

Nutshell



An ISA Publication

Volume 2, July - September 2016



***LEVERAGING
RAILWAY MEDIA
FOR DDH GROWTH***

New
**MAHARAJA
MAC**
The Social Burger



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#ThodaTimeAur
TO PLAN A HOLIDAY.**



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MAHARAJA MAC
WITH
GRILLED
—PATTY—

VEC
MAHARAJA MAC
WITH
**CORN &
CHEESE**
—PATTY—

Images are representational.

From the Chairman's desk

Dear Member,

The Out-Of-Home industry has been evolving rapidly over the last couple of years with digitization at the centre of change. With new technologies and formats now, brands are leveraging OOH better and it is expected that it will find place in the core social and mobile strategy.

Having said that, there is a lot of potential to leverage this medium to its fullest. One such example is the Indian Railways that has captive traffic available and has opportunities and means to interact with this traffic. Our latest issue of Nutshell attempts to understand these opportunities thanks to our editorial partner, E&Y who have been appointed as consultants to RITES (Rail India Technical and Economic Service) for brands to understand and evaluate this rather untapped media vehicle.

Hope you find this useful. Please do send us your feedback on isa.ed@vsnl.net

Regards,



Saugata Gupta
Chairman

How Railway Media can be leveraged for Indian OOH growth

Bharat Rajamani, Ernst & Young

Out-of-home advertising (aka OOH advertising) reaches consumers while they are out of home. OOH advertising is focused on marketing to consumers when they are “on the go” in public places, in transit, waiting (like a railway waiting room), and/or in specific commercial locations (like a retail venue).

Indian Media and Entertainment Industry

Advertising is one of the key activities for businesses and it is broadening its realm on creative as well as investment front. India is one of the fastest growing advertising markets

with an expected growth rate of 16.8 per cent year-on-year. The INR 57,000 crore advertising and media industry (US\$ 8.5 billion) is buoyed by positive industry sentiment and a strong GDP growth of approximately 7 per cent and above.



New product launches, spiralling start-up ecosystem and opportunities in new age media have so far demonstrated an optimistic industry outlook and contributed to the advertising expenditure pie. Despite the recent slowdown due to macroeconomic trends, the industry is showing signs of growth in media investment, balancing cost efficiencies at the same time. FMCG, Auto and E-commerce have been the major spenders in 2015 and the growth trend continues. The industry is observing an exponential growth in digital and mobile form

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of media over others. In fact, India is one of the few markets where traditional media will show stable growth.

The top ten spenders during 2015 were Hindustan Unilever, Amazon, Procter & Gamble, Flipkart, Maruti Suzuki, Mondelez, Godrej Consumer, ITC, Snapdeal and Reckitt Benckiser. Hindustan Unilever was the largest spender, with nearly INR 2,500 crore ad. expenditure.

The table below shows the spending pattern on different media platforms in India -

Media	2011	2012	2013	2014	2015f	2016f
TV	14,000	14,800	16,860	19,400	23,000	27,000
Radio	1,450	1,530	1,650	1,800	2,000	2,200
Newspapers	13,300	13,600	14,250	15,300	16,000	17,000
Magazines	820	820	820	780	675	600
Cinema	210	240	270	340	400	500
Out Of Home	2,100	2,150	2,300	2,500	2,600	2,750
Digital	1,520	1,900	2,500	3,400	5,000	7,300
Media Total (INR cr)	33,400	35,040	38,650	43,520	49,675	57,350

(Source: approximations from Big 4 estimates, GroupM projections)

Media Neutral Planners point out that media selection should complement the brand's target audience and market. It is media agnostic and no matter how much Gung Ho! in the market about new age media, the importance of traditional media cannot be overlooked.

At the same time, as the advertising industry grows, advertisers are looking for fresh, cost efficient and innovative modes of



communication with the brand's target group. The mode of communication has become a critical constituent of the marketing plan due to ever increasing marketing clutter and changing media consumption habits of Indian audience.

OOH

Out-of-home advertising (aka OOH advertising) reaches consumers while they are out of home. OOH advertising is focused on marketing to consumers when they are "on the go" in public places, in transit, waiting (like a railway waiting room), and/or in specific commercial locations (like a retail venue).

OOH advertising formats fall into four broad categories: billboards, street furniture, transit, and alternative. Outdoor provides last mile connectivity with the consumer, thereby creating a strong top of mind recall. OOH medium being a reminder medium adds dynamism to the media plans. It adds significant value considering low cost per contact and high visibility.

It helps register brands in the minds of the consumers. According to industry reports, the OOH industry is going to see a 5.8% growth in 2016.

The table below shows a Year on Year (YOY) % growth of the OOH industry in India



OOH media is growing in terms of brands utilizing this form of media, and coming up with innovative creative to make the



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audience captive of their communication. One of the key industry trends that I foresee as revolutionizing the OOH media planning is the launch of Digital OOH network that is helping increase the advertising revenue.



OOH media is providing new canvases for creativity; city walls, windows, bus stands, taxis, even public toilets seats are becoming places to market products. In order to stand out, more and more creativity and imagination is being poured into designing of outdoor creatives.



OOH advertisement started off at a major disadvantage when compared to traditional

media as well as its relatively new companion – digital marketing, which quickly became synergetic to consumer's life. However, one cannot discount the importance of OOH advertising that plays a major role in offering visibility to residents in its vicinity and also those who pass by. OOH industry is evolving over the last couple of years. Digitisation is changing the industry perception to a great extent. Digital outdoor media is gaining interest and receiving a positive response from the marketing fraternity.



Experiential advertising uses OOH form of communication and interactivity to approach marketing from a different angle. The number of digital screens is expected to increase drastically. OOH plans to become an intelligent form of media, as forward-thinking brands take advantage of developments in internet-connected screens, facial/object recognition and external data feeds.

A convergence of art and science will lead to innovative OOH creatives that self-optimize based on how people react. Dynamic content triggered by data feeds already allows advertisers to change creative real-time based

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on external conditions including CRM data, weather, sports scores, traffic and social media sentiment. OOH industry experts predict that the media will form a core part of social and mobile strategies, and we will see more campaigns with **OOH as a centrepiece**.

Some interesting examples drive this agenda and bring out the relevance of OOH. TV channel **Colors** created an outdoor innovation around couples for the launch of their TV show. Interestingly, not one, not two, but five innovative ideas were executed. One of the innovations was a frame on a stand, where the rim of the frame displays the channel logo and the name of the show, 'Yeh Pyar Na Hoga Kam'. It had been placed at key locations in Mumbai where couples usually hang out, such that it frames these couples sitting arm in arm. In another creative idea, stickers with the show's name and logo were stuck on tetrapod rocks by the seaside at Bandra Bandstand and Marine Drive, which are popular meeting places for couples.



(Source: www.afaqs.com)

TATA Motors recently launched their new car named Tiago with significant amount



of outdoor media usage. The medium has been used in an innovative way that grabs the attention of audience. They advertised in prime areas with novel creatives. The OOH agency put up an actual real-size 3D model of the car on a hoarding in prime location, using sky-tracker high intensity lights to build curiosity from a distance and gave the hoarding an iconic feel. The campaign had two phases with the first phase announcing bookings for the hatchback in key markets, followed by the launch phase in all markets. Traditional outdoor formats, key mall facades and airports were used to enable the consumers to experience the car. On the day of the launch the agency highlighted different features of





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the car through larger than life installations at multiple locations. Some of these include, blinking headlamps of the car, highlighting the car name, emphasis on Messi with Messi's cut-out and a Tiago Zone at one of the busiest junction in Mumbai.

Every brand aims towards driving cost efficiency optimization of marketing spends. Traditional media carry a lot of spill over and wastage because it is not easy to use geo targeting using traditional media. Carrying out this exercise turns out to be an expensive affair and not pocket friendly for brands.



New age media like digital helps in relevant targeting and conveying brand communication at specific platforms. Geo-targeting, contextual targeting and limited spill-overs are some of the key perks that push the traditional media including OOH in taking a backseat.

Some of the key issues faced by OOH media include passive audience engagement, high spill-overs across diverse sets of audience, fleeting audience, limited monitoring mechanisms beyond metros and lower controls of outdoor campaign execution in



tier 2 and tier 3 cities of the country. One of my enriching learning experiences was the outdoor campaign monitoring for Bharatiya Janata Party (BJP) in Lok Sabha Elections, 2014. The party had limited control over the campaign execution in cow belt areas and hinterlands of the country relative to the city level campaigns.

Outdoor industry is facing relatively slower growth in comparison to growth in new age media platforms and measures are being taken to evolve the media using top notch technology, in order to sustain investments in media.

Indian Railways – Growing the Outdoor Industry

“Indian Railways plans to increase its revenue through non-fare sources”, said Railway Minister Suresh Prabhu in his second





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Rail Budget. Railways Budget 2016 showcased a positive development for outdoor industry - the decision of Monetization of Indian Railways Assets.

While introducing the Railway Budget for 2016-17, Prabhu said that the current revenues through non-fare sources are **less than 5%** and it will be increased to world average of 10% by next five years.

Indian Railways has recently appointed EY as an independent consultant to RITES in order to evaluate the advertising potential of different assets like hoardings, walls, pillar-wraps and other innovation driven advertising display at railway stations. EY will identify assets and formulate a pricing strategy for advertising across wide base of 7,000+ railway stations in the country. The plan is to leverage on the vast physical infrastructure for advertising.

Mr. Prabhu mentioned that special focus will be given to explore potential of stations, trains and areas that are 10 kms in vicinity of tracks. Advertising capabilities are evolving and so is Outdoor. The announcement has just come at the right time, and industry onlookers believe that it will revolutionize how Indian Railways will now be seen as new out of home advertising opportunity.

Indian Railways has appointed one central point of contact, **Mr. Ranjan P. Thakur**, as **Executive Director – Non Fare Revenue** to head the monetization project and oversee the non-fare revenue streams.

Indian Railways – Wide Asset Base for potential advertising

Owned by the Government of India and operated through Ministry of Railways, Indian Railways (IR) boasts of one of the world's largest railway networks comprising a track



of 115,000 km (approx.) over a route of 65,808 km and 7000+ stations.

Indian Railways is divided into many zones and categories. The zones are decided based on geographical divisions. IR consists of 16 zones namely Central, Eastern, East Central, East Coast, Northern, North Central, North Eastern, North Frontier, North Western, Southern, South Central, South Eastern, South East Central, South Western, Western and West Central. All the zones represent the culture of that region. Indian Railways carries approximately 23 million passengers across these zones.

Indian Railways – 16 Zones	
1	Central Railways
2	Eastern Railway
3	East Central Railway
4	East Coast Railway
5	Northern Railway
6	North Central Railway
7	North Eastern Railway
8	North Frontier Railway
9	North Western Railway
10	Southern Railway
11	South Central Railway
12	South Eastern Railway
13	South East Central Railway
14	South Western Railway
15	Western Railway
16	West Central Railway



Each zone has different categories of stations. Indian Railways broadly divides categories from A1 to F, based on the annual revenues generated in that station. Category A1 stations are the biggest stations that carry heavy annual footfall and generate highest revenue for Indian Railways. Most of the A1 category stations are located in Tier 1 and Tier 2 cities of the country. C category refers to sub-urban stations that provide connectivity inter-city/inter-district. Category F stations are primarily halt stations and offer limited advertising options.

Advertising on Indian Railways has been bifurcated by the Railways Board into static and mobile assets.

Static Assets refer to the advertising avenues available at Railway stations like **hoardings**,



truss, walls, foot-over-bridges, crossing gates, circulation areas, waiting hall spaces, front gate façade that can be potential avenues of advertising. It is not new for Railways to keep it open to advertisers. However, now the initiative is to focus on the formalization of the process, identification of potential advertising assets and arriving at the right revenue value of the assets.

Many advertisers across categories like Finance Banking, FMCG, Auto, and Consumer Durables are already utilizing limited



Railways Assets on stations. The current monetization opportunity will help the railway stations formalize the process, leverage its infrastructure and sites and thereby ensure a sustainable pipeline of revenue.

Mobile assets at railway stations comprise of asset inventory available in passenger trains and freight trains. External branding includes vinyl wrap, window branding, while, in-train branding includes branding options inside the train, like berth areas, toilet doors, cutlery, windows, floor aisles and seats.

It is interesting to see how brands can leverage on advertising opportunity across

Railways infrastructure and derive benefits of advertising to the captive audience.

In a competitive bid, EY has been appointed to perform an All-India Assessment of the assets for Indian Railways and help them in increasing their advertising revenue.

Effectiveness of Railways Advertising

Advertisers know limitations in the outdoor media industry like lack of reliable data pertaining to eye views at an outdoor site and risk of vandalism of the outdoor assets.



One of the biggest advantages that Indian Railways assets will bring for the OOH industry is measurable data-set of passenger footfalls. Advertisers shall get real-time access of ad-exposure rates and thereby measure the effectiveness using cost per contact.

The unique aspect of this exercise will be the creation of a neutral assessment on the return of investments by advertisers in this medium. Advertisers struggle with the measurability of traditional media. In the case of Railway assets, they will remain comforted as eyeballs, quantity of time spent and segmentation of viewers is highly quantifiable as the Railways maintains ticketing and station footfall data as part of their database.



Another advantage of Railways Advertising is ensured protection of all Railway Assets in and around Railway properties by Railways' police. 100% protection of Railways Assets will bring in credibility for the media and offer assurance to the advertisers in terms of monitoring and structured tracking of campaigns at railway stations.

Besides monitoring, vendor management for Railways advertising space has also been thoughtfully planned and structured in the current scheme of planning. The current plan is to limit the contracting with aggregators, who further deal with vendors and advertisers to lease out advertising assets. The length



of contract period is planned to be designed for 5 years which can be further extended to 2 years based on Railway's discretion. It will

streamline the process of asset allocation and shall be a hassle-free awarding exercise for both Railways as well as the advertisers. The Railways board plans to phase out the existing contracts in place with limited vendors at stations and roll-out a fresh advertising platform that revolutionizes how Railways is projected as a medium to advertise.



Indian railways currently does lease space on select avenues like hoarding spaces, pillars, trusses, platforms areas at Railway Stations. The agenda is to scale up the quantum of exercise and project Indian Railways as new potential advertising avenue.

Railways have started using formats like LED screens, glow balls, glow signs, motion pictures, radio jingles and other innovations. The initiatives like availability of in-train entertainment, availability of Wi-Fi, radio-jingles and GPS are all initiatives planned to be apart of larger scheme of advertising options available for advertisers. Indian Railways is investing and trying to modernize the assets thereby adding value to the everyday passenger as well as advertisers.

Innovative ideas like using attention grabbing creative can be very effective in marketing the brand to a larger audience. Innovations can



change the game of any business. Innovations in the advertising formats and methods can create a revolution in the industry leading to greater profits.

Indian Railways with a vast reach and availability of space is going utilize its assets to reach the people of our country and help brands write great success stories through their innovative advertising strategies.

In a Nutshell

Marketers are becoming aggressive with their marketing tactics to grasp highest share of voice. Advertising on the assets of Indian Railways gives brands advantages like captive audience and measurability of media investment. Brands can utilize Railways Assets



as an extension of OOH and reach out to the relevant audience by conveying the right communication to the right audience.

Psychographic targeting is one of the greatest benefits that Indian Railways can offer since passenger trains are useful and cost effective media in comparison to television. Trains are divided into different Classes, AC and non - AC. The brands can leverage on this segregation and tap relevant audience at the right place.



Another unexplored territory for Railways, **Activations & Events** at station premises and trains can add great value. Brand activations generate consumer interest by allowing consumers to use a product or experience a service. In this way, the brand's value is "activated," or realized by the consumers, who then connect the value given with the brand and walk away with a strong impression. Indian Railways can start with activations at their A1 category stations. Brands can approach passengers in trains when they are commuting, since the audience is captive and have their complete attention unlike TV, where, people can change the channel if they don't want to see the commercial.

Activations at stations can be used for free

distribution of product samples inducing trials of the product. FMCG brands can promote sampling, trials at stations while, telecom companies can set up kiosks at the stations to talk about their services or know what kind of services the customers need from them by conducting a primary research.

Railways as an asset in other countries

Many countries across the world have a well-developed platform of advertising in Railways and rapid transit systems. The system calls for top-notch technology for assets like digital screen displays, 3-D hoardings and digital activations in railway stations as well as trains.

South-east Asia and Europe have well developed city connectivity through rail transit system and have been utilized for advertising since a decade and more.



Dublin

92% of DART (Dublin Area Rapid Transit) and Irish Rail passengers in Dublin notice Outdoor Advertising. The habitual nature and behaviour of passengers as they commute daily allows for rapid build-up of audience reach. Premium Outdoor advertising formats are positioned at DART and Irish Rail stations throughout Ireland.

© Commuter Squares are 8² metres in size offering a significant canvas for advertising and brand messages.

© Commuter Points are 6 sheet poster sites strategically positioned throughout the DART and Irish Rail Network. The format includes both scrolling and static units.

© Commuter Cards are 23cm x 71cm landscape advertising panels are located at head height inside DART & Arrow commuter trains. They present the perfect opportunity to reach a mobile target audience.



Europe

More than 60 percent of Rail Europe's business is generated via online sales – and it's not just selling rail passes. Rail Europe offers a wide range of European travel products including: reservations, airport transfers,



luggage services, excursions, hotel packages and museum passes for Amsterdam, Brussels, London, Madrid, Barcelona, Rome, Florence, Paris, Prague and virtually every city in the UK.

Kuala Lumpur

Kuala Lumpur rail connectivity is also one of the best in the world. The advertising avenues in rail transit are well utilized. In 2016, JobStreet



launched #iCanBeBetter campaign to inform commuters to update their JobStreet profiles for better Job opportunities.



They used the stations and train interiors in Kuala Lumpur for communicating the message to their audience.

Singapore

The Railway infrastructure is very well planned and developed in Singapore with end to end city connectivity. The Railways are used extensively as a platform of brand advertising.



Railway assets for advertising across asset base. Categories across FMCG, consumer durables, baking and Healthcare can be seen on Railway platforms. Many innovative ads can also be seen displayed across Japanese Railways stations.

Some examples of how they utilize their assets can be seen below:



This advertisement for National brand washing machines actually moves and spins the small yellow disks round and round on the Yamanote Line, which coincidentally also performs the same motion, moving passengers in a loop around Tokyo.

Japan

Japanese Railways also extensively uses

Forgot your tissues at home? This train



advertisement has you covered, just take a few that are hanging above your head during your morning commute. The only problem with this 3-D ad is you'll have to pay someone to refill the samples.

Waterloo Station

The Jurassic World exhibit, organized by the previous exclusive rights holder JCDecaux, saw Waterloo station taken over with faux advertising for the fictional dinosaur theme park and a giant metal crate (pictured) surrounded by the film's velociraptors. Ledger credits the campaign for helping Waterloo Station's retail space secure a 13% increase in like-for-like sales between April and the end of June, and a "record level of tweets".



Indian Railways – Evolving for the good

It is interesting to ascertain the advertising potential of Indian Railways as an advertising platform. Indian Railways is the lifeline of the country and one of the largest media resources that can be exploited on a large scale for advertising. The current utilization of Railways Assets is limited and is restricted to hoardings on stations and vinyl wraps for Mobile trains.



The current monetization project will not only scale up the quantity and variety of Assets but also, provide better and advertiser friendly policy guidelines. The project has also covered a lot of traveller surveys, industry expert interviews and opinions to gauge the attractiveness of media for advertising.

Advertising on Railways assets shall boost the growth of Indian Outdoor industry and has the potential to add great value to the advertising-media ecosystem. Railways advertising shall help advertisers monitor and measure the impact of advertising spends justifying return on investments.

Indian Railways - Another feather in the cap!

ABOUT THE AUTHOR



Bharat Rajamani

Executive Director & Solution Leader – Marketing & Advertising Risk Services (MARS) across Asia, South East Asia, Middle East & Africa

Bharat has more than 18 years of experience serving in EY & over 15 years in specializing in MARS reviews covering :

- Marketing spend optimization reviews
- Agency contract compliance reviews
- Agency performance reviews
- Planning & strategy reviews
- Assistance in agency selection
- Creative production reviews
- Promotion reviews
- Digital reviews

His key MARS clients span across categories :

FMCG / FMCD : Hindustan Lever, L'Oreal (India, Korea, Thailand), Reckitt & Benckiser (India & Thailand), Samsung, LG Electronics, Coke (India & Turkey), Cadburys, J&J, GSK, Titan, Tata AoR, Nokia (India, Singapore, Malaysia, Thailand, Cambodia, Hong Kong).

Telecom : Vodafone, Airtel, Idea, MTNL, SriLankan Telecom / Mobitel, Maxis Telecom / Aircel (India & Malaysia).

Automobile : Maruti, Jaguar (China).

Financial Services : Max New York, Bharti AXA, ICICI Bank, Kotak Bank.

Ecommerce : OLX, Flipkart, Quikr.

Government : Bharatiya Janta Party (BJP).

Bharat has :

- Assisted AC Nielsen in validating the controls implemented by them for conducting the National Readership Surveys on behalf of the National Readership Survey Council. He also worked on projects for leading broadcasters across India & US.
- Led projects with BJP for Lok Sabha & all Vidhan Sabha Elections held in 2014 (i.e. Maharashtra, Haryana, J&K, Jharkhand and Delhi elections).

He actively participates on Industry Thought Leadership initiatives conducted by Indian Society of Advertisers on Media Audits, Return on Marketing Investments & Digitization.

He is also a visiting faculty for Marketing in SIES College of Management Studies.

Bharat is a Management Graduate with specialization in Marketing from Symbiosis & holds an Accounting Technician Certificate from Institute of Chartered Accountants of India.



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