Challenges of Indian Advertising agencies

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ABSTRACT

The research paper argues that in order to appraise the growth prospects of advertising in India, one needs to develop an understanding of patterns prevailing in the market and the expected focus areas to be targeted by the advertisers. The challenge is to overcome the threat imposed by the dynamic environment and coping up with the changes affecting the overall advertising functionality. In this part-real-part-virtual world, advertising and marketing services in India are trying to marry the age-old traditions of story-telling and brand experience. The key objective of this paper is to evaluate the marketers' strategies to keep on top of the scale of change, ensure their strategies to touch the points where consumers are spending their time.

Keywords: Advertising agencies strategies, online advertising, Indian advertisers, changing consumer dynamics, Advertising Portfolio(AP).

Introduction

Indian advertising is not very old, it witnessed a spurt after the country became independent in 1947. The current environment replete with debate, speculations and risk about how rivalry among the media may be reshaped in the future. The threat to traditional advertising media is posed by the rapid growth of the internet, and it is becoming "more like television"(Wall street Journal). Liberalization opened the floodgates for some of the best names in international advertising, who began to look at India as a serious place for business operations. As of 2004-05, there are 775 accredited advertising agencies in India, besides hundreds of smaller ones looking for accreditation and to be engaged in national advertising. India's economic prosperity and maturity has also helped to shape the world of advertising agencies enabling the latter to reach global standards. It has become serious and big business in India, with its worth being estimated at Rs. 13,200-crore, and one of the consistently growing industries of the world along with oil, automobiles, information technology and agriculture. The growth of this industry in any country is in direct relation to the level of business activity and the health of the economy. In fact, the size of the advertising industry is looked upon as a perfect indicator of the living standard of the people in the particular country and its economic development. In India, the last decade of the 20th century has witnessed a phenomenal growth in advertising business. In 1974, the amount spent in India for advertising was as low as Rs. 75 crore, in 1990 it jumped to Rs. 1504 crores and the growth recorded was 17.1% and improved each year till 1994-95, showing a growth of 49.5% and in 2003, it reached the height of Rs. 15000 crore which indicates the increased relevance of advertising in the Indian economy. This was due to the first major economic boom in the country.

From Table 1, it would be noted that India is sixth on the world list in terms of absolute growth in advertising expense during 2007-10. India's own advertising growth market chart shows that the whole advertising spend was set to boom 8 times from around Rs. 47 billion in 1995 to around Rs.

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367 billion in 2010 including Rs. 36 billion expected to be spent on online advertising.(Lintas media report, 2009).Economic policy changes introduced in 1990s have opened the doors for global competition and a new economic era has begun. Most businesses in our country had to wake up and take serious notice of the emerging changes which were threatening their survival in their otherwise well established markets. The emergence and growth of the new technologies, availability of new media and media vehicles and an increase in middle class income and aspirations have contributed to the phenomenal increase in the level of the advertising and other forms of promotions. The web is now used as a mass market media channel.

Table 1. Top Ten Contributors to global Advertisement Growth during 2007 - 10

Country	Absolute growth (US $ mn)	Growth Percentage
USA	14,182	8.3
CHINA	9,243	61.5
RUSSIA	8248	92.1
UK	4541	19.5
BRAZIL	4520	46.6
INDIA	3163	52.2
JAPAN	2347	5.7
SOUTH KOREA	2095	21.6
SOUTH AFRICA	2070	45.8
PAN ARAB	1987	54.2

Source: Interactive Advertising Bureau (June, 2008)

Objective

The Indian advertising industry has transited exhaustedly for last decade with the continuous adaptations with the market media mix, selecting a concrete media mix and customers' demand/choice are consistently forcing this industry to bring innovative changes to sustain or survive in the competitive world. The purpose of research paper is to explore the challenges faced by the advertising agencies to confront the dynamism developed in the market due to shift in the state-of-the-art living of Indian consumers, global competition, and the digital revolution. The major objective is to identify the key areas where the advertisers have to concentrate completely & for utilizing the media options optimally for fulfilling their desired markets. It also examines strategies adopted by small and big advertising agencies facing challenge for their survival and searching for innovations in new segments and areas.

Research Methodology

This research paper analyzes top rated Indian advertising agencies' revenues, approaches, strategies etc and examines their initiatives/ steps taken for capturing the clientele targeted. Factors are analyzed on the basis of changes and strategies adopted by the small and medium advertising agencies.

Advertising Agencies

Technological advancements in the last decade or so have enabled the common man to consume the media of their choice at their convenience. Blurring of lines between TV, Internet, mobile phones and other devices has increased media fragmentation leading to paradigm shifts within the industry. Agencies are creating, sharing and managing stories and brand experiences in a manner that involves and engages, rather than interrupts or alienates. Almost all Marketing and Advertising agencies in India believe in the concept of 360 degree branding. The services provided by most of these agencies include advertisement for TV, print ads, creating web sites, working on web banners, email marketing, direct marketing, telemarketing, radio promotions, outdoor promotions, tracking retail visibility and communications, designing inputs on packaging, rural communications and PR. It is safe to say that at present a single ad agency provides a host of services from content creation, developing the artwork to radio jingles, to monitor the effectiveness of the advertisements, and even inventing new idioms and language to relate to consumers of all pocket shapes and sizes.

Table 2. Global Holding of Advertising Agencies

Global holding company	The Indian ad agencies	Revenue in Billion $
Omnicom	RK Swamy, BBDO, TWA Anthem, Minor stakes in Mudra	8.62
WPP	JWT, O & M, Contract, RMG David, Bates, Red Cell, Everest, Rediffusion / DY & R	6.76
Interpublic	Lowe, SSC&B, Quadrant, McCann, FCB Ulka	5.86
Publicis	Leo Burnett, Saatchi 7 Saatchi, Ambience D' Archy	4.41
Dentsu	Dentsu communication, dentsu Marcom	2.35
Havas	Euro RSCG	1.88

Source: www.adage.com, 2006

In the current scenario, the top agencies in India are Ogilvy and Mather (Subsidiary of WPP Group), J Walter Thompson India, Mudra Communications Pvt ltd, FCB ULKA Advertising Pvt ltd, Rediffusion- DY R, BBDO Advertising Pvt ltd. The above Table 2 shows the current Indian advertising group holdings of the big players in the Indian market. (Omnicon is leading in India, with 8.62 billion).

Literature Review

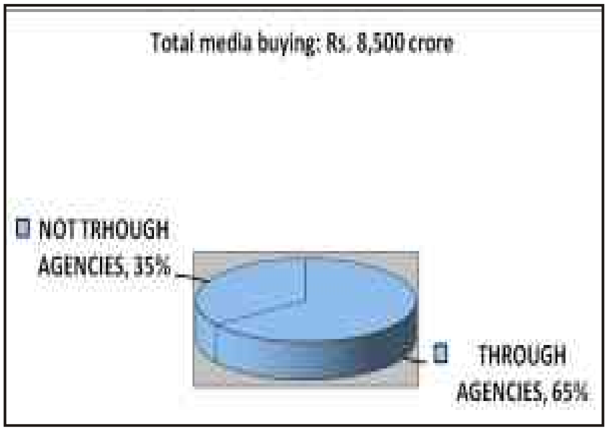
All aspects of planning, the marketing mix and the idea of targeting the consumers arose in 1900's. *Scientific advertising* (Claude Hopkin's , 1920) tried to give marketing and advertising a professional discipline. Marketers and advertisers needed to make the unmeasurable and unmanageable consumers as measurable and controllable assets of the firm. This was attempted through the development of professional organizations, standards of training and the rise of marketing concept.The marketing concept was first articulated after the Second World War by the GE Company. This concept assumed that buyers were rational and chose and preferred those brands that met their wants. This meant that firms should try to identify wants and then try to satisfy them (Dickinson et al, 1986: 18).The concept of synergy is not new for communication researchers and advertising professionals. It is defined as “the interaction of two or more agents or forces so that their combined effect is greater than the sum of their individual effect” (American Heritage College Dictionary, 1997). As a matter of fact, advertisers frequently use multiple communication tools (e.g., advertising, public relations, etc.) or channels (e.g., television, press, the Web, etc.) within a single campaign as the ultimate goal of integrating multiple communication vehicles to create the optimal persuasive effect (Chang & Thorson, 2004). Synergy is the fundamental concept of Integrated Marketing. Synergy is the fundamental concept of Integrated Marketing Communication. It differs from simple repetition in that it is believed to bring in integrated increment rather than just simple addition of different components. As Chang and Thorson (2004) elaborated: “An advertisement is usually viewed more than once. The effect resulting from repeated exposure to the same advertisement is called the repetition effect and is assumed to be the incremental effect of each additional advertising exposure. The effect resulting from exposure to coordinated advertisement is called the synergy effect.” Conventional advertising, predominantly TV-commercials and print ads, still dominate today's advertising market. However, a diversity of new advertising formats emerges. One major “threat” comes from the Internet, as advertising through internet is constantly seen to be on the rise (Janoschka, 2004). As Leong and his colleagues (1998) suggested, “the phenomenal growth of consumers and businesses connected to the Internet indicates a viable audience for advertising and promotional messages for many companies”.

Challenges faced by Indian Advertisers

1. The Indian market matrics

The Indian market matr0ics consist of a combination of organized and unorganized segments. While organized buyers have a chunk of the market, there is still about Rs. 30 billion (Chart 1) or more worth of buying that does not come a media agency's way. Some very big advertisers- like paras, Nirma or Cavin Care- don't use an agency.

Chart 1(a)



a) Competition and Declining Margins

Ten years after media buying started moving out of ad agencies and five years after consolidated buying picked up speed, the real cost of the media has actually fallen over last few years, squeezing their margins. The advertisers offer lower rates to the media buyers so as to capture the maximum market. So, the media agencies have build volumes at the cost of margin.

The highly unorganized nature of both space providers and the digital printers (even though, there exist a few associations), has driven advertisers to a negotiating spree. As a result, there is less and less of organisation, and small players tend to seize a share of the ad budget and provide unprofessional services. The other common issues associated with the booming OOH segment is the clutter it creates in the skyline of urban India and the hazards connected with it.

b) Evolution of new media technologies

There are several 'new media' categories where growth rates are high, like mobile telecom or dotcoms or local newspapers, which deal directly with advertisers. As a result, while the total media buying in India is closer to Rs. 8500 crore, agencies get only 65% of it. It is a large chunk, but constantly splintering and fast becoming unprofitable.

In the digital age, mobile phones and web based advertising are pushing revenues. Advertising on the internet is the most cost-efficient way of reaching customers all over the world including one's own country. Indian advertising agencies need to wake up to the challenges posed by global economic trends and emerging interactive technologies like the Internet. Indian companies need to pay attention to characteristics of the new economy like open standards, digitalization, and volatility, as Internet-based communication offers "tremendous new opportunities for Indian companies via media convergence and re-intermediation." This also requires Indian advertising agencies to pay attention to the importance of online market research, since new media like the internet are bound to affect people's perceptions of advertising. The nature and time path of its evolution is subject to considerable uncertainty arising from issues relating to expansion of the Internet's penetration of households; consumer demand for information; development of pricing policies and measurement capabilities; and its attractiveness to advertisers in different product/ service categories. The analysis of these issues suggest that its long-term impact on intermedia rivalry will be broad and substantial. From Table 3 it would be noted that internet is emerging as an adaptive, hybrid medium with respect to the factors hypothesized to affect intermedia substitutability, namely, audience addressability, audience control, and contractual flexibility.

Table 3. Media mix Expenditures 2007 - 08

Medium	Year 2007 (Rs Crores)	Year 2008 (Rs. Crores)	% Growth
TV	6823	6766	-0.8
Press	8304	8591	3.5
Radio	413	529	28.0
Cinema	167	194	16.0
Outdoor	908	1068	17.0
Internet	150	215	43.0
Total	16,765	17,356	3.5

Source: lintas media report, 2008

c) Expansion in the market regions

Over the years, media buyers have somehow squeezed out all the joy of using a 30 second commercial or a newspaper advertisement. The buying game is as much about reaching out to the people and giving them a compelling reason to remember or to buy a brand, as it is about a great deal. This is a fatal flaw that several agencies are now attempting to fix. Some of the more profitable Indian agencies, like Lodestar Media (a division of FCB ULKA), insist on or have a common balance sheet for media and creative, even though, operationally, they are different. The idea is to invest in tools and research which help the consumer connect better, without the pressure margins, that a separate profit centre involves. Most of these agencies are offshoots of advertising agencies and now they are going down the same path that ad firms went in late 1990s in their quest for growth, when media unbundling happened. The reason why the other countries are cropping up so early in India is because both media and media buying have grown without a pause for over 12 years now. The channels increased from two to two hundreds, from a few newspapers to hundreds fighting for advertisers attention. In last decade, media has quickly shifted from about 50 agencies to the hands of just eight major holding companies. So India has raced through decades of evolution at a breath- taking speed in 12 years. As the industry catches its breath, it is becoming evident that this growth ignored glaring deficiencies in the way the market is built. It is now time to pause and figure out just how and where growth will come from.

d) Advertisers' fight with rate obsession

Consolidation happened because several creative agencies typically handled different brands. So, if HUL has 30 brands, it could have anything between 8- 15 agencies, each doing the creative and media buying for the brands it handled. When there was one newspaper and one TV channel to buy, it did not matter. As the options increased, so did the complexities. Today one needs to choose between 100 channels, several dozen newspapers, half a dozen radio stations, outdoor cinema multiplexes, mobile and other options for advertising. Clearly, buying separately for each brand brings no economies of scale. Agencies have a very little incentive to negotiate or cut cost. So in 1994, HLL (Now HUL) started experimenting by having one agency, Lintas, O & M , for six months each, to do all buying, and that straightway made a difference.

Over the last 8 years, media buying is about rates, rates and rates alone. That was the best way for agencies to show that they are good; that they get better GRPs for the same money, or more efficiencies, the measures of which have been simple and suspect for long. Despite the obvious difference, technically there is no difference the way the media and vegetable are being bought and sold. Most agencies are not fighting on the fact that they offer a better, more impressive way of reaching the consumer, but on rates. It is routine for agencies to take lower rate media and use it either to pitch for a business or to earn brownie points with advertisers.

e) Less Consolidation more fragmentation

There are some differences in the way consolidation of buying happened in India versus mature markets like the US and UK. The biggest one is how fragmented both the Indian consumer and media markets are. In India, there are no conglomerates that sells dozens of dominant brands of newspapers, TV stations, films, radio, and so on. There are very few media owners with some negotiating power; the rest are all small players. Media buying in India is complex because of too many languages and diversity. SAMSUNG is one of the largest ad spenders in India. It has 800 products which include 150 models in IT, TVs, scanners, IT equipments and others. Every year it launches about 150 models in IT, 20 in phones, 50 in audio and video, and about 30 in household appliances. The scale of its business, and of India, means that Samsung spends three times the money it did 3 years back to reach the same audience.

f) Value added services

Now a days, the best way for media agencies and owners to deliver impact is by offering the very things advertisers are looking for-whether it is inside a programme or outside. These could be in-content services. In last few years, non-traditional businesses grew at 100 %, against the 5-6 % growth in its regular media buying and planning business. Madison now gets half its revenues from its non-media units. These include creative, Anugraha (for rural marketing), MRP(for Retail), and PR. Even media owners now try to offer 360 degree services.

2. Innovative market with advanced technologies

While it is true that new medium takes away a chunk of ad budget from other media, the total pull of mass media as a whole is under threat from the new innovative basket of media channels. This is because the adoption rate of the new media is quite fast. Besides gaining numbers very quickly, these non traditional media have emerged as cheaper and more effective options for advertisers. The various non-traditional tools are Internet advertising including rural marketing, search engine advertising, Blogging entertainment etc, Mobile SMS advertising, retail outlets advertising and word of mouth marketing. Internet's rapid acceptance and worldwide spread opened the floodgates for global advertisers. Banner ads promised to deliver eyeballs in large numbers. Viral marketing uses the pace of information flow online to spread communication messages. Pop-up ads that crop up at pre-determined time-intervals, are used to catch the surfers unawares and are very difficult to ignore. Entertainment as a medium began to be experimented through in-film and in-program advertising in movies and television programs respectively. Carefully planted brands in the background, characters mentioning or using a brand and deliberate panning of a prominently placed brand have become a media for attention. Cell phones' mass base quickly caught the attention of advertisers, for text based and visual advertisements. Similarly ATMs are being experimented with to display commercial messages. Consumerism and professional retailing lured more and more shoppers into outlets. Marketers, ever eager to catch customer's eyes, could not resist point of purchase advertising.

With media explosion reverberating all around and increasing competition amongst the brand marketers beginning to be eye-catching, media planners are now opting for the new technological developments available with outdoor advertising, in contrast to the traditional modes with limited options. Currently, the Indian outdoor advertising market contributes 10% of the total advertising expenditure and has been growing at 20% since 2007. 8% of the total advertising spending in India is being done through out-of-home advertising which has grown from 5% in 2003-04. The Indian outdoor media is growing steadily and it was expected to grow to Rs.17,500 million in 2010, with a compounded annual growth rate of 14%. As the efficiency of the print media is waning globally and due to the non-measurable ROI on advertising, the trend is gradually shifting to Out-of-Home advertising, which is becoming increasingly predominant. The assumption that the Internet will become a major advertising medium has been an important factor contributing to the growth of electronic commerce. For numerous fledgling Internet businesses, the prospects of becoming profitable are highly dependent on their ability to generate substantial amounts of revenue from the sale of advertising.

3. Growth of social media and networking

Despite the fact that the Indian online population is not very large, they have latched onto social media pretty early. Social networking sites and blogs are the most popular forms of social media, with a large following from the Indian online audience. Marketers are finding it easier to reach customers through tweets and forums than e-mails. Indian users are in the transition face for accessing the various networking sites and thus it is acting as an attraction for the media partners. Several Indian companies were advertising on Orkut via AdWords, which Google had integrated into Orkut a short while ago. However, rising problems, mainly cultural, forced Google to remove ads from Orkut. Several companies like MTV have sought out the option to run official communities on Orkut. At this time, Orkut does not offer varied advertising options similar to Facebook's sponsored groups, social ads, pages etc.

4. Paradigm shift in rural strategies

This is perhaps the first time that Indian companies have tried to understand the habits of rural consumers, their tastes, preferences & brand consciousness and surprisingly the rural consumers are more adaptive and aspired towards adoption of advanced technologies. The studies have shown a straight jump from no-TV to DTH directly & no-Phone to mobile services from rural consumers. For last one year the rural market has gained strength, companies are developing a network to reach their products to the country's village and small towns in this economic tsunami. A paradigm shift in the policy of rural development has also taken place, with the rural poor treated as resource who form an integral part of the development strategy and not as burden. Indian advertisers are forced to develop strategies for the rural people as to capture maximum they can. The advertisers are highlighting the common or rural people in the advertisement in order to create their image. This is out of the compulsion because the urban market is saturated and also because the opportunity lies in this segment. Currently more than 74% of the total population makes the rural segment. Now, rural consumers are better exposed, better informed, have a greater choice and are in a position to demand the same service as urban consumers. Also, they've become far more discerning in terms of which brand they want to trust right across categories. Before 1995, there were no mobile phones in this country. In 2009, of all the phone users in India, only 9 % use landlines, the rest use mobile phones. In rural areas, they are graduating from no-phone to mobile phones. The case of direct-to-home television is the same, again from no-TV they are skipping cable and going straight to DTH. These examples show that rural consumers are more adaptive in adopting new concepts.

The Indian rural consumer lives in over 600,000 villages across the country and they account for over 70% of the population of the country. For several product categories, rural markets account for well over 60 per cent of the national demand. While the rural consumer is generally seen as less affluent than his urban cousin, things are changing in rural India over the last ten years.

Table 4: Percentage Distribution of Households and Income

Area	Households	Population
Rural	72.6%	74.6%
Urban	27.4%	25.4%
All India	100%	100%

Source: NCAER report

If 50% of your target market is in rural India, and if television delivers only a 26% reach, the marketers' have to think for other media to communicate with the users. The major consumers of products and services are lying in the rural areas and hence the need of the industry to target these people.

Also there is rise in the adoption of the technologies by the rural people. Today there are over 15 million villagers in India who are aware of the Internet and over 300,000 villagers have used it. Ten years back, history was created with Public Call Office phone booths (essentially manually operated payphone facilities), opening in every corner of the country. The Government of India moved a step further in its efforts to strengthen the reach of IT enabled services to the people in the rural areas by setting up 18,000 Common Service Centres (CSCs). These centers are part of the overall plan of the Government to establish one lakh CSCs in 600,000 villages (the Ministry of Communications and IT Report). The rural consumers spend time and money to access higher level information. Studies have indicated that if the content has direct relevance and will result in commercial gains, people in rural areas are willing to pay for information services. Consumerism has altered rural buying behavior in recent years. Spending patterns of those who spend are now adapting to face the technology bug. Today's rural children and youth will grow up in an environment where they have 'information access' to education opportunities, exam results, career counseling, job opportunities, government schemes and services, health and legal advice and services, worldwide news and information, land records, mandi prices, weather forecasts, bank loans, livelihood options

5. Match fit of media mix with customers' expectations

Increased consumer's purchasing power, changing patterns, brand consciousness and easy payment demand more personal attention and professional services for their convenient living pattern. The advertisers have understood that the tastes and preferences of the consumers changes day by day, require prompt service to face cut throat competition. Thus advertisers find out what matches consumer requirement and offer better than competitors'. It is not all about deciding the format but all about serving the consumer better, faster and at less cost. Advertisers certainly need to be innovative in designing the ads, campaigning, interactive media selection, and deciding the media mix to deliver that to the consumer.

6. Advertising associations and laws

The main objective of advertising associations is to identify the common priorities and potential areas of action for advertisers, both local and international, operating in the region. The participants agreed to re-convene on a regular basis in order to build on the cooperation and action developed during this first summit. The issues included self-regulation versus government regulation, appropriate and accurate media measurement and media monopolies, which lead to high media prices. Ad professionals debated the prolific increase in advertising expenditure across the Asia-Pacific, and the region. Ad professionals in Asia were particularly concerned about the increasing trend of introducing legislation to restrict advertising, which in turn leads to stifled innovation and competition and reduced consumer choice. This impacts economic growth, jobs, the press and media and becomes a burden that is ultimately shouldered by the consumer.

WFA called on the advertising and research industries to put transparent and effective systems of audience measurement in place, which would serve as an incentive for greater commercial communications expenditure (Hongkong Meet 2008). Increased diversity was suggested to ensure healthy competition and as a defense against increasing media ownership concentration, which, it was felt, was impacting on media costs and creating significant barriers to real and free competition.

Conclusions

The Indian advertisers are facing a transition phase where the strategies are implemented in order to survive and grow in this competitive market. Literature review shows that there are various phases with dominance of particular media leading the market, and, also advertisers' choice of media is according to the demand of the market. The findings suggest that Indian market is fragmented and competition is enhancing as there is a lack of consolidation due to which the advertisers face rate obsession. This decade is dominant with the new advertising media option and thus the advertisers are focusing on innovation and advanced media tools. There is still a need to conduct research to explore the differences between small and big advertising agencies in India and their competency level.

The paper concludes that the advertising agencies are experimenting with the new media, inculcating the desired changes in strategies, expanding their market horizons and coming forward to reshape the advertising trends. The paper suggests a tool that enables organizations to recognize how they should handle the critical situations and develop required changes in the strategies.

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