Advertising across the BRICS

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The once fundamental distinction between the ‘developed’ and the ‘developing’ nations of the world has been thrown into disarray by the rapid economic growth and social change exhibited over recent decades by Brazil, Russia, India, and China. In spite of their obvious and very considerable differences in geographical attributes, economic base, historical and political formation, and not to mention sociocultural composition, these countries became united in global business discourse under the acronym BRICs, coined by Goldman Sachs (Kowitt, 2009). In 2011, South Africa was invited to join the group, thus making it BRICS (South Africa.info, 2011).

One of the major features of the apparent unity of these diverse countries is the growth of their national markets for consumer goods and services, especially in relation to the rise of an ostensible ‘middle class’ in each case. Such a development implies a key role being played by marketing in general and advertising in particular in the making of BRICS. However, there are great discrepancies between these countries as national markets for advertising, and neither are they all necessarily the fastest-growing. The table shows only China, Brazil and India in the top ten world markets as of 2016, while the global media-buying agency ZenithOptimedia predicts that in 2018, China and Brazil only will be in the top ten, India having been outpaced by Indonesia. However, in terms of growth, as distinct from absolute size, both India and Russia make the top ten contributors to growth predicted over the 2015-2018 period, but no mention is

made of South Africa (ZenithOptimedia, 2016). This suggests that the boundary between the BRICS and the 'Next 11' countries designated by Goldman Sachs, such as Indonesia, will become ever more blurred, with South Africa remaining at the margin (Global Sherpa, 2011). Indeed, one of WPP's major international agency networks, Ogilvy & Mather Worldwide, went so far as to declare in 2016 that BRIC had 'outlived its usefulness' and identified twelve 'velocity' markets, which still included Brazil, India and China, but not Russia or South Africa (Campaign Brief Asia, 2016).

The advertising 'industry' is understood here as an intricate and variable set of institutional relations between advertisers and the media, with advertising agencies as key intermediaries. These relations can be conceived of as a 'manufacturing-marketing-media complex' (Sinclair, 2012, p.1), which underwrites media communication systems and forms a cultural as well as economic nexus between production and consumption. Accordingly, this chapter identifies who are the advertisers which the agencies are serving in each of the BRICS countries examined, having special regard to their national, regional or global provenance, and also their field of service or production – retail, consumer goods, etc. Similarly, publicly available information is presented on the top ten largest advertising agencies in each of the nations studied, and their local and global connections. For each country, the distribution of advertising expenditure across the different media is also noted, having regard, in particular, to the degree to which television is able to defend its historical pre-eminence against the mounting challenge of internet advertising.

Largest advertising markets worldwide in 2016 (in billions of $US)

US	179
China	53
Japan	34
UK	26
Germany	22
France	12
Brazil	12
Canada	11
Australia	11
India	9

Source: Statista, 2016

China

Of all the markets outside of the English-speaking world, China is by far the most spectacular in its size and growth. As the above table shows, China is second only to the United States in advertising expenditure, and ahead of Japan in Asia, and the UK, Germany and France in Europe. In terms of the advertising agency landscape, the Japanese marketing conglomerate Dentsu was the first foreign agency to be admitted, but not until 1979, in China's initial phase of market 'liberalisation'. It was closely followed by McCann Erickson from the US, then other Western agencies, such as J Walter Thompson, which arrived in the 1980s, with a further influx

in the early 1990s. These set up offices not only in Beijing, but also Shanghai and Guangzhou, representing the three major markets in which their newly-arrived clients were becoming active, largely global advertisers like Procter & Gamble and General Motors. In accordance with government regulation of foreign ownership at the time, the agencies' offices were either outposts of their base in Hong Kong, or joint ventures with Chinese partners (Wang, 2000). This restriction was lifted in January, 2006, thus clearing the way for foreign agencies to buy out their joint venture partners. However, the list of leading agencies in China is still characterised by several joint ventures, notable amongst which are Shanghai Leo Burnett, Saatchi & Saatchi Great Wall, Beijing Dentsu, and Shanghai Advertising (partner to both Ogilvy & Mather and Hakuhodo). Foreign managers argue that apart from the fact that their joint venture partners are in a comfortable position with no incentive to sell, the partners are valuable in providing 'local connections' to clients they would not attract otherwise, and furthermore, are 'a huge help in getting things done in China', presumably a reference to the partners' role as intermediaries in an alien culture and political system (Trombly, 2006). On the other hand, while the global groups like WPP, Publicis, Omnicom and Interpublic are amongst the greatest revenue earners, so are the Japanese-based groups Dentsu-Aegis and Hakuhodo, not to overlook Chinese marketing communication companies such as Bluefocus, GDAD, Charm and BAC (Adbrands, 2016b).

Looking at the biggest corporate spenders on advertising in China, it is no surprise to find some of the major global advertisers dominating the list, such as Procter & Gamble, L'Oreal, Unilever, and Coca-Cola, but there are also substantial Chinese corporations, namely Jiangzhong Pharmaceutical, Dali Foods Group, and healthdrinks company Hangzhou Wahaha, in the top ten (Adbrands, 2016b). Notably, while all of these advertisers are manufacturers of 'FMCG' (fast-

moving consumer goods), broadly understood, the Chinese companies are marketing products such as traditional medicines which are more intrinsically ‘Chinese’ than the global behemoths.

Even for Chinese brands, there are formidable natural barriers against building a national market. For one thing, the sheer physical size of its territory and population are a challenge just for the logistics of distribution of goods and services, let alone for advertising them. Then, from a demographic and sociological point of view, there is extreme internal differentiation within China as a consumer market: there is no ‘Chinese market’ as such. For all the hype about the emergent ‘middle class’, there are in fact vast socioeconomic and regional gaps between, say, the urban elites and the peasants of the remote provinces, so marketing has to seek to differentiate itself accordingly. One study puts the ‘upper middle class’, one of the world’s largest markets for luxury goods, at around one per cent of the population (‘China takes luxury lead’, 2011). This is manifestly more upper than middle. In her *Brand New China*, Jing Wang cites research that suggests that if a realistic definition is applied, the ‘middle class’ amounts to around five per cent of the population (2008, pp.189-192). The meaning of the term, it should be noted, is highly variable, and studies of ‘middle class’ growth tend to emphasise its potential rather than its actuality (Kharas, 2010).

The mass of Chinese consumers outside of Beijing and the coastal metropolises have not been acculturated into seeing products as brands (Doctoroff, 2005), and have been found to have a stubbornly pre-modern inclination to buy goods on the basis of their price and reliability, or other pragmatic values such as safety (Wang, 2008), rather than the kind of brand image imparted by Western-style advertising. Yet this is not just a question of the relative susceptibility of rural and

urban dwellers to advertising images and appeals, but of income distribution and purchasing power, which in turn limits their actual consumption and experience of brands. In response, global marketers such as Procter & Gamble have been developing 'brand extensions', cheaper versions of their advertised brands, so as to give consumers an affordable product with which they may experience and come to recognise the brand ('P&G adapts in emerging markets', 2011). Urban youth, on the other hand, the most media-aware and brand-conscious segment of the population, might know and want advertised global brands, but in line with their income, instead purchase cheaper local substitutes, or the counterfeit versions of global brands for which China is notorious (Saywell, 2000). Given the size, distribution and demographics of the population, marketers have had to extend their operations from the metropolises where they began into the industrial and provincial cities, and the global advertising agencies have been obliged to follow in their support (Hargrave-Silk, 2004; Sinclair, 2008).

Looking at the advertising media, television in China is highly decentralised, with thousands of channels ranged over local to national levels, so advertising campaigns on a national basis do not necessarily reach a national audience. Nevertheless, in terms of the distribution of advertising revenue, television is dominated by the nationally-networked, state-owned China Central Television (CCTV), which along with provincial competitors, notably Hunan Satellite TV, ensures that 'Television continues to play a dominant role in terms of coverage and influence despite lowering market share' (GroupM, 2016a). Indeed, at least until 2015, television was the principal advertising medium: by 2016, ahead of the global trend, more than half advertising revenue was going to the internet, leaving television with a 36% share (GroupM, 2016b).

So, notwithstanding the high penetration of television, it needs to be appreciated just how massive the internet is in China. More than half of the population is on line, making it the largest national internet market in the world (Internet World Stats, 2016b&c), albeit a carefully controlled one. The Chinese are provided with equivalent versions of all the popular internet services known in the West –Youku instead of YouTube, for instance, though there are some Western services - and most users have mobile access (Klassen, 2010). Also, there are platforms which don't correspond to Western ones. Given its penetration, the internet has become the most attractive medium for advertising, with mobile internet growing twice as fast as total internet expenditure (GroupM, 2016a).

The huge and rapid take-up of mobile phones is just one of several points of comparison that can be made about China and India (Jeffrey and Sen, 2015). Indeed, the term 'Chindia' became current in the mid-2000s to bracket off these two Asian members of BRICS. At the most obvious level, China and India have in common their billion-plus populations, and thriving economies which have been opened up in recent decades to foreign investment, and otherwise liberalised to produce growing consumer markets after decades of heavy-handed state control. In accordance with their high economic growth in general, advertising expenditure is also strong: Publicis' global media-buying agency ZenithOptimedia predicts that China will outrank the US as the world's largest contributor to advertising expenditure growth in the period 2015 to 2018, with India following up in fifth position (ZenithOptimedia, 2016).

India

India's history of contact with Western consumer capitalist modernity dates from an initial involvement beginning between the World Wars, followed by a period of disengagement. This was initiated by the Foreign Exchange Restriction Act of 1974, which affected advertisers and agencies alike. Notably, Coca-Cola left the country entirely, while J Walter Thompson, which had arrived in 1929, survived by forming a joint venture, Hindustan Thompson. It was not until the large-scale economic liberalisation of the 1990s that the international agency networks were encouraged to enter India (Mazzarella, 2003). Even after liberalisation, the joint venture model continued to be favoured in advertising, not because it was mandated, but as was seen in the case of China, because it was strategic for the foreign agencies seeking local market knowledge, and reciprocally, for the local agencies to gain access to the global clients that the agencies brought with them.

Although Indian agencies have their own creative traditions, the advertising industry exhibits the typical pattern of domination by the global holding groups, either with their own fully-owned offices or mainly, as in China, via joint ventures with Indian agencies, mostly dating from the 1970s and 1980s. Of the global groups' connections, WPP has the strongest presence with its Ogilvy & Mather, JWT Hindustan Thompson, DY&R Rediffusion and Trikaya Grey agencies. Omnicom has two joint venture agencies, one with Mudra (DDB) and the other with RK Swamy (BBDO). Interpublic is represented by McCann-Erickson and a joint venture known as FCB-Ulka, while Publicis has Chaitra Leo Burnett. As of 2015, the only agency in the top ten with no global affiliation was the Kolkata-based Pressamn Advertising and Marketing Ltd (Top 10

Companies in India, 2015). Similarly, on the media-buying side of the business in particular, the global groups dominate (Adbrands, 2016c).

Liberalisation across various economic sectors allowed global consumer corporations access to the Indian market (including the return of Coca-Cola), so that after more than two decades of liberalisation, they figure prominently in the tally of largest advertisers. The top ten contains three of the biggest European and two US-based global corporations in FMCG; and one Asian-based consumer electronics corporation; but there is also the strong presence of Indian corporations. These are Aditya Birla Group, a diversified conglomerate, prominent in mobile telecommunications; ITC (formerly Imperial Tobacco Company of India) with a wide range of FMCG and unrelated brands; Tata Group, an Indian-based industrial conglomerate in the process of becoming global (owners of Jaguar); and motorcycle manufacturer HeroMotocorp (Adbrands, 2016c).

At least three points of comparison can be made between the Indian and the Chinese top ten advertiser lists: namely, the massive dominance of the world's very biggest global advertisers; but the presence nonetheless of significant national corporations; and the incidence of both global and local companies in the FMCG categories. These points can be taken as an indication of the incipient stage of development of consumer capitalism in both countries; the adaptation of large national companies to the modes of marketing introduced by the global advertisers and their agencies; and the instrumental role played by those modes in the process.

As far as advertising media are concerned, India's experience of liberalisation took television from a restrictive government monopoly to a cornucopia of channels which continues to pose a challenge to print's former dominance as an advertising medium. The size of the television market is now second only in the world to China (KPMG-FICCI, 2016, p. 31). The most profitable channels to emerge are entertainment channels in Hindi, including many pay channels. Notable amongst these are Star Plus, one of 21st Century Fox's greatest international successes, and Indian-owned Zee TV, both of which have entered into programmatic geotargeting of advertising. As of 2015, television was taking nearly 47% of total advertising expenditure, as against newspapers' 30% share (GroupM, 2016b). About half of the money going to television was from FMCG companies, as one would expect from the largest advertisers list (KPMG-FICCI, 2016, p. 41).

On the internet, which attracted 13% of advertising revenue in 2015, telecommunications, banking, financial services and retail have been the most-advertised categories (GroupM, 2016b). While the penetration rate, at 36.5% of the population, is well behind China's 52.3% (Internet World Stats, 2016b), in both countries there is rapid growth being propelled by take-up of mobile telephony, as distinct from home computer ownership, for internet access. In India, mobile phone access accounts for 60% of the total internet user base (KPMG-FICCI, 2016, p. 2). Mobile phone use, while still rudimentary for many users, extends astonishingly far into the mass of the population beyond the middle class, so, as telecommunications infrastructure expands and smartphones become more accessible, mobile internet access is greatly enlarging the market and broadening the categories for internet advertising in the immediate future.

Brazil

Whereas both China and India long resisted the embrace of consumer capitalist modernity, with controls on foreign investment and requirements to ensure national sovereignty over agencies, the foundations of advertising in Brazil were laid by US-based agencies that entered in the initial 'imperial phase' of advertising's global expansion between the World Wars (Mattelart, 1991), and the first Brazilian agencies developed very much under their tutelage (Woodard, 2002). However, after World War II Brazilian advertising assumed its own character, and began to enjoy the international reputation for creativity which it has earned for itself (O'Barr, 2008). This development occurred in association with the emergence of TV Globo as the pre-eminent national television network (Sinclair and Straubhaar, 2013).

With regard to current advertising agencies, Adbrands, the same industry source as cited above for China and India, which has ranked agencies in all these countries according to their 2014 billings, indicates that of the top-ranked ten agencies, the global groups have five wholly-owned subsidiaries, and five are global-Brazilian partnerships. The groups are predominantly US-based (Omnicom and Interpublic each have two partnerships), but the British WPP is well-represented via three of its own global agency networks. The French Publicis has both a subsidiary and a 'Tailor Made' partner agency, while Havas has a subsidiary. The mix illustrates the various phases of the internationalization of the industry in Latin America, from the 'imperial' phase, up until the present global era, when we find that some of the most acclaimed Brazilian creative agencies of recent decades, notably Almap and Africa, have been incorporated into the one global group, Omnicom (Adbrands, 2016a).

Looking at the top ten advertisers in Brazil for 2014, and comparing them to the Chinese and Indian lists, the only common advertiser is Unilever, the Anglo-Dutch FMCG conglomerate, which is perennially at the top of the world's biggest advertisers. Unilever has been either the second, or more often, the largest advertiser in Brazil at least since 1996, and also has a history of dominance in China and India (Sinclair, 2012). The British-based Reckitt Benckiser, also a leading global advertiser of many FMCG brands, appears on both the Brazilian and Indian top ten. Beyond that, the Brazilian list is striking for the presence of state-owned enterprises (two banks, and the fraught petroleum company Petrobras); for the Brazilian retail corporation that heads the list, Via Varejo; for Brazil's own pharmaceutical and FMCG corporation, Hypermarcas; and for Ambev, the Brazilian partner in the world's biggest brewing company, ABInBev. This was formed in 2008 in a truly global merger under the former Interbrew of Belgium, which brought Brazil's AmBev together with the US brewer Anheuser-Busch (Reuters, 2016). Completing the top ten are two multinational companies from elsewhere in the Iberoamerican world, namely the Mexico-based pharmaceutical company Genomma Labs, and Spain's Telefónica, advertising Vivo, its Brazilian mobile service. So, if we count AmBev as Brazilian, there are six Brazilian advertisers in the top ten, and four multinational (Adbrands, 2016a).

The distribution of advertising expenditure across the various media shows that television has continued to hold close to its historical share of around 60%, and although internet advertising has expanded rapidly, it was still taking less than 8%, according to Brazilian data for 2014, (Meio and Mensagem, 2015). Indeed, in spite of growth in both household broadband and smartphone access, and an internet penetration rate of 67.5% (Internet World Stats, 2016a),

television is still expected to be attracting three times the revenue of internet advertising in 2018 (PricewaterhouseCooper, 2014). This situation sets Brazil in stark contrast to China and India, where in both cases internet penetration is lower, but the share of expenditure is higher. Commercial television is much more deeply entrenched in Brazil, and TV Globo, the dominant network, is favoured by government regulation, such that, historically at least, it has been able to garner an estimated 70% of television advertising revenue (Sinclair, 2009).

Brazil's ongoing economic and political crises demonstrate that growth in the BRICS nations is neither constant nor uneventful, and furthermore, that such crises have their impact on the much-vaunted middle class. While one estimate implausibly put the Brazilian middle class at over half the population in the decade 2004-2015, unemployment and real wage decline have since caused drastic downward mobility for millions (International Business Times, 2016).

Russia

Russia is by no means the only, but certainly the largest, of the national markets formerly inaccessible behind the 'Iron Curtain' that have since proved very attractive to the manufacturing/marketing/media complex of the 'West'. By the end of the first decade of Russia's post-Soviet existence, the leading advertising agencies were all members of the global groups: Young & Rubicam and Grey (WPP); BBDO, DDB and TBWA (Omnicom); D'Arcy, Leo Burnett and Saatchi & Saatchi (Publicis); and McCann Erickson (Interpublic). Dentsu set up a subsidiary in 2008 (Sinclair, 2012, p. 127).

Of all the BRICS countries, Russia is the most subject to the domination of global FMCG corporations, an ironic realisation of the worst fears of the 1970s critics of 'cultural imperialism'. The biggest spenders on advertising in Russia, according to 2014 data from Adbrands, were predominantly US and European-based global marketers such as Procter & Gamble, PepsiCo, Unilever, L'Oreal and Nestlé, but some Russian advertisers figured: OTCPharm, a pharmaceutical company, and significantly, two of Russia's largest telecommunications providers, MTS and Beeline (Adbrands, 2016d). It is evident that nearly all of the global advertisers are in one branch or other of FMCG, and historically, FMCG advertisers have tended to prefer television as their advertising medium. However, as in the other markets, digital advertising is growing rapidly, so that as of 2015, television was attracting 43% of total advertising expenditure, closely followed by digital at 35%, once again with growth in the latter being driven by the rapid expansion of mobile telephony (GroupM, 2016b).

South Africa

To offer a brief comparative perspective on South Africa, its estimated total expenditure on advertising in 2016 was $2.68 US billion, as against Russia's $4.55 US billion (Adbrands, 2016 d&e). Four of the ten largest advertisers were supermarket chains, and three were in banking, finance and insurance, all South African companies. The only wholly global advertiser was the ubiquitous Unilever, the remainder of the top ten being a subsidiary of Vodaphone; and the global brewing conglomerate of South African origin, SAB Miller, which is roughly comparable to Brazil's relation to ABInBev (Adbrands, 2016d). Television still attracts about half of all advertising revenue, and in spite of rapid growth in digital, and especially mobile advertising, as elsewhere, total digital is expected to reach only 11% by 2019 (PricewaterhouseCooper, 2015).

In this respect, the BRICS nations are not quite in step with global trends. Based on current rates of growth, ZenithOptimedia calculates that internet advertising, particularly driven by mobile, will be attracting 38% of all global advertising expenditure by 2018, thus overtaking television as the world's largest advertising medium. However, we have seen that in the BRICS nations, with the significant exception of China, although there certainly is this same rapid growth in mobile-driven internet advertising, television retains its supremacy. As the agency concedes, 'television is the pre-eminent brand awareness channel [which] will remain the principal display medium for many years to come.' (ZenithOptimedia, 2016)

Discussion

When one looks across all the top advertiser lists, the most striking feature is how each one of these nations manifests both the impact of globalisation, and at the same time, its own specific national realities in political economy and culture. In Brazil, the national banks and state-owned petroleum institution Petrobras feature along with large privately-owned Brazilian corporations. In Russia's case, while there is a preponderance of global FMCG advertisers, there are nevertheless Russian corporations that have arisen in the post-Soviet era. In India, two of its largest private conglomerates appear on its list, while the biggest Chinese advertisers include pharmaceutical companies which, amongst other things, make and market traditional medicines. Notably, there is at least one telecommunications corporation amongst the top ten in most of the BRICS nations, indicative of the globalisation of communication infrastructure which is giving support to their economic transformation in general and that of advertising in particular.

Such an observation, that a nation's largest advertisers reflects its particular economic and cultural character, would not be surprising nor even worth remarking upon, but that the discourse of globalisation (both pro and anti), like that of cultural imperialism before it, has created the impression that the influence of global corporations is a total and direct rather than a partial and complexly-mediated phenomenon. Certainly, as we have seen time and again, the advertising industry itself is predominantly globalised, though often via mutually-beneficial joint ventures between the global networks and nationally-based agencies, and there are certain advertisers, notably the free-spending FMCG marketers Unilever and Procter & Gamble, that appear on most top ten lists, but none of the lists consulted here is totally global. On the contrary, what the lists bring to light is the specific identities of the national and regional corporations which are the participants in, and beneficiaries of, the drive towards capitalist modernity. Thus, it becomes apparent how the manufacturing/marketing/media complex operates across global, regional and national, and arguably also, sub-national levels. There is little evidence of 'global' campaigns, however: not at least amongst this diverse group of national markets (Sinclair and Wilken, 2009).

Finally, as to the targeted consumers of all this advertising, there may indeed be an emergent 'middle class' in the BRICS countries, understood in the broadest sense, but the rhetoric of neoliberal modernity conceals its precarity and the huge gap which still prevails between the privileged classes' access to new consumption possibilities, and that of the vast mass of the people. While the former might be ready and willing to value and to consume the same branded goods as in the West, the latter have much less spending power, and like the Chinese consumers mentioned earlier, value price and reliability, but have no predisposition to admire and desire brands for their own sake. In this context, advertising, and all the other dimensions of marketing

which underlie it, assumes the task of ‘teaching’ prospective consumers to acquire the modern orientation towards branded goods: advertising agencies thus cast themselves as the pedagogues of consumer citizenship in the global era. This is a role in which the global advertising agency networks have decades of experience, and we have seen how they dominate the business in the BRICS nations. As one early advocate earnestly enthused:

> In what is called its pioneering phase, advertising’s function is not to rob sales from competitors, or gull the unsophisticated, but to teach new consumption behaviour. Western European/North American-style advertising has demonstrated itself as an enormously effective teacher of new ways of living (Stridsberg, 1974, p. 77).

While it is an open empirical question as to what advertising actually does teach, and how effectively, it is at the very least arguable that audiences for advertising in these settings are shown how to place themselves as subjects addressed by advertisements, how to make the associations amongst the meanings which advertising seeks to bestow upon goods, and even how to interpret the unfamiliar visual language of TVCs (Wang, 2003), all part of the repertoire of cultural competencies required for consumer citizenship. In this respect, the advertising industry and marketing in general play a key role in the making of a middle class in these developing nations, thus bringing their societies into the ambit of the global manufacturing/marketing/media complex, the prime agents of capitalist modernity.

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