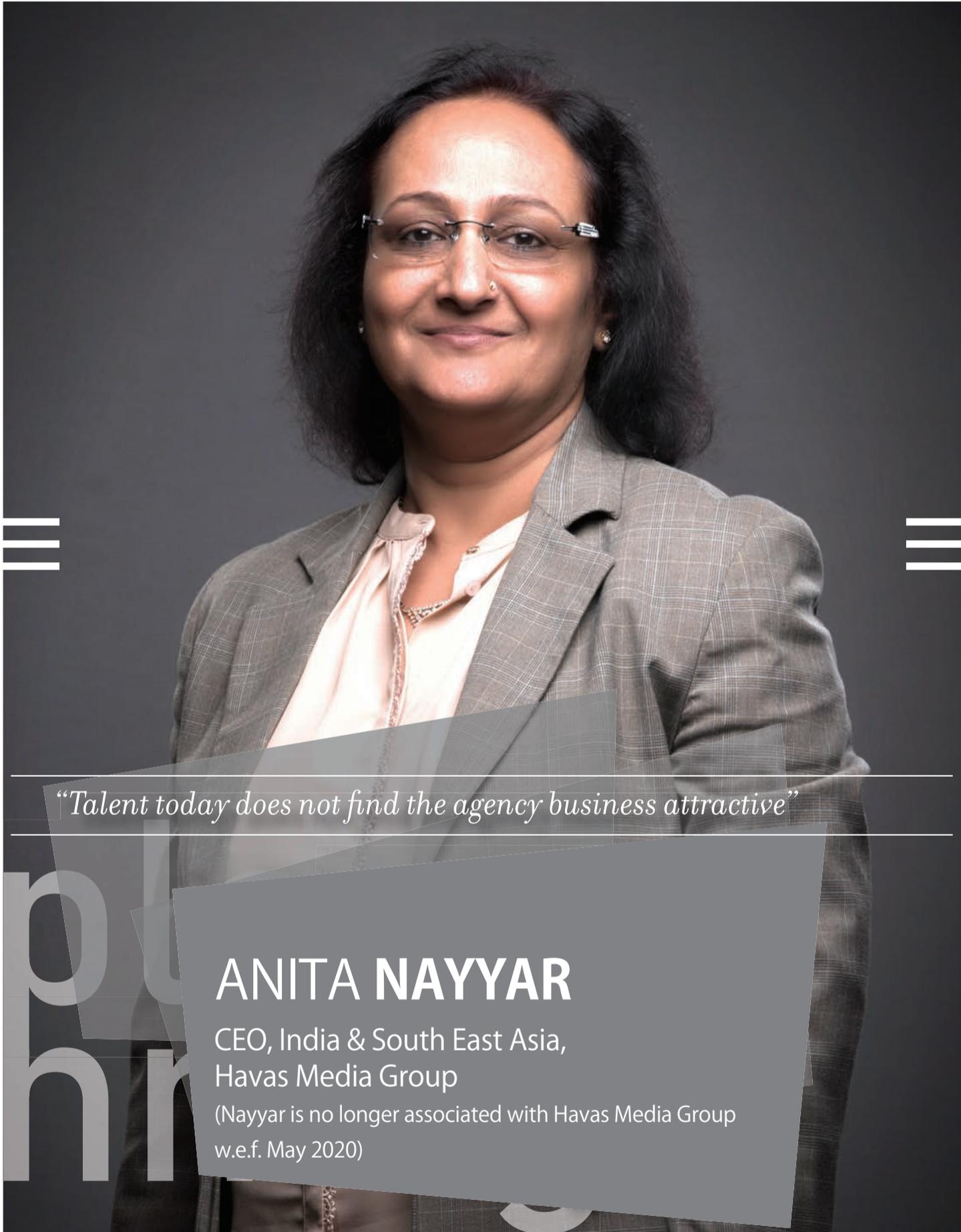
I wish clients would...

... consider out of home agencies as partners and involve us at the stage of annual planning, so that we can give strong solutions with richer information, product know how, innovations, digital integrations and reduced lead time. ■

“The out of home space requires more youngsters with a marketing specialisation and a basic understanding of digital media”



INDIA'S MOST ENGAGING CONVENTION FOR THOSE WHO LIVE BY THE PROMISE OF DIGITAL VIDEO



"Talent today does not find the agency business attractive"

ANITA NAYYAR

CEO, India & South East Asia,
Havas Media Group

(Nayyar is no longer associated with Havas Media Group
w.e.f. May 2020)



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Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?
Without a doubt, I'd name the Durex campaign, which has completely changed the face of condom advertising. From a consumer perspective, the campaign breaks all taboos and inhibitions, making discussions around the act interesting and pleasurable.

In 2020, what is that big trend that ought to concern or excite media agencies?

The biggest concern for media planning and buying agencies will be to engage meaningfully with the audience in a hyper-cluttered media environment. This concern itself is a source of excitement for agencies, as they try to find effective and impactful ways to engage.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

We should catch up with the trend of deciphering the digital ecosystem well, and making it measurable and accountable.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

Spends across all product categories have been affected. The low phase the automobile sector is going through is something that one reads and hears about on a daily basis. E-commerce spends should be least affected.

And within that, what consumption trends are you seeing in rural versus urban markets?

Urban markets are saturated; it is rural markets that bring a ray of hope. The industry will be driven by rural consumption across product categories.

In the next 12 months, the solution to the digital ad fraud menace will come from...

We will solve this problem if we have strict laws, digital policies, and regulations. These are of utmost importance.

What kind of specialisation/talent is missing in media agencies today?

Media as an industry – especially media agencies – is facing a huge talent shortfall, as talent today does not find the agency business attractive. Ours is a resource intensive industry in which people need to be looked after well. However, the shrinking margins in agencies are making the business unattractive. Hence, we see a dearth of talent and skill sets.

I wish clients would...

... respect the value the media agencies bring to the table as they did many years back. Treat agencies as partners and not vendors. ■

"We should catch up with the trend of deciphering the digital ecosystem well... and making it measurable"

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“There is no one silver bullet to resolve ad fraud”

**PARTHASARATHY
MANDAYAM**

CEO, South Asia, Mindshare

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For Restless, Creative 12-year-olds and less*



Q **What, in your view, was your agency's best campaign of 2019? What about it impressed you?**
 There were so many great, award-winning campaigns last year; it's hard to choose one. I am especially fond of campaigns that transformed the experience consumers had with brands – like the “Truckasana” campaign for Castrol, the EVM deployed by Lifebuoy at Kumbh Mela and the industry leading voice engagement created for Idea.

In 2020, what is that big trend that ought to concern or excite media agencies?

I think the biggest thing that concerns as well as excites us, and marketers, is the aspect of evolving regulations around the usage of data. I believe it gives us an opportunity to do true data-driven marketing in a responsible manner, but we need to evolve significantly to unlock this opportunity.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

There has traditionally been a division between ‘planning for brand’ and ‘planning for demand’, with distinct processes, touch-points and skill-sets involved in each. This needs to be brought together and planning for an integrated consumer journey needs to be done.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us – and least?

Products that are viewed as discretionary expenses will be affected the most, especially among the less affluent sections of society.

And within that, what consumption trends are you seeing in rural versus urban markets?

Growth in the past has been powered by small town and rural markets. And the slowdown has affected these markets to a higher degree than large urban markets.

In the next 12 months, the solution to the digital ad fraud menace will come from...

There is no one silver bullet to resolve ad fraud, because the frauds are also evolving at a rapid rate. The only solution is to have stringent processes and guardrails that also evolve as quickly. GroupM is leading this initiative by deploying relevant tools, guardrails, measurement systems and contractual agreements to prevent brands from incurring legal, reputational or financial losses.

What kind of specialisation/talent is missing in media agencies today?

Agencies today have invested in specialist talent in areas like data science and ad tech. We have always had expertise in consumer insights and planning rigour. However, what is in short supply is talent that's able to integrate these two to unlock real value.

I wish clients would...

With data being the core that powers growth for brands, it is beneficial for clients to consolidate the various elements of marketing around a unified data lake rather than letting it stay fragmented across multiple agencies. ■

“Traditionally, there's been a division between ‘planning for brand’ and ‘planning for demand’; we must bring them together”

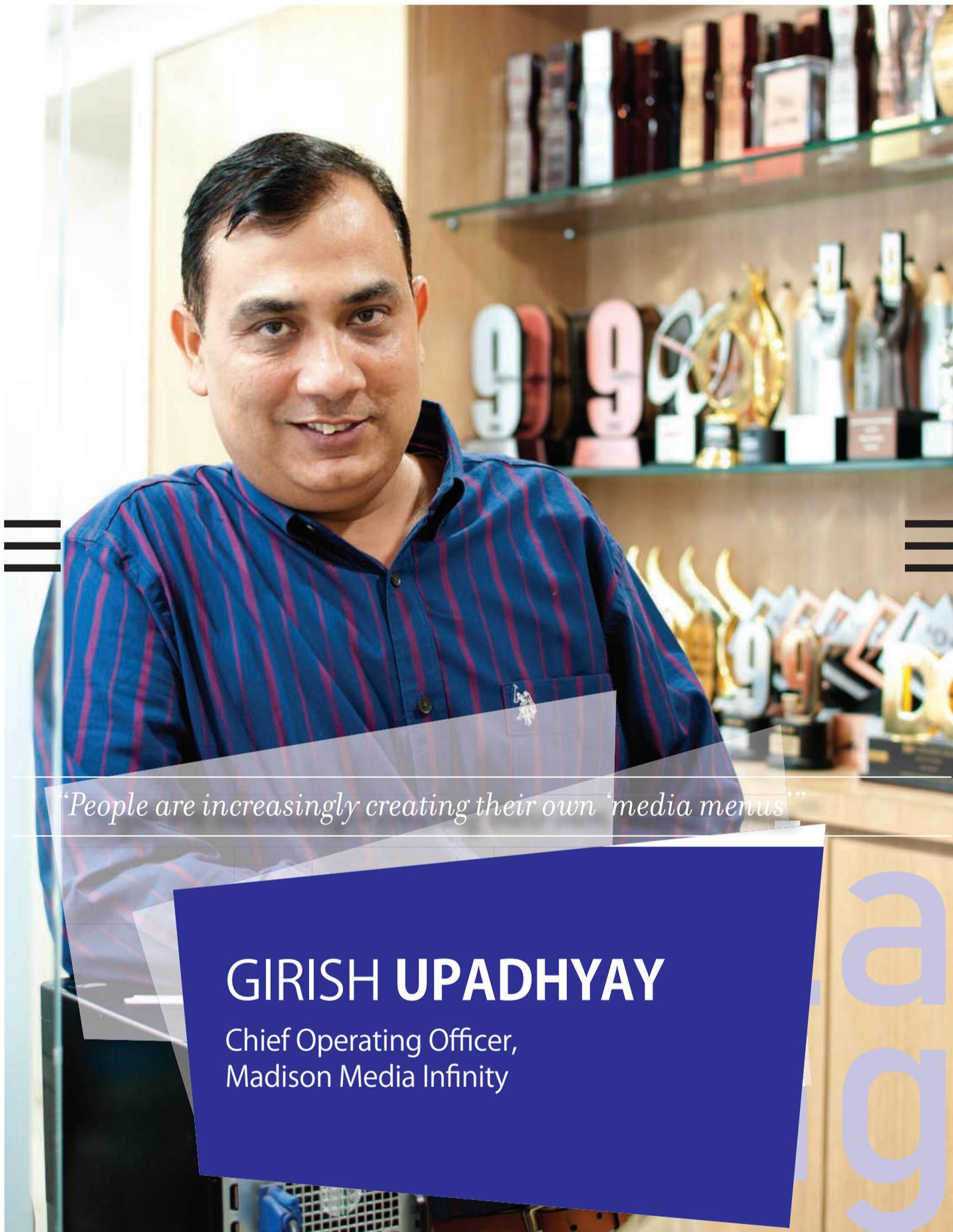
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“People are increasingly creating their own ‘media menus’”

GIRISH UPADHYAY

Chief Operating Officer,
Madison Media Infinity

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Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?
The 'Missing i' campaign we did for Tata Salt is something to be proud of. While iodine has always been a key highlight of all communication by Tata Salt, we spotted just the right media opportunities to engage with our consumers and thus created a multi-platform, 'i-deficient' campaign across networks. It not only delivered numbers but also shed light on an issue which requires attention.

In 2020, what is that big trend that ought to concern or excite media agencies?

We can see the shift to personalised experiences all around us. Behaviour towards entertainment is changing fast. People are increasingly creating their own media menus and are rejecting the bundles of channels their cable operators are selling to them. Instead, they're constructing their own ad-hoc bundles comprising various OTT players and are consuming it at their own pace. This great unbundling is happening at a pace much faster than anyone expected. This will definitely excite media agencies in the year to come.

"Clients should understand that agencies need capital to attract talent; effectiveness is far more important than efficiency"

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

It definitely has to be around cross-media audience measurement. Being able to identify and measure audiences' media consumption, as a 'single view' across media, is a much needed breakthrough for the Indian media planning and buying industry.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us – and least?

Through many of us would tend to name the auto category as the most affected one, I will differ on this. With new launches and the roll out of BS VI, the category will see a new sense of excitement in the next financial year. Real estate, telecom and e-commerce might go slow whereas FMCG, education and retail should be least affected.

And within that, what consumption trends are you seeing in rural versus urban markets?

Consumption in rural India has hit a seven-year low and this trend might continue next year. Demand is being eroded by falling crop prices, stagnant incomes, farm distress and erratic rainfall patterns. Urban growth might still be a little better, but not significantly better. We will need to adjust to the new norms of growth, across urban and rural.

In the next 12 months, the solution to the digital ad fraud menace will come from...

The solution has to come from publishers themselves. They need to work with high-end, reputable ad exchanges and invest in the technology required to detect and manage fraud. Agencies and brands need to ensure their programmatic advertising is delivered to humans in brand safe environments and not fall for unrealistic traffic numbers.

What kind of specialisation/talent is missing in media agencies today?

The kind that understands marketing, not just media. The outcome for a planner has to go beyond reach, frequency and CTR to sales, revenue, customer satisfaction and customer lifetime value.

I wish clients would...

... understand that agencies need capital to attract good talent, and that effectiveness is far more important than efficiency. ■

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"Attention-commanding creative ideas are the lifeblood of brands"

DIVYA KARANI

Chief Executive Officer, dentsu X

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Creative Studios and Content Creators

Q **What, in your view, was your agency's best campaign of 2019? What about it impressed you?**
 There are very many that come to mind. The multiple campaigns we have done for Maruti Suzuki bear testimony to insightful, well crafted work. In a significantly depressed market, the brand has held its own. Also, the stupendous work done by Webchutney recently speaks for itself.

In 2020, what is that big trend that ought to concern or excite media agencies?

There is no one big thing alone. Continuous, compressed, faster disruptions herald exciting times. Let us strap ourselves in for an even more exhilarating ride ahead. Today, more than ever before, we can engage in meaningful dialogues with our consumers; we can measure and calibrate the exact impact and value we bring to the table.

Technology, furiously evolving digital productivity, and data turbines, combined with our agile, ever-demanding consumers, are holding companies and brands accountable. These are the forces at play today.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Democratisation of information has de-centralised ideas; today, ideas are 'global' and don't necessarily come from any one 'privileged' location. When knowledge is everywhere, so are the thinkers. Partnering clients, as they leverage first party data, at scale, holds tremendous opportunities for agencies. We are also focussed on serving a customised, curated offering to consumers, as and when they need it, to ensure an optimal outcome.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

Age old wisdom applies just as well today – during a slowdown, companies need to continue to invest in brands, because brands that invest during slow growth periods tend to extract multiplicative dividend over the long term.

And within that, what consumption trends are you seeing in rural versus urban markets?

India's urban-rural consumer divide is an illusion of the past. Sometimes the difference between segments of urban consumers may well be starker than the difference between urban and rural consumers. In fact, given media and market proliferation, there is an increasing similarity in the mindset of urban and rural consumers – both seek value and make choices basis 'brand connect'.

In the next 12 months, the solution to the digital ad fraud menace will come from...

This is the elephant in the room that needs significant focus and attention. Change needs to come collectively from all stakeholders – clients, agencies and media owners.

“Ideas are global and don't necessarily come from a privileged location. When knowledge is everywhere, so are the thinkers”

What kind of specialisation/talent is missing in media agencies today?

Media agencies need to transform themselves and become business partners to their clients, by having more meaningful conversations with them. The lines between media and creative are blurring. Consumers' attention is the prize and they are in

complete control. Attention-commanding creative ideas are like the lifeblood of brands.

The work done by Data2Decisions (global marketing effectiveness consultancy, part of Dentsu Aegis Network) shows that creative execution is the second highest driving factor behind market size and has ten times more influence on ROI than flighting and cost!

I wish clients would...

... foster a collaborative, multi-function culture across teams such that everyone has an equal seat at the table, and works towards a common goal. I have had the good fortune of working with such clients who effortlessly orchestrate this and inspire everyone to give their heart and soul to the common enterprise. ■

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"Thinking is completely missing today; everyone is driven by numbers"

SANDEEP SHARMA

President,
RK Swamy Media Group

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Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?

That would definitely be our campaign for Polycab wires, which ran during the IPL, and across high impact properties on leading GECs. We also had prime-time sponsorship and logo visibility on leading news channels through the year.

The media team that strategised this pan-India campaign did impressively well by buying and implementing everything within the stipulated budget. We had a clear-cut mass focus, and our regional emphasis helped us cover a large volume of our TG. Further, brand integrations and reality TV shows helped boost reach and recall. The proposition, 'savings in electricity', was distinct and well enacted by a talented cast including Paresh Rawal.

In 2020, what is that big trend that ought to concern or excite media agencies?

The advent of OTT, and the possibilities it has opened up for advertisers, is a big trend that ought to excite media agencies. Once more and more people start consuming video content and TV through OTT, the revenue formats will increase.

With 5G coming in, these OTT platforms will reach a tipping point. This will probably affect both TV as well as experiential entertainment. Among the younger audience, there is a clear shift towards OTT.

“With 5G coming in, OTT platforms will reach a tipping point. It will affect both TV as well as experiential entertainment”

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Measurement of video across TV and digital, recorded through impressions, is a much awaited practice in the context of media planning, as is programmatic buying. Also, measurement should be more focused on our rural audience, as a lot of TV viewing comes from semi-urban and rural areas. In fact, brands from categories like FMCG and consumer durables would love to allocate more to these areas but there isn't enough data to corroborate this media consumption. Also, India needs to match international standards when it comes to measuring radio and outdoor.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

While an economic slowdown affects all product categories, auto and BFSI are among the most affected ones. Even real estate and commodities are affected. Least affected categories include insurance, mobile handsets, consumer durables, online shopping sites, and food delivery apps, to name a few.

The slowdown has affected all mediums, especially print which was already reeling.

And within that, what consumption trends are you seeing in rural versus urban markets?

In rural India, there is huge proliferation of mobile handsets due to the easy availability of data. Thanks to the increasing income in the hands of the rural consumer, FMCG, tractors, crop enhancement related products, and certain low-end consumer durables are likely to do well in rural markets.

In the next 12 months, the solution to the digital ad fraud menace will come from...

BARC or comScore could perhaps work out a solution for this, but don't see it happening in the next 12 months.

What kind of specialisation/talent is missing in media agencies today?

People well versed in mar-tech and those who can work out holistic, tech-led marketing solutions are missing in media agencies. 'Thinking' is completely missing today; everybody is driven by numbers.

I wish clients would...

...continue to invest in brand building, and not look at rates specifically, as rates do not buy quality. Clients should continue to invest in media campaigns, as it has been proven time and again that those who invest during depressed times are usually the first to benefit when the tide turns. ■

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“Programmatic is growing fast in India, but not fast enough”

AJAY GUPTA

CEO, South Asia, Wavemaker

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Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?

The work we did for Pernod Ricard stands out; we executed 100 music gigs across 27 cities simultaneously, and each gig was tied to a cause. I'm also proud of the work we did on Myntra – titled 'Fashion Superstar', it was a talent hunt based contest among influencers, which was aired on the Myntra app.

Our Cadbury Fuse campaign is special to me as well; we had multiple topical creatives which were personalised and delivered to customers based on their profile. It showcased our digital capabilities.

In 2020, what is that big trend that ought to concern or excite media agencies?

One major trend is that media is being held accountable. This will directly impact both, the business and the brand side of things. Balancing the two is where the challenge lies and it's an exciting trend. Another huge trend that's coming up in India is the one around the 3 Vs - vernacular, video and voice.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Programmatic is growing very fast in India, but not fast enough. We need to build capabilities in that space. There are some areas in which India can emerge as a leader, like video and mobile.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

As stated in the GroupM report, we are forecasting about 10.7 per cent growth for media in 2020. This makes India the fastest growing large media market in the world. Obviously, this will be impacted by factors like the corona virus which came up after we published our data.

Real estate is one sector that has definitely slowed down. As far as auto is concerned, well, though it has been in the news for being down, I think it will certainly grow again, given the emphasis on electric vehicles. In fact, automobile companies that have come

up with electrical vehicles will be advertising a lot more. Another factor that will help the sector grow is related to the BS-VI pollution certificate.

And within that, what consumption trends are you seeing in rural versus urban markets?

We've noticed that rural consumption rates have come down, as have growth rates. Urban growth rates are now ahead of rural growth rates. So, the expectation that growth will come from rural is now changing – focus has shifted to urban markets. The other thing that is clearly 'trending' is the consumption of premium products, which is growing faster than the consumption of base products. This means the lower strata is curtailing consumption whereas the upper strata is consuming a little bit more. While that is good news, it's the mass market where real growth comes from.

“The consumption of premium products is growing faster than the consumption of base products”

In the next 12 months, the solution to the digital ad fraud menace will come from...

Ad fraud has been tackled to a very large extent, with the help of technology. We recommend that brands utilise this technology to avoid ad fraud, improve viewability and increase brand safety.

What kind of specialisation/talent is missing in media agencies today?

There are a lot of new fields that are growing, like digital programmatic and content. We are looking for skills in these areas; not all of them are available in the ecosystem. Also, the amount of data available today is insane. We need people skilled to analyse it and make it meaningful. Data science is an area we're investing in. ■



*“The world is becoming too logic driven;
we need magic too”*

KARTIK SHARMA

CEO, Omnicom Media Group India



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Q **In 2020, what is that big trend that ought to concern or excite media agencies?**

The last few years have seen a lot of interest and investment around owning consumer data, particularly the kind that's enabled through digital media. While data is important, marketers are losing the art of delivering a great message. Though super-targeting excites marketers, if this 'personalisation at scale' is not backed by creativity, then it won't solve problems. Targeting and personalisation have been embraced to such an extent that good old creativity has taken a backseat. It needs to be brought to the forefront again.

In many categories, as consistently evidenced by good research, it's clear that light buyers are more critical for brand growth. Therefore over-targeting might be harmful. Also, relevant messages need to be crafted using the right context. The big opportunity is to understand how context impacts behaviour. In sum, take more risks, be creative, don't over-target, and try to understand the context before delivering any message.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

One of the best global practices is measuring the marketing investment and understanding its impact on business. While large clients and brands tend to do this as a matter of routine, many Indian companies don't. Regular measurement unlocks great value and helps optimise marketing investments.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

The current slowdown has two components - one is linked to our economy and the other, to the corona virus epidemic which is impacting all sectors that have some level of dependency on China. Categories that contribute heavily to the ad-ex and are driven by the economy, such as FMCG, auto and BFSI, will be affected. However, the impact will not be uniform at the company level.

And within that, what consumption trends are you seeing in rural versus urban markets?

For the first time in many years, we have observed low growth in rural FMCG. The rural economy is dependent on many factors, like rural income - which is now stagnating, crop prices - which are falling, and the income of wage workers - which is under pressure as many of them are landless. However, being an optimist, I do expect things to bounce back over the next few quarters. Consumption will grow again.

In the next 12 months, the solution to the digital ad fraud menace will come from...

...technology companies, many of which will be startups. Solutions will also come from countries like Israel that are extremely advanced when it comes to technology, including ad tech.

What kind of specialisation/talent is missing in media agencies today?

In the media business, it's becoming increasingly important to understand technological changes. The industry, in general, has been low on attracting experts from fields like tech, data science and coding, to name a few. We need people who can blend logic and magic to weave great brand media strategies for clients. The world is becoming too logic driven - we need people who can create magic too.

I wish clients would...

... firstly, pay a fair price to agencies for good quality thinking and execution. Secondly, focus more on understanding marketing effectiveness rather than obsessing over efficiency just because it's easy to measure. And thirdly, prioritise long-term effects, as opposed to short-term results which lead to frequent changes to campaign designs. ■

"While data is important, marketers are losing the art of delivering a great message"

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"Unlike the old linear world, the digital world is flat"

VAISHALI VERMA

CEO, Initiative India

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Q What, in your view, was your agency's best campaign of 2019? What about it impressed you?

It's difficult to choose one; we had stellar work across offices, clients and categories. If you take awards/external recognition as a barometer, we clocked the second highest number of Golds and were ranked third at the Media Abby Awards as well as the Emvies; our work on Amazon, Reckitt

Benckiser, and Guilt Free Industries was awarded by juries of both. One of the biggest content launches last year was Mirzapur on Amazon Prime Video and we are proud of the work we created for that. Also satisfying was the work we did on Mission Pani for Harpic.

In 2020, what is that big trend that ought to concern or excite media agencies?

The two big pillars that any media agency needs to focus on: First, consumer journeys, across the vast spectrum of social, programmatic, personalised messaging and content marketing. Second, deeper integration with the client's business. With technology, big data and the blurring of lines between creative and media, especially in content, there is a big opportunity to integrate deeply with the client's business.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Why play catch up when one can define the rules? Unlike the old linear world, the digital world is flat. Today, India is not playing catch up, but is defining the rules of engagement in areas like community marketing, mass personalisation at scale, sports marketing and content marketing. This is the first market where many clients, social media apps and e-commerce giants test new ideas.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

Many categories are already affected - telecom, automotive, banking. However, there is enough marketing research done over many recessions in the past to show us that the marketers who

stay engaged with their customers, and do not drastically cut down on their spends, usually emerge stronger after the recession. Any challenging period separates the wheat from the chaff. Sectors like education are recession-proof in a country like India.

And within that, what consumption trends are you seeing in rural versus urban markets?

Given the large size of India's rural population, the value of goods and services consumed has always been greater in rural India. But urban India had narrowed the differential during most of the last decade by growing at a faster pace. Internet usage in the country has exceeded half a billion people for the first time, pegged at 566 million, driven by rural internet growth and usage. Categories like used cars and pre-owned durables, including mobile phones, will see much more traction. But, the most difficult thing about the future is to predict it.

"Marketers who don't drastically cut down on spends, emerge stronger post-recession, which separates the wheat from the chaff"

In the next 12 months, the solution to the digital ad fraud menace will come from...

...regulation, brand safety measures, consumer education, working with industry approved partners, and asking a lot of tough questions to tech providers. Why can't all the players come

together and set aside a budget for consumer education? Why should it just be the government's responsibility?

What kind of specialisation/talent is missing in media agencies today?

Good agencies will always hire diversified talent, of which there is no dearth in India. We are hiring specialists from varied backgrounds like behavioural economics, data science, as well as consumer behaviour experts and storytellers.

I wish clients would...

...not award business basis pricing claims only, and not push agencies to drop commission. Agencies are investing in up-scaling talent and clients should acknowledge this, as it's going to fuel their business. ■

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“Connected TV has the potential to become a trend”

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Q In 2020, what is the one big trend that will concern or excite media agencies and clients?

Connected television has the potential to become an emerging future trend. A growing section of consumers is adopting smart TVs - essentially, bigger screens for live streaming and to access OTT content. This is becoming a high focus area for a few leading players. The trend is furthered by the easy availability of affordable smart TVs in India.

In the context of media planning/buying, what's the one global practice/trend that India will do well to catch up with fast?

While we have come a long way in data and audience planning, there is still a lot to cover. ROI measurement and full-funnel attribution are still in work-in-progress mode; they will become more important in the years to come, as consumers spend more time online. As this area keeps evolving, more and more importance will be given to media tactics and triggers that enable a quantifiable impact on branding and conversions in the full purchase cycle.

From the perspective of ad-ex, which categories will be most -and least- affected by the economic slowdown?

An economic slowdown impacts most categories. However, depending on the cause of the slowdown, impact varies by category. Typically, in the context of urban consumption, a slowdown impacts discretionary spending, whereas in the case of rural consumption, it impacts the staples. For instance, following the NBFC crisis in 2018, the first sectors to get impacted were the ones with higher reliance on financing, whereas the impact on other categories was witnessed much later.

This is in contrast to what we saw during demonetisation, where the impact was seen across categories with an exception of online/mobile payments, which saw a spike as usage surged. The same principle would apply in any such situation.

What consumption trends do you foresee in rural versus urban markets in 2020?

Rural is likely to continue seeing a shift, as consumers upgrade to premium brands via smaller SKUs. Urban consumers would prefer

products and services that offer more convenience, better health/wellbeing, and that advocate environment-friendly practices. Given the current macro-economic condition, consumers would seek more bargains and value for their money. Hence, bundling of products and services is likely to increase.

In the near future, what measures do you think could lead to a solution to the digital ad fraud menace?

Digital ad fraud is a matter of concern for the industry. It requires all stakeholders to collaborate and work towards solving it. This could be done by establishing clear measurement guidelines on brand safety and viewability across digital investments. We need to find ways to make this an important element of compliance between the parties conducting digital marketing.

What kind of specialisation/talent do you think is missing or dwindling from media agencies today?

I would rather look at what we need to do in order to be future-ready and to stay relevant given the rapidly changing landscape around us. There needs to be more willingness and speed. We must be more adaptive and in sync with clients' needs for end-to-

end solutions.

Whether it's in the area of developing deeper understanding of consumer behaviour through the right dissection of data, or whether it's about focusing on relevant technology and emerging trends, what's important is for agencies to invest in and develop the right talent. ■

“Given the current macro-economic condition, bundling of products and services is likely to increase”



"This year will be tougher than 2019"

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Q **What, in your view, was your agency's best | campaign of 2019? What about it impressed you?**
 Early last year we won Spotify; the global music streaming service wanted to enter India, with a mix of Indian and international music, with over 40 million songs. We made the simple yet decisive call to go with an audience-first approach, leveraging data to identify a personalised connection with content, and eventually linking it to every single instance in the consumer's life.

We used neuro-imaging techniques coupled with mind-and-mood studies to co-relate music content with finely split user micro-moments, thus moving seamlessly from mass to individual content. With over 1,000+ micro-moments mapped across over three billion playlists, we personalised content at an unprecedented scale, through our People-Place-Moments (PPM) framework.

In 2020, what is that big trend that ought to concern or excite marketers and media agencies?

It's exciting to see the coming together of two strengths, from the past and the future – the scale of legacy media with the personalisation of new media. Personalisation at scale is like an open and shut case for the future.

Here's what should concern us: While marketers know that technology and data stacks will raise their brand scores, barely nine to ten per cent of them have a stack that they're using optimally. Brands that move with speed to put together an optimised, inter-operable marketing stack will have a major strategic advantage over brands that don't.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

That India is a complex and vast country is so true that it's a cliché. In many aspects, some of our databases are far more evolved than globally available ones. However, the global learning curve on digital, mobile and e-commerce is way ahead of ours. While in India we are comforted by the fact that traditional media - TV, print, radio - is still growing, we must pick up global lessons on digital. Our raw material is far superior but our mining processes are fairly dated. However, even globally, they haven't been able to agree on a common measurement metric for digital.

“Even if the consumer regains spending power, he/she is certainly spooked; it'll be a while before they feel confident again”

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

This year will be tougher than 2019. While last year saw a decline in GDP, the fall in consumption was also due to emotional sentiments. This year, due to the global health crisis and the dependence on manufacturing from China, we will undoubtedly face added challenges.

While last year saw a dip in auto, BFSI and real estate, this year we will see challenges in durables, travel and tourism, fashion retail and pharma. Even if the consumer regains spending power, he/she is certainly spooked; it will be a while before they feel confident again.

And within that, what consumption trends are you seeing in rural versus urban markets?

In most downturns, high-income urbanites can withstand a depression far better and recover faster than their rural counterparts. The intensity is usually more in rural areas. Moreover, the monsoons haven't been consistent, so the agri-economy has not had a very good time.

In the next 12 months, the solution to the digital ad fraud menace will come from...

With advertisers investing more and more on digital it is inevitable that audit and transparency will have to come into play. While technology companies are working on this aspect, I think for every solution a new trick will emanate from somewhere. In India, BARC has been pushing for digital ratings and transparency for two years now. I truly hope we find a solution that is accepted unanimously across large digital companies.

What kind of specialisation/talent is missing in media agencies today?

That media has proliferated is beyond discussion. Lodestar UM, for instance, tracks over 68 touch-points through a single source study - Moments. Thus, specialists and integrated strategists are direly required. Also missing are data scientists and analysts.

I wish clients would...

...invest a bit more in research. ■

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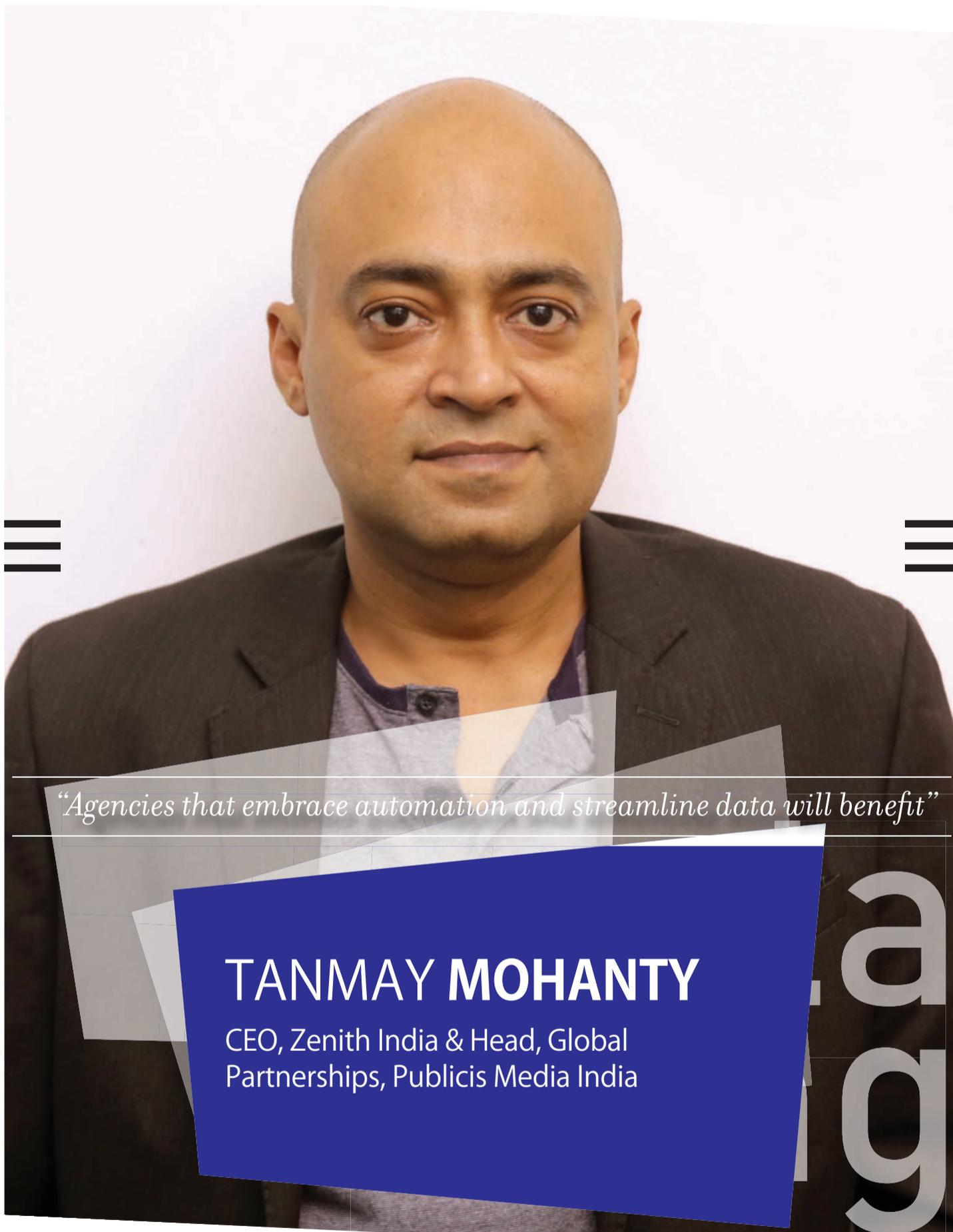
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“Agencies that embrace automation and streamline data will benefit”

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Q **What, in your view, was your agency's best campaign of 2019? What about it impressed you?**
 It was our 'Ask Nestlé' campaign, India's first corporate nutritional counselling brand campaign, led by an AI-based chatbot on the Google Home system. This application was built using rich first-party data that informed Nestlé about the nutritional needs of its customers, which were answered in real time. The objective was to strengthen Nestlé's credentials as a leading nutrition, health and wellness company, by helping parents choose the right meal plan for their children.

There are about 2,00,000 searches happening around nutrition in India every day. 'Ask Nestlé' came as a digital rostrum for anxious mothers. It was launched on kids channels on TV, to ensure mass reach. In print, we used a creative that talked to parents with kids. We also used the biggest reach platform on digital – the YouTube masthead. The acquisition and remarketing strategy included online parenting platforms.

In 2020, what is that big trend that ought to concern or excite media agencies?

The biggest opportunity today is the ability of a brand to create unique experiences for each customer, at scale. With the right technology, agencies are better able to meet this need and tell compelling stories.

In the context of media planning/buying, what's the one global practice/trend India will do well to catch up with fast?

Agencies that embrace automation and streamline data have a clear advantage moving forward. We are exploring automation for marketing optimisation, product recommendation, dynamic pricing, customer retention, personalisation at scale, and work flow management. This, in the coming year, will create better planning, execution and operational rigour, across agencies.

From a media spend perspective, which product groups do you suppose will be most affected by the economic slowdown that has crept up on us - and least?

The global economic slowdown and the corona virus are impacting, both global and domestic economies alike. This is affecting both consumption and supply. The supply chain disruption will affect

commerce, electronics, high value products and travel. Consumers from all parts of the country, including urban areas, are spending drastically less on essential food items which is going to affect the CPG (consumer packaged goods) category as well.

And within that, what consumption trends are you seeing in rural versus urban markets?

We see a sharp contrast in the rural versus urban story, when it comes to non-food related spending. The urban market seems to be doing well still. This is also reflected in automobile, health and retail consumption.

In the next 12 months, the solution to the digital ad fraud menace will come from...

Ad fraud is more of a by-product of demand and pricing. There are too many SSPs (supply side platforms) sprouting up and this has led to a lot of fraudulent products and companies that use these platforms to make a quick buck. In India, given that OTT pricing is higher than to TV, we will definitely see a play of these fraudulent elements here, as they try to skip off the top margin.

"We see a sharp contrast in the rural versus urban story, when it comes to non-food related spending"

What kind of specialisation/talent is missing in media agencies today?

The analytical ones.

I wish clients would...

... think long-term. ■

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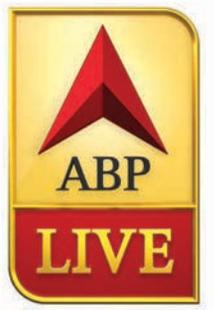
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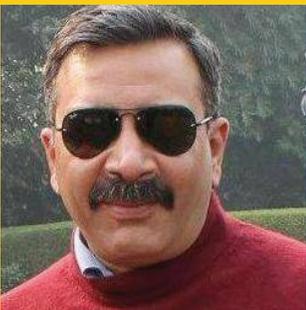
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