

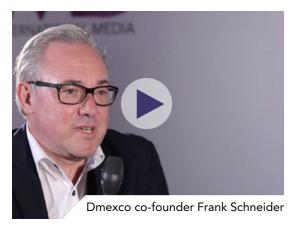
## WRAP REPORT



2015

IN ASSOCIATION WITH:







## DIGITAL EXPERTISE ON WORLD STAGE

Dmexco is a remarkable event, it must be said. Whoever thought that the world's hottest digital companies and talent would congregate in unfashionable West Germany? Yet here we are, with 43,000 flocking to Cologne. As International Media Partner, M&M Global arrived to hear the wise words of conference speakers and interview some of the industry's finest at our very own studio.

Over this 22-page 'Wrap Report', we hope to bring you a flavour of the buzz in the Koelnmesse, and some of the biggest topics of debate. Also watch our interviews with Frank Schneider and Christian Muche (left), two of the senior guys behind this year's event.

Alex Brownsell, editor, M&M Global

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## DRIVING THE DIGICONOMY ABOVE AND BEYOND THE AD BLOCKERS

Over two days in Cologne, visitors from around the world delved in-depth into the digital economy, discussing subjects from the threat of ad blocking apps to the latest Instagram advertising initiative and the opportunities of emerging regions. Mike Fletcher reports

The spectacle of Dmexco takes some believing. This year's annual event saw more than 43,000 delegates and almost 900 exhibitors arrive in the German city of Cologne, on a digital pilgrimage for two days of bullish debate, discussion and education.

The hot topics at this year's event, run by the Bundesverband Digitale Wirtschaft (German Association for the Digital Economy), included ad blocking, programmatic, measurement, infiltration opportunities into the fast-growing markets of China and Africa, a disagreement over what constitutes content, and a glimpse into the future of where in-car technology is heading.

Oh – and not to mention dodgy WiFi and interminable food queues.



has to click on the footage for the audio to start, he said. "I'd just point out that Facebook has a lot of work to do in terms of video It wasn't just Facebook's measurement policy that came under scrutiny, however. Many speakers over the two days raised

## "WE'RE HAVING DISCUSSIONS AROUND CUTTING THROUGH THE BULL AND GETTING TO WHAT IS THE SIMPLE PRODUCT MEASUREMENT THAT WILL ALLOW US TO MAKE A DECISION"

WPP's chief executive Sir Martin Sorrell got the event off to a characteristically feisty start with an opening keynote address that attacked Facebook's video measurement model, which, for example, informs advertisers their ads were watched after only three seconds by someone scrolling through a newsfeed.

Some video ads on Facebook are charged instantly and many simply play without sound since the user

and video viewability," Sorrell told a packed conference hall. "Three seconds and 50% of video online not listened to with sound is ludicrous. The standards have to change.

"The traditional measurement model, in the US with Nielsen, for example, is not efficient, effective or accurate. The standards for a view on linear are much higher, whereas online they're much lower," he concluded.

serious concerns that common metrics such as CPM hinder rather than help the industry to evolve.

"CPM is not a real metric," IPG Mediabrands' new chief executive Henry Tajer told delegates in a session entitled 'Finding the Way to the Consumer'. "We're having discussions around cutting through the bull and getting to what is the simple product measurement that will allow us to make a decision."





"THE TRADITIONAL MEASUREMENT MODEL IS NOT EFFICIENT, EFFECTIVE OR ACCURATE. THE STANDARDS FOR A VIEW ON LINEAR ARE MUCH HIGHER, WHEREAS ONLINE THEY'RE MUCH LOWER"

### Ad blocking

Another hot topic to get as much – if not more – air time on stage from speakers was the issue of ad blocking, particularly as a way of improving the mobile experience.

With Apple introducing ad blocking features to app developers as part of its iOS 9 update, and a recent study revealing that 17% more Germans are using ad blockers compared with 12 months ago, speakers in Cologne were keen to discuss the dilemma for both publishers and brands.

"With ad blockers coming in, we just don't know what effect it'll have on all this," said Babs Rangaiah, VP global media innovation and ventures at Unilever. "Complexities are more than just the basics. So much is happening that's actually a barrier to us getting to the promise of what the internet could be. Until we can get through that with not just realistic but logical ways to do business, we'll continue to run around in circles."

Søren Hagh, executive director of global marketing at Heineken,

agreed during his session on 'The New Brew – Data, Content & Relevancy'. He said: "We need to take ad blocking very seriously. If we don't talk properly to people online, it'll become a real issue."

The temperature of the ad blocking threat was taken during a 'hot seat' session entitled 'Adblock: Catalyst for a Game Change', starring Ben Barokas, founder and chief executive of Sourcepoint – a company that helps publishers to fight back against the offending software.

Research from Sourcepoint and comScore shows one in 10 people

were already blocking ads on desktops and laptops before the Apple iOS 9 update, rising to around a quarter in Germany and France. Younger and wealthier people are more likely to block ads, while the rate of blocking on mobiles currently stands at just 0.1% in the UK. However, despite the removal of Peace from Apple's App Store, the increasing availability of other new mobile ad-blocker apps is almost certain to make this figure rise.

Barokas described the struggle between ad blockers, publishers and brands as "an extinctionlevel event" because it "kills

## **KEY STATS**

43,000
delegates and nearly
900 exhibitors attended
the Cologne event

1 in 10

people were blocking desktop/laptop ads before the iOS 9 update 17%

more Germans are using ad blockers than 12 months ago

0.1%

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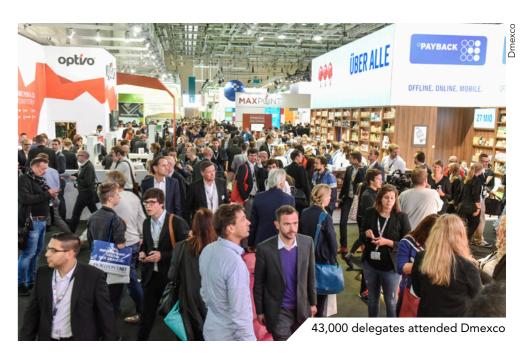


MediaMath's MD EMEA Dave Reed discusses how Dmexco represents a visualisation of the changing ecosystem, how he has recently observed marketers more efficiently using first party data and a shift in the way marketers think about Programmatic taking a more consumer centric view of their world.

mediamath.com

content". He added: "It's too late to go back to how things were in the past. The genie is never going back in the bottle. In the past, the understanding was implicit. Publishers gave people content and put ads on the side, believing the value exchange would happen. But now the ad is being taken out, people don't realise that blocking ads is sabotaging the creation of content."

Barokas believes that the only way publishers can combat a surge in popularity of the adblocker apps is to give users a choice, similar to that of Spotify, whereby they can either see the ads, provide information to



## "AS AN ADVERTISER, YOU CAN NOW TAKE ADVANTAGE OF THE BACK END TO PLAN AND DELIVER MORE SOPHISTICATED CAMPAIGNS ACROSS BOTH INSTAGRAM AND FACEBOOK MOBILE PLATFORMS"

receive personalised ads, or pay a subscription for an ad-free service.

While brands and publishers engaged in heated debate over the blocking of ads, Instagram was busy showcasing its new ad formats and features to Dmexco delegates and confirming that its formats will soon be available to all advertisers globally.

The latest Instagram advertising initiative is called Marquee. It allows advertisers to run a high-impact, single-day campaign and reach a larger proportion of the 300 million-strong user base.

Amy Cole, Instagram's head of brand development EMEA, further confirmed that Instagram is now offering 30-second video ads, along with landscape dimensions and a wider array of calls to action for its direct-response formats.

All formats and placements are being made available through Facebook's self-service ad interface, Ads API and Power Editor, which allows for greater demographic and granular interest targeting.

"Instagram and Facebook are powerful mobile platforms and we understand that they deliver a unique consumer experience. As an advertiser, you can now take advantage of the back end to plan and deliver more sophisticated campaigns across both platforms," Cole told delegates.

#### **Back and forth**

Dmexco attendees interested in the conference programme shuttled their way back and forth between the Debate Hall and the Congress Hall, passing former German TV game-show host Walter Freiwald's slightly bizarre campaign to be elected 'President of the Internet'.

Elsewhere, thousands of other visitors filled the surrounding exhibition halls, perusing the stands and discussing digital solutions with suppliers.

In Hall 9, the Girls' Lounge provided a space for women

to talk business and forge connections, while receiving hair and make-up styling, confidence coaching and professional headshots. Meanwhile, in Hall 6, the inspiring Start-up Village gave entrepreneurs the opportunity to demonstrate their vision and technologies to the relevant market players.

In the Debate Hall, the conversation turned to programmatic, while, back in the Congress Hall, a disagreement over what actually constitutes content was taking place.

Several key agency heads, including ZenithOptimedia chief executive Steve King and Havas global chief executive Yannick Bolloré, were keen to paint a picture of a disrupted agency landscape.

King told an audience that the acceleration of programmatic over the past five years has changed the role of media agencies "for the better" when it comes to collaborating with clients.

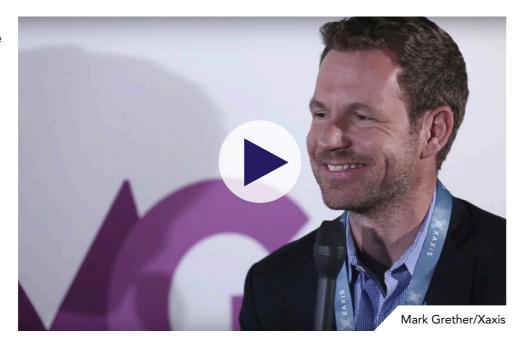


"As we explore the opportunities for programmatic and addressable communication, the role of the media agency has changed for the better, as we deepen our relationships with clients and with media vendors," he said.

Bolloré clarified previous comments about Havas' recruitment of mathematicians and data scientists by insisting that technology is a vital tool to aid creativity within a programmatic landscape.

He said: "We are not becoming a technology company. We are an advertising company and creativity is our core business. We employ mathematicians to help our creative people to address messages in a better, more targeted way.

"Technology is the tool to do this. We need to have the best technology and the most talented and clever people, but we will always be proud to do creative advertising. I'm very excited by the world of data," he continued. "We are only scratching the surface of what will be achieved in the future around personalised content. The future of data means more meaningful messages, served at the right time, but it will



To exemplify good, engaging content, Stengel showed Pampers' '#Everybaby is a Prince or Princess' campaign, celebrating all the babies born on the same day as Princess Charlotte.

Wunderman chief executive Read agreed that the video, viewed more than 1.6 million times on YouTube, was compelling, but challenged its definition as 'content'. Setting off a slightly awkward exchange, he countered: "I don't know if that's content marketing in the sense most of our clients are thinking about it.

advertisers and brands who want to tell impactful stories," she said.

"Marketers aren't spending enough time in mobile app marketing. They need to think harder about how to tell their impactful stories and get a return for their content because consumers are living in their smartphone apps."

## **Emerging regions**

Something Dmexco speakers could all agree on was those emerging regions of the world that are now ripe for digital

## MARKETERS AREN'T SPENDING ENOUGH TIME IN MOBILE APP MARKETING. THEY NEED TO THINK HARDER ABOUT HOW TO TELL THEIR IMPACTFUL STORIES AND GET A RETURN FOR THEIR CONTENT'

go beyond ads. Imagine being served music based on your different moods at various times of the day."

Back in the Congress Hall, Lisa Utzschneider, Yahoo's global revenue chief, was debating 'The Content Revolution' with Mark Read from Wunderman and former Procter & Gamble chief marketing officer Jim Stengel, now running his own consultancy, The Jim Stengel Company.

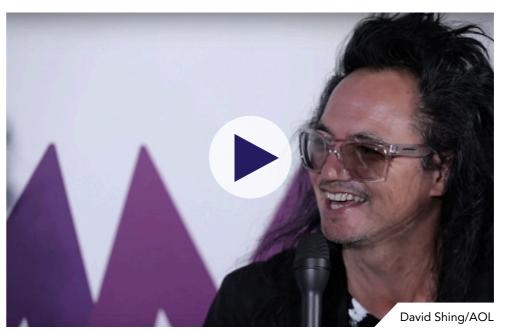
I'd say that feels like an ad that people share."

Yahoo's Utzschneider came to the rescue by changing the subject to in-app content, describing how Tumblr is used by brands for authentic content that connects with a millennial audience.

"On average, we are seeing a three times lift in performance for mobile app marketing, which is a combination of direct response

infiltration from brands and global suppliers.

Kate Kui, vice president of China's largest B2C e-retail platform, JD.com, said that, following a 10-year journey in which China once envied the speed at which Western societies evolved online payment convenience and delivery systems, the country now has all its digital elements in place and is seeing 65% year-on-year growth in the online shopping market.



Kui said: "There are no political or any other barriers to entry for brands and digital suppliers to the Chinese e-commerce market. We see e-commerce as a global industry, we all speak a global language and with platforms such as WeChat providing access to more than 500 million users, China has huge online traffic."

The digital opportunities in Africa, meanwhile, were discussed by Jeremy Hodara from the Africa Internet Group, Mikul Shah from Kenya-based online restaurant guide EatOut, and Taffi Ayodele, who runs Thando's, an African shoe designer.

"Mobile is everything in Africa and we're a Facebook-first platform," Ayodele said. "Africa has poor road infrastructure so commutes are often long and slow-moving. It's a perfect opportunity to market to people on the move."

Hodara agreed: "Facebook is where their internet journey starts. From there they go on other websites. The way of thinking is very different from the US. When they see pictures, they say 'I want to buy this product on Facebook'.

"We have to adapt to these needs, plus how and where they use the internet."



One of the big coups for Dmexco 2015 was getting BMW to premiere the technology of the new 7 Series in Cologne, just days after the car was launched at the Frankfurt Motor Show. Delegates heard how the car has a fifth-generation iDrive system, which includes touchpad and touchscreen functionality, plus gesture control for the first time.

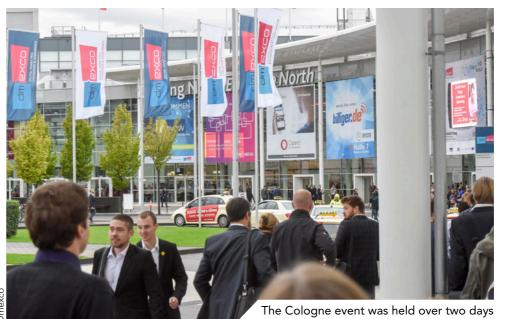
The vehicle can detect hand movements that are used to control functions, including the volume of the audio system or rejecting or accepting mobile calls. The new system detects five different gestures, including clamp, point, rotate, swipe – and a two-fingered command.

Timo Resch, vice president product management grand series, BMW, said: "It was crucial for us to include technologies that are exciting and engaging and bring them to the forefront of the communication and marketing around this new car."

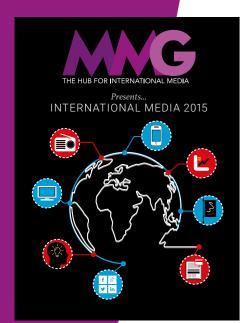
BMW has also introduced a digital key fob that displays information such as whether the vehicle is locked and its fuel level. Delegates were able to witness first-hand how the fob can also be used to remotely park the 7 Series, without the need for a driver to be behind the steering wheel.

Outside, following Resch's talk, BMW demonstrated the Remote Control Parking function, and how the vehicle uses a mounted camera within the windscreen and additional sensors to allow forwards- and reverse-parking manoeuvres at the simple press of a button.

Suitably wowed by this glimpse at the future of mainstream automotive technology, delegates left Dmexco with renewed digital vigour and a greater understanding of where our connected world is heading and the challenges that need resolving along the way.











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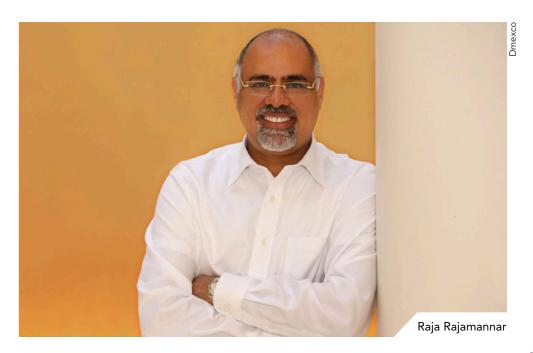
## MASTERCARD BRINGS PRICELESS CAMPAIGN INTO THE DIGITAL AGE

M&M Global speaks to Raja Rajamannar, MasterCard's chief marketing officer, about how digital is helping to deliver the brand's experiential strategy as part of its updated 'Priceless' campaign, which spans music, entertainment, sport, travel, arts and fashion

According to Raja Rajamannar, MasterCard's chief marketing officer, there are four key factors driving accelerated digital change in the market.

The first is Moore's Law – the observation that computer processing power is doubling every two years. The second is the affordability of available technology, and the third is the miniaturisation of tech.

The fourth catalyst, for a fully inclusive connected population, is the simplicity of the user interface, which has meant that young, old and everyone in between, according to Rajamannar, can



## "DO WE SHOW THE SAME CONTENT ACROSS EACH SCREEN? DO WE TAILOR THE MESSAGING ACCORDING TO THE DEVICE? OR DO WE DO SOMETHING COMPLETELY DIFFERENT?"

immerse themselves more easily in today's digital world.

"The challenge for marketers," says Rajamannar, "is how can a brand reach this more connected consumer? Prime time no longer exists and our audience is watching three different screens at the same time.

"Do we show the same content across each screen? Do we tailor the messaging according to the device? Or do we do something completely different?

"At MasterCard, we've shifted our focus from consumer

behaviour within the context of consumption to understanding what happens outside the sphere of consumption, which may better connect and influence future buying decisions."

Rajamannar is referring to the brand's prolonged experiential marketing strategy and its power to effect consumer behavioural change through positive emotions.

### Lifestyle platform

In the past two years, MasterCard has moved away from its previous 'The Best Way to Pay' brand strapline and, instead, focused its marketing aspirations on being seen as a lifestyle platform, and not just a card, through increased experiential activity.

For MasterCard's 1.6 billion customers worldwide, this means having easier access to once-in-a-lifetime 'Priceless' experiences in areas including music, entertainment, sport, travel, arts and fashion.

"Today's connected audience are more reachable in real time and content is instantly shareable, which should be a dream for all marketers. Technology is enabling us to offer more priceless experiences that help us to



form a more valued connection between our brand and the consumer," says Rajamannar.

MasterCard's updated brand positioning is now 'Connecting People to Priceless Possibilities'. The experiences are divided up into four platforms: Priceless Surprises, Priceless Cities, Priceless Causes and, finally, Priceless Specials.

### **Priceless Surprises**

The first to launch was Priceless Surprises, around last year's Grammys in America. Initial activity by the brand ranged from offering fans of MasterCard brand ambassador Justin Timberlake free downloads of his latest track via Twitter, to a surprise appearance at a fan's house by Timberlake himself.

"Since then, during the past 15 months, we have created



## 'TODAY'S CONNECTED AUDIENCE ARE MORE REACHABLE IN REAL TIME AND CONTENT IS INSTANTLY SHAREABLE, WHICH SHOULD BE A DREAM FOR ALL MARKETERS"

more than a quarter of a million surprises and expanded the campaign into different regions around the world, leveraging music and sports stars and our 4,000 event sponsorships," explains Rajamannar.

"Our aim is to give cardholders positive surprises in all 112 countries every single day of the year. It's a huge challenge creatively because, when a surprise becomes predictable, you have to move it on."

### **Priceless Cities**

12 M&M GLOBAL

Priceless Cities experiences are now available in 45 cities around the world, accessed via the Priceless website. By the middle of 2016, Rajamannar says that he hopes to have increased the number of participating cities to an impressive 55.

"We need a lot of help so we're constantly looking for partners who can bring these priceless experiences to life," he says. "I invite anyone who has experience in this area to get in touch and help us to keep expanding our offer."

### **Priceless Causes**

Priceless Causes - the charitable fundraising mechanic - has so far raised more than \$30 million for Stand Up for Cancer in the US, Russia and Canada, through the creation of unique experiences that people can bid for or buy online, such as dining on a table erected from a billboard in Times Square, New York.

## **Priceless Specials**

Still to launch is Priceless Specials, which is expected to go live

before the end of the year, although Rajamannar wouldn't be drawn on a date.

Rajamannar does confirm though that the next stage of the Priceless campaign will reward cardholders with discounts, extras and freebies such as the ability to jump the queue at exclusive restaurants or receive a pamper experience when they use their MasterCard in-store.

"The connectivity of today's world has made our Priceless campaign truly global," Rajamannar concludes.

He adds: "We have tripled our digital investment in the last few years, but have married it with real-life face-to-face experiences that really matter to the consumer."

## HAVAS MAKES THE CASE FOR A UNITY OF TECH AND PEOPLE

Havas chairman and chief executive Yannick Bolloré was one of the biggest names to drop into Cologne this year. M&M Global caught up with him to hear his insight and opinions on the current tension between technology and human creativity

### M&M Global: What are your impressions of Dmexco 2015?

Bolloré: Extremely positive. I was really impressed by the size and scale of the event, and I hope to be back next year.

## There appears to be a huge growth in the number of ad tech businesses - is this good or bad for clients?

Technology has opened doors to new opportunities within our industry and is now an integral part of a lot of what we do. It is not, however, the be-all and end-all. It is a tool we can use to enhance the creativity and skills of our talent, but it can never replace them. We are in a



## ' WE ARE IN A PEOPLE BUSINESS, AND NO ALGORITHM CAN COMPETE WITH THE CREATIVE MAGIC OF HUMANS. CREATIVITY IS OUR CORE BUSINESS - AND THAT IS A TRAIT THAT IS UNIQUELY HUMAN"

people business, and no algorithm will ever compete with the creative magic of humans. Creativity is our core business - and that is a trait that is uniquely human.

## Dmexco draws a large crowd to Germany, but how important is Europe at the cutting edge of innovation in media and marketing?

I may be biased, but I see Europe as being enormously important as a driver of innovation in these areas. One of the things that's most exciting now, though, is that it's not just a handful of markets that dominate. There are

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hotspots all over the globe and so much interaction and genuine collaboration that the best ideas can come from anywhere.

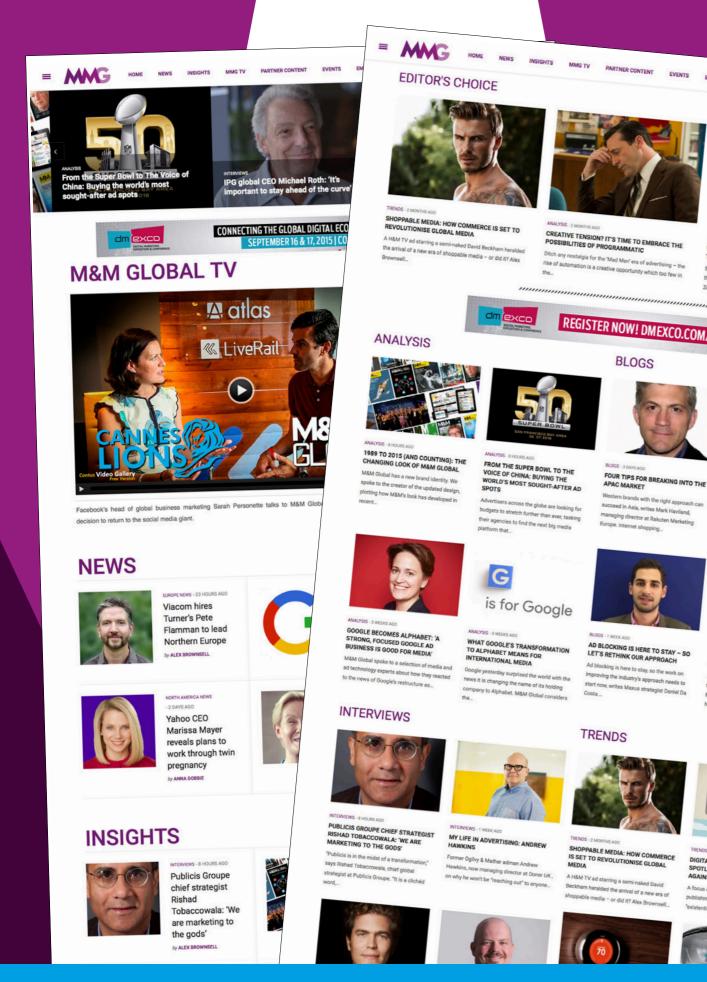
## What do you consider to be the most important trends facing brands over the coming 12 months?

The world of data and everything related to it is going to radically and rapidly change the game for brands. We have only scratched the surface of what can be achieved if we use data intelligently. I also think predictive marketing is going to become more and more key to our industry and our clients.

## How is Havas and its agencies changing to meet client needs?

Market changes mean that our clients now demand greater coordination, integration, and optimisation. A client with its ad budget fragmented over several agencies is not sustainable. Havas was the first comms group to have adopted a business model based on collaboration among media, data and creative teams. This integration simplifies our clients' lives, and it is our promise to them that we can look beyond our individual identities and work together, create project groups, strive hand in hand, and pool our expertise.





## VIDEO INTERVIEWS - PHOTO GALLERIES - INDUSTRY ANALYSIS

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## YAHOO PLANS TO TAKE BRANDS' ADVERTISING TO THE NEXT LEVEL

Yahoo's recently appointed global chief revenue officer Lisa Utzschneider might be a familiar face at Dmexco, but there will be no resting on laurels for the woman whose task is to 'return this iconic company to greatness', she tells M&M Global

"I love Dmexco – I refer to it as the conference where business gets done," says Yahoo's newly appointed global chief revenue officer Lisa Utzschneider. "The presence of ad tech is very noticeable, as is the presence of lots of Americans."

Too true. Our meeting is located in the hustle and bustle of Hall 7, where Yahoo's sizeable stand competes for attention alongside the likes of Google, Facebook and AOL. Utzschneider is no stranger to the Cologne event, but these remain novel times for the former Amazon global ad sales boss. In July, only eight months into her Yahoo career, CEO Marissa Mayer

THREE LESSONS FROM T GLOBAL AWARDS 2015 FI JUDGING DAY

FIVE KEY PILLARS TO A WINNI CONTENT STRATEGY

POTLIGHT ON UX IN THE FIGH BAINST AD BLOCKERS

ling is the only way to tackle the



Tumblr blogs. "The question I'm asking every agency and client is, 'When we meet again in this hot room a year from now, what does success look like with Yahoo – what is the one thing you want to get done?'"

So what comes next for Yahoo? The immediate priority is to achieve "greater clarity" with the company's content offering, and "what role Tumblr plays in that strategy". Utzschneider is also determined to make the most of insights garnered across Yahoo's global operations, from London to Omaha – albeit while maintaining centralised structures: "If you want to build a global,

## "ADVERTISING IS CORE TO YAHOO'S BUSINESS; WE ARE BOTH A MEDIA COMPANY AND A TECH COMPANY, AND I'VE NEVER WORKED ANYWHERE WHERE ADVERTISING IS THE CORE BUSINESS"

promoted Utzschneider to the role of global CRO. The task? Quite simply to "return this iconic company to greatness".

"Advertising is core to Yahoo's business; we are both a media company and a tech company, and I've never worked anywhere where advertising is the core business. It makes it fun because advertising is the centre of everything that we do," she says.

Utzschneider spent the first half of the year trying to work out how to integrate Yahoo's three recent acquisitions: blog platform Tumblr, mobile analytics firm Flurry and video ad company Brightroll. It all feeds into the firm's 'MaVeNS' advertiser proposition – to use mobile, video, native and social for compelling brand experiences.

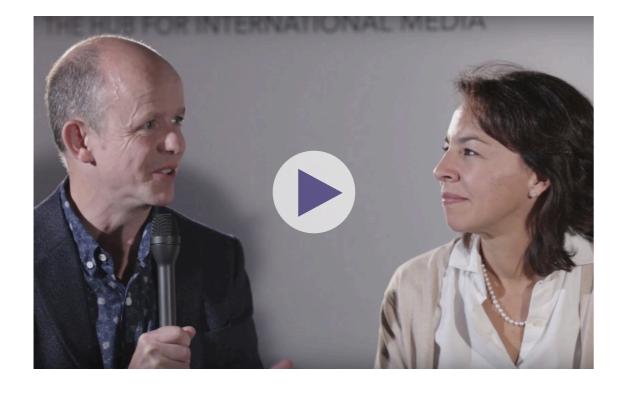
#### Don't boil the ocean

Clients have never been faced with such multifarious routes to reach consumers. Successful brands, claims Utzschneider, are those that reject the temptation to "boil the ocean" and build a more focused marketing strategy.

She is particularly pleased with a partnership that will see Nescafé drop its brand websites and convert all its web pages into scalable business, [you must] find the common threads across the regions. [Individual markets] like to say 'we are different', but the way to really scale is to identify what is the same throughout. Then you can find local nuances... I'm a huge believer that ideas come from anywhere. [We want to] find out how to surface some of them, and have more of a highway for ideas, not just a one-way street."

As Dmexco 2015 winds down, Utzschneider turns her attention to the next appointment – just don't ask her when or where it is. "If you ask me what time it is, well, I have no idea! I just keep rolling."





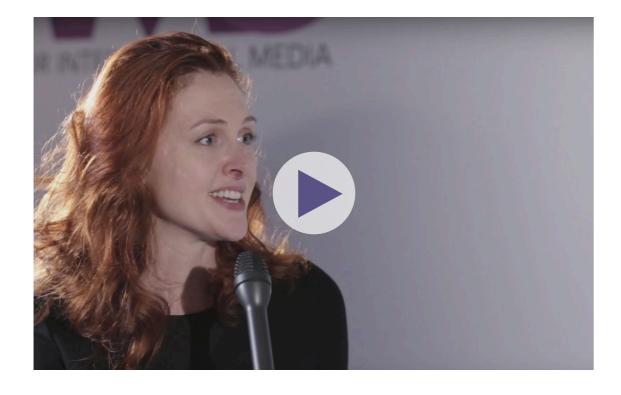
# GETTING CREATIVE WITH DATA TO TRULY CONNECT

M&M gathered Iain Jacob, president EMEA at Starcom Mediavest Group, Taide Guajardo, European marketing director at Procter & Gamble, and Stuart Renshaw, digital development director at McCormick, for a discussion about how data is revolutionising brands' relationships with consumers.



# A NEW BROOM IN TOWN FOR IPG MEDIABRANDS

Newly appointed IPG Mediabrands chief executive Henry Tajer tells M&M Global about his ambitions for the agency group, and what impact this summer's flood of media reviews has had on the business.



# TAKING SOME DIGITAL MEDICINE WITH BAYER

Bayer's chief digital officer Jessica Federer explains why the pharma giant is overhauling the way it works with agencies, and why "interoperability" is the most exciting trend in digital right now.



# A YEAR IN THE LIFE OF MAXUS GLOBAL'S CEO

Maxus Global chief executive Lindsay Pattison marked a year in the job by catching up with M&M Global, as well as reflecting on the role of agencies in Dmexco's digital jungle.



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