

MUMBAI LONDON ADVERTISING FORUM 2011

APA

Advertising Producers Association



THE REPORT

“There was a time when Globalisation meant ‘Americanisation’. Today, it means understanding India and China.”

Pops SV Sridhar

National Creative Director Leo Burnett India
Mumbai London Advertising Forum
November 2011

CONTENTS

Overview	4
The Aims of the Forum	5
About the Forum	6
Local press coverage	8
Understanding the Market	10
The Indian Advertising Market	12
The Forum	14
What did we achieve?	17
Next steps	19
Responses to the Forum	20
Agency Map of Mumbai	22
India's Top 15 Production Companies	23
The Speaker Programme	24
The UK Delegates	25
Forum Programme	26
Event Photos	30

OVERVIEW

The APA is the trade association for UK commercials production companies. That includes commercials production companies, visual effects (post production), editing, music and sound design companies producing commercials.

The objective of the APA is to create the best possible business environment for its members, one in which their expertise has the best opportunity to thrive.

One strategy to fulfil that objective is to increase the market for our members services outside the UK, with a particular focus on growing and/or large markets which UK commercials production have not yet established substantial engagement with.

Our research, as summarised in this report, identified India as such a market.

Building on our events in Tokyo (2004), Shanghai (2007) and Beijing (2009), we organised an event in Mumbai that would bring our members together with the Mumbai advertising world.

THE AIMS OF THE FORUM

- **Enable APA and IPA members to understand the potential of the Indian advertising market and the obstacles to engaging with that market, in order that we can work to overcome them.**
- **Enlighten Indian advertisers, agencies and production companies as to the expertise APA and IPA members offer.**
- **Provide guidance to Indian advertisers, agencies and production companies on how to engage APA members and budgets, to help translate interest into action.**
- **Demonstrate a serious commitment by UK commercials producers to working with the Indian advertising community.**

ABOUT THE FORUM

The Mumbai London Advertising Forum 2011 took place in Mumbai from 7 to 9 November 2011.

The launch was a reception at the Vie Lounge on the Mumbai beach front, hosted by the APA with the British Consulate.

The UK delegates and Indian advertising guests were welcomed by the British Deputy High Commissioner, Peter Beckingham, the UKTI, Senior Trade and Investment Advisor, T R Giridhar and APA Chief Executive, Steve Davies.

Advertising industry guests were joined by Bollywood stars Malaika Arora Khan, Sharman Joshi, Raju Hirani, Vidhu Vinod Chopra, Sohail Khan, Riya Sen and Raima Sen which resulted in it being covered by the Mumbai paparazzi and generating substantial media coverage. Photographs of the event appeared in national newspapers (see the next few pages for some of the press coverage) and in TV news.

That was a pattern of the event, which secured much greater coverage in national press, as well as trade media, in India than we had received for our previous forums.

The launch was followed by two days of presentations in the Blue Frog, a music and arts centre in Bandra, central Mumbai. A total of 20 speakers, 10 of whom were delegates from the UK and 10 of whom were Indian advertising people, produced a feast of learning, which we detail in this report. We were fortunate enough to have speakers of the highest calibre who were prepared to share their insights.

LOCAL PRESS COVERAGE

PRINT

The Times of India Wednesday 9 November 2011

DNA Daily News and Analysis Wednesday 9 November 2011

Hindustan Times HT Wednesday 9 November 2011

MidDay Wednesday 9 November 2011

The Asian Age Wednesday 9 November 2011

The Afternoon Despatch & Courier Saturday 12 November 2011

ONLINE

Little Black Book Friday 11 November 2011

Shots Thursday 10 November 2011

Campaign India 8 & 9 November 2011

TV

Storyboard, CNBC India 12 November 2011

NDTV Saturday 12 November 2011



The Asian Age

Wednesday 9 November 2011

UNDERSTANDING THE MARKET

THE STATS

India population: 1.18 billion, so around one sixth of the world's population is Indian. Projected to overtake China and become the world's most populous country in the next few years.

Indian advertising industry growth in adspend: 10% per annum 2006-2009, 14.1% per annum projected for 2009-14.

The Indian economy is worth US\$1.631 trillion, making it the ninth largest economy in the world.

Source: IMF

Per capita income is low but the Indian middle class is predicted to rise to 580 million people by 2030.

Source: Farrell, D.; Beinhocker, E. Next Big Spenders: India's Middle Class, McKinsey & Company

TV advertising growing at a higher rate than Indian advertising as a whole, with annual growth of 17% being projected for 2012-14.

Network agencies are established in India, with the top twenty ranked by Brand Equity (The Economic Times) as follows:

INDIA'S TOP CREATIVE DIRECTORS

- 1 Piyush Pandey
- 2 Prasson Joshi
- 3 R. Balki
- 4 Bobby Pawar
- 5 Agnelo Dias
- 6 Josy Paul
- 7 Abhijit Avasthi
- 8 Ashish Chakravarty
- 9 Rajiv Rao
- 10 KV Sridhar
- 11 Senthil Kumar
- 12 Sumanto Chattopadhyay
- 13 KS Chakravarthy
- 14 Adrian Miller
- 15 Raj Kurup

Source: Brand Equity, The Economic Times, February 2011

THE INDIAN ADVERTISING MARKET

The potential of the Indian advertising market for UK producers is clear. Strong economic growth, with millions of Indians becoming middle class each year, is providing a strong and growing market for Indian and international brands.

Network and independent agencies that APA members work with in the UK and the rest of the world – such as BBH, Weiden + Kennedy, and BMB – are devoting substantial resources to the Indian market because of the opportunities it already provides, as well as its potential.

Agencies reported an enthusiasm to draw on UK expertise and to have the variety and creative stimulation that working with directors with new perspectives and skills and producers would bring.

Set against this are the three challenges identified by the Indian advertising agencies:

1 Budgets

The average budget is relatively low, to the extent that it would effectively preclude accommodating the cost of engaging an overseas production company.

2 Time frames

Clients often need to get a commercial on air very quickly and find it more practical to do that by working with local production companies.

3 Cultural understanding

There are concerns that the nuances of Indian culture would be difficult for an overseas director to understand, though the extent to which they are seen as an obstacle varies.

It is wrong to identify an Indian view though because Indian agencies views on working with overseas companies vary significantly. Some are working with them now and actively seek overseas production companies. Others are more concerned about the issues referred to above.

The twenty invited speakers were asked to direct their presentations to different aspects of these challenges.

The ten Indian speakers explained the challenges and how we should go about overcoming them, to enable them to draw on the expertise we offer.

Agnello Dias, chairman and co-founder, Taproot India, who is one of India's most respected creatives and was the man behind the Nike Cricket commercial, much referenced by other Indian speakers as a great example of Indian creativity, talked about the Indian School of Thought. Explaining the complexity of Indian culture and behaviour, Dias shared:

“There's a certain sense of aesthetics that appeals to us which is stylized, and it might come across as rather garish to those who don't belong to this country, but this is what we like. Complexity is what makes us stand out in the horde; if we'll be simplified, we'll probably lose our sheen.”

On a similar theme, **Pops SV Sridhar**, National Creative Director, Leo Burnett, said:

“There was a time when Globalisation meant ‘Americanisation’. Today, it means understanding India and China. It's difficult to understand this country even for an Indian, God help a foreigner! You can't communicate to your consumer in this country by just categorising them into different demographics. There are multiple subsets within those demographics and they have to be taken into account as well.”

They also screened what they considered to be the best commercials from India in the past few years, enabling APA delegates to experience the best Indian creativity and learn which commercials worked best in the Indian market.

Subhash Kamath, managing partner, BBH India, identified an area in which he thought London production could add value:

“We started off with category codes in advertising but a large part of that has now turned into category cliches. Perhaps London could add some value to change that sea of sameness across a few categories mired with cliches. The directors can also add value on where the script has to go.”

A reel of these commercials is available at:

www.a-p-a.net/index.php/india

These commercials show the high quality creative advertising that India is producing.

The ten speakers from the APA membership explained how we would address these issues.

That included explaining how we were used to working for a variety of budgets, by showing films at different budget levels, how we draw in talent around the world and how we shoot around the world, seeking out the best and most cost effective location. Also highlighted was the ability of UK production to understand and bring something new to other countries' advertising, not least in China, where UK companies have created successful advertising.

UK visual effects are world leading and the quality of those effects and the ability of the UK visual effects industries to work around the world and deliver those effects was demonstrated.

So too was the quality of UK animation and the variety of media we work in, including 3D projection projects.

The speaker programme is attached – see pages 26-29.

WHAT DID WE ACHIEVE?

1. We learnt about the Indian advertising market.
2. We demonstrated that we had expertise it could benefit from.
3. We started to build the business relationships which are an important foundation of future work in commercials production.
4. We demonstrated a commitment to India.

In terms of learning, we saw what work lies ahead of us to successfully establish a flow of commercials production projects between Mumbai agencies and production companies and London production companies.

To compete beyond the productions with exceptional budgets, we need to be flexible on how we work down to things such as the cost of flights and hotels.

We need to continue to persuade Indian agencies of the value of engaging the UK production company and not just the director, given that it is the production company as a whole that enables the director to fulfil the potential of the script.

We need to demonstrate commitment, in terms of nurturing the business relationships the MLAF2011 gave birth too and on individual productions. Mumbai agencies have to know that the production company and its director will devote time to the pre-production, to arriving to prepare the production and be committed to the editing and post production process, whether done in India or remotely.

We need to demonstrate cultural understanding. That does not mean understanding India as well as the Indians do but to show understanding in two ways. Firstly, seeking to understand Indian advertising. Secondly, understanding and embracing their approach to business. This is characterised by flexibility and fluid decision making, contrasting with western emphasis on clarity and certainty.

NEXT STEPS

- To build on the relationships we started at the MLAF 2011.
- To provide APA members as a whole with knowledge and support for their efforts to understand and market to India, with this report being a step toward that aim.
- To ensure that we demonstrate a commitment to the Indian advertising market by continuing to engage with it through the provision of information, new work and possibly future events.
- That could mean creating another event in Mumbai or, possibly, Delhi; or working with an Indian advertising festival. Two Indian festivals were highlighted as being good opportunities to interact with large numbers of people from the Indian advertising community, Goafest and AdAsia. Goafest is in Goa each April and AdAsia in Delhi in October/November.

RESPONSES TO THE FORUM

“I think it was a wonderful experience sharing things with each other. As India moves forward to becoming a truly global economic power, such collaborations will only help us produce better quality work that can stand up to the best in the world.”

Subhash Kamath Managing Partner of BBH India

“It’s clear that the desire to work with UK companies exists, just as it’s clear that the process will be initially complicated and will require effort on both sides to make it work. But I think the effort will ultimately prove fruitful. There will be a bit of back and forth over the next couple of years, and I suspect a few more quick trips to Mumbai. But ultimately how can you not want to get involved with a massive market that has good creative?”

Tim Katz Managing Director of Knucklehead

“The Mumbai forum was a fascinating insight into a tremendously vibrant and rapidly changing market. The breadth and quality of the creative work was inspiring and we hope to be able to work with many of the great creative talents that we met. Having pitched for a job straight off the back of the trip we know that India is actively looking to collaborate with us, which is exciting for both parties.”

Luke Beauchamp Executive Producer and Partner of Compendium Media

“It’s a great beginning towards a more collaborative way of working. The Indian market is unique and as it opens up to the west there will be great opportunities towards inter-cultural exchange in our business. MLAF has been a brilliant initiative in that direction.”

Ravi Deshpande Chairman and Chief Creative Officer of Contract India

“It was great to see so many representatives of British production talent in Mumbai. We learnt a lot about what the UK has to offer and I hope we enlightened them about the vast potential of India, as well as its complications. It is a good basis for future co-operation between the advertising industries of India and the UK.”

Raj Kurup Founder, Creativeland India

“It was an opportunity to explain how advertising works in India and what we need from production companies from London. The London companies were very interested to see Indian advertising and we all gained a better understanding of what each country can offer, which I think is a good starting point for us to work together more.”

Agnello ‘Aggie’ Dias Chairman & co-founder, TapRoot India

“As a Creative Director in Indian advertising it was wonderful to rub shoulders with, discuss issues and exchange ideas with UKs best directors and producers. I’m sure this will go a long way in UK and India benefitting mutually from each others strengths; giving Directors and Production Houses for the UK better access to the Indian market, and helping Indian agencies upgrade their executional and process skills.”

Rajeev Raja Creative Consultant, DDB India

“This was the first real initiative made by either side of the industry to get closer working relations. In India, and among the Indian agencies, it has always been a matter of concern to work with foreign production companies for several reasons, cost, communication, people, crazy time lines and taxation. The APA London managed to get on board some fantastic people to speak at the forum who were extremely informative. It opened new horizons for new partnerships and representations in both countries.”

Karan Singh JWT India

“At RSA Films we’ve already booked our first job off the back of the APA Indian delegation trip and are now in weekly, if not daily communication with many of the Indian production community, pitching and presenting directors for Indian work. It was an extremely fruitful exercise to visit and meet much of the Indian advertising community and although the budgets and fees will be challenging to begin with, there’s a clear case for investment in relationships with both agencies and production companies.”

Damiano Vukotic Head of Sales & Digital Strategy, RSA

AGENCY MAP OF MUMBAI

Goregaon East

Ogilvy & Mather
Advertising

Andheri

Contract

Khar/Fort

RK Swamy/BBDO

Vile Parle

Rediffusion YR

Parel

McCann Erickson
Leo Burnett
Grey Worldwide
Saatchi & Saatchi
M&C Saatchi

Santa Cruz

Mudra India
BBDO India
DDB Mudra

Lower Parel

JWT
Percept/H
Euro RSCG
Publicis

Worli

DRAFTFCB ULKA
Law & Kenneth

Mumbai Central

Dentsu
Bates141

Nariman Point

Lowe



INDIA'S TOP 15 PRODUCTION COMPANIES

1. **Bang Bang Films**
2. **Chrome**
3. **Corcoise**
4. **Equinox**
5. **Footcandles**
6. **Good Morning Films**
7. **Nirvana Films**
8. **Nomad**
9. **RDP**
10. **Soda Films**
11. **Highlight Films**
12. **QED**
13. **Red Ice**
14. **Rising Sun**
15. **Stratum**

Source: APA research

THE SPEAKER PROGRAMME

INDIAN Speakers

Agnello 'Aggie' Dias Chairman & co-founder, TapRoot India
Pops KV Sridhar National Creative Director, Leo Burnett India
Daniel Sapiano Global Head of Client Services, Prime Focus
Roopak Saluja Co-Founder and Managing Director, Bang Bang Films
Subhash Kamath Managing Partner, BBH India
Rajeev Raja National Creative Director, DDB Mudra Group
Karan Singh Creative Director, JWT
Pat Burns Executive Creative Director, BMB
Amod Khare Adviser, BMR
Neeraj Nayar President India Region, Contagious Magazine
Raj Kurup Founder, Creativeland India

UK Speakers

Steve Davies Chief Executive, Advertising Producers Association
Mark Benson Global Managing Director, MPC
Josh King Senior Producer, MPC
Joce Capper Managing Director, Rushes
Anthony McCaffery Head of Production, Rushes
Simon Gosling Executive Producer, Framestore
Tim Katz Managing Director, Knucklehead
Luke Beauchamp Executive Producer, Compendium Media
Damiano Vukotic Head of Sales & Digital Strategist, RSA Films
Esther Raphael Head of Development, Across the Pond
Penny Verbe Chief Operating Officer, Passion Pictures

THE UK DELEGATES

Steve Davies Chief Executive, Advertising Producers Association
Nicki Masterson Global Director and Marketing, Advertising Producers Association
Lewis More O'Ferrall Chairman, Advertising Producers Association
Tim Katz Managing Director, Knucklehead
Penny Verbe Producer, Passion Pictures
Anthony McCaffery Head of Production, Rushes.
Joce Capper Managing Director, Rushes
Esther Raphael Head of Development, Across the Pond TV.
Damiano Vukotic Head of Sales and Strategy, RSA FILMS.
Jason Underhill Founder, P for Production.
Paul McLoone Founder, P for Production.
Mark Benson Managing Director, MPC
Josh King Senior Producer, MPC
Joce Capper Managing Director, Rushes
Luke Beauchamp Managing Director, Compendium
Matt Cooper Founder, Little Black Book.
Pippa Bhatt Director of Business Development, Crossroads Films
Simon Gosling Executive Producer, Framestore
Spencer Friend Executive Producer, Joyrider Films
Siobhan Murphy Head of Sales and Marketing, Moxie pictures

1000 REGISTRATION Tea/Coffee

1030 Welcome and introduction

Steve Davies, Chief Executive, APA
TR Giridhar (Giri), Senior Trade & Investment Adviser,
UK Trade & Investment

1045 We are like this only

Roopak Saluja, Co-Founder & Managing Director, Bang Bang Films & Jack in the Box Worldwide. Roopak explains Indian work culture and some rather quirky Indian traits that will also give you a taste of the challenges that lie ahead of you in your quest to enter the Indian market. Additionally, get some insight into the internationalization process of the Indian commercials production industry.

1115 What makes India special? An Indian agency perspective

Subhash Kamath, BBH India. Subhash explains why BBH regard India as a key market, and discusses the latest thinking on advertising in India.

1145 BREAK Tea/Coffee

1200 What makes London special?

Tim Katz, MD of Knucklehead. Knucklehead is one of London's top production companies, and Tim will explain the expertise they bring to their work, and how working with talented people from around the world has kept London in the top rank of commercials production centres.

1230 Meet and greet

Each delegate from London will present their company's work to give delegates from India a chance to know more about their directors and expertise.

1300 LUNCH Buffet lunch provided for all delegates and guests.

1400 How advertising in India works

Bobby Pawar, Chief Creative Officer, Mudra Communications. Bobby, as one of India's most successful creative directors, shares his insights into advertising in India, how it is changing and how agencies choose directors and production companies.

1430 The right budget for the idea

Luke Beauchamp, MD Compendium. Compendium specialise in 3D, but Luke will be exploring wider issues, demonstrating that London can handle a great variety of work and budgets.

1500 Experiences of London and India

Karan Singh, HTV, JWT Delhi. Karan will explain his perspective on the potential and challenges for production companies from the UK in working with Indian agencies. Having just returned to a senior role in India, having worked most recently in London, Karan will speak from the perspective of a head of TV with knowledge of both markets.

1530 BREAK Tea/Coffee

1545 India: the steep learning curve

Pat Burns, Executive Creative Director, BMB India
Pat will tell us about how he has negotiated the steep learning curve that confronts a UK creative in transporting his skills to India and the insights he can share from his first year in India.

1600 New media models for India

Damiano Vukotic, Head of Sales and Strategy, RSA Films Esther Raphael, Senior Producer, Across the Pond. Damiano and Esther will look at the most exciting developments in commercials outside the TV commercial, and introduce RSA Films Cannes Lions Grand Prix winning films for Philips.

1630 Tax and Practical Issues

Mahesh Patira, Partner, Mahesh Patira & Co. Mahesh has extensive experience in handling all matters relating to Audits, International and Direct Taxation related issues and will explain the processes that play a very important role in how India and the UK can work together efficiently and effectively.

1700 CLOSE

1000 REGISTRATION Tea/Coffee

1030 Welcome and introduction

Steve Davies, Chief Executive, APA
TR Giridhar (Giri), Senior Trade & Investment Adviser,
UK Trade & Investment

1045 Growing a new agency in India and beyond

Agnello Dias, Chairman & Co-Founder, TapRoot India.
Agnello is considered to be one of the most influential people in Indian advertising, having won much recognition over the course of his career in both India and worldwide, with creative awards including India's first Grand Prix at Cannes in 2007. He will share his insights on Indian advertising and how it has changed.

1115 The very latest in visual effects - Post Production session

Mark Benson, Managing Director, MPC
Josh King, Senior Producer, MPC
Joce Capper, Managing Director, Rushes
Anthony McCaffery, Head of Production, Rushes
Simon Gosling, Executive Producer, Framestore
Top London VFX companies talk about the latest in visual effects and how they are utilising them to produce brilliant commercials.

1215 BREAK Tea/Coffee

1230 India transformed

Pops, KV Sridhar, National Creative Director, Leo Burnett. Pops is one of India's most renowned creative directors. He will explain what he is seeking to achieve for his clients and what he needs from overseas production companies.

1300 LUNCH Buffet lunch provided for all delegates and guests.

1400 It's like that only

Daniel Sapiano, Global Head of Client Services, Primefocus. Daniel shares his insights having just moved from a senior position at Primefocus London to the Mumbai office.

1430 Growing a new agency in India and beyond

Raj Kurup, Creative Land Asia. Creative Land Asia are one of India's fastest growing independent agencies, producing award winning work for clients including Audi. Raj will share his thoughts on what has brought them success and the opportunities and challenges for Indian advertising agencies expanding overseas.

1500 Marketing for People, not Robots:

Less Killer App, More Killer Experience
Neeraj Nayar, Contagious Communications. Neeraj is a President at Contagious and Founder and Chief Creative of The FAB Awards in London and will explain how to create success with the new means of communicating with consumers.

1530 BREAK Tea/Coffee

1545 London animated

Andrew Ruhemann, Producer, Passion. Andrew is the founder of Passion, and an Oscar winner, both as a producer and, in 2011, as director of The Lost Thing (in the Best Animated Short Film category). He'll tell us about the exciting variety of animation styles being used in commercials.

1630 Lessons learned from the Forum

Steve Davies and APA delegates share their thoughts on how to use the knowledge to strengthen working relationships between the UK and India.

1700 CLOSE

EVENT PHOTOS



Clockwise from top left:

Rajeev Raja

National Creative Director, DDB Mudra Group

Raj Kurup

Founder, Creativeland India

Luke Beauchamp

Executive Producer, Compendium Media

Tim Katz

Managing Director, Knucklehead

Penny Verbe

Chief Operating Officer, Passion Pictures

Amod Khare

Adviser, BMR

Agnello 'Aggie' Dias

Chairman & co-founder, TapRoot India

Karan Singh

Creative Director, JWT

The Advertising Producers Association

47 Beak Street
London W1F 9SE
United Kingdom

T 00 44 20 7434 2651
W www.a-p-a.net