

MWG INTERNATIONAL MEDIA 2017





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Things can only get better...

2016 will almost certainly go down as a watershed year in recent history. Did you know that your British customers really wanted to leave the European Union, or that your US target audience would elect Donald Trump to the highest democratic office in the world?

We are constantly being told how awash we are with data, and that it has never been easier to understand the thoughts and desires of consumers. Yet, in reality, the marketing and media industry is only at the start of a long journey to work out how to make the most of that opportunity.

Yet opportunity remains the key word. In the wake of the explosive ANA report on media rebates, agencies have a chance to reframe their relationships with clients (p10). Whoever cracks the media measurement challenge will win huge levels of business from clients weary of fraud, viewability and ad-blocking scandals (p20). And the rise of artificial intelligence is likely to reshape marketing in unimaginable ways over the coming few years (p30).

For the second year running, we also bring you a list of the brightest talents in international media in the form of our Meet the Millennials programme (p42). The prevalence of data, digital and content skills gives us every reason for optimism that our industry can thrive, no matter what geopolitical shocks it must withstand in 2017 and beyond.

Wishing you a hugely successful year, from everyone on the M&M Global team.

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2016

A YEAR IN REVIEW

M&M Global casts its eyes over the key trends in 2016, and predicts what we might expect over the coming 12 months

For all the political tumult, 2016 was by no means a bad year for the media and advertising industry. In fact, IPG Mediabrands agency Magna claims that it produced the highest rate of global growth since 2010. All the key trends continued apace: digital commands a larger and larger slice of marketing budgets; an increasing portion of that spend is going into mobile; and programmatic is attracting ever-more investment, particularly outside of advanced markets such as the US and UK.

By examining the global forecasts from Magna, WPP's GroupM and Publicis Media's Zenith, M&M Global has curated a selection of need-to-know facts about media and marketing in 2017. And overleaf, our friends at eMarketer have given in-depth reports on the comparative development of digital media in Western Europe and Asia.

THE NEXT 12 MONTHS IN NUMBERS...

31%
Programmatic advertising's growth in 2017
Source: Zenith

52%
For the first time, the majority of digital ad sales will be generated by mobile impressions or clicks
Source: Magna

\$22.9bn
Net global ad growth in 2017
Source: GroupM

Growth in ad spend by regional bloc in 2017

North America	3.7%
Latin America	1.9%
MENA	7.3%
Western & Central Europe	2.8%
Asia	8.5%
'Advanced' Asia	2.3%

40% vs 36%
Global digital-based ad sales (\$202bn) will overtake linear TV (\$186bn) to become the number one media category in 2017
Source: Magna

71%
of total ad sales growth will be contributed by six countries:

- China \$6.2bn
- US \$4.7bn
- UK \$1.6bn
- Argentina \$1.4bn
- Japan \$1.3bn
- India \$1.1bn

Source: GroupM

4.4%
Source: Zenith

3.6%
Source: Magna

4.4%
Source: GroupM

Three predictions for annual growth in the global ad market in 2017

2016
A YEAR IN REVIEW

A landmark year for digital advertising in Western Europe

By **Karin Von Abrams**, senior analyst at eMarketer



eMarketer sees a handful of powerful forces pressuring the global media and marketing ecosystem in 2016. The first and most powerful of those forces is mobile. Looking back, 2016 may well emerge as the pivotal year in the evolution of our mobile-

first, mobile-centric society. Investment in mobile internet ads in Western Europe is expected to jump almost 45% this year. Several key markets – including France and Germany – have reflected a similar pace of change in the past 12 months.

The second force is data-driven advertising automation, otherwise known as programmatic advertising. In France, an estimated 64% of all digital display ad spend this year went to programmatic trades. On the other hand, legacy systems for media buying and selling have delayed programmatic implementation in some countries. Automated trading is already delivering on some of its promises, but is unlikely to fulfil them all.

The third force is consumers' increasing desire to avoid advertising to some extent, abetted by technology: ad-blocking, in other words. In 2016, 10.9 million internet users in the UK used an ad blocker, and that number is climbing.

All of those forces are playing out across Western Europe, regardless of political and economic trends, and against the background of rising digital ad spend. But the impact differs country by country.

The UK continues to be the leading regional market, in many respects. This is an advanced digital culture; internet penetration is high, as is usage of smartphones and other mobile devices, and the country has a well-deserved reputation as a hotbed of both technological and marketing innovation.

So it's not surprising that the UK currently accounts for more than 40% of digital ad spend in Western Europe. A large proportion of digital advertising in the UK is already handled programmatically; similarly, a lot of programmatic activity is already focused on mobile devices.

Germany lags some way behind on these measures, yet it will register digital ad spend more than double that in France this year. By contrast, Italy and Spain have seen much lower levels of digital ad expenditure – below \$2bn in each case. In these two markets, long-standing economic difficulties have hindered the expansion of digital infrastructure and business investment in digital operations, with a predictable



Western Europe is becoming 'mobile-first'

64%
of digital ad spend in France went to programmatic trades
Source: eMarketer



It's not surprising that the UK currently accounts for more than 40% of digital ad spend in Western Europe

effect on brands' digital budgets. That said, we expect Spain to finish 2016 on a more positive note than Italy, where digital ad spend growth is concerned. A vibrant mobile culture is contributing to Spain's upswing.

SPOTLIGHT ON GERMANY

As a relatively mature digital market, Germany will continue to post steady gains in digital ad spend during the next few years. Despite the political and financial turbulence felt across Europe as a whole, the German economy is essentially solid and resilient – one of the healthiest in the region, in fact.

As Germany's population skews slightly older than some other major markets in the region, traditional media – print formats in particular – have maintained a firm hold on national audiences. Expenditure on digital ads is gradually closing this gap, though.

While digital doesn't yet account for as much of the total ad spending pie in Germany as it does in the UK, for example, that slice is expanding, and will hit 29% this year, eMarketer estimates. Here, too, mobile is the crucial driver; in 2016, mobile ad spend grew nearly 10 times as fast as digital ad spend overall.

Meanwhile, back in Germany's desktop economy, an interesting trend may be emerging, according to industry body the Online-Vermarkterkreis (OVK). It ▶

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Optimise

towards those opportunities to consistently improve results



Analyse

the impact on consumer actions

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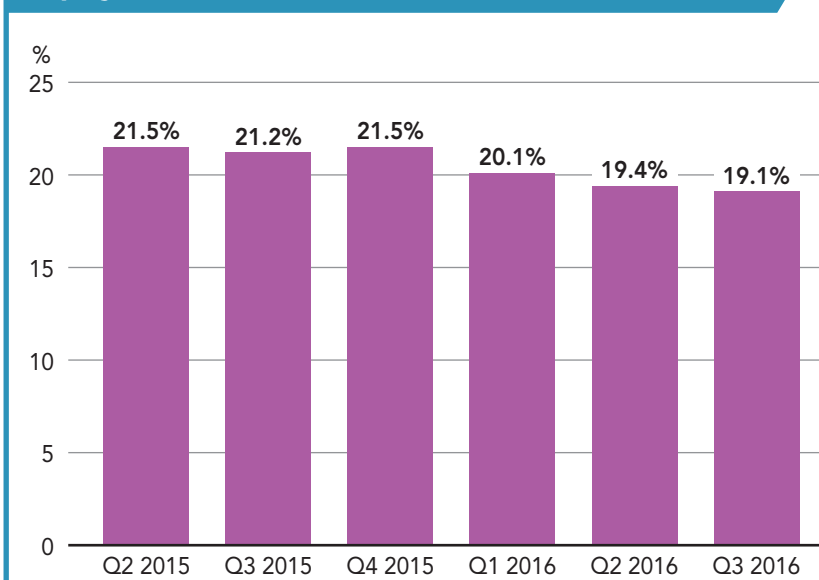


In 2016, mobile advertising spend grew nearly 10 times as fast as digital ad spend overall in Germany

recently reported a decline in the share of web page impressions on which display ads were blocked. Over the first three quarters of 2016, that share fell by modest increments, from 21.5% to 19.1%.

This may signal that some internet users were taking a more measured view of ad-blocking, and agreeing to see ads on sites they value, for example – or that a growing focus on mobile devices has marginalised desktop PCs, making ads served to them less significant, so hardly worth blocking. It's too soon to pinpoint the cause or causes of this trend; similarly, we don't know whether it will continue, or be replicated in other Western European markets. But it's one of many things to keep a sharp eye on, as 2016 comes to an end.

Share of desktop page impressions in Germany on which display ads were blocked Q2 2015 – Q3 2016 (% of total)



Note: based on figures reported by OVK members; read as 'delivery of ads was blocked on 19.1% of page impressions in Q3 2016'. Source: Bundesverband Digitale Wirtschaft (BVDW) and Online-Vermarkterkreis (OVK). "Zentrale Adblocker-Rate des OVK" as cited in company blog, 16 November 2016.

2016 A YEAR IN REVIEW

Digital advertising in Asia-Pacific is driven by the smartphone revolution

By **Rahul Chadha**, Asia-Pacific analyst at eMarketer

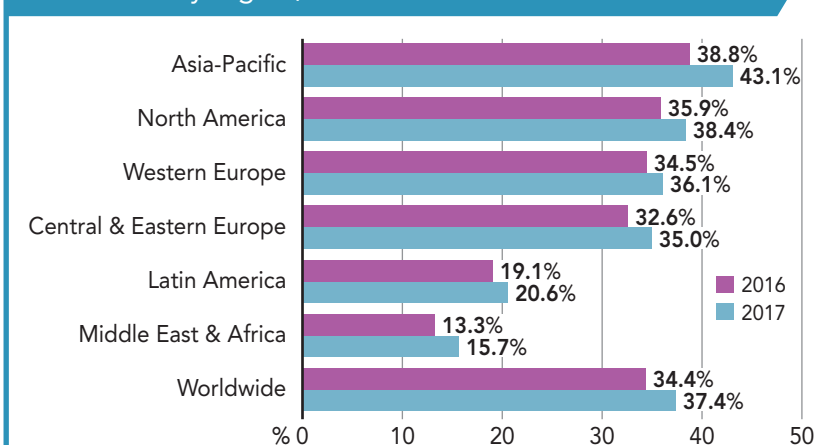


While Asia-Pacific currently trails North America on digital ad spend, expenditures in the region are a close second this year. eMarketer projects that digital ad outlays will total \$68.7bn in 2016, and more money will be spent on digital advertising in Asia-Pacific by 2018 than in any other area of the world.

The growth of digital ad spend is inextricably tied to the emergence of the mobile-first markets of China, India and Indonesia, which boast a combined population of almost three billion, according to figures from the US Census Bureau. These three markets will see the strongest growth in digital ad spend over the next four years, largely due to one factor: the smartphone.

There will be 841 million smartphone users in these three countries in 2016, by eMarketer estimates, more than four times the number found in the US. The continued emergence of a nascent, but burgeoning,

Digital ad spend as a percentage of total media ad spend worldwide by region, 2016 and 2017



Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets and other internet-connected devices, and includes all the various formats of advertising on those platforms; excludes SMS, MMS, and P2P messaging-based advertising. Source: eMarketer, March 2016

middle class in all three countries has created a new consumer cohort with the disposable income to spend on smartphones and service plans. These items were once out of the reach of all but the highest income-earners. However, the ascent of low-cost smartphones – many of which are made in China – and data plan price wars resulting from competition among wireless carriers, has made mobile internet more widely accessible in the Asia-Pacific region.

There are, nonetheless, several areas of the digital ad ecosystem in which developing Asia-Pacific markets still lag behind more advanced countries, one key area being programmatic advertising.

China represents a unique middle ground between emerging and mature programmatic markets. eMarketer estimates that more than half of digital ad outlays in China will be transacted via programmatic methods for the first time in 2016, with the vast majority handled by Baidu, Alibaba or Tencent.

However, China's programmatic market remains beset by significant problems, including a dearth of robust third-party data providers, conflicts of interest among those selling inventory and rampant ad fraud.

Programmatic faces even higher hurdles in most Southeast Asia markets, where digital has yet to achieve a comparable reach to traditional media outlets such as television. Automated trading, with its attending lexicon of jargon acronyms and often opaque methods of measuring return on investment, presents a significant barrier to ad-buyers more used to direct deals and clearly established metrics.

One area of digital advertising that is likely to see faster growth in Asia-Pacific is video advertising. India, for example, is on the cusp of a sharp increase in digital video consumption that will be driven by falling service plan prices due to competition among mobile carriers. Upstart mobile telecom company Reliance Jio has already had a dramatic effect on the market by providing consumers with 4G data rates of less than \$1 per gigabyte.

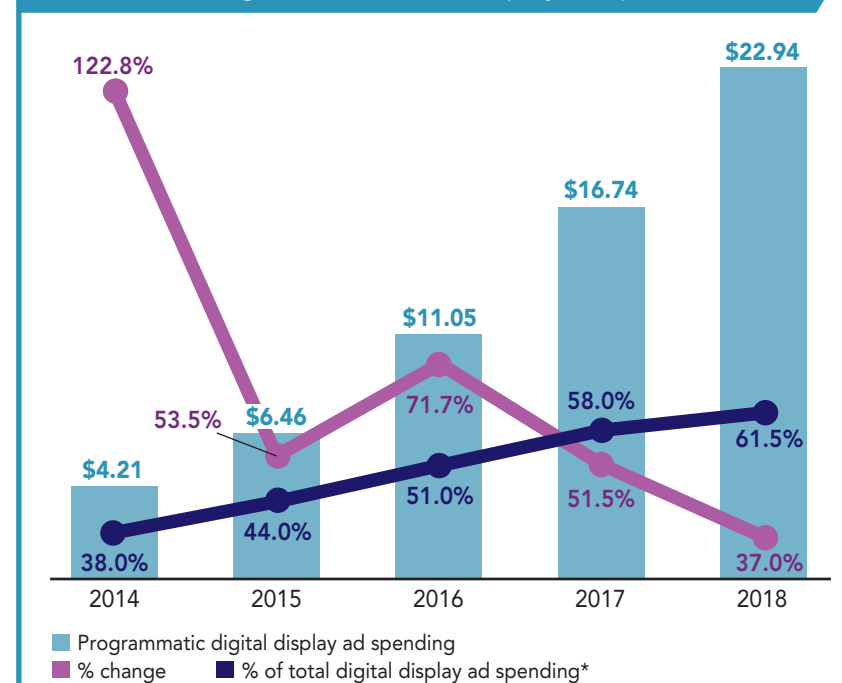
eMarketer estimates that the number of digital video viewers in India will climb from 149.7 million this year to 244.1 million in 2020, when 18.4% of the population will watch a video online at least once per month. Cheaper and faster data will have a strong appeal to these entertainment-content-crazed consumers in India, which churns out an astounding amount of cinema and music.

Advertisers will be forced to follow those consumers as the traditional media format of TV fractures, much as it already has in both the US and Western Europe. **M&M**



There will be 841 million smartphone users in China, India and Indonesia in 2016, four times more than in the US

Programmatic digital display ad spend in China 2014-2018 (billions, % change and % of total display ad spend*)



Note: converted at the exchange rate of US\$1=RMB6.23; digital display ads transacted via an API, including everything from publisher-erected APIs to more standardised RTB technology; includes ads on ecommerce websites such as Alibaba properties; includes advertising that appears on desktop/laptop computers, mobile phones, tablets and other internet-connected devices. *Includes banners, rich media, sponsorship, video and other. Source: eMarketer, March 2016



The focus is on smartphones in Asia-Pacific



A STATE OF DENIAL?

Mike Fletcher investigates what has happened since the ANA published its explosive report into US media practices in June last year

Deflect, lash out, refuse to take responsibility and blame anyone but yourself. America must be praying that its new President-elect does not revert to his campaign rhetoric once he takes office in January. However, according to some media commentators, Donald Trump is not the only one who should think before he speaks. GroupM's global chairman Irwin Gotlieb has come in for a lot of flak after giving a very Trumpesque response when asked recently about the ANA-backed seven-month investigation into US media practices, which in June reported that rebates and other "non-transparent" methods are pervasive in the American media-buying ecosystem.

On-stage at the Video Everywhere Summit in New York on 27 October, Gotlieb said: "I'm going to be really harsh. The entire effort was a biz-dev

[business-development] effort. The ANA allowed themselves to be part of a third party's business development."

Gotlieb's attempt to dismiss the findings of the ANA's report as merely a cynical bid by Firm Decisions (a subsidiary of Ebiquity) and the forensic investigation team at K2 to win more business has, if anything, only served to put the ANA's investigation and the issue of agency transparency squarely back on the agenda.

Tom Denford, chief strategy officer at ID Comms, was disappointed by the comments: "Irwin Gotlieb doesn't say anything that's not scripted or intentional so I was really sad to hear his remarks. It's disappointing to know that agencies haven't moved on and accepted there's a problem and that it's time to find a solution.

"Agencies are still intent on deflecting the spotlight and kicking up enough silt to get them from one financial reporting quarter to the next."

More recent remarks from WPP's chief executive Sir Martin Sorrell would appear to substantiate Denford's point. During a third-quarter earnings call on 31 October, Sorrell tried to deflect the attention away from the \$180bn media market in the US, by saying that the ANA should have pushed for greater transparency in Japan and the Middle East instead.

HEAD IN THE SAND

No-one can deny that a lack of transparency in these regions is a problem. In September, Tokyo-based Dentsu promised to pay back \$2.3m (230 million yen) to clients it had overcharged for digital advertising work in Japan. Dentsu admitted that following a month-long investigation, it had uncovered 633 suspicious transactions affecting 111 clients, some of which date back to November 2012.

But what frustrates people like Denford is that, rather than daring to admit that transparency is a global problem, and that they should work together



Tom Denford, chief strategy officer, ID Comms



The more it's denied by agencies, the greater the loss of trust between clients and their media agencies



Nick Manning, chief strategy officer, Ebiquity

with clients and media owners to ensure that media one day joins the ranks of other, highly accountable professions, agencies continue along a road of outward denial.

Ebiquity's chief strategy officer, Nick Manning, sums it up best by saying: "The industry has to stop denying the disease in public and start talking about the cure instead. It's a global problem that for every dollar of media spend, only 40 cents reaches the publisher.

"K2's investigation found 150 clients, agencies and media owners across America who painted a picture of the industry that every media owner and ad tech player recognises. The more it's denied by agencies, the greater the loss of trust between clients and their media agencies."

Ebiquity's role in the ANA report was to produce the recommendations document, which was intended to build on the investigation carried out by the K2 Intelligence Study, and move the conversation on from the revelations to prescribing solutions.

Its report recommends three overarching actions: a uniform code of conduct between advertisers and agencies; establishing media agency management principles such as complete transparency and better communication; and that marketers establish primacy over the client-agency relationship, and regularly re-evaluate and upgrade internal processes and practices.

FINDING SOLUTIONS

In addition to these three pillars, there were a further seven strategic recommendations for advertisers to consider, in order to reduce or eliminate the potential conflicts identified in the K2 Intelligence study.

One drawback, however, which Ebiquity's Manning concedes, is that the three documents that make up the ANA report are so dense that not many people actually got as far as the seven strategic



It's disappointing to know that agencies haven't moved on and accepted there's a problem

recommendations. There seems to be a widely held assumption that Ebiquity was only recommending auditing when, in fact, it was much broader.

“My hope is that, in 2017, we can spend more time talking about the solutions to greater client agency trust, which in turn will lead to more conversations about all the great advertising and media work taking place around the world,” Manning says.

“What can agencies do? Acknowledge the issues and then address them. However, it’s the advertisers themselves who have to step forward and take control of their media governance, in order to force real behavioural change.”

According to several industry sources, advertisers have responded to the ANA’s report in three ways.

Some remain paralysed by the complexities involved in investigating or changing contractual terms with an agency, so have done nothing. Some, such as JP Morgan Chase, have carried out a full agency audit and found no wrong-doing, so are sticking by their agency.

BRAND-LED CHANGE

The third way could be a potential game-changer, however. With many advertisers planning global agency reviews, and some, like Procter & Gamble, recruiting chief media officers, there is a sense that the brands will hold their media agencies to better account.

A media professional who did not want to be named told *M&M Global*: “The ‘Mediapalooza’ of 2015 saw almost \$30bn of business up for grabs, but it was very US-centric. In 2017, we’ll see even more global reviews as advertisers realise they need to sure up out-of-date contractual terms with their agencies and keep a closer eye on how media is bought, in the wake of the ANA revelations.”

One advertiser that has already been through a global review process is Mondelez International.



Over a four-month period in 2015, it consolidated its agency roster and moved media buying in the US, UK and India to Dentsu Aegis’s Carat, while also giving the agency network global communications across all product categories. Carat also handles Mondelez in the Asia-Pacific region and most of Europe.

“The ANA report findings in 2016 didn’t come as a surprise to us because we’re a global business. Understandably, most US-only businesses regarded it as a non-rebate market, but the prior evidence from all other regions was compelling,” says Gerry D’Angelo, European director of media and global digital media partnerships at Mondelez.

“Well in advance of the report we were able to implement best practice from other regions, in particular Europe, and insisted that transparency by audit was a major part of our recent global media agency RFP. We were pleasantly surprised though to find that those agencies who pitched really bought into this,” adds D’Angelo, who is soon to join P&G.

Despite the continued attempts to discredit the ANA report by the likes of Gotlieb and Sorrell, other advertiser brands also say that, away from shareholder scrutiny, many agencies are co-operating professionally over client concerns around transparency.

It is possible that, if progress is happening, it is going on behind the scenes. Some agencies are even believed to be planning announcements for 2017 that will give clients more accountability and control.

If a second, more globalised pitch storm is brewing for 2017, agencies will need to focus on this internal evolution in order to avoid a potentially costly client revolution. It will mean placing transparency and trust at the heart of the media relationship. **MVG**



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Marketers have long been at war about the relative importance of creativity, data and technology. We spoke to six key industry figures about how the ever-progressing field has changed in the past 12 months

AD TECH LEADING THE HOLY TRINITY OF CONTENT IN 2016?



NICK REID

UK managing director, TubeMogul

What have been the key trends and insights driving ad tech in 2016?

Consolidation and cross-screen. We see advertisers automating broad-reach RTB, with programmatic direct on broadcast and, now, social, as Facebook, Twitter and Snap look to scale their video offering. This is all in the ambition to take an audience-first approach and break down the traditional silos, moving in the direction of cross-screen. The challenges of planning, buying and measuring cross-device are starting to be overcome, and cross-screen is the topic on everyone's lips, as programmatic TV solidifies in the US, was launched in Australia earlier this year and picks up steam in Europe. Through software, advertisers have a more holistic audience and inventory approach and are able to start thinking about reach and frequency, something which had

become challenged by a fragmented consumer landscape.

What challenges must be tackled for ad tech to grow?

Walled gardens. The reality that there are businesses that prevent the free flow of audience data to the hindrance of the advertisers. The irony that we are still talking about transparency, when this should be what software provides. Measurement, as the proxy of a cookie disappears as the consumer continues to move from desktop to mobile. Silos – we are still a long way from being in a place where we break down the approach and budgets that sit in social, digital, mobile, TV – something which contradicts audience behaviour.

What does 2017 bring for ad tech?

Continued ambition for automation and measurement from a cross-screen and device point of view. We also predict measurement and attribution will be critical.

DAMIEN HODGE

Commercial director, Xaxis

How do you see the relationship between data, tech and creative developing?

The creative element is incredibly important; the industry has come a long way in putting a single relevant message in front of the right user group. What hasn't been addressed fully yet is using data to further inform the look and message of the creative on a more individual basis and with greater elegance, especially around branding messages. The potential benefits of successfully doing this require clear will and drive by all parties. The key to how quickly this develops is ensuring that any solution is scalable.

What effect has ad-blocking had on the space?

Most users don't use ad-blocking software, and the sheer scale of inventory available has negated any reach issues, plus there are clearly issues around how it is monetised and who is deciding what the 'quality' rules are. It is, however, a potential big issue which needs to be taken seriously – the more irrelevant ads, or horribly disruptive ads there are, the more people will turn to these solutions.

What does 2017 bring for ad tech?

We'll see further blurring of the lines between ad tech and mar-tech, and of course further M&A activity in this space as companies enhance their platform, and develop fuller stacks. More clients will base media activation on their own DMP and make more use of the deep data they already hold. I also believe that measurement will change to include more qualitative analysis – including a re-look at attribution, which could have a profound effect on ad-tech players behind the curve. This is one you may have heard before, but I genuinely think that 2017 will see the end of mobile and desktop being treated individually.



DAVID McMURTRIE

Head of UK publishers, Google

How are brands approaching ad tech differently in 2016?

There has been a marked shift towards having a fully optimised technology stack, consolidating to just a few technology partners with the goal of improving end to end efficiency. This is true across both demand and supply sides of the business and addresses the major challenges the digital advertising industry faces – delivering a better user and advertising experience and driving greater transparency and efficiency in the ecosystem. 2016 was the year when we saw brands really start to understand and interrogate the value of each component part of their ad tech infrastructure. At a simplified level, is each element of my programmatic stack delivering enough value to justify its inclusion?

What challenges must be tackled for ad tech to grow?

Ad tech will continue to grow at a rapid rate, the question is more what hurdles are we going to place in front of ourselves? Not abusing the tools we've been given will be important – particularly how to create and deliver personalised messaging without crossing the boundaries. Understanding the value of intermediaries is also key, and whether the value delivered is justifying the cost. Finally, as ad tech becomes more mainstream, it's important to reflect that in the positioning and language that we use – it's not about making marketing speak in a programmatic language, it's the other way around.

What does 2017 bring for ad tech?

Technology consolidation and platform diversification. I'd expect buyers to continue to refine their stack, while also looking to bring the efficiency, performance and insight benefits that they have derived from digital to other media channels. Audio and digital OOH are already well under way, while addressable TV will continue to be the big prize.



We'll see further blurring of the lines between ad tech and mar-tech, and of course further M&A activity in this space

GRAHAM MOYSEY

Head of AOL International

How are brands approaching ad tech differently in 2016?

The way brands are spending and how they are buying continues to change. We're seeing more ad dollars shifting to programmatic, although it's important to note that the value of the traditional managed media business remains, and indeed for many advertisers a hybrid approach is delivering the right results for them. Mobile video is also exploding, with 20% of ad buyers telling us they have increased what they spent on mobile video advertising in 2016 versus the previous year.

What challenges must be tackled for ad tech to grow?

Since the introduction of the multi-device lifestyle, there's billions more touchpoints for brands and marketers to sift through and understand in order to make their message better resonate. But when we consider the fact that each device lives in its own silo, and that digital footprints differ greatly for each medium, it's much harder for marketers to know exactly how their marketing investments are paying off. That 'lack of understanding' remains one of the biggest challenges to the industry as a whole, but one that I believe can be solved by investment in measurement and attribution technologies.

What effect has ad-blocking had on the space?

Let's start by acknowledging that we are all responsible for the need to create better ads so that there is less negative user impact. What this means will differ by publisher; sometimes it means less obtrusive, lower density, more relevant, less bandwidth intensive. Sometimes it will just mean having fewer ads that are more beautiful and impactful, or bigger native and custom integrations within publisher sites. For advertisers, the challenge is creating great ad experiences that consumers actually want. That comes down to three key factors: quality content native to brands and publishers; premium ad experiences that are engaging by bringing together design and data; and, finally, premium inventory from trusted environments.



Since the introduction of the multi-device lifestyle, there's billions more touchpoints for brands and marketers to sift through and understand



ROB SCHWARTZ

President, Undertone

What have been the key trends and insights driving ad tech in 2016?

In 2016, from our perspective I think the biggest driver has been brands requiring more from their ad-tech partners than they have in prior years, and a big focus has been on driving business results, so whether it's thinking about how digital advertising fits with your media mix model or return on investment, or trying to

see that connection or driving store traffic. As more and more dollars are being spent on digital, the demand of brands rightly has been more on that business result. Second, we've seen big demand in video, social advertising and the influencer market. Snapchat has been a big part of the industry, both in terms of interest in a different type of consumer experience using video and also in terms of experimenting with different ways to get engagement in an activity.

How are brands approaching ad tech differently in 2016?

There's more of a desire to experiment with different form factors. Also, the focus really has been on 'what are we getting for our advertising dollars?' In 2015, you saw a lot of talk about programmatic and automated buying and selling and how you use data as a transaction mechanism; in 2016, the questions become 'what are we getting for that?'

How do you see the relationship between data, tech and creative developing?

I think that's going to be one of the biggest trends you're going to see in 2017. I think it's critical and we're just at the beginning. As a company that is really focused on creative, our biggest opportunity now is to take all the unique data that we have around the ways that consumers engage and interact with ads, disciplined consumer research, and then make creative audience profiles that match up with first- and third-party data to get the most relevant creative and the right message to consumers. For the industry in general, I think we also need a better sense of what is valuable data. **M&M**

SAMMY AUSTIN

Head of programmatic, OneFineStay

How are brands approaching ad tech differently in 2016?

More brands are talking directly to tech partners. Brands are either implementing direct contracts with technology partners and deploying the technology themselves, or their agencies are deploying the technology on their behalf.

How do you see the relationship between data, tech and creative developing?

We'll start seeing data segments/audiences being used more widely and not sitting in silos within marketing channels; for example, retargeting for display. Brands will start building data segments and targeting consumers within those segments across CRM, SEM, display and video. Different marketing channels will be used in sequence, and creative will reflect that. We'll start understanding more about how different data segments and audiences respond to different marketing channels.

What effect has ad-blocking had on the space?

I think it's been a wake-up call for the industry, there's a



reason that consumers are blocking ads. There's a need for brands, publishers and agencies to deliver better creative – creative that is more relevant, optimised to mobile devices and creative that is engaging and tells a story. There's a need for us to implement general best practice around delivering ads to consumers. We don't want to deliver intrusive ads, ads that slow down page load times, and we need to stop serving the same ads to customers multiple times – there needs to be frequency caps in place across all marketing channels, and we need to stop targeting people when they have already purchased certain products.

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LAURA BOWEN

Chief operating officer and co-founder, Admedo

"Julianne Moore or Rachel McAdams. Both are unassumingly fierce and gloriously ginger!"



GUY CHISWICK

Managing director, Webloyalty

"Jason Statham purely for the hair and beard likeness, but he'd have to explore a new direction in his acting career and steer away from beating people up all the time – I don't do that. I'm a huge fan of Michael Caine, so I'd like him to play me."



BEN COOPER

Managing director, Europe, HookLogic

"As disappointing as it is to write, Rick Moranis – to whom my now wife claimed I bore a striking resemblance when we first met."



PAULO CUNHA
CEO, Shiftforward

"Humphrey Bogart, although I appreciate time machines might be useful to make this happen."



ALESSANDRA DI LORENZO

Chief advertising officer, Lastminute.com Group

"Claudia Cardinale. Described as 'Italy's best invention along with spaghetti', and a UNESCO Goodwill Ambassador for women's rights to boot."



ROSS WEBSTER
Managing director, international sales, The Weather Company

"Bob Parr (aka Mr Incredible)"



CHARLIE JOHNSON

Vice president UK and Ireland, Digital Element

"Zoey Deschanel."



ALAIN PORTMANN

Partner and head of media and insights, House of Kaizen

"Benicio del Toro."



DAVID INDO

Chief executive, ID Comms

"Ryan Gosling, if only to delight my other half."



VIKTORIA DEGTAR

Head of EMEA sales, Bloomberg Media

"Ideally me, but definitely someone who is determined and who cares about others. Angelina Jolie springs to mind!"



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Is digital advertising facing a CRISIS OF INTEGRITY?



An appetite for cheap inventory and tolerance of low-quality ads has sowed the seeds of mistrust among advertisers. Ben Bold reports

Like any advertising medium, digital attracts its fair share of both optimists and pessimists. The former group tends to enthuse about the seemingly inexorable growth of digital advertising, as it meets and even exceeds the levels of spend enjoyed by traditional media, while offering advertisers value for money.

The latter bemoans the crude, slow-loading or just plain annoying ads that intrude consumers' desktop or mobile screens, or points to the growing frequency of ad fraud that means brands are paying for ads that never reach their audiences.

Then there are, of course, the realists, who sit somewhere between the two, passionate about the medium, but equally sceptical about its shortcomings.

Adam Smith, futures director at GroupM, who recently authored the WPP agency's 'Interaction 2016'

report, is quick to point out that the acceleration of digital advertising is anything but symptomatic of an industry facing crisis, while remaining under no illusions about the threats overhead and looming on the horizon.

Yet storm clouds are undoubtedly amassing. The prevalence of digital ad fraud is backed by some alarming estimates, with one figure estimating it at \$7.2bn in 2016, putting it on course to become the world's second-biggest criminal enterprise after the drugs trade.

"That should be enormously concerning from a moral perspective as well as its potential impact on brands," says Tim Gentry, who spent nearly 20 years at Guardian News & Media, latterly as global revenue director, and who is now a consultant working with a range of media businesses.

He points out that the figure, as astronomical it is, is merely "the tip of the iceberg". "We're not scratching the surface of all the long-tail sites that exist," he says.

"Fraud manifests itself in a number of ways – some legitimate businesses buying fake eyeballs, with some illegitimate sites pretending to be one publisher, when they're nothing like it."

WILFUL OBSTRUCTION

While ad fraud means that ads are not reaching the eyeballs of their target audiences, despite advertisers paying for the privilege, other ads are escaping the fraudsters only to be obstructed wilfully by consumers who have downloaded ad-blocking software.

"The technology and gaming communities are the ones that adopted native ad blockers first. It's as high as 40% for gaming and tech sites," says Steve Chester, director of data and industry programmes at the Internet Advertising Bureau (IAB). "Broadly, lifestyle sites see much lower incidences, sometimes as low as single digits, of ad-blocking."

The IAB's own research into ad-blocking, based on a YouGov sample of 2,000 adults, found in July that 21.2% of adults are currently using ad-blocking software, compared with 21.7% in February, a marginal rise. However, around 20% of those who said 'yes' were confusing ad blockers with anti-virus software and other non-ad-blocking software,



What makes it possible is greed... It's down to a fixation on price and a refusal to question anything too good to be true



meaning an adjusted figure of around 16%. "I think if you're a publisher or media owner, it should be of concern," Chester adds. "I certainly think there is a lot that people can do to take control of their destiny. If you're a brand or agency, it amounts to a loss of audience, which is not good."

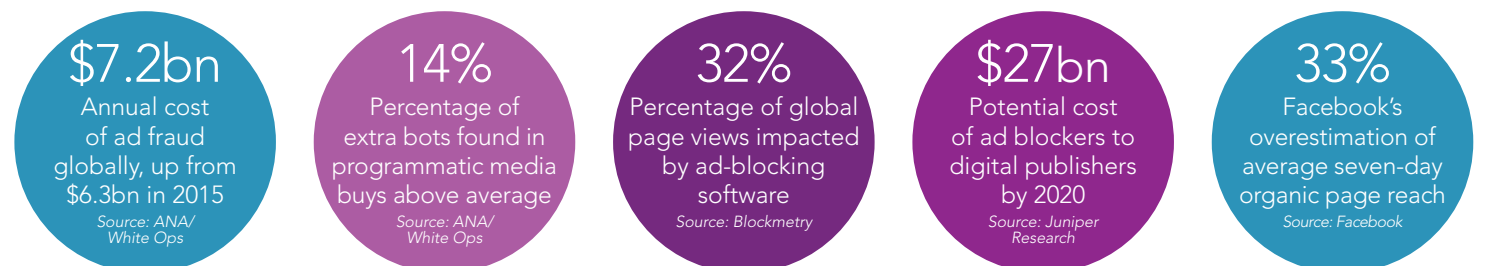
How is it then that in a discipline that employs the sharpest minds on the planet, the rise of fraud and ad-blocking have been allowed to happen?

"What makes it possible is greed," says Smith. "One of the odd things about the internet [and digital advertising] is that if you're an advertiser and you're only prepared to bid 10 cents for a click, you will always find someone to sell to you. It's down to a fixation on price and a refusal to question anything too good to be true."

Gentry concurs. "Businesses are focused too much on short-term results," he says. "It's not their fault, it's what the industry sold as the benefit of the medium. But we're going through that shake-up now where everyone is realising that it's no longer sustainable."

"If you talk to agency CEOs involved heavily in the pitch process with marketers, quite often the conversation is around the issue of quality and

5 WORRYING STATISTICS ABOUT DIGITAL ADS



transparency. There is a trade-off for these things, in that, as with all aspects of quality, it comes at a price.”

Smith cites another reason why ad inventory is failing to deliver. “The risks haven’t been properly costed,” he says. “If a newspaper or TV channel shows ads in the wrong place then the advertiser gets their money back. There’s no recourse in digital.”

Ad-blocking take-up, on the other hand, is being fuelled by something more prosaic, and less criminal.

“The biggest reason for [people using ad-blocking] is advertising that interrupts their experience,” says Chester. “It might be an ad that gets in the way, that flashes, or audio that suddenly blares out.”

He adds: “What we’ve seen as we gravitate towards mobile-first is that as publishers try to monetise mobile because CPA rates on mobile cost less than desktop, the yield has gone down, which is encouraging some to go for more intrusive advertising, like overlays.”

FIGHTING BACK

But both fraud and ad-blocking can be combated. Google’s DoubleClick is one such defence, while a study by the Association of National Advertisers in the US that unearthed an agency culture involving non-transparent practices such as rebates has brought the issue to light.

“We will never be complacent,” says Smith. “I do think that fraud can be defeated by careful planning. In other words, be careful of the company you keep, and screen suppliers.”

Chester agrees. “The caveat is that it varies considerably, but we’re seeing more instances and greater sophistication of fraud,” he says. “More people are taking measures to prevent fraud, such as

better detection – if you have a more direct line of sight to where you’re buying and from whom. We’re encouraging all members to use fraud-detection software.”

Meanwhile, industry-wide movements are being formed to battle ad fraud. The IAB is part of JICWEBS (the Joint Industry Committee for Web Standards in the UK and Ireland), which represents media owners, buyers and advertisers from industry bodies the IPA, ISBA and the Association of Online Publishers.

“We all got together under the umbrella body looking at trading standards,” Chester says. “We’re building an accreditation system under which anyone that trades has to be certified in terms of how they are reducing the risk of fraud.”

JICWEBS is also working with TAG (Trustworthy Accountability Group) in the US to conduct a number of initiatives to try to eradicate fraud by introducing a blacklist and ID system.

Likewise, the insidious rise of ad-blocking too can be stemmed with a focus on better-quality ads, observers claim. “From all the conversations we’ve had, I can’t think of one in which anyone said that we want advertising to be intrusive and annoying,” says Chester, half joking. “What we’re seeing the debate about is where the line is.”

“An ad can’t be so discreet that it disappears, but it can’t be intrusive. The challenge is to achieve an equilibrium.”

It is this objective that has led to industry-wide initiatives such as ‘The Coalition for Better Ads’, a global project backed by the IAB and advertisers including Procter & Gamble and Unilever and the likes of Google and Facebook. In essence, its proposed solution is straightforward – make less-intrusive ads that don’t piss off consumers.

The advertising industry is also talking to lawmakers and police across the globe about measures to help detect and prosecute ad fraudsters. But does this notion of official intervention apply to the regulatory frameworks that govern advertising; or should it?

Gentry questions how practical and implementable such rules would be. “I think that regulation in the digital industry is so difficult in terms of its pace of change,” he says. “You need to be fast enough to regulate the industry.”

MEASUREMENT AND AUTOMATION

In a discipline so enriched by, and simultaneously complicated by, the huge volume and granularity of data available, it is little wonder that there are calls for better measurement technology to help advertisers quantify and qualify exactly where their money is going.

“When you’re advertising, try to build in mechanics or devices that are hard for fraudsters to fake,” explains Smith. “We have a walled garden of our own, a data spine, in the US, UK, Netherlands and Germany, where we have anonymised profiles of users, so when you’re dealing



An ad can’t be so discreet that it disappears, but it can’t be intrusive. The challenge is to achieve an equilibrium

Steve Chester, director of data and industry programmes, IAB



Tim Gentry, consultant



Perhaps Google and Facebook are not the answers that brands need. Google represents the whole web, and that’s good and bad

with inventory from the web you can run it through our filters.”

Automation is also part of that answer, he argues. “Programmatic started as a market-clearing remnant tool for cheap media. Now it has become the opposite, a means to pull data into the buying mechanism. I think that’s an important safeguard, avoiding criminals by ingesting more data.”

Half of digital buying is now automated, up from around 40% last year. Smith proposes that it ideally should rise to 90% of bought media, with the remaining 10% managed manually to make “sure that the robots are working”.

The IAB’s Chester welcomes the growth of programmatic. “With programmatic on the rise, we’re likely to start seeing a shortening of the supply chain,” he says. “If the industry really wants to minimise ad fraud then it needs direct deals, buying from named sources like *The Guardian*, knowing where the inventory is going.

“It’s not to say that programmatic on open exchanges is bad, just that the risk is higher. There’s a shift towards private marketplaces.”

At the heart of the issue is the need for the advertisers to push for greater transparency across the supply chain.

“I remember hearing Mondelez talk about combating fraud and they seemed to have a very sensible solution,” reveals Gentry, “saying to suppliers and partners that ‘unless you can tell us exactly where our money is going, we’re not investing in you’.

“It’s incredibly simple, while the reality of executing on that is incredibly complicated. Advertisers are voting with their wallets and moving spend away from non-transparent sources of media to sourced media.”

If clients and agencies lead, then others will follow. “Ultimately the pressure needs to come from the clients and agencies. The latter are very active in this space,” adds Gentry.

“While they have been such beneficiaries, because they are big organisations, perhaps Google and Facebook are not the answers that brands need. Google represents the whole web, and that’s good and bad.”

CONFLICT OF INTEREST

The latter point is especially resonant given Facebook’s recent admission that a raft of errors had led to it overestimating its metrics (and effectively overcharging clients).

“Facebook put out its confession about the mistakes it’s making around measurement,” says Smith. “It was making schoolboy errors, and the idea of them marking their own homework is a worry.”

To be fair, Facebook has made moves to prevent a repeat, recruiting Unilever and Nestlé to its new ‘Measurement Council’. But the debacle highlights a particular concern among advertisers. “Clients worry about the sellers making the rules,” says Smith. “Making them convenient to the seller or that the seller might suddenly change the rules.”

There is clearly a long way left to go before ad fraud is anywhere near to being stamped out, or at least brought to heel; while ad-blocking will remain an issue so long as there are artless, slow-loading or intrusive ads. So what can we expect to see? Will things get worse before they get better?

“If the appetite for cheap inventory grows and a tolerance of low quality rises, then the problems rise with that,” says Smith. “But they’re not going to rise from the agency-bought business.” **MMG**

Travellers remain a key audience for international advertisers, but brands must use new methods to reach them. Alex Brownsell reports

MEET THE NEW BUSINESS TRAVELLER



International travellers have long formed the bedrock of international media as we know it. It is a familiar audience segment: well-heeled businessmen clasp a copy of *The Economist* or *Wall Street Journal* in the airport terminal, and tuning into CNN in their hotel rooms. But this affluent and influential group is evolving, and so too must the advertisers hoping to affect purchase intent. Two major trends have caused this transformation. First, the cost of flying has significantly reduced over the past 20 years, meaning business travellers are less likely to be CEO or MD-level, middle-aged white men. The other major shift, of course, is the proliferation of mobile devices. In short, travellers are younger, more diverse and infinitely more connected. This has meant a rapid evolution in the methods used by advertisers to reach travellers. Take outdoor

media, long a vital method by which to alleviate consumer despair in the departure lounge, and to encourage duty-free spending. The digitisation of OOH inventory in airports such as London's Heathrow – managed by JCDecaux – has allowed advertisers to use data to inform messaging. A plane-load of Chinese tourists can be served a Mandarin-language digital ad in the baggage reclaim area. Advertisers can update their creative at the push of a button depending on all manner of factors, from local traffic issues to weather conditions. The banking and insurance companies most prevalent on airport poster sites before the financial crisis in 2008 have been replaced by mixture of luxury brands – Estée Lauder is Heathrow Airport's biggest consumer advertiser – as well as technology firms such as Microsoft. Some financial services are returning to

the fore but, tellingly, you are as likely to see ads for Bank of China as for many Western institutions. "If you were a big B2B brand, top of your list would be to find an illuminated, back-lit box in a key location, and to sit there for a year," says Steve Cox, marketing director of JCDecaux Airports. "Increasingly, those brands are looking to embrace the digital opportunity. Not all are using data to drive their content yet, but they are certainly creating more engaging content."

TRANSIT TOUCHPOINTS

Travel providers and media firms alike are finding more innovative ways to reach consumers in key transit moments. Eurostar, the rail service linking London with Paris and Brussels, has introduced advertising on printed tickets, while brands are linking up with luxury car companies transporting travellers to hotels. All brand activity must be conducted in the knowledge that consumers are now glued to mobile devices, and less likely to be looking around in search of distractions. This gives an opportunity to reach travellers with more relevant content, says Tammy Smulders, global managing director at Havas Media Group's luxury consultancy, Havas LuxHub. "We know that people are constantly on their phones and devices, so that is an important way to reach people. Not only is it a place people are spending their time, but it also gives the advertiser the opportunity to really specify if they are talking to a man or woman, target by age, by spending patterns and travel patterns," she says. However, while Smulders agrees mobile should form an "important part" of any campaign to reach travellers, she favours a balanced media plan:

» We can serve a traveller a mobile ad on arrival at the airport, when they are in their five-star hotel, when they are in a key shopping district



Tammy Smulders, global managing director, Havas LuxHub

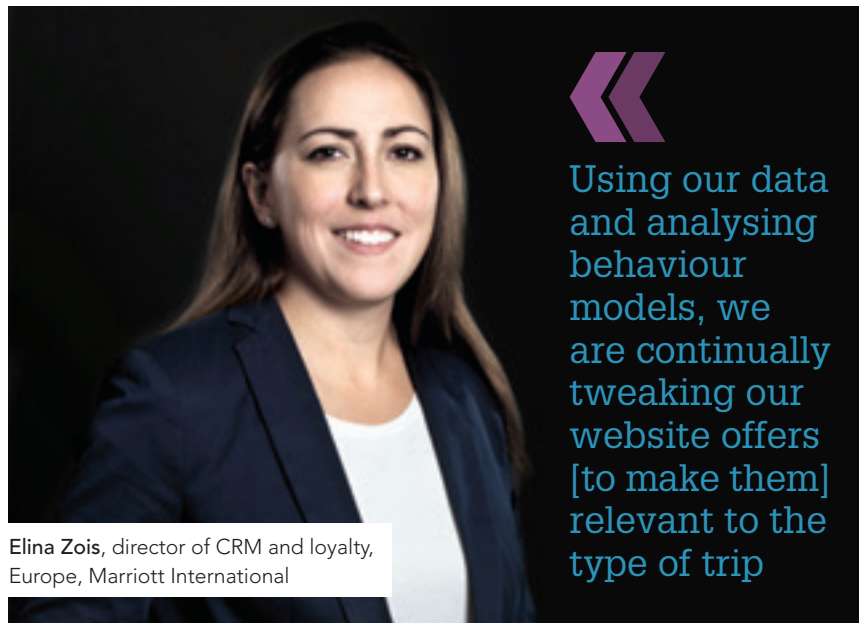
"We would not recommend an exclusively mobile campaign – only in rare cases. We would still recommend an integrated campaign. People like to see [ads] in places they deem to be premium environment, [such as] premium ad spaces in airports."

HIGHER EXPECTATIONS

LinkedIn estimates that some 26 million of its global users fall into the category of 'business travellers', and travel on average eight times per year. The social network is encouraging brands to build communities on its platform, to ensure engagement continues between those trips. And it claims that ▶

JCDecaux has digitised the poster sites at London's Heathrow





Elina Zois, director of CRM and loyalty, Europe, Marriott International

« Using our data and analysing behaviour models, we are continually tweaking our website offers [to make them] relevant to the type of trip

those individuals are far more responsive than the average consumer.

Sally Keane, head of agency sales and international at LinkedIn Marketing Solutions, says that business travellers engage in 173% more content-sharing and follow 93% more brands than non-travellers, meaning they are ripe for targeting by advertisers. Most of those – some 69% – are accessing LinkedIn on mobile, and are keenest for offers and professional advice: LinkedIn has partnered with Virgin America to offer expertise via the airline's in-flight entertainment system, for example.



Advertisers can easily personalise their messages in airports

One such brand to have pursued a more year-round content strategy is Emirates. Earlier this year, the Dubai-based firm became the first airline to pass 500,000 followers on LinkedIn; at the time of writing, it was bearing down on the 650,000 mark, with subscribers enjoying its blend of offers and travel tips.

“People tend to fly two, three, four times a year – maybe more frequently on business. There is a lot of downtime between brand interactions. We look for ways to keep our brands top of mind during that period when people aren't flying and experiencing our product,” says Chris Galanto, Emirates' senior vice president, advertising.

“It is very important that, as we try to build more of a lifestyle brand, we give people opportunities to engage with us, and to entertain them and provide them with useful information that goes beyond just going to the airport and flying somewhere.”

AFTERNOON DELIGHT

Another brand investing heavily in its digital experience is hotel group Marriott. According to Elina Zois, director of CRM and loyalty, Europe, at Marriott International, services such as a free Wi-Fi are now simply expected and no longer able to boost perception with regular business travellers. Instead, the chain is focusing on a range of “value-add” and “surprise and delight” innovations.

Customers can check in using Marriott's mobile platform and pick up their room keys without joining the back of the queue. The firm is piloting a ‘personal concierge’ service in the US, allowing Marriott Rewards loyalty members to make special room requests to a dedicated “go-to person”, and partnering with the likes of Universal Music Group



So is the future of advertising to travellers an increasingly one-to-one pursuit?

Marriott's M Live social command centre aims to develop deeper relationships with individuals, which in turn may add depth and texture to communication with guests during their stay at its hotels. Zois acknowledges there “will come a day” when its ‘chat’ service – currently being tested as a replacement for old-fashioned hotel room telephones – will incorporate artificial intelligence ‘bot’ technology.

And there can scarcely be many environments more appropriate to the *Minority Report* vision of ultra-personalised OOH advertising than airport departure lounges: advertisers know precisely who is in the airport, where they are going and, given the granularity of mobile data, precisely where they are sitting. Yet Cox remains sceptical such techniques will be introduced at Heathrow any time soon.

“There is a school of thought that says it is increasingly becoming possible to connect a digital screen with a personal device in such a way that you can deliver them a personal message. But why would you want to do that? You will tend to see advertising as seen by a significant number of people. We don't place our product where individuals will see it one at a time. What we're looking at is mass personalisation,” he says.

Even if the departure lounge poster is not delivering an unerringly personal brand communication, Cox agrees that beacon-style technology may allow advertisers to use OOH inventory to serve customisable content on travellers' own devices.

Travellers are on the move, and so too are the advertisers trying to gain their attention. It is surely only a matter of time before greater personalisation takes off in a significant way. **MMG**

and the NFL to offer exclusive treats. These loyalty techniques are also being boosted by a more rigorous approach to customer data, says Zois. “We play a lot with [personalisation] on our website, to make sure that the offers are relevant to the type of trip. Using our data and analysing behaviour models, we are continually tweaking that. If a customer goes to Paris every week, why don't we do something [bespoke] for them?” she adds.

Mobile data means brands even know exactly where travellers are sitting

LESSONS FROM LUXURY

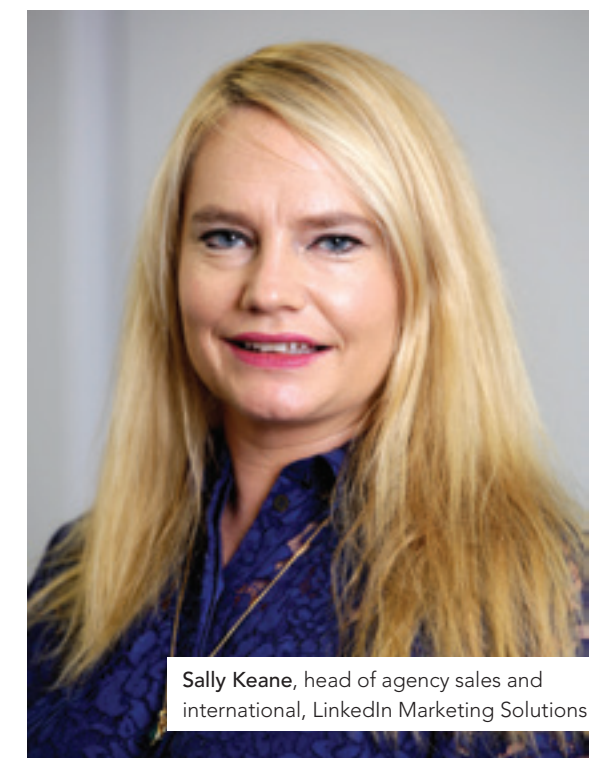
Few client segments are as reliant upon traveller business as the world of luxury. In the UK, 55% of all luxury goods are purchased by overseas visitors. This rises to 60% in France, compared with a meagre 20% in Germany. And, even if those travellers from China, Russia or the Middle East do not make a purchase, the visit may prove vital in shaping brand reputation and influencing future purchase intent.

To drive both footfall and brand perception, luxury advertisers are embracing a more data-driven creative approach, says Havas LuxHub's Smulders: “We know where people originate from, based on the networks on their phones and lots of other third-party data. We can serve a traveller a mobile ad on arrival at the airport, when they are in their five-star hotel, when they are in a key shopping district.”

Context and location are not the only option, she adds. The creative itself should also be tailored depending on the target consumer. With a fashion brand, a Chinese model could be swapped in to appeal to visitors from the Far East. In the case of jewellery, the choice of stone can be changed to account for differing tastes in, say, the Middle East.



Business travellers engage in 173% more content-sharing and follow 93% more brands than non-travellers



Sally Keane, head of agency sales and international, LinkedIn Marketing Solutions

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LUCKY 13

What is your favourite
restaurant?



JAMES BROWN
UK managing director, Rubicon Project

"My current favourite is Bentley's on Swallow Street, they do the best fish pie on earth."



MARTIN KELLY
Chief executive and co-founder,
Infectious Media

"The Paternoster Chop House. We went there when we got paid for our first actual piece of work for Infectious Media, there's a real buzz that you can't beat when you realise that just maybe you could be building something that could work as a business."



ELINE VAN DER VELDEN
UK managing director, Makers Channel

"I had the best night of meat at Lurra on Seymour Place recently."



SULTAN KHAN
Chief executive,
AdMaxim

"I love sushi, so Nobu is up there, but equally Amaya and Lahore Kebab House are where I think you get the best Desi food in London."



ROGER PEROWNE
Managing director, Morar

"There are some amazing places in Buenos Aires, but closer to home I've always enjoyed Vinoteca. A bavette steak that's always amazing."



JOHN LITSTER
Managing director, Sky Media

"Sale e Pepe. I don't want to say too much because it's a small Italian in Knightsbridge, off the beaten track, and I won't do myself any favours if everyone reads this and decides to give it a try. It's a traditional trattoria, Toni welcomes you and makes you feel at home, and let's say the food is just about OK."



TORIE CHILCOTT
Co-founder, Scoota

"Dim Sum Go Go in NYC!"



JENNY BIGGAM
Co-founder, the7stars

"Le Relais de Venise in Marylebone."



CALUM SMEATON
Chief executive, TVSquared

"Andrew Fairlie at Gleneagles in Scotland."



ADAM GILSEMAN
Director, Future

"Il Portico on High Street Kensington. Say hi to James and that Mr Adam sent you..."



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MARKETING 2020

The Artificial Intelligence decade has begun, and will reshape the way brands communicate with consumers.
Matthew Chapman reports

This decade has already witnessed a seismic shift in marketing communications, but the aftershocks in its final three years are set to dwarf what has gone before.

In the first half of this decade, Google and Facebook grew to dominate the marketing landscape, while mobile has become the 'first screen' for billions of consumers and programmatic has revolutionised the media buying process.

As if that was not enough for the industry to wrap its head around, there is now the explosion of artificial intelligence, virtual reality and Internet of Things to contend with.

Some brands are slowly looking to get a grip. At a 'The Future Now' event in London's Shoreditch – the heart of the UK's tech industry – online food delivery firm Just Eat unveiled a series of innovations it is developing to help maintain its position as market leader in its sector.

On display was everything from delivery robots to virtual reality experiences for customers and restaurateurs. The ambition was impressive, but as ever at events designed to showcase the latest tech to media and analysts, teething difficulties struck at

vital moments. Chatbots failed to load and Amazon's Alexa maintained a sullen silence, while virtual reality sushi hung disconcertingly in the air a metre above the table.

Just Eat chief marketing officer Barnaby Dawe explains that the innovations the company is currently trialling seek to make the lives of customers "friction-free".

It launched a beta of its chatbot in Facebook Messenger in September, joining a growing number of brands turning to the technology. Dawe believes chatbots are a stepping stone to more advanced artificial intelligence that "will evolve over time".

Chatbots may seem like the cutting edge of technology now, but it is likely they will be looked back on soon with nostalgia mixed with slight

INSIDERS' VIEW ON A.I.



"It is 11.59pm on 'AI Eve' and everything is about to explode around us"
Mark Holden, worldwide strategy and planning director, PHD Media



"We are now in the Artificial Intelligence decade"
Carl Erik Kjærsgaard, founder, Blackwood Seven



"We now exist in a world that is a mirror of the real world or worlds that never existed"
Iain Ellwood, chief growth officer, Group XP



"We think Watson ads is the next frontier in advertising"
Jeremy Steinberg, global head of sales, The Weather Company

embarrassment. "Five years from now, we will look back on chatbots the way we look at ZX Spectrum computer games," says PHD Media worldwide strategy and planning director Mark Holden.

Holden believes this will occur once virtual personal assistants achieve a conversational ability.

Google's DeepMind has shown AI is already capable of human-like intuition following its defeat of Lee Se-dol, the world champion of the Go game, which has more possible permutations than atoms in the universe.

"It is 11.59pm on 'AI Eve' and everything is about to explode around us," predicts Holden.

INTUITIVE ADS

Jeremy Steinberg, global head of sales for The Weather Company, finds himself at the forefront of driving the artificial intelligence revolution through marrying up the Watson ads technology of parent company IBM with companies including GSK and Campbell's. The ads are triggered by location and weather data, but crucially they are able to display intuition when communicating with customers.

"We think Watson ads is the next frontier in advertising. They listen to questions and can translate user intent," says Steinberg. "They think in order to return a thoughtful response, and they do this with reasoning through training."

This is allowing one-on-one communications between brands and customers that are becoming increasingly hard through traditional means due

to the proliferation of internet-connected devices. "When people's homes and cars and all their devices are connected, there is going to be an expectation that you will get the same customer experience with a brand across any touchpoint," says Steinberg. "And the only way for a brand to deal with that is by using a cognitive solution."

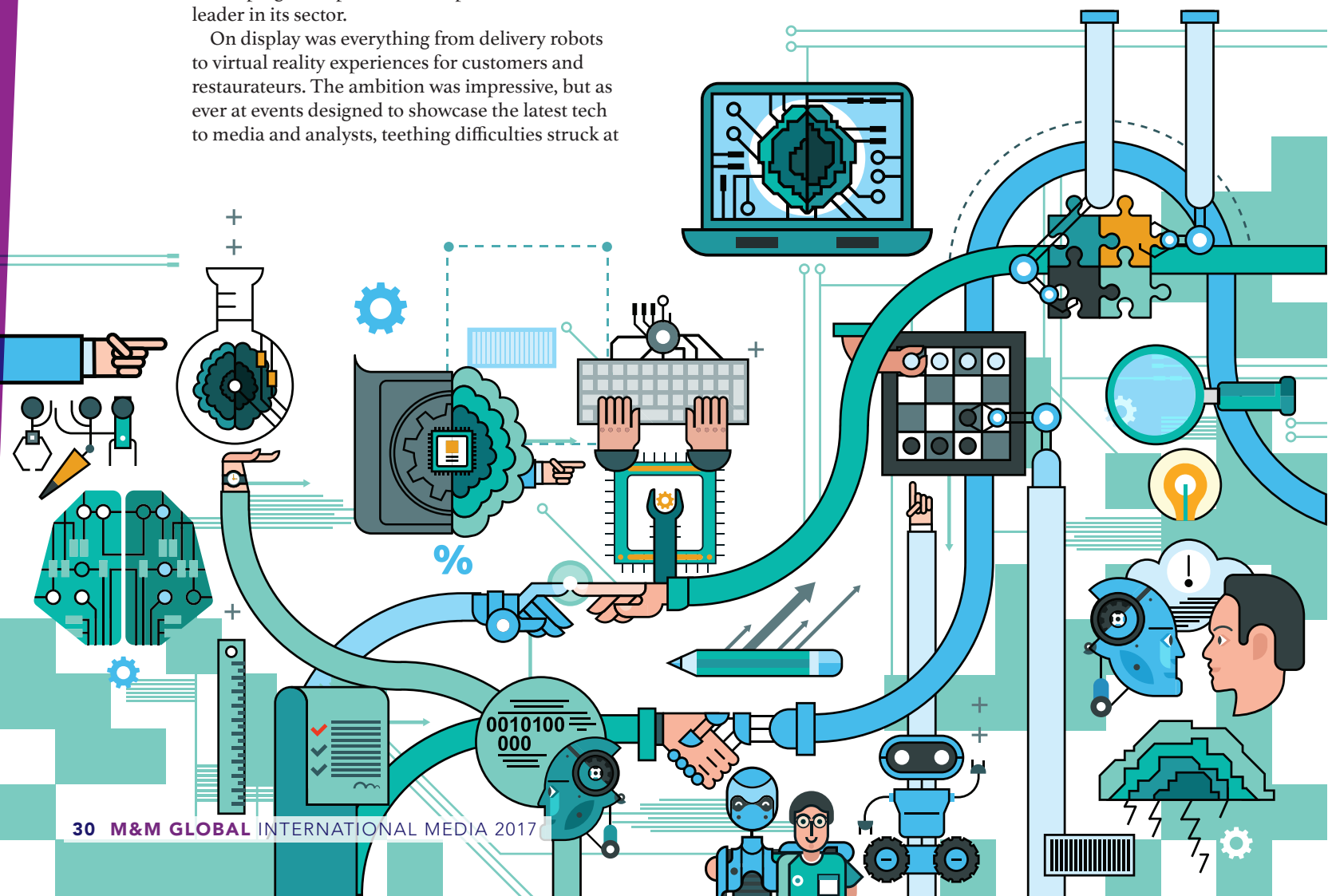
J. Walker Smith, executive chairman at Kantar Futures, believes marketers are in for a rude awakening if they follow existing protocols.

"Marketers operate on the assumption that the more stuff we can get to people, the more involved they will be with our brand," says Smith. "We have exceeded the limits of people's capacity to engage with us. People have run out of time and attention, and that is the hard lesson for marketers yet to come."

As a result, he believes the future of marketing lies not with a technology such as virtual reality, which requires further "currency of engagement". Instead, Smith argues it is reliant on understanding and owning personal algorithms that make decisions for the consumer based on knowing their preferences.

He refers to this phenomenon as "programmatic consumption", and believes it will require a new approach to advertising. "We know how to write ads for consumers, but we are going to have to learn how to write ads for algorithms because they are going to be the ones watching our ads," says Smith.

Iain Ellwood, chief growth officer at Group XP, agrees there will be a challenge in how to create ads





Five years from now, we will look back on chatbots the way we look at ZX Spectrum computer games

Mark Holden, worldwide strategy and planning director, PHD Media



in the next few years as augmented reality and virtual reality are set to rise to greater prominence.

"It is really Jean Baudrillard's 'Simulacra and Simulation' come to life," says Ellwood. "We now exist in a world that is a mirror of the real world or worlds that never existed."

AI's KEY ROLE

While Pokémon Go is a rare example of an augmented reality experience that has taken off, Ellwood believes that AR and VR have been held back because they are "sorely lacking" in interesting content. "How do you get a brand or marketing story embedded in something that is essentially software?" he asks.

While America is once again producing the hardware and software solutions that are driving the future of marketing communications, the content could be driven from outside the US.

"From a content point of view, some of the Asian markets may produce more interesting and compelling content because they have such a unique view on the world," says Ellwood. "They have a more interesting mindset for that sense of future and characterisation."

While innovations including virtual reality and the Internet of Things are exciting prospects in themselves, it appears that artificial intelligence will be the fabric that stitches them all together. "AI really is the next platform epoch, a bit like the internet was," says Holden.

Holden argues that AI underpins everything. Alongside being used to enable one-on-one communications with time-poor consumers in an

increasingly fragmented media world, it is also revolutionising the media-buying process.

Danish agency Blackwood Seven is one such firm introducing AI into media planning and buying. Founder Carl Erik Kjærsgaard believes that AI will become "bigger and bigger" in decision-making areas, and can even be integrated into the creative process, and allow recognition of consumers' reactions to adverts.

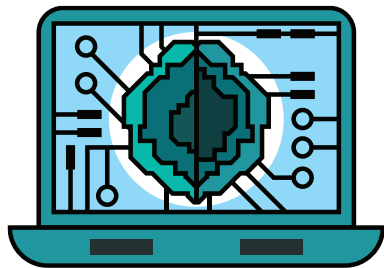
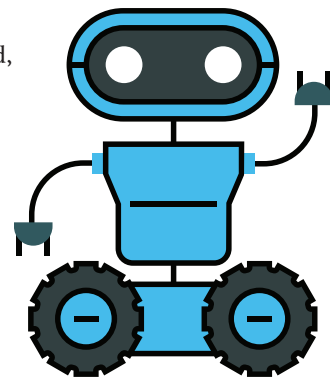
Holden agrees that in the next few years robots will be able to handle creative tasks by writing headlines and pulling images into adverts. However, he does not think that artificial intelligence will be able to create a blockbuster-style John Lewis advert in the near future.

"It is almost like a central nervous system functioning by itself and we ourselves are not making decisions any more, we are just looking after it, feeding it and letting it function," says Holden.

Kjærsgaard, an industry veteran of 30 years, says that the pace of development within marketing in the past three to five years has been "extreme" and will only get faster. He points out that every decade, a development revolutionises the advertising industry, starting with television advertising in the 1960s.

"We are now in the Artificial Intelligence decade," concludes Kjærsgaard.

The rise of the machines is upon us and it should fill the industry with confidence rather than scare it. Those that embrace it are sure to dominate the next decade. **MMG**



STOPPING THE TALENT ESCAPE

Under pressure from the likes of Google and Facebook, international media firms are adopting a new approach to talent recruitment. Alex Brownsell reports

Advertising, so they say, is the ultimate people business. An agency's creativity and strategic output is only as good as its creative and strategy teams; a media owner's innovative spirit is only as strong as the innovation capabilities of its employees.

Yet, more than ever, businesses in the marketing and media sector are facing up to the prospect of a talent drain. Young people – especially those with technology and data skills – are in high demand, not least from digital giants such as Facebook, Google, Alibaba and Tencent.

A joint study by the American Association of Advertising Agencies (4As) and LinkedIn provides plenty of cause for concern. According to the report, the average first-year agency salary is \$45,000 less than that offered by the tech sector, and staff turnover at agencies has increased 10% over the past 12 months in comparison with other competitive industries.

The report goes on: In 2015, there was a 25% net global talent loss from agencies compared with other comparable sectors. Respondents complained about unsatisfactory senior management, a desire for more challenging work and a lack of opportunities for

career advancement.

Furthermore, agencies ranked lowest out of nine industries in the perception of 'work/life balance', and were judged harshly on factors including 'compensation and benefits', 'strong career path', 'job security' and 'long-term strategic vision'.

A key issue, says John Doré, managing partner at OMD EMEA, is increased competition. "As an industry, we are facing competition from new areas such as tech companies that invest in staff benefits to strip out all the worry with things like meals, travel and even dry-cleaning, so that employees can focus on the work."

"Agencies need to continue to invest in benefits that maintain attraction for the very best talent, such as OMD's canteen, which was recognised as one of the top 10 in the world by *The Daily Telegraph* and which our staff love."

GO-TO EMPLOYERS

Agencies are not the only ones with a perception issue – many brands also lack the alluring qualities needed to appeal to those entering the jobs market for the first time.

Hannah West, AXA's global head of employer brand and attraction, says the Paris-headquartered insurer realised a few years ago that it was not considered a "go-to" destination for digital marketers and data scientists.

It invested in a number of joint HR-marketing projects to broaden its appeal to a millennial audience, including a 'Great Global Adventure'



Sarah Golding, chief executive and partner, CHI&Partners



We have to speak to all aspects of society, but how can you do that if it is not reflected in the make-up of the agency?

worldwide apprenticeship prize, offering the chance to travel the world and gain work experience in AXA's various regional offices. The company has also encouraged its recruiters to become content-creators, to connect with skilled youngsters averse to combing through jobs boards.

"We needed people with new skill-sets, which are constantly changing, so we needed to do something to stand out and make people realise AXA is a great potential place to work," says West.

She believes that the generation of graduates emerging from college today have different priorities from their predecessors. The societal and environmental "purpose" of their employer organisation is increasingly important, says West, as is the freedom to innovate and "own" their work. They are also insistent upon a "fun and friendly" workspace, she argues.

GENUINE DIVERSITY

There is a growing belief in the media and marketing world that businesses must seek out skills in new locations, and no longer solely among the graduates from top Western universities. While the progress towards genuine 'diversity' in the industry has been painstaking, to say the least, a talent war may at last change the situation.



We needed people with new skill-sets, so we needed to do something to stand out and make people realise AXA is a great potential place to work



Hannah West, global head of employer brand and attraction, AXA

3

KEY STATISTICS AGENCIES FALL SHORT

\$45,000

Average salary deficit for first-year ad recruits compared with tech counterparts

Source: LinkedIn/4As

25%

Net global talent loss from agencies compared with other comparable sectors

Source: LinkedIn/4As

10%

Increase in staff turnover at global agencies in 2015 compared with the previous 12 months

Source: LinkedIn/4As

London-based ad agency CHI&Partners has launched a new "blind recruitment" scheme, called 'Spark', in which it pledges to remove CVs and photographs from its processes. With an urgent need to upskill in technology and data analytics, and to be more channel-agnostic, CHI&Partners says it needs to look beyond its usual graduate in-take and towards teenage school-leavers.

The initiative, says chief executive and partner Sarah Golding, will turn its approach to talent recruitment "on its head". "At present, our industry is mostly comprised of the same type of people, who look and sound like me. We're trying to change that, to find talent from different backgrounds, and to tackle unconscious biases head on," she says.

"We have to speak to all aspects of society, but how can you do that if it is not reflected in the make-up of the agency? By looking in the same places, you're not going to get these new talents into the building. We're looking to set CHI up for the future," she adds.

OMD's Doré adds that recruiting the best talent doesn't necessarily always mean going down the traditional routes of university graduates.

"At OMD we piloted a new internship which has recruited students from disadvantaged areas and it's been a great success," he says.

CULTURE ANGLE

The danger of consumer disconnect is a theme that crops up time and again. How well can advertisers truly understand audiences, if they are distributing marketing messages borne out of a homogeneous culture?

Writing for *M&M Global* last year, MEC's global chief talent officer Marie-Claire Barker said agencies face a "leadership challenge" to remain relevant among both consumers and prospective recruits.

"Brexit showed us how decisions can be made with little information or understanding. We must learn from this. We need to open our minds to what is possible and tune in to a generation of employees who have a point of view and a perspective of how real change can be made," she says.

A more proactive approach to workplace diversity can help agencies, brands and media owners alike in the pursuit of innovative ideas that connect with consumers. Moreover, by hunting for talent in new locations, these organisations can help relieve the recruitment pressure it is feeling from businesses in the tech and management consultancy spheres.

And, in the long term, these leaders of tomorrow will be able to bring different life experiences to the table and keep the industry fresh for the challenges of the future.

Advertising remains a people business. However, the type of people are changing, and not before time. **MWG**



We need to open our minds and tune in to a generation of employees who have a perspective of how real change can be made



Marie-Claire Barker, global chief talent officer, MEC

SAVE THE DATE



FESTIVAL OF MEDIA N.AMERICA
 1-2 November 2017,
 New York, USA

LUCKY 13

Which industry buzzword would you ban?

"THINK OUTSIDE THE BOX"



CATHY IBAL
 Sales director for Middle East, Africa, Turkey, CIS and Southern/Central/Eastern Europe, CNN International

"360 campaign, as it takes on too many different meanings."



MARTIN HEATON COOPER
 Vice president of commercial development, UK, Discovery Networks

"Native. There are already other names for it."



JULIA BURTON BROWN
 International sales director, InSkin Media

"There is so much out there that just baffles and I think acts as a comfort blanket to the person speaking. 'Cultivate' is one I heard recently that would get the chop."



KATHERINE MUNFORD
 Managing director, Data2Decisions

"Any TLA (three letter abbreviation) in the data or digital space. There are so many. Ban them all!"



JO DAVIES
 Chief executive, ZAK

"Millennial. It is ridiculous that the marketing world continues to club together individuals of 18 to 35 years old based on their similar interests just because they were born in a similar period. Brands need to stop stereotyping and start celebrating the power of the individual."



ANANT JOSHI
 Director of international business, Meetrics

"Ad fraud – would be great if it didn't exist and the greedy bad players were all weeded out."

"GROWTH HACKING"



GLEN CALVERT
 Founder, Affectv

"Think outside the box."



ALEX ALTMAN
 Managing director, Global Solutions London, MEC

"All industries have buzzwords. I'd probably ban Big Data from our lexicon for a while and see what else we could come up with in its place."



GIOVANNI STROCCHI
 Chief executive, ADmantX

"Programmatic – as a word it's too generic with numerous definitions and meanings depending on whom you speak to."



DAMIAN BLACKDEN
 Worldwide chief strategy officer, Maxus

"Growth hacking."

"360 CAMPAIGN"



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CINEMA

Have cinema's superheroes saved it from digital decline?

Cinema is finding a new role within brand marketing budgets, reports Anna Dobbie

2015 proved a blockbuster for cinema, with three films surpassing \$1bn in takings and global box office revenues hitting \$38bn. However, questions remain as to whether the strong performance of franchise movies like *Jurassic World* and *Star Wars* has translated into increased investment from advertisers in what is considered by some as a legacy OOH medium.

The advantages of cinema are obvious. Aside from reaching an engaged audience devoid of distractions, the big screen, powerful sound system and dark room offer a unique opportunity to target customers when they are ready to be connected with and told stories. In recent years, cinema advertising has become easier to plan and buy with greater flexibility and more affordable rates, not to mention improved sound and picture quality.

Despite this, Vincent Letang, European vice-president at IPG Mediabrand's Magna agency, admits that cinema advertising is not top of his company's effort on a regular basis.

According to Magna, box office growth for 2016 is expected to be down 2% on the previous year, albeit with a corresponding 1% rise in ad revenue – much lower than the 13% advertising leap in 2015. Looking further into the future, cinema advertising is set to increase by 3.5% in a “slightly stronger” 2017, slowing slightly to 2.5% in 2020 – outperforming the OOH average of 2.9% in 2017, and matching it in 2020.

“There is a correlation between cinema advertising sales and box office in the sense that when we, as a media buying organisation, buy cinema campaigns, the cost is guaranteed. We may pay \$50 to reach 1,000 viewers in a certain age range category, and they're guaranteed,” says Letang.

“If the theatres are full, the cinema media vendors [National CinemaMedia and Screenvision Media in the US] can reach the agreed number of impressions quickly, and then there is more inventory left for other brands.”

Batman v Superman: Dawn of Justice was the sixth-biggest movie of 2016 in terms of cinema takings

However, Letang feels that, over the past couple of years, in-theatre advertising has become more attractive to TV-heavy brands. This is in part because of vendors beginning to sell upfront in a manner similar to the broadcast industry, and also because it is now easier to buy against the same demographic targets as offered by TV companies.

While there is some evidence of local players taking advantage of cinema's ability to target specific communities, most cinema advertising is national, with little sign of international deals. The biggest US categories in 2016 were automotive, media, entertainment, snacks and insurance.

VIDEO FIRST

Kantar Media chief research officer Jon Swallen feels that cinema ad sellers in the US have benefited from bringing a wider range of national advertisers, who have larger budgets than local and regional advertisers, as well as charging higher CPMs and selling more inventory.

He says on-screen ads in movie theatres act as an extension of a video-first media strategy, with the added benefits of enhanced geographic targeting capabilities and comparatively low CPMs. Also, in the media and entertainment categories, linear TV networks, streaming video services, casinos and live music events are using cinema to deliver ‘switch-pitch’ messages for their offerings.

“The US movie-going audience is skewed towards the millennial generation [nearly 50% of ticket buyers are 18 to 34 years old] and this degree of concentration is scarce within the linear TV market. As a result, the ranks of top-spending cinema advertisers include a number of brands with modest, not large, TV budgets and for whom young adults are a core target market,” says Swallen.

He argues that, in an earlier era, the sales pitches that advertisers received from cinema companies frequently positioned the medium as “not TV” and

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The scale of the 40-foot screen and the opportunity with the immersive captive audience even raises stakes higher

John McCauley, chief strategic development officer, Screenvision Media



Captain America: Civil War was the biggest-grossing movie of 2016, taking more than \$1.1bn at the box office

worldwide box office. “We’ve hit an inflection point in the US where the ratings, particularly the live broadcast ratings, have hit a number or a level and it’s no longer efficient for media planners and buyers to spend as much money on television, because they can’t efficiently get the reach,” he says. “Cinema has very much been a beneficiary of that.”

Although McCauley believes that many would describe cinema as legacy, he feels on some level the perennial nature of movie-going had created a stability that is now an almost unrivalled strength.

“I think five years ago there was a very loyal base of cinema advertising ‘aficionados’ – people really appreciated the nature of the business,” he adds. “Now I think it’s become much more assimilated with agencies and planners where it’s a very considered medium, where there’s scatter money available and people are trying to find that engaged reach.”

McCauley says that branded content is a big factor in cinema advertising in the US, with Screenvision running its own creative studio to make branded content optimised for cinema impact called 40 Foot Solutions.

“They’ll run their branded ad, the ad they came up with, then we think through with them if there’s another way you can have additional impact in our pre-show called Front and Centre,” he explains. “Branded content is a very big trigger for driving incremental revenue across any publishing platform, but in particular in cinema advertising, considering the scale of the 40-foot screen and the opportunity with the immersive captive audience even raises stakes higher.”

While Screenvision currently operates only in its domestic US market, McCauley feels that this may change as emerging technology breaks down national borders.

He also predicts that the future will see new people joining the movie-going fold and an increase in “underdog, independent films” breaking out. “I always cheer for those films and this year I think there will be more.”



If the theatres are full, the cinema media vendors can reach the agreed impressions quickly

Vincent Letang, European vice-president, Magna

advised marketers to create ads specifically for the big screen, with a wider variety of lengths, instead of repurposing existing assets.

“That was then, this is now,” says Swallen. “The recent gains cinema has made with national marketers are in part because the medium has made itself more like TV in order to better compete for a share of the fragmenting video ad budget.”

It’s not uncommon for a brand to share ad creatives across TV and cinema. In some cases the same execution will run concurrently on both platforms, while in other situations a brand takes a TV commercial that has been out of rotation from TV airplay and puts it in the theatre, so long as the message strategy still fits in with the current campaign.

The UK’s Digital Cinema Media (DCM) claims that, while 90% of the ads it uses are the same as on TV, 85% of viewers think they are different, misremembering them as longer, with better sound or colour, which is credited to higher engagement. Using ads with standard TV lengths also allows the cross-platform swapping of commercial executions.

Sally Dickerson, managing director of Omnicom Media Group’s Benchmarking, comments that “adding cinema to the mix improves campaign effectiveness across all analysed categories”, while a study in conjunction with DCM demonstrated that, in the UK, advertisers in many sectors, including travel, food, retail and telecoms, are currently underinvesting in cinema, reducing the effect of their campaign’s overall ROI.

STABLE IS THE NEW SEXY

Screenvision Media chief strategic development officer John McCauley claims that cinema and movie-going attendance has been remarkably stable and that, in the US, “stable is the new sexy”. He says that, generally speaking, Hollywood studios are much more in tune with the overall impact of the



Karen Stacey, chief executive, DCM

There’s still a lot to like... even in a recession, cinema does well because it’s people’s treat



PEOPLE’S TREAT

DCM chief executive Karen Stacey is insistent that cinema’s core proposition – in contrast with other ‘traditional’ media owners – is getting stronger, with exclusive content, investment in infrastructure and experiential differentiations between chains.

“We’ve got a very strong, undistracted audience, we’ve got fantastic content and you can play your content on a screen that’s 56-feet wide – there’s still a lot to like,” she says. “Even in a recession, cinema does well because it’s people’s treat.”

DCM has been exploring the opportunities that mobile can offer, even when the device is turned off. Experiential campaigns, such as a recent London stunt for Smart Energy GB, can achieve scale through

social shares, while companies such as Mobster are utilising retargeting to re-serve brands that have already been featured in pre-roll ads to the audience in cinema foyers, giving twice the interaction of only one serving.

“You’ve got to remember people are there to be entertained,” Stacey adds. “They’re there for a night out, so entertain them, make them laugh.”

Stacey feels that franchise movies are successful, not only in the box office but for advertising partnerships, because there is a known audience and brands are more certain about how the audience will react and how characters will work on screen. She also notes that films with high numbers of pre-booked tickets offer a good indicator of financial success.

“We are very keen to remind people that [cinema is] a great place to start a story,” says Stacey, paraphrasing Bartle Bogle Hegarty founder John Hegarty’s distinction between advertising and promotions. “Advertising is telling a great story and persuading people to do something. Promotion is about finding your target audience and keep talking to them.’ They are different things and we need to go back to telling stories because all that brands are a series of stories.”

Stacey ends by restating cinema’s niche: “We don’t do reach, that’s what telly does, but we do cut through. We do that really well with films. I want to see a return to great brand advertising and storytelling.”

Maybe the superheroes of the silver screen haven’t been so super in 2016 – but 2017 heralds a new hope (pun intended) in the form of the next *Star Wars* and *Marvel* instalments. Cinema is a treat, for both audiences and advertisers, and that is not going to change any time soon. **M&M**

\$ TOP 10 GROSSING FILMS OF 2016
Global: \$m

1	Captain America: Civil War	\$1,153.3
2	Finding Dory	\$1,026.9
3	Zootopia	\$1,023.8
4	The Jungle Book (2016)	\$966.5
5	The Secret Life of Pets	\$874.5
6	Batman v Superman: Dawn of Justice	\$873.3
7	Deadpool	\$782.6
8	Suicide Squad	\$745.6
9	Doctor Strange	\$634.9
10	Fantastic Beasts and Where To Find Them	\$607.9

Source: BoxOfficeMojo.com

In September, we kicked off our second annual search for the brightest talents in international media and marketing. We received a deluge of submissions from as far and wide as Argentina, Ghana, Pakistan and Taiwan, and showcasing a broad range of skills, including content creation and distribution, data management and mobile media trading.

MEET THE MILLENNIALS

It certainly made life tough for our panel of judges – and our thanks go out to Alex Altman, managing director, Global Solutions London, at MEC; Toby Hack, chief executive of PHD International; and Jodie Stranger, president of global network clients at Publicis Media, for their time and effort.

Thank you also to everyone who entered – it is great to know that the future of our industry is in such brilliant, dynamic, creative hands.



ANNA-LEE BRIDGSTOCK
Global new product director, MediaCom

What is your greatest achievement in international marketing and media to date?

My greatest achievement was my appointment to global new product director this year. In this role, I am in charge of redeveloping MediaCom's global planning process and delivering the next generation of media tools. This is a significant achievement due to the scale of the project: the products are accessible in over 100 countries and to more than 17,000 employees globally.

How have you displayed a creative or innovative spirit in your role in the past 12 months?

It's my job to ensure we're embedding the most innovative technology into our products, which means I work with the best UX/UI specialists to develop visually stunning and intuitive tools. While this is an example of how I need to display creative and innovative spirit in my role, I believe it's also vital to contribute to MediaCom holistically. So, in August, I volunteered to lead the fundraising effort for MediaCom's charity, Rays of Sunshine. Here, I applied knowledge from my day job and introduced 'PayPal Here' contactless facilities and 'text to donate' messages into our marketing and events. We raised over £32,000 in one month.

MEHER ANAND
Account executive, CNN International

What do you believe are the most important trends in media today?

The way audiences are consuming media has undergone a paradigm shift. People are progressively consuming information via hand-held devices and videos and the curious, mobile-first, Millennial audience – me! – are moving to ad-free networks. As a result, content associations become an essential of a brand's communication strategy. Audience and data targeting solutions are an integral tool, allowing advertisers to reach the right audience at an optimum cost. All this, with real-time reporting and optimisation capabilities, are some of the exciting trends in media.

Why are you one of the industry's hottest young talents?

I go beyond the obvious to help clients reach their objectives through the effective compilation of new technologies, creative resources and unique opportunities. My approach involves and integrates traditional media along with the latest digital technologies and innovative ideas. I have been recognised as a 'Reverse Mentor' to the Turner International Leadership team in India since January 2016. I keep them updated on the latest technology and social media trends.



I work with the best UX/UI specialists to develop visually stunning and intuitive tools

Anna-Lee Bridgstock, global new product director, MediaCom

JAMIE CIAMILLO
Global associate director, digital, Red Fuse Communications

How have you displayed a creative or innovative spirit in your role in the past 12 months?

One of the main challenges that Colgate faces as a US-based advertiser is the constant volatility of exchange rates that affect our business. Recently, our team hosted a digital two-day workshop for the client – a real opportunity for us to educate and empower clients at a time when they are understandably cautious about divesting budgets away from proven successful traditional media routes. With a streamlined team on the ground, I knew my in-depth digital expertise could add real value. I proactively put together a proposal to my management of how I could help the team, travelled to the workshop and presented and helped facilitate the session.

What drives you to succeed?

I would argue my drive to succeed is unparalleled, and that determination is what gets me up every morning. I have a deep passion for the work that I am involved in, and the ability to continue to help support local markets and watch my client's business transform is hugely rewarding.



» No matter the pitch or the brief, my global network trusts me to deliver the best solutions

Shelby Craig, partner, creative director, MediaCom Beyond Advertising LA

SHELBY CRAIG

Partner, creative director, MediaCom Beyond Advertising LA

What is your greatest achievement in international marketing and media to date?

Creating a brand-funded TV series called *Air Rescue* for Westpac bank that went on to be so successful it has gone four seasons (and still going), has been distributed to 42-plus countries and has won global awards.

Why are you one of the industry's hottest young talents?

I'm breaking barriers in the media and content industry. Having jumped ship from production companies and creative agencies, I'm harnessing the power that comes with being part of a global media network and producing work at a global scale that keeps me in constant high demand across markets and time zones! No matter the pitch or the brief, my global network trusts me to deliver the best solutions – leading to the global executive creative director of MediaCom

LAUREN GOTTLIEB

Associate director, business development EMEA, MediaCom

Describe an occasion where you have made a decisive contribution to your own brand or your client's business.

Early this year I had the opportunity to organise our company's EMEA conference where we welcomed CEOs and managing directors from over 30 countries in Europe and demonstrated our latest innovations, successes and strategies on how we want to move the company forward over the next few months. My role was to oversee and help steer all content, in order to make sure we were delivering provocative, relevant input that

would contribute to raising the bar across the region.

Why are you one of the industry's hottest young talents?

I'd like to think the 50-plus pitches for large and small clients alike I've worked on, the relationships I've built with my peers, department heads and CEOs from around the world, the systems and strategies I have helped implement, and the organisation and processes I have helped create to drive growth for MediaCom at 28 years old are something to be proud of. A good starting point, certainly!

Beyond Advertising to state: "Shelby is the best creative in our network without a doubt."

GREG CUSSELL

Digital account director EMEA, CNN

How have you displayed a creative or innovative spirit in your role in the past 12 months?

Entering into a team of 25 people with a predominantly heavy broadcast focus, I was put in the position as the main digital lead. I have had to both educate the internal team and keep them up to date on all the digital advancements within the business and how to creatively implement these into our offerings.

Describe an occasion where you have made a decisive contribution to your own brand or your client's business.

After the new digital arm of CNN had implemented all of the specific tech tools into the business, I was then able to create a strong digital-only commercial offering which enabled me to find new clients in unexplored verticals. I successfully closed one of CNN's biggest digital-only advertisers, a new client that invested over \$1m into a fully integrated digital solution comprised of a custom editorial video sponsorship, a bespoke digital advert (which was the first time the production team had shot a video in VR) and strategically planned audience data with a targeted distribution plan, both using the CNN network and social media amplification.

ROXY DINH

Head of EMEA, 247 Laundry Service

What do you believe are the most important trends in media today?

Live TV has always been the king of content in terms of eyeballs and ad revenues for TV networks. However, we're stepping into a new era where Twitter users are able to stream Thursday night football live on mobile. We no longer need to watch TV to keep up with the Kardashians – there's Snapchat for that. There are now four times more people watching live content on Facebook. Social is the only place where users can consume such content and engage with what's happening in the world in real time. Social is now the new TV. And anyone can become a TV channel if they know how to create amazing content and engage with their community.

Why are you one of the industry's hottest young talents?

I am the youngest minority woman leader at an AdAge A-List agency, and I'm on a mission to revolutionise not just the European social landscape, but also the traditional publishing and sponsorship industry. Having worked in social media for over eight years in three different countries, I have a clear understanding of what works on a global scale. I am using this knowledge to help the best brands in the world do awesome stuff on social.

SIMON HILKERT

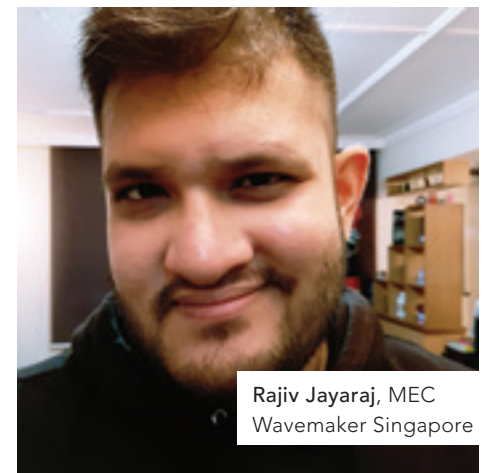
Implementation manager, Kinetic Worldwide

What is your greatest achievement in international marketing and media to date?

I am part of our company's global junior board. The board is a group of eight young talents from across the world, which leads initiatives on social responsibility, creativity and innovation, and is farming the next generation of our company. One of these, 'Kinetic Future', is an initiative to advance sustainability by honouring Kinetic's responsibility to team, community and planet. It is a grassroots effort developed, led and implemented by team, and now managed locally by 94 enthusiastic co-ordinators from 13 countries.

How have you displayed a creative or innovative spirit in your role in the past 12 months?

Together in a team we have developed a



Rajiv Jayaraj, MEC Wavemaker Singapore

new revenue stream for our company by launching a start-up in our own company. We have invented an online platform which could have killed the business. At Kinetic we are experts in audience-led OOH planning – how people move around, where they go, what they see, and what really holds their gaze. This start-up is a web-based platform that empowers small advertisers by connecting them with OOH media inventory that meets their needs and budget.

RAJIV JAYARAJ

Director of content production, MEC Wavemaker Singapore

What is your greatest achievement in international marketing and media to date?

Having started my career in TV production, spent five years in creative agencies, and my last three and a half years in a media agency, I see the world a little differently. I believe that the best ideas are the ones that merge product with human desire and tell a story that people actively want more of. That is why my greatest and proudest achievement is a TV format I co-developed called *Celebrity Car Wars* that aired on A+E networks in August 2016 and demonstrated the benefits of a new fuel product launched by Caltex in the South East Asia region. The show featured six celebrities, each from a key Caltex market, competing in a series of hilarious motoring challenges, all the while putting the new Caltex with Techron fuel to the test.

Why are you one of the industry's hottest young talents?

Having taken on multiple roles in the creative and media industry over the past decade, my unique



Simon Hilkert, Kinetic Worldwide

perspective and passion for creating emotional connections with audiences sets me apart from my colleagues.

LAURA KASTORYANO

International digital planner, MediaCom

What drives you to succeed?

Determination. Ambition. Trust. My determination drives me to constantly want to produce great work. I've always wanted to be part of a team that produces fantastic results and I'm proud to be part of that. I'm determined to learn from my peers and follow in their footsteps. My ambition to always strive for finding new and innovative ways of connecting with my audiences helps me to stay focused and enthused. My own self-trust helps me succeed. I'm confident I can implement my established skills to help my client and team produce creative work. I trust my own ability and look forward to learning more.

What do you believe are the most important trends in media today?

Understanding audiences' behaviours, and the developing technology world. People want content centralised, easy to consume and on hand when they need it. Technology has created multiple opportunities and touchpoints for content to be displayed. Media agencies and brands need to understand this media landscape, for it is ever-changing and developing.



Laura Kastoryano, MediaCom

JO KETLEY

Director, global business development, MediaCom

Describe an occasion where you have made a decisive contribution to your own brand or your client's business.

The biggest contribution I can make to MediaCom is winning pitches. Earlier this year I played an instrumental role in pitching and winning a large retail client in one of our key local markets. The local team was relatively new and not used to pitching together. I took this as an opportunity to spend time regularly in the local market to lead the pitch and train the team on how to apply our global best practices. The training paid off, it was a really important win for us.



When MediaCom wins a new global account, the impact on the agency is tangible

Jo Ketley, MediaCom

What drives you to succeed?

When a new brief comes in, it is an opportunity for us as a team to create something new and different and add real value to a client's business, as well as MediaCom. When MediaCom wins a new global account, the impact on the agency is tangible; it often affects hundreds of people all around the world and completely lifts the organisation and the people working in it. To be a part of that is an amazing feeling and that definitely drives me to succeed.

GEORGINA KOENIG

International account manager, MediaCom

What is your greatest achievement in international marketing and media to date?

Winning the DADI Chairman's award and Branded Content award for Shell's Influencer Collective as part of the #makethefuture campaign, and topping the viral global branded content charts three times this year.

How have you displayed a creative or innovative spirit in your role in the past 12 months?

Working with Channel 4 this year in the UK, we created a series of shorts called *Reverse Engineers* whereby a group of celebrities 'unboxed' Shell-supported inventions, creating entertaining content that celebrated the ingenuity behind the bright energy ideas in action.

Why are you one of the industry's hottest young talents?

In the two years since moving to London and joining MediaCom – my first media agency job – I have gone from co-ordinating global markets to becoming the client's central point of contact, overseeing the entire process from strategy formulation, briefing and implementation to post-campaign reporting across the central and market teams.

JAN KOENIG

Director digital, MEC Germany

What drives you to succeed?

It's about finding the sweet spots between brands and buyers. We can't go product-first any more, they won't listen. We have to embrace people and don't see them as consumers. They need to be touched by what we communicate. This challenge is what drives me. Today, a message can be transported in so many ways, on so many channels and in

LAEEQ SHAFI

Manager investments, OMD Pakistan

What is your greatest achievement in international marketing and media?

It has to be winning the 'Most Creative Use of Media in 2014' for Mountain Dew and Mindshare APAC at the Purple Head Awards. We challenged the global perception of security turmoil in Pakistan, landed top FMX bikers in three different cities, pulling off the biggest action event the country has ever experienced. My efforts also contributed in landing international franchises like *Idol* and *MasterChef* in Pakistan, and ensuring PepsiCo gets to make the most of it.

How have you displayed a creative or innovative spirit in your role in the past 12 months?

For the launch of Telenor 4G services in Pakistan on Independence Day 2016, as media buying lead I negotiated a five-minute roadblock. The idea being that we kick off the campaign by airing our five-minute commercial music video on 40-plus channels on national TV simultaneously, so all viewers tuned into any channel at that specific time would be exposed to our commercial. The first launch of its kind in the industry.



different formats. We have to get the best out of every idea.

Why are you one of the industry's hottest young talents?

It took a while for me to realise it, but with the chances MediaCom and MEC offered me, they allowed me to develop into the direction which is quite unique. I can create 360-degree campaigns with inspiring, engaging messages, add technology and, while doing so, I'm thinking about distribution and the key assets we need. I'm not a digital guy. I'm not a creative guy. I'm not a tech-expert. I'm connecting the dots and make things fly.

JONAS LARBALETTE

Content strategy, MediaCom Germany

Describe an occasion where you have made a decisive contribution to your own brand or your client's business.

A personal milestone for me was the Deutsche Telekom Street Gigs event series this year, presenting the first-ever 360-degree live-streamed concert in Germany, featuring the Red Hot Chili Peppers. With our sophisticated distribution strategy, we were able to generate more than half of the total views via our 360-degree player. This way, we positioned Telekom as innovative first-mover in 360-degree live streaming, which will be crucial for their business success.

What drives you to succeed?

Working as a content strategist in a 'Content + Connections' agency, my greater objective is to make communications deliver true value for both the target group and our clients. I want the people out there to profit from the campaigns we're crafting every day. There's nothing better than a good idea that brings relevance to customers – which will thus bring business relevance to our clients again.

EMIL LAURITSEN

Digital developer, GroupM Denmark

What is your greatest achievement in international marketing and media to date?

I was the first person in the Nordics to write custom algorithms to handle programmatic media buying. As soon as we saw the effect this had, we started implementing this across several clients. I am now leading our effort in exploring the possibilities of these algorithms. In order to do this, I



developed software that allows our Business Science units to easily integrate sales predictions into algorithms. Because of this, we are now seeing 15% of all programmatic spend across the Nordics being used on custom-written algorithms that I have had a part in developing.

What do you believe are the most important trends in media today?

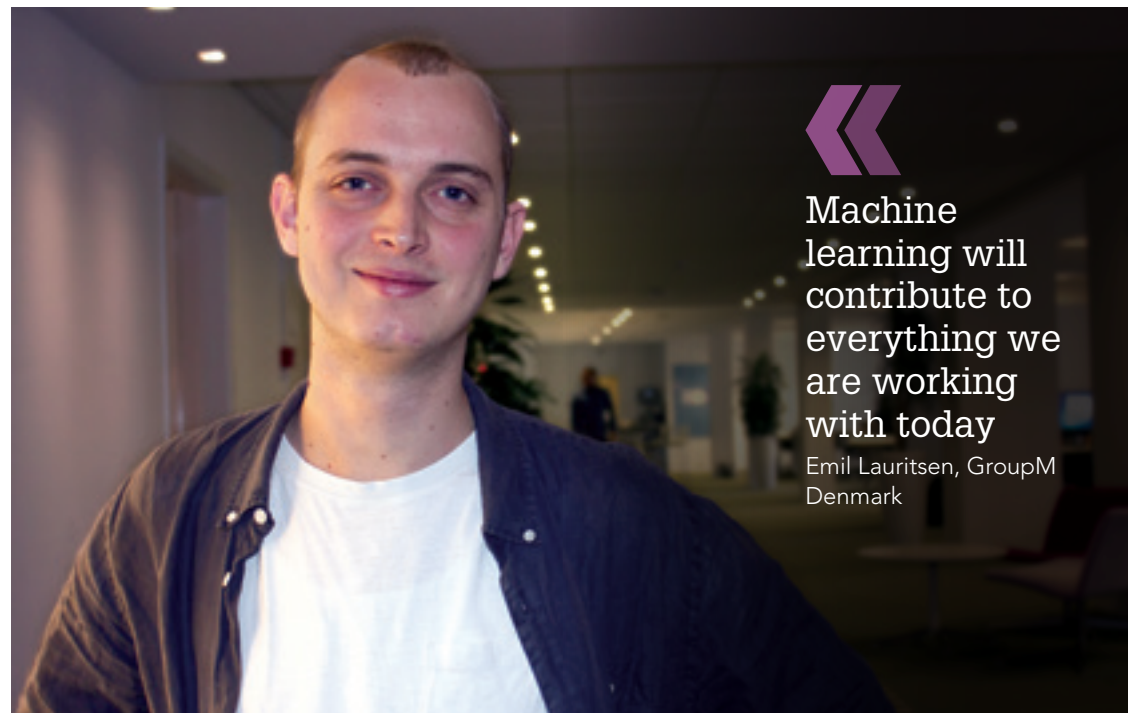
I believe that if you are not getting started with AI and machine learning now, you will not have success in the market in three to five years. I think machine learning will



Georgina Koenig, MediaCom



Jonas Larballe, MediaCom Germany



Machine learning will contribute to everything we are working with today
Emil Lauritsen, GroupM Denmark

contribute to everything we are working with today, and will play a big role in assisting us in what we do both in our personal life as well as in our profession.

RYAN MANNING
Content distribution director, MediaCom Australia

Describe an occasion where you have made a decisive contribution to your own brand or your client's business.

I was recently selected by our CEO to manage the construction of our three-year vision and business plan. This had myself and another member of our junior leadership team managing the opinions and passion of over 300 people in the business nationally to deliver a three-year plan that focused on 'People, Products, Clients and Commercial'. MediaCom Australia now has a new vision and plan that over 300 people have contributed to and will transform us into a solutions business.

Why are you one of the industry's hottest young talents?

The way people consume content and marketing messages is changing faster than ever before. With more formats, devices and mediums, the media industry is in desperate need of innovative and passionate young professionals who have a hunger for change and a diversified marketing background. I believe that I am one of those people; with content marketing expertise

and a passion for communications technology, I will combine experience across UK and Australian markets with an innovative spirit to deliver new and exciting solutions to any communications problem.

ANNE MOGELVANG
Associate director, global strategy, MediaCom

Describe an occasion where you have made a decisive contribution to your own brand or your client's business.

Before joining the global strategy team in London, I was an account manager at MediaCom Denmark. I was eager to work abroad. When the Global Team came to the Nordics to train us in the new planning process, I identified this as my opportunity and I went for it. I prepared, displayed enthusiasm, skill and curiosity during the training, and I made sure to network with key members of the team. From that came the move to London.

What drives you to succeed?
I think it's crucial to first establish what success means. The most common interpretation of this I suppose would be climbing the corporate ladder one promotion at a time, but for me success means being in a position where I love what



Ryan Manning, MediaCom Australia



Anne Mogelvang, MediaCom

I do, where I am inspired and challenged. At this particular time in my life, success also means getting to travel and work all over the world.

FELIX MORGAN
Senior strategist and innovation lead, Livity

What is your greatest achievement in international marketing and media to date?

Having my neuromarketing research shared on stage in 14 different countries in 2015, including the Cannes Lions and SXSW.

How have you displayed a creative or innovative spirit in your role in the past 12 months?

As the innovation lead at Livity, it has been my job to ensure we are keeping up with all the new ways that people are interacting with the world, and advising brands on how to keep up. Young people are always behavioural pioneers, and it makes my job incredibly challenging at times to keep ahead of them. One of my proudest moments recently was when I managed to create and manage a community on reddit for Dyson campaign 'Rethinkers'. This is something brands have tried and failed at (due to reddit's famously fickle nature), but it was well received by the community and became an integral part of the campaign.



MADDIE RAEDTS
Co-founder and creative director, IMA

What is your greatest achievement in international marketing and media to date?

IMA (Influencer Marketing Agency) was an idea I came up with for my graduation project; however, it was never approved. I truly believed in it and my greatest achievement is bringing it to life.

Why are you one of the industry's hottest young talents?

At 28 years old I have truly made a difference in professionalising this area – helping brands recognise the importance of influencer marketing in today's digital landscape. It wasn't like this when we started and it is now a core part of the marketing mix of international marketers. Three years ago we were still a small team and today we work with more than 40 people representing 10 different countries in our new office at the Prinsengracht in Amsterdam. I helped build a strong, diverse, international growing team of experts who develop multi-market strategies for clients across several categories, such as Tommy Hilfiger, Yves Saint Laurent, Diesel and Farfetch, and for many different audiences.



MAX NEWNHAM
Digital content lead, Asia Pacific, CNN Global Advertising

What do you believe are the most important trends in media today?

Industry trends come and go, whether that be a new social media platform, uptake of a new technology such as virtual reality, or product targeting a particular user group. These are important, but equally important is the need for media organisations to continue to be adaptable and open to constant new ideas and transformational technology that cater to audiences' wide behaviours and habits.

Why are you one of the industry's hottest young talents?

Over the past eight years, I have worked for international media organisation across three continents and have progressed to a regional position in Asia. In that time, I have developed winning strategies and executions for a variety of high-value multi-platform media campaigns, many of which have delivered award-winning results. I've also worked on a number of new business proposals, helped deliver incumbent client uplift and renewals, and contributed directly to the overall profitability of the companies I've worked for.

JOX PETIZA
Worldwide associate director – content strategy, MediaCom Beyond Advertising

How have you displayed a creative or innovative spirit in your role in the past 12 months?

In just a year of moving from Kuala Lumpur to London, I launched a company-wide global product for MediaCom: DARK-ready. At the core of this product is a strategic framework in understanding content and connections called Content Shading. This initiative has also made the company future-facing with the upcoming mainstream rise of messaging apps in advertising.

What drives you to succeed?

Having the ability to influence the world and make it better. Messages have power. Media has power. And if I am able to fuel campaigns with social consciousness and ethical purpose to change perceptions of beauty, confidence, gender and help spread the message in the right channel and context, I am happy to have a positive impact in society. Brands are becoming active agents of change in shaping a better world; I'd like to be part of that.



Ramiro Sanchez Caballero, GroupM

RAMIRO SANCHEZ CABALLERO
Partner, partnerships and corporate development, GroupM

Describe an occasion where you have made a decisive contribution to your own brand or your client's business.

A decisive contribution I made to Chicago Booth was when working with the admissions team to revamp the school's brand among prospective students. We activated different social media channels, such as Facebook, Instagram, Twitter and blog, generating a genuine conversation between prospective and current students. I was honoured with the Chicago Booth Ambassador Award scholarship.

What drives you to succeed?

Passion. I believe achieving success is not just a matter of aptitude, but – most importantly – of attitude. Sometimes one letter makes all the difference. If you are passionate about something, you are willing to go the extra mile, to learn; you enjoy your work, and you will get up after failing. I am passionate about marketing and communication, and I feel blessed to be doing this for a living.

IRINA SMIRNOVA
Search planner buyer, Dell EMEA, MediaCom London

How have you displayed a creative or innovative spirit in your role in the past 12 months?

I have always been analytical and advocate

ALEXANDRA SHETCLIFFE
Strategist, PHD International

What is your greatest achievement in international marketing and media to date?

Being credited on a Silver Cannes Health Lion in 2016 for the 'Excedrin Migraine Experience'. There is little empathy for those suffering from migraines as most people think it's just a bad headache. The reality is that it can be highly debilitating. Excedrin used a migraine simulator to drive empathy with migraine sufferers. I helped develop the media guidance that scaled the experience and firmly positioned Excedrin as the expert in migraines.

What do you believe are the most important trends in media today?

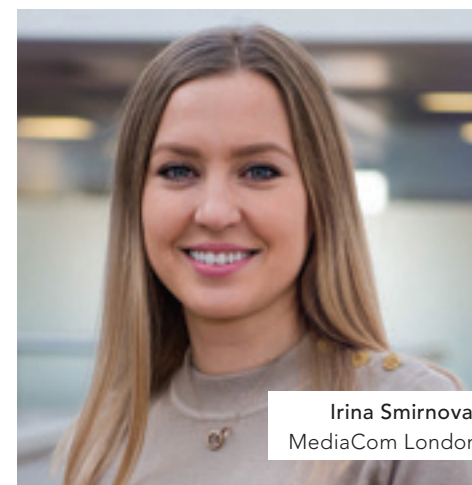
Wearables is an exciting area, especially in consumer healthcare. The future of these will go far beyond syncing to smartphones. This is an area I have contributed thought leadership to. GSK wants to help people live longer and wearables will play a key role in this. The implications are vast as we begin to understand the potential and wealth of information across smart apparel (helping overall wellness and training) and other connected technologies in the 'smart home'.



the importance of processes and data in developing best client solutions. Upon joining the team a year ago, I challenged the classic and somewhat conservative approach and worked with past data from Omniture, Marin and Google to develop the most fitting metrics to focus on and the most effective KPIs for each business unit. There is still a lot to be done on promoting the importance of looking beyond the last click. However, this integrated report on behavioural metrics is a good starting point.

What do you believe are the most important trends in media today?

I believe we have come to a tipping point where just collecting terabytes of data is not enough and what truly matters is the links between multiple touchpoints and what they tell us. As an industry we aren't



Irina Smirnova,
MediaCom London

currently set up to fully harness the potential this information provides, making accurate attribution modelling a top priority today.

SECIL SÖGÜTOĞLU

Digital planning and international co-ordination trainee, Mindshare Frankfurt

Describe an occasion where you have made a decisive contribution to your own brand or your client's business.

Taking responsibilities of international campaigns requires decisive contributions every working day, therefore it is not possible to consider just one occasion. In every call I try to understand my business partners (client and local markets); I start to read between the sentences. Knowing what they are asking for, no question is asked. Empathetic understanding and listening is very important. Listening is much more important than talking. When someone is listening carefully, he/she will act accordingly and it is not necessary to talk much.

Why are you one of the industry's hottest young talents?

Media means more than handling numbers, formulas and templates. It is more than knowing Excel, PowerPoint, Word and Tools. It is more about finding the correct way of communication with various people with different backgrounds, experiences and expectations. I know my tools and I can

handle numbers and templates, but besides them I'm able to communicate in a way which helps me to build trust between all business partners.

CAROLINA VERGEL

Regional marketing manager, LatAm, MediaCom

What is your greatest achievement in international marketing and media to date?

I was chosen to represent Latin America as a Future Leader at a global MediaCom meeting where the top 200 leaders from around the world gathered. Being part of that meeting gave me the unique opportunity to interview Sir Martin Sorrell along with Stephen Allan regarding key industry trends. I was also a key member of the award-winning pitch team for an innovative new model utilising data at the heart of our offering for Procter & Gamble LatAm Digital, now the biggest P&G assignment in LatAm and one of the biggest assignments in the region. This has been the catalyst for how we work in the region, as well as aligned new partnerships to deliver against horizontally.

What drives you to succeed?

My constant curiosity, my drive to learn beyond my region, my belief in team lead efforts and loving being a part of constant diversity. I believe that working with different countries, building on a diverse set of backgrounds and skillsets, helps me deliver stronger ideas. This knowledge

helps me challenge myself with the objective of finding better solutions.

NIAV WATTERS

Senior media planner, PHD International

What do you believe are the most important trends in media today?

The trend I find the most exciting at the moment is personalisation, and in particular dynamic creative. I think it is one of the best innovations that will help avoid banner blindness and ad-blocking. Dynamic creative is something we have used for one FMCG brand already, using banners that incorporate location, weather and insecticides for our summer campaign.

Why are you one of the industry's hottest young talents?

Despite being in the industry for just over two years, I have made a big contribution to both my clients and my agency always having a can-do and positive attitude to every challenge. I also believe it's not just about delivering great client work, but I'm extremely passionate about building the strength of my team and working together to build the best agency and thus offering for our client. I do this by organising internal work-sharing meetings and team lunches. I believe that creating a warm, open and exciting environment to work in will bring out the best in our people.



Niav Watters, PHD International



Carlotta Zorzi, MediaCom

GEORGINA WILLIAMS-GRAY

International digital manager, OMD

Describe an occasion where you have made a decisive contribution to your own brand or your client's business.

Over the course of a year, I dedicated my career to winning the Sony Pictures pitch and retaining the business that we, as an agency, have nurtured for more than 13 years. Over a gruelling 12 months, I devoted my time to securing the future of the business. After months of preparation, as the most junior member of the team, I was selected to travel to Los Angeles to be a part of the core pitch team. This experience threw me in at the deep end, to say the very least, but I have since been regarded as a trusted presenter and contributor for new business opportunities at the drop of a hat.

What drives you to succeed?

I believe you can find a tremendous amount of success in life if you first identify what it is that you love. For me, media and creative advertising is what I love. It brings out the best in me, and drives me to succeed. I'm very results-driven. Going above and beyond, and exceeding my clients' expectations, is my primary motivation.



I believe you can find a tremendous amount of success in life if you first identify what it is that you love

Georgina Williams-Gray,
OMD

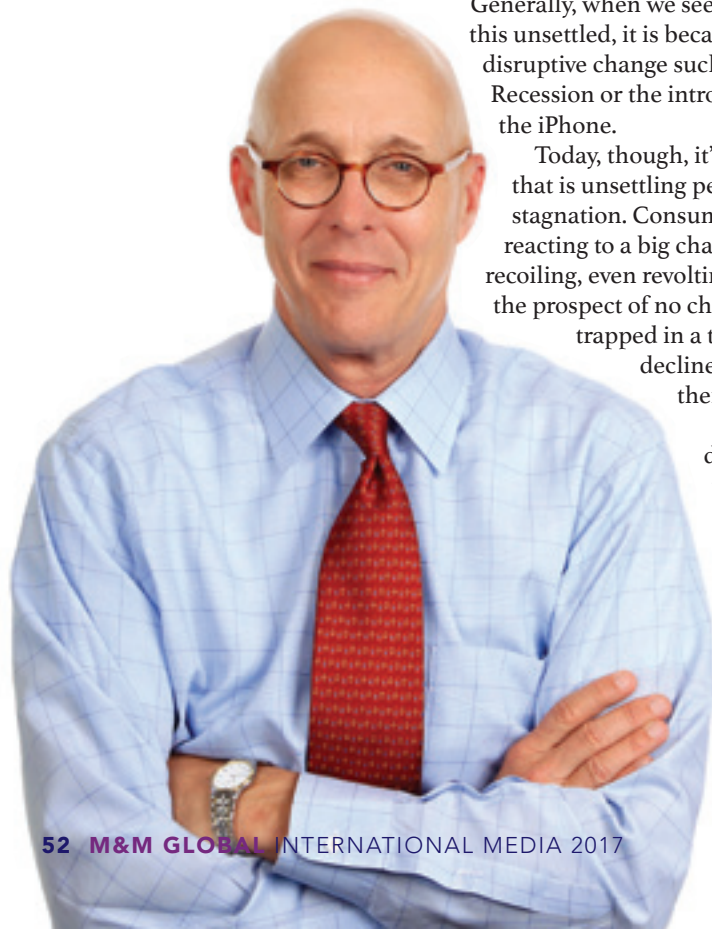


MEDIA BLOG J. WALKER SMITH

CONSUMERS FEAR STAGNATION IT'S TIME FOR BRANDS TO GO OFF-SCRIPT

Consumers, reacting to a fear that they are going nowhere, are anxious for change in their lives. Brands must reflect this too, writes J. Walker Smith, executive chairman of Kantar Futures

» Brands that stick closely to a script have a style, feel and tonality that cut against the grain



Over the years, brands have had to adapt to many factors influencing consumer attitudes: the sharing economy; mindfulness; the shift from active to passive digital; the on-demand business model; and the rise of programmatic consumption.

While all of these things remain important, there is a bigger dynamic in play right now, one that is shaping how all of these other things are unfolding. It's a dynamic creating division as much in society as in the marketplaces. It lies beneath these divides, giving rise to the angst and anxiety and even anger we see bubbling up.

Generally, when we see consumers this unsettled, it is because of some disruptive change such as the Great Recession or the introduction of the iPhone.

Today, though, it's not change that is unsettling people; it's stagnation. Consumers are not reacting to a big change – they are recoiling, even revolting, against the prospect of no change, of being trapped in a trajectory of decline from which

there is no escape.

Indeed, it's even deeper than that. It's the fear that even as things at large change, people will see no change in their individual prospects

and possibilities. The only way out of no change is to break out of the trajectory of decline, which is why we see people pursuing very radical shifts in course, particularly in voting and politics.

BRAND EXPECTATIONS

Expectations of brands are affected a lot by this sensibility. Brands that simply continue on course will feel stagnant to consumers and thus out of sync with the change people want in their lifestyles.

Simply put, the imperative is for brands to go off-script.

Nowadays, the predictable trajectory – the script of life, if you will – is perceived to be downhill. So staying on-script is a bad thing. And brands that stick closely to a script – or, in marketing jargon, a fixed persona or image – will have a style, feel and tonality that cut against the grain. When no change is a signal to consumers that something is awry, going off-script becomes a necessity. Brands must find ways to embrace change as the core of what they deliver.

Marketers readily embrace change as an input but rarely as an output. Continuity, or staying on-script, is our objective. What's needed now, though, is the opposite.

Axe deodorant has refreshed its appeal by going off-script, from highlighting immature sexuality to celebrating maturing individuality. Ford is turning toward the future by going off-script, from a manufacturer of cars that people drive to a provider of vehicles that drive people. *Teen Vogue* has re-engaged its readership by going off-script, from a focus on fashion to an embrace of bigger issues – its best-selling issue of 2015 was a cover that broke all of the traditional rules of thumb.

Brands have never ignored change, but now they must make change a distinctive point of emphasis in order to resonate with consumers whose biggest fear is not change, but no change. **M&M**

MEDIA BLOG HANNAH MIRZA

Balancing the competing demands of consumers and brands isn't easy, says Hannah Mirza, MediaCom's global head of partnerships

PUBLISHERS PAY FOR FACEBOOK'S ENGAGEMENT CRISIS

Right now, publishers are hurting. Because Facebook has tweaked its algorithm to reduce the number of brand stories in the newsfeeds of its 1.65 billion monthly active users. This has hit both advertisers and publishers, which were reliant on the previous algorithm for traffic.

The reasons behind the switch are unclear, given that Facebook never releases data on engagement, but as a consumer it comes as little surprise.

Increasingly the feed had become cluttered with brand messages and publisher content. The personal connection that originally drove Facebook's success had ebbed away.

Facebook was faced with a choice of either annoying the users of its system (its product), advertisers (its revenue providers), or publishers (its content providers). In the end it was no contest.

For all of Facebook's success in pulling in mobile revenue – \$4.3bn in its first quarter in 2016 – without a strong user base, it has nothing to sell. The growing success of Snapchat, which it has tried to purchase, represents a real threat.

Underlying these challenges, however, is the fact that Facebook is a desktop product that has migrated to mobile. The migration has taken a desktop solution, the blended feed, where all content comes in the same place, into an environment where better solutions are possible.

The nature of the blended feed – which mixes personal and professionally produced content – has left Facebook struggling to find the right mix of revenue and engagement.

BEAUTY OF SEPARATION

Into the gap has come Snapchat, with a mobile-first solution that neatly sidesteps the whole problem. At the heart of this hugely popular app – more than 100 million daily active users and rising – is the beauty of separation between personal content and the professional, interruption-accepted content.

Consumers have been willing to accept a model where they swipe left for personal conversations, and right for the people they want to see and the



media they choose to consume. The advantage of this model over the blended feed is that the consumer is in control. There is a choice that makes them feel more comfortable than leaving it to the decisions of an algorithm.

Consumers see ads while consuming media, but this is an experience not unlike any other channel. Personal chats and stories are rightly ad-free.

This model also feels more comfortable for content producers, agencies and brands, because they know that their business models won't be hit by sudden changes in reader numbers or reach.

That's not to say that Facebook's approach doesn't have its own advantages. Both platforms leverage what's best in consumer mobile interactions, swiping and scrolling. Their trademarks are in the different ways they do this.

Snapchat benefits from its app-only solution and simplicity to keep clean separation between media and personal content. Facebook's big weapons are the full range of features included in its mobile experience, including Facebook Live.

What consumers have to decide is whether they prefer the clear consumer choice of Snapchat or a single scroll where decisions are made by artificial intelligence, with the sometimes baffling result that distant acquaintances pop up randomly in their feed.

Brands ultimately will follow consumers. So if Facebook's changes make consumers more engaged, and therefore its content and advertising becomes more effective, that will be well received.

After all, consumers seeing fewer ads but paying more attention to each makes for a wiser investment. **M&M**



Facebook is struggling to find the right mix of revenue and engagement

MEDIA BLOG JOLINE MCGOLDRICK

NAKED WOMEN DON'T SELL SHOES | AND OTHER WHAT-SHOULD-BE OBVIOUS AD TRUTHS

Too many advertisers are outdated in their portrayals of women, writes Joline McGoldrick, vice president, research at Millward Brown Digital

Naked women don't sell shoes, handbags or anything else you might like women to buy. With women having \$40tn in global spending power by 2018, ignoring this ad truth is a costly mistake for brands.

Demographics, economics and the advertising ecosystem have changed. Smarter brands have already adapted; those that don't embrace this will become irrelevant, particularly to the Millennial and Gen Z audiences that value narrative and authenticity more than over-stylised objectification.

In the US, there is an industry movement afoot, led by notable women such as Madonna Badger (#womennotobjects) and Susan Wojcicki, to encourage advertisers to consider how they portray and speak to women. Beyond equality and decency, this movement makes good business sense.

Audiences have more media touchpoints than ever. According to Millward Brown's AdReaction, 16- to 24-year-olds spend over 226 minutes just with digital screens and TV. This large amount of media time has translated into refined consumption – they make quicker choices about what to engage with and ignore.

And more democratised forms of advertising such as YouTube uploads and Facebook auctions mean that a large array of brands can utilise more targeted advertising to vie for attention.

ATTENTION SCARCITY

The average person spends less than two seconds looking at an ad on desktop and one second looking at an ad on mobile. The eyes will scan most ads (pass over them for less than a second) or ignore. Advertising competes against an attention scarcity, but marketers don't need to shock to get noticed.

Advertisers are constantly challenged to utilise the newest and best tools to earn this audience attention. Stuart Weitzman's SS16 campaign used some of the latest and greatest advertising tools to capture that attention. Unfortunately, it was anchored in the black-and-white campaign "nearly nude" described by *Women's Wear Daily* as featuring "ladies largely in the buff, all for a pair of chunky sandals."

What this Weitzman campaign fundamentally ignored was that great advertising doesn't just attract attention – it motivates the audience. You don't motivate women to buy shoes by showing them other naked women wearing shoes.

Apparel has been slower to realise that how you portray women and the narrative around it is what allows you to connect and motivate in a way that both creates desire and builds meaning for the brand. There has been fantastic work by advertisers in the past year portraying women respectfully and accurately. Nike's 'Better for It', Always' #LikeAGirl, Under Armour's 'Rule Yourself', and Procter & Gamble's 'Thank You, Mom – Strong' campaigns are great examples.

And if you are still haven't bought in to this concept, watch the P&G ad, or '#LikeAGirl', and then look at the Stuart Weitzman SS16 campaign. Are you sold? **M&M**



Advertising competes against an attention scarcity, but marketers don't need to shock to get noticed

MEDIA BLOG YANNIS ZACHOS

HOW CAN BRANDS ADAPT TO SOCIAL CHANGE?

Understanding the effects of Black Swans and echo chambers, by Yannis Zachos, head of strategy at Havas Media International

In 2007, Nassim Nicholas Taleb introduced the world to his 'Black Swan' theory, exploring the impact of the highly improbable. A typical Black Swan event comes as a surprise, has a significant effect, and is retrospectively rationalised with the benefit of hindsight. A few months after his book hit the bookstores, the world economy went on a meltdown following the subprime mortgage crisis in the US. Surely the timing could not have been better for Mr Taleb, who was elevated into stardom and given prophet status.

Major events such as the Brexit vote, Donald Trump's election and the Farc referendum in Colombia continue to validate the Black Swan theory and fill us with doubt about our understanding of the world. This is not just happening at a personal level, but rather more systemically with most of the predictive models we have traditionally relied on, despite continuously getting it wrong.

As advertising practitioners this should alarm us. Our industry and expertise were built upon analysing human behaviour, needs and motivations. We have built models and rules that are methodologically affine to the ones that are failing us. However, this is not a critique on research methodologies, but about something bigger: the ability to understand the shifting consumer sentiment and rationale.

How confident can we be that big data can help us understand human behaviour? Should brands take the high road and appeal to consumers at a more emotional level? It certainly seems there is a case for the latter. The popular sentiment, as captured by the various referendums, shows that arguments based on facts and logically constructed



How confident can we be that big data can help us understand human behaviour?

propositions don't necessarily venture as well against the more vague and emotional appeals.

And emotion certainly seems to be linked very often to Black Swans, either by preventing their detection or propelling their advance.

NAVIGATING THE ECHO CHAMBERS

We are witnessing heightened polarisation in countries such as the US where, according to a Pew study, political polarisation is at its highest level ever.

The effect of this is that people become less tolerant of divergent opinions and insulate themselves from such views both at a physical but also at a virtual level. Hence conservatives tend to reside in small community towns, while liberals prefer urban suburbs in bigger cities. This lifestyle inevitably strengthens confirmation bias as people become less exposed to alternative views.

The ability to tailor and personally control media exposure doesn't help, either. Digital and social media have allowed us to build our personal propaganda machines that feed us with 'one kind of opinion', allowing us to block any opposite views.

The advertising trend to tackle audience diversity is adapting executions and creating bespoke messaging. Increasing sophistication in targeting is also opening up new opportunities to advance this approach even further. However, personalisation comes at a cost. Creative ideas are being stretched, losing their edge and becoming more vanilla. In the race to fill all the boxes and cater to all tastes, creativity takes a hit.

To avoid Black Swan events in advertising, we must focus on the things that bring people together, not those that divide. We need ideas grounded in human truths, fuelled with emotion and delivered via impactful media, instead of fragmented micro messages that are easily ignored. **M&M**





CUBA'S | MARKETING REVOLUTION

Cuba is slowly opening for business for brands and media companies. Ben Bold explores the hurdles facing marketers in their attempts to gain a foothold on the island of Castro and Communism



Over the final decade of his life, before his passing in 2016, Cuban leader Fidel Castro began wearing Adidas tracksuits in public. While his decision to ditch the military fatigues in favour of more casual garb was reportedly based on comfort (he was recuperating from an operation), the image of the revolutionary in Adidas gear is a neat metaphor for Cuba's increasingly relaxed stance on overseas brands establishing a presence in the Communist country.

A general loosening of trade regulations in a bid to attract outside investment, and last year's agreement between the US and Cuba to restore diplomatic relations after half a century of Cold War hostility, are expected to have profound implications for the Cuban economy.

The questions is whether, and how quickly, Western brands and media businesses can establish a foothold in this highly complex market.

There are no two ways about it – reaching a largely untouched population of 11 million consumers is a hugely attractive prospect for brands and agencies. But

when government regulations largely prohibit brands from advertising their wares, it is a prospect rife with complications.

Yet a growing number of brands are undaunted. In January, Unilever announced that it is building a \$35m homeware factory in a partnership with state-owned Intersuchel. When it opens in early 2017, the factory will manufacture brands for sale in Cuba, including Sedal, Rexona, Omo, Lux and Close-Up.

There also are a handful of agencies making moves. WPP wasted no time in launching operations in Cuba, installing an executive in Havana via a partnership with state-owned Palco Group.

Sir Martin Sorrell, WPP's founder and CEO, told *M&M Global* that his group's Havana-based operation is "the only international communications services group with a stable presence on the island".

"This allows us to guide our international clients interested in investing in Cuba and to support Cuban institutions and organisations wanting to internationalise their products and services," he says.

MARKETING REVOLUTION

The opening of doors – albeit by a crack – to overseas business marks a dramatic turnaround. Following the 1959 revolution, the majority of Cuba's shops were shut down and consumers instead had to use their *Libreta* rationing booklet to buy state-approved, unbranded goods from government-run distribution centres.

For years, Cuba's product landscape was defined by officially sanctioned, state-produced goods and, accordingly, little choice. However, in more recent years, Cuba's attitude to both the domestic and overseas private sector has relaxed, particularly since Raúl Castro became president in 2008.

The likes of Heineken have been allowed to launch initiatives such as donating refrigerated lorries to the Ministry of Trade, which can use them for whatever purposes the department sees fit, giving the Dutch brewer a brand presence on the roads of Cuba.

Rose Marketing, which in 1989 entered the former Soviet Union and is now headquartered in Moscow, is

Fidel in Adidas; and Cuba's president, Raúl Castro



International brands will find a willingness to experiment among consumers, if they are able to communicate with sensitivity



Martin Sorrell, founder and CEO, WPP

another agency making inroads into Cuba. John Rose, its founder and chief executive, told *M&M Global* that the group is in the process of building a local team and setting up with a local office and via Cuba-based partners. "We're starting to do projects and are about to launch more significant campaigns," Rose says.

Media agency network Local Planet, which brings together agencies from local markets under a centralised offering for global clients, has recently signed up Cuba-based agency EBM (Eurobusiness Market). The agency has operated in Cuba for 12 years, working for both state enterprises and foreign brands across merchandising, fair marketing, event promotions, and promotions on social networks.

"We have also developed several campaign spots for foreign clients for their activity outside Cuba," explains EBM chief executive Manuel de la Rica. "Most recently, we are working on the sponsorship of cultural and sporting events. However, everything is easing up slowly, and in a short time, I hope we can act as in any Western market."

BRAND-IGNORANT?

Given the infancy of Cuba's more liberal approach to Western brands arriving on its shores, it would be forgivable to presume that the Cuban population is largely brand-ignorant. But this is not the case, according to Emilio Morales, president and chief executive of Miami-based The Havana Consulting Group, which specialises in market intelligence and produces the THCG Business Reports, a tool for entrepreneurs and companies interested in the Cuban marketplace.

"Cubans know many brands," he explains. "Why? There is actually a very large external influence from Cubans living abroad and tourists visiting the island. This includes more than half a million Cuban-Americans travelling laden with suitcases full of branded goods, such as shoes, clothing, perfumes, cell phones and appliances of all kinds."

Sorrell notes that the average adult consumer behaviour is “mainly based on price and availability criteria, and to a lesser degree on brand preference”, but adds: “That behaviour is changing among Cuban urban youth, who are more familiar with brands.”

“Except for a few unique sectors, international brands will find a willingness to experiment among consumers, if they are able to communicate with sensitivity to the local culture.”

Meanwhile, EBM’s de la Rica claims that – with Cuba’s economically active population of five million, around 1.2 million of whom are working in the private sector – “the average Cuban is a voracious consumer” with a high proportion of disposable income.

“It is logical if we think that health and education are free, and transport, energy and food are heavily subsidised by the state, the Cuban people do not have a savings culture,” he says. “All of their income is spent on travel, tourism, quality clothing, restaurants, entertainment, et cetera.”

MEDIA CHALLENGE

But while Western brands are physically ending up in the hands of Cubans, targeting consumers with brand messages via traditional media remains challenging.

“The problem in Cuba is that it’s a big overstatement to say that advertising is happening,”

says Rose. “The problem is not a regulatory issue, but an ideological one. The mass media is run by the state, by the Communist Party, which controls the newspapers and TV. Their guiding principle is not to promote capitalism.”

Interestingly, de la Rica is quick to dismiss the notion that Cuba’s traditional media is ad-free.

“There are media that already allow advertising,” he says. “And those include some state media outlets, radio stations, an international television channel that can also be seen in the island, phone books, and magazines covering art and culture, economics and business and classified ads.”

Cuba is also home to other general and lifestyle publications edited by entrepreneurs who live in a kind of “legal limbo” until the new Ley de Prensa press law is approved, and some foreign media published with the permission of the International Press Center of the Ministry of Foreign Affairs.

Digital is on the rise, especially thanks to the proliferation of free Wi-Fi hotspots, with 65 being installed this year alone. According to official data (which de la Rica suggests underestimates the reality), in 2014 the number of internet users grew to more than three million, around 27% of the population.

The term ‘legal limbo’ could equally be applied to a digital medium that is playing an increasingly

influential role in the lives of Cuban consumers. The hugely popular *El Paquete Semanal* (The Weekly Package) is quite literally hand-delivered online content, a terabyte collection of pirated digital material, including TV series, video games, apps and movies. *El Paquete* is updated every Sunday, allowing consumers to take their terabyte hard disk and have it filled with new content at a cost of just 10 CUC (around \$1).

“The new content reaches users in less than 24 hours via a network of distributors throughout the island,” explains de la Rica. “Its coverage has grown, it does not operate with any licence, but its current penetration in Cuban society is such that it would be a mistake to ban it. There is little data about its diffusion. For example, it is known that in Havana it reaches 39% of the population, and Havana has 2.3 million inhabitants, but intuitively we know that it is more than 39%, since a customer of the weekly package then in turn rents it to a friend or neighbour for a dollar.”

According to Morales, there are moves to establish a paid cable television network, which could be financed in part through advertising revenue.

“While the investment project included in the investment portfolio does not explicitly mention advertising, it is obvious that one of the main ways for financing a paid cable television channel would be commercial advertising,” he says.

REGULATORY HURDLES

But as things stand, brands looking to raise awareness must typically take a more below-the-line approach to their marketing. In-store activity is therefore prevalent. For example, Heineken uses point-of-sale displays to reach Cuban consumers.

Foreign brands harbouring aspirations to enter the Cuban marketplace in an official capacity will have to jump various government and regulatory hurdles.

De la Rica cites fashion and clothing brands including Mango, Benetton, Paul & Shark and Nike, all of which have had to form agreements with various state-owned store chains, which act as their distributors.

“The challenge is that there is an antiquated system of entry into the market, no way of just walking in and selling goods in-store,” says Rose. “You have to go through a regulated process. But once you get over these significant hurdles, there are opportunities and multiple customers within the government structure.”

Morales highlights the past five years as a preparing of the ground for the reintroduction of advertising. “Today, signs and billboards advertise the services of fancy paladares (private restaurants), hostels, beauty shops, small shops to service cell telephones, and other small businesses authorised under the self-employment legislation,” he says.

“Self-employed businesspersons have been allowed to advertise in the telephone directories and, more recently, the National Information Agency, a government institution, has created a website with classified advertising.



Manuel de la Rica, chief executive, EBM

“I believe that in the next two years, maybe less, TV advertising will be coming back after 57 years absent,” claims Morales.

For Rose, experimentation lies at the heart of its work for clients wanting a piece of the Cuban market. “Cubans haven’t caught up with the idea that advertising can be good,” he says. “We have been putting forward the idea that marketing doesn’t have to be evil.”

“When we’re developing programmes for clients, what’s uppermost in our minds is how to make it palatable – the sense that it’s something good for the population. For brands there are opportunities to be there now because it’s only going to get more expensive. The greatest opportunity is for mid-sized brands.”

WPP’s presence in Cuba is also no flash in the pan. The group is in it for the long term, Sorrell insists. “We are alive to Cuba’s economic evolution and the changes happening there, and we see a role in supporting and partnering with Cuban organisations, as well as overseas clients, as they go through these changes.”

Political change is also on the horizon, with Raúl Castro – architect of Cuba’s enhanced role on the global stage – set to leave government in 2018.

“Whoever succeeds him in the government will take some time to control the state apparatus and then will accelerate the reforms,” says de la Rica.

“This does not mean that from now and until then there will be no changes, but we have to take things with the patience and the wisdom of the Cuban ‘guajiros’ (peasants). The internet will develop at full speed and, of course, over the next three years Cuba will reach levels similar to the West in number of users.” **M&M**





THE MEDIA MEN



In April 2016, *M&M Global* began serialising 'The Media Men', a compilation of stories by the personalities who led the unbundling of media planning and buying from full-service advertising agencies in the 1970s and 80s.

The series, curated by Carat founder-director Mike Yershon, features chapters written by John Billett, Peter

Swain, John Perriss, Stephen Allan, Charles Courtier, Jack Klues and Dominic Proctor. Since publication, it has become part of the teaching at Buckinghamshire New University in the UK.

In this extract, MediaCom founder Allan Rich (pictured) describes how he came to create his first pure-play media agency, The Media Business, in 1975. **To read his full story, visit mandmglobal.com/the-media-men.**

In 1958 I left school at 16 years of age, knowing that I always wanted to be in the advertising industry.

However, as neither my parents nor I had any connections within the industry, I simply wrote to 20 full-service advertising agencies. Sadly I only got one reply, from the then eighth-biggest agency in the UK, Masius Wynne Williams, which was run by two very well-known personalities within the industry – Mike Masius and Jack Wynne Williams.

The opportunity offered to me was pretty normal for those days in that I would start in their dispatch department, which was simply a place from where letters or parcels were taken around to other people within the company. However, as it was the only opportunity on offer, I was more than happy to take up the position immediately.

After six months in this department, one day I was invited to take up a position in the media department – specifically in their television time-buying division, which I very quickly found out was the very first dedicated such service in the UK. So in a strange way I found my way into the media world a little by default, and it could well have been different if the first opportunity given to me had been in the account handling or creative divisions of the agency.

In those days, media planning and buying was right down the pecking order and it didn't seem to matter very much how successfully or brilliantly you were negotiating on behalf of clients in order for them to get best value from every pound they spent; marketing directors were almost all single-mindedly concerned only about the creative output. Indeed, in any client presentations – be they existing or new business – the media presentations usually ended up as just two minutes at the end of a two-hour show, or sometimes left off altogether. This is extraordinary when you consider the value placed in today's world on the importance of all aspects of media planning and buying.



I found my way into the media world a little by default, and it could well have been different if the first opportunity had been in the account handling or creative divisions

Unlike now, there were 14 independent television contractors, many of which were public companies listed on the London Stock Exchange. In addition, in the print world many of the newspaper groups enjoyed completely full issues – something never heard of today – and indeed some newspapers, like the *Sunday* and *Daily Express*, often could not accommodate even the smallest amounts of space unless you committed many weeks in advance as their order books were full.

THE POWER OF TELEVISION

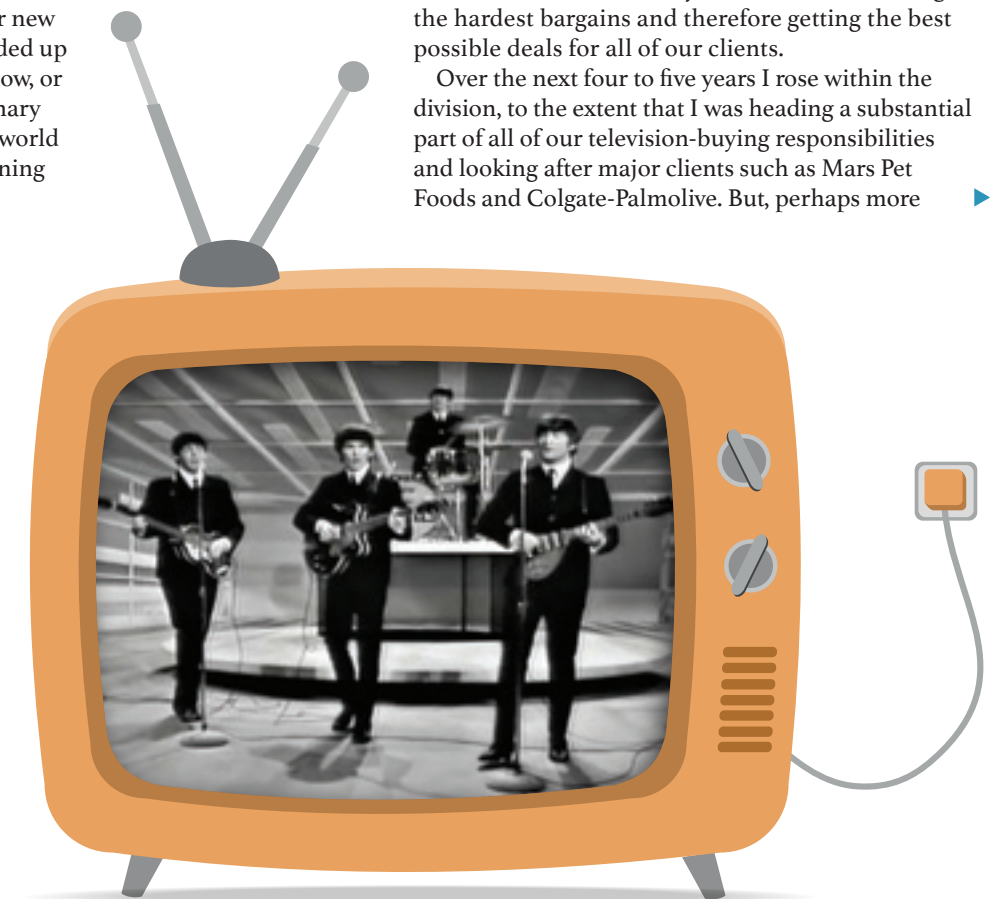
When it came to negotiating in the television industry, the beauty of having so many independent companies (representing, of course, different parts of the country) meant that we could play one off against another, bearing in mind that all of them were trying to retain their fair share of any budget in relation to the size of the population they represented. Within the television buying division at Masius, we became very well known for driving the hardest bargains and therefore getting the best possible deals for all of our clients.

Over the next four to five years I rose within the division, to the extent that I was heading a substantial part of all of our television-buying responsibilities and looking after major clients such as Mars Pet Foods and Colgate-Palmolive. But, perhaps more

The Beatles on Sunday Night at the London Palladium in the early 60s



I moved every one of my clients into every break in that show – which was difficult, to say the least, because everybody wanted to be there, but I got there first and was very proud of the fact





The beauty of it was that I was able to bring the importance of media up to the same level as the creative process and, by so doing, was allowed to be involved in all aspects of the decision-making

importantly, the knowledge gained from my college courses enabled me to begin to have closer links with all aspects of our planning and creative divisions and play a much bigger part in the total advertising decisions that we were taking as an agency (although obviously still concentrating on my television-buying responsibilities).

I was very enthusiastic and perhaps my greatest coup came when I learnt that The Beatles were going to appear on *Sunday Night at the London Palladium*, which was then the most highly rated show of the week, getting enormous audiences. I moved every one of my clients into every break in that show – which was difficult, to say the least, because everybody wanted to be there, but I got there first and was very proud of the fact. I think, at that stage, that was a moment in time which probably confirmed to me both how competitive and, more importantly, how entrepreneurial I really was.

In the middle of 1966 and at the age of 24, I had a phone call from the marketing manager of Colgate-Palmolive, and he simply said, "Allan, you have done a great job for us but I am leaving Colgate and going to help start a brand-new full-service advertising

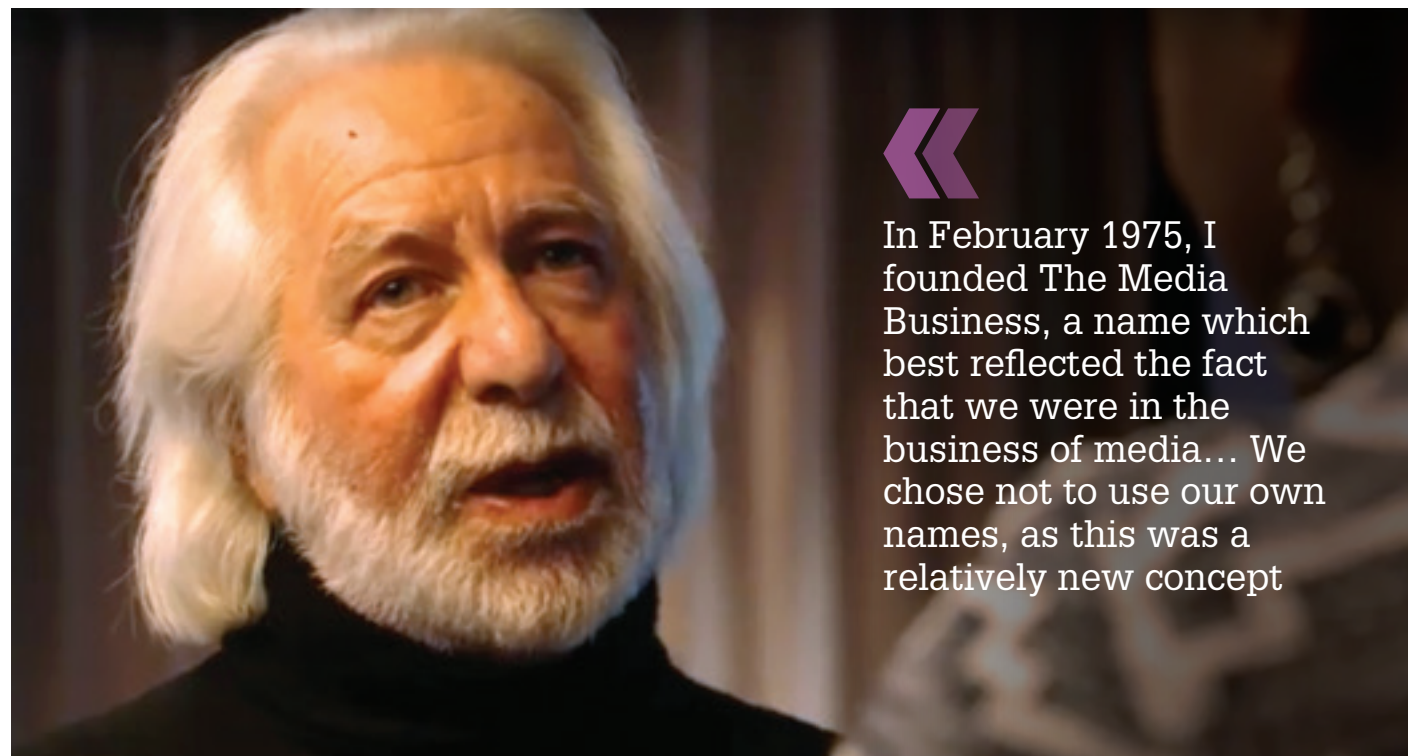
agency. We would like you to be our media director." However, I was getting married that year, and I will never forget my future wife, Vivienne, saying, "It's worth a chance, because you can always go back to being a television time buyer." So in June 1966 I joined six people, five of them from Young & Rubicam, and all of them well-known creative people at the time, such as Norman Berry, Jill Asquith, Paul Hoppe, David Newton and Mario Lippa.

ROAD TO SUCCESS

Our agency quickly became one of the hottest boutiques in the UK and over the next four years created some extraordinary creative and media work, particularly for industrial advertisers who, until then, had simply used trade magazines. What we did was brave and needed a brave client, because we took them out of those magazines and into the then very new weekend colour magazines of *The Times* and the *Telegraph*, in essence to treat their target audience (mainly factory managers) as human beings who often needed to relax at weekends like everybody else. This, together with some amazing creative work, was hugely successful. The beauty of it was that I was



In February 1975, I founded The Media Business, a name which best reflected the fact that we were in the business of media... We chose not to use our own names, as this was a relatively new concept



Our agency quickly became one of the hottest boutiques in the UK and over the next four years created some extraordinary creative and media work

able to bring the importance of media up to the same level as the creative process and, by so doing, was allowed to be involved in all aspects of the decision-making as opposed to simply being an outsider doing the bidding of the creative work.

Against this background, I was beginning to build a formidable team within the media department, all of whom could benefit from the close interaction between our creative and account-handling divisions. Only limited media research was available in the late 60s, and one of the key methods we used was reading and noting studies which demonstrated that we needed always to have the first spreads or whole pages available in the colour magazines. In terms of television, we used presence research which had been done in the early 60s and demonstrated the importance of centre breaks as opposed to beginning and/or end breaks.

In 1969 we had a call from the Conservative Party asking us to pitch for the 1970 general election marketing campaign. We won, and set about creating exciting creative and media executions in the run-up to the election. I shall never forget having to present to the then shadow cabinet on why they should be advertising in the *News of the World* and not in the *Sunday Express*, where the majority of their existing supporters were. They finally got it and understood that, however down-market the *News of the World* might seem to them, it was full of voters who had never voted for the Conservatives. On the night of the election it was nip-and-tuck all the way, but I remember getting a call at 3am the next day from Norman Berry to say that the Conservatives had won and that Edward Heath would be the new prime minister.

All of this success meant that we had outgrown our existing offices in Marylebone, and we moved to very plush offices next door to Harrods in 1971. Then, early in 1974, one of our largest clients challenged us in relation to our ability to buy as competitively as

Allan in his Davidson, Pierce, Berry and Tuck days – from a BBC documentary film shot in 1969

other traditional media departments in certain major agencies, and that if we didn't deliver the value we had promised them for their forthcoming campaign, they would discount our normal agency commission.

BREAKING THE MOULD

This was the trigger that set me believing that there was clearly an independent media planning and buying opportunity outside the full-service arena. So, in June 1974 I suggested to my colleagues at Davidson Pierce that we could offer out our successful media department to those smaller agencies that couldn't afford or didn't want a media capability of their own, and also to the many creative boutiques that were now in the marketplace and who had no intention of ever having a media department. Sadly, my colleagues considered my ideas to be too radical, and I gave six months' notice of my intention to start an independent media planning and buying company on my own.

In February 1975, I founded The Media Business, a name which best reflected the fact that we were in the business of media; I invited Don Beckett to join me, as he had recently left Lintas (sadly, he was forced to retire a few years later due to ill health). We chose not to use our own names, as this was a relatively new concept of which most traditional clients and their marketing directors would not be aware. At this stage I had little or no money coming out of Davidson Pierce as I hadn't owned any equity – a mistake that I never made again, by the way.

As luck would have it, however, on the day we launched, the *Financial Times* carried their usual page on the advertising industry and featured my departure from my media directorship with one of the UK's hottest full-service advertising agencies to set up one of the country's first truly independent media and buying companies.

I had a dream and I was determined to see it become a reality, not knowing that this could eventually become a worldwide concept. **M&M**





M&M GLOBAL TV

WPP's Sir Martin Sorrell: The whole virtual reality opportunity is colossal

When you have witnessed as many trade and industry shows as WPP chief executive Sir Martin Sorrell, the odd flash of déjà vu is to be expected. So, on a flying visit to Mobile World Congress 2016 (MWC) in Barcelona, he cannot help but smile when referencing reports of mobile operator consolidation in Western Europe and beyond.

"I remember when I came here in the late 1990s to talk to the GSMA about the need to pull operating systems [together], and get one operating system," he says.

"Now we're seeing consolidation taking place, and I guess there will be more consolidation."

With nearly 100,000 people shuffling from hall to hall at Barcelona's Fira Gran Via in search of the latest must-have mobile innovation, and the advertising industry in a state of perpetual flux, the constancy of Sorrell's advice has become

highly prized. Don't believe us? Take it up with *M&M Global's* readers, who last year voted him the most influential individual in international media and marketing.

With this in mind, it felt appropriate to quiz Sorrell on the indisputable top talking point at MWC: virtual reality (VR).

Shiny new VR hardware could be found in every corner of the exhibition, from Samsung's Gear 360 – unveiled by Facebook boss Mark Zuckerberg – to HTC's Vive headset.

The excitement of visiting delegates was palpable, but what is less certain is the extent to which this will disrupt marketing.

"I don't see it as being a disruption; I see it as being an opportunity," argues Sorrell.

"Obviously, if you don't do anything then an opportunity becomes a threat, but I think it opens so many new vistas in terms of travel, sport and entertainment."



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M&M GLOBAL TV

Simplicity is really important: AOL's Tim Armstrong on Verizon's Yahoo deal

So often major industry conferences are dominated by a newcomer: in 2015, Meerkat stole the show at SXSW, while Snapchat dominated conversations in Cannes. In contrast, it was a more established company that had tongues wagging at Dmexco 2016 – to be more precise, the potential coming together of two of the internet's oldest and most famous names.

The man to oversee the newly merged business, if the deal goes ahead, will be AOL's chairman and chief executive Tim Armstrong, who met with *M&M Global* at Dmexco 2016 immediately after a conference session, during which he was interviewed by MediaCom global boss Stephen Allan.

Scale is a clear motivation in the battle for ad dollars, and Armstrong hopes that the combination of AOL and Yahoo will enable it to "play at the large level" of the industry. He believes that the coming

together is a "great partnership for the whole industry", and not just for AOL.

Backed by Verizon, Armstrong also argues that the new entity will be able to bring "unique" data to the market, enhancing the choices for advertisers and publishers: "We bring a lot of mobile data and information, we have a lot of web data and information, and we can do it in a differentiated, more open way."

Moreover, he claims that AOL/Yahoo will offer CMOs a third major opportunity within the digital landscape.

"I like to say that Google is search, Facebook is social, and we're going to be about brand," says Armstrong.

He adds: "Really helping consumers that love content brands, and also helping brand marketers to keep their pricing power, and to keep their connection with consumers up by building brands digitally."



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I like to say that
Google is search,
Facebook is social,
and we're going to
be about brand

Tim Armstrong, AOL



Landmrk's Tom Nield and Unilever's Aline Santos speak to M&M Global's Anna Dobbie (l) and Alex Brownsell (r)

M&M GLOBAL TV

Introducing IBM's Watson Ads:

How can advertisers use AI technology right now?



Earlier this month, The Weather Company began offering US brands the chance to work with its IBM-powered 'cognitive' platform Watson Ads – described by the media owner as a “new frontier in advertising”.

Brands including Campbell Soup Company, GSK and Toyota have been trialling methods to use the Artificial Intelligence (AI) technology, with the former offering recipe suggestions from an ad unit with The Weather Channel app.

Ross Webster, IBM's managing director of international sales for The Weather Company, offered M&M Global a demonstration of the new product, which he says will be available globally in 2017.

Webster also explains that the long-term plan

is for Watson Ads to operate independently of both IBM and The Weather Channel's websites and apps.

“You have an ad unit which, for the first time, can understand what your intent is, what you're after, and can have a conversation with you about the brand it is advertising. Watson can understand and learn,” he says.

“We see the future of Watson very much as a branch of advertising where you can talk to the advertisement in any sort of situation, whether that be OOH, television, online or anywhere you have a digital screen,” he adds.

Advertisers will also benefit from the influx of data from Watson ad units, says Webster, which will help with product development and ad targeting refinement. **MMG**



WATCH IT HERE
Watch the full video at mandmglobal.com

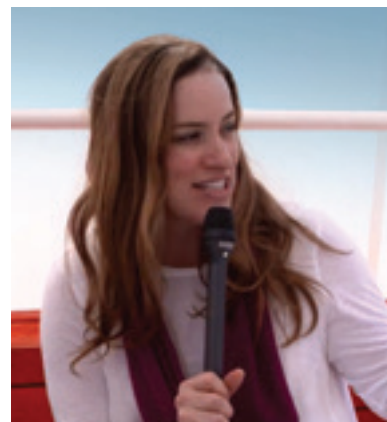
M&M GLOBAL TV

Cannes Lions 2016:

Who takes ownership of marketing creativity in today's data-driven world?



Jerry Buhlmann, Dentsu Aegis Network



Debbie Weinstein, Google

The Cannes Lions advertising festival has long been a celebration of creativity, but the very definition of 'creativity' in marketing is shifting. Tensions exist between the traditional ad agencies and the tech and data companies populating the yachts and beach clubs off the Croisette.

M&M Global spoke to clients, agencies, media owners and technology experts attending last year's Cannes Lions to find out how they believe creativity is changing – and who is responsible for driving that new creative approach.

Our documentary film features contributions from, among others: Aline Santos, executive vice president, global marketing at Unilever; Jerry Buhlmann, global chief executive at Dentsu Aegis Network; and Kathleen Hall, corporate vice president, global advertising and media at Microsoft.



WATCH IT HERE
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We see the future of Watson very much as a branch of advertising where you can talk to the advertisement in any sort of situation

Ross Webster, IBM

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M&M GLOBAL AWARDS 2016



Presenting all the winners from this year's M&M Global Awards, who collected their well-earned prizes during our celebratory event at Grosvenor House in London



The evening was emceed by comedian Alun Cochrane



The M&M Global Awards has long provided a fascinating glimpse into the cutting-edge work being carried out by the international media and marketing industry – and this year was no different.

Our thanks go to chair of the judges Ben Jankowski, senior vice president of global media at MasterCard, and his superb jury of experts. For night-on 12 hours, they pored over dozens of entries to this year's awards, uncovering innovations in all fields, from programmatic buying to virtual reality.

Many of the best entries – including Ariel India's Campaign of the Year-winning 'Removing the Stains of Social Inequality' – managed to combine traditional media with digital invention and a strong social purpose.

Congratulations to all the winners. We hope you enjoy taking a closer look at this year's strongest entries. Thanks to all M&M Global Awards 2016 partners, especially headline partner NBCUniversal, and to euronews, africanews and our judging-day host, Yahoo.



M&M GLOBAL AWARDS 2016

B2B CAMPAIGN OF THE YEAR

Winner Lucy the Robot (Atomic 212 / Double Robotics)

BEST COMMUNICATIONS STRATEGY

Winner Girl Emojis (Starcom / Always)

BEST ENGAGEMENT STRATEGY

Winner Lo Kar Lo Baat (PHD / Active Wheel)

BEST LOCAL EXECUTION OF A GLOBAL BRAND

Winner 100% Kosher Head & Shoulders (MediaCom / Head & Shoulders)

BEST PARTNERSHIP AWARD

Winner Virtually Dead (OMD / HTC Vive)

BEST TARGETED CAMPAIGN

Winner The Force is strong and excellent at targeting campaigns! (OMD / Star Wars: The Force Awakens)

BEST USE OF CONTENT

Winner Removing the Stains of Social Inequality (MediaCom / Ariel)

BEST USE OF SOCIAL MEDIA

Winner VW Trailer Assist (MediaCom / Volkswagen)

BEST USE OF VIDEO

Winner More Than TV – Delivering content in context (Vizeum / BBC Earth)

B2C CAMPAIGN OF THE YEAR

Winner Removing the Stains of Social Inequality (MediaCom / Ariel)



BEST CREATIVE USE OF TECHNOLOGY

Winner Sea Hero Quest (MediaCom / Deutsche Telekom)

BEST INTERNATIONAL GROWTH STRATEGY

Winner Explore Canada (OMD / Destination Canada)

BEST MULTIPLATFORM CAMPAIGN

Winner Removing the Stains of Social Inequality (MediaCom / Ariel)

BEST USE OF AN INFLUENCER

Winner San Andreas (MediaCom / San Andreas)

INNOVATIVE USE OF A PUBLISHING PLATFORM

Winner Trial Blazing – Ambi Pur (MediaCom / Ambi Pur)

THE INTERNATIONAL EFFECTIVENESS AWARD

Winner Removing the Stains of Social Inequality (MediaCom / Ariel)

THE SMART USE OF DATA AWARD

Winner Explore Canada (OMD / Destination Canada)

THE TALENT AWARD

Winner Disrupting the Talent Paradigm (MEC / MEC Global)

MEDIA BRAND OF THE YEAR

Winner Viacom International Media Networks

INTERNATIONAL ADVERTISER OF THE YEAR

Winner Unilever

CAMPAIGN OF THE YEAR

Winner Removing the Stains of Social Inequality (MediaCom / Ariel)

AGENCY OF THE YEAR

Winner MediaCom



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