

# Elevating your Digital Marketing Strategy with AI



Insights from India's top advertising  
and industry leaders

# Table of contents

---

1	What's at stake?	3
2	Evolution of programmatic advertising	4
3	When media worlds collide: The audience takes centre stage	6
4	The advertiser's quest: Greater agility and cross-channel measurement capabilities	8
5	Beyond the walls: Valuing the open internet's scale and reach	10
6	The driving forces of modern programmatic	12
7	Recommendations from advertising leaders	14
8	About The Trade Desk	15

## Research methodology

Our research involved in-depth, semi-structured interviews with eight advertising leaders in India discussing various facets of programmatic advertising and its trajectory. The interviews took place in late 2023 and 2024.

### Expert Outlook

**Anil Pandit**

EVP and Head of Programmatic, Data, and Tech  
**Publicis Media**

**Arvind B Sainath**

Head of Marketing Effectiveness and Media/Digital Planning  
**Diageo**

**Om Jha**

Head of Media Strategies and Partnerships  
**PepsiCo**

**Paras Mehta**

Business Head of Programmatic Solution  
**Matterkind**

**Prabhvir Sahmey**

Senior Director  
**Samsung Ads**

**Rahul Marwaha**

Vice President of Digital  
**EssenceMediacom**

**Sairam Ranganathan**

Chief Digital Officer  
**Wavemaker**

**Shashidhar Sharma**

Head of Programmatic  
**Group M**

# Executive summary

Today's world is all about instant connections, and people expect nothing less – even when it comes to the ads they see. Given that digital content is sprawling across multiple platforms, reaching the right people with ads that are relevant to them has become increasingly complex.

## Why this report matters

This report sheds light on the current state of online advertising in India and provides guidance for brands that want to lead the pack with an advertising strategy that places consumers at the heart of their media strategies.

The insights shared in this report are curated by some of India's top advertising leaders. Their collective wisdom and foresight can offer valuable recommendations for succeeding in a market where competition is fierce, privacy is key, and technology sets the pace.

## Two primary approaches are discussed in this report:

### Conventional programmatic

- Media-centric approach
- Also known as programmatic guaranteed (PG)

Advertisers begin by selecting the media outlet (publisher) or social media platform they want to advertise in. In this arrangement, advertisers negotiate directly with media owners, reaching an upfront agreement on a fixed price for a specific number of ad impressions on the selected platform.

### Modern programmatic

- Audience-centric approach
- Also known as open-market bidding or decisioned media buying

Advertisers first define the target audience for their ads. Ads are then bought in real time through an automated, open-market bidding process. This approach can help advertisers to decide in real time which ad spots to buy, and at what price, to reach their target audience across the open internet.

### Key findings

- Media fragmentation can fuel growth for audience-centric advertising.
- Many advertisers are seeking greater agility and cross-channel measurement capabilities.
- Scale of the open internet prioritised over convenience of walled gardens.

### Recommendations from advertising leaders

- Set clear goals, KPIs, and realistic timelines to evaluate your programmatic and data strategy.
- Train teams to unlock the full potential of your chosen programmatic platform.
- Create a playbook of dos and don'ts for audience-led programmatic that fits your goals.
- Foster a mindset shift by assigning internal champions to lead adoption.

# The evolution of programmatic advertising

India's advertisers are all too familiar with manual insertion order (IO), where ad prices are negotiated directly with media owners – whether on news sites, social media platforms, or streaming services. The IO approach typically lumps diverse audiences together, assuming that those who consume the same content are similar, missing out on the nuances that make each user unique.

A transformation has been unfolding since the early 2010s. Programmatic advertising emerged and flipped the script on conventional methods by marrying data and automation.

Digital advertising has transitioned from relying on guesswork to making data-informed decisions that power the delivery of more relevant ad impressions. This shift has boosted efficiency in the ad industry like never before.

PG has since set the tone for ad agreements, where direct deals take place between advertisers and media owners, including social platforms. But this 'media-first' approach, which was effective when consumer attention was limited to a few content platforms, is now struggling to keep pace with today's dynamic media landscape.

## A new dawn in programmatic advertising



Present-day India is a behemoth of digital engagement where users are spending half of their digital media time enjoying premium content across the open internet.<sup>1</sup> This includes a diverse array of online media properties – spanning news, blogs, gaming, music, and over-the-top (OTT)/connected TV (CTV) platforms. It's on the open internet, where programmatic advertising is undergoing metamorphosis once again.

Each user, a world apart in their media consumption, preferences, and habits, deserves a brand encounter that's as unique as they are. The audience-first programmatic approach replaces conventional media-first targeting in favour of personalisation. By harnessing AI and advanced data sources to help unpack user lifestyles and preferences, advertisers can sculpt campaigns that resonate with individuals, not just crowds.

Today, India's media-buying practices have evolved from manual guesswork based on IO to predominantly PG-heavy strategies. However, many advertising leaders are convinced that the audience-led programmatic approach is a significant advancement in data-driven advertising. They are urging brands to pivot. Now is the time to reshape long-established norms and sharpen the focus on the audience so brand stories can effectively reach the right people.

<sup>1</sup> The Trade Desk and Kantar, *Gateway to the Open Internet: India edition*, 2023.

# Media fragmentation can fuel growth for audience-centric advertising

New media channels have created a complex patchwork of digital platforms. How will brands convey their messages effectively? Experts in advertising point us to audience-led programmatic advertising.

Consumers are spreading their time across the vast open internet, with a preference for premium content on ad-supported streaming platforms. The idea of a single platform being the go-to source for reaching your audience is rapidly fading. In India, people spend over half of their online time beyond search and social media networks. Today, we switch between watching our favourite shows on our smartphones or CTV, listening to music, and battling it out in online games.

While our habits have forever changed, advertising budgets have not caught up. Only 15% of India's advertising spend is funnelled into the open internet, indicating a significant untapped opportunity for brands looking to connect with audiences where they spend their time.

## Embracing the opportunity in fragmentation

With today's incredible diversity of content, sticking to PG – the conventional way of securing ad spots upfront with select media outlets or social media platforms – is no longer sufficient.


And the media landscape isn't getting any less complex. The smart move is to embrace change and do it quickly.

With audience-led programmatic advertising, brands can turn fragmentation into opportunities for connection, conversation, and conversion.



**Anil Pandit**

EVP, Head of Programmatic, Data, and Tech  
Publicis Media


If you're looking to layer multiple attributes, the best strategy is private marketplaces and open market. Unlike PG, they provide the control needed for precise targeting. The open market also helps you maximise outcomes when you have to achieve multiple KPIs. 

### Real-world scenario

A consumer packaged goods brand promoting their new energy drink can employ an audience-led targeting approach to enhance ad relevance to reach sports enthusiasts who will most likely convert:

- Targeting users ages 25 to 44, working professionals, and residents of select cities
- Identifying frequent gym goers and users of fitness apps
- Reaching purchasers of fitness equipment and health beverages
- Engaging consumers who bought other energy drinks
- Leveraging first-party data through lookalike modelling to reach audiences resembling their current customers



Given the heavily fragmented nature of India's media ecosystem, programmatic advertising is essential to reaching audiences effectively. 

**Om Jha**  
Head of Media Strategies and Partnerships  
PepsiCo

## The taste of success: PepsiCo reaches 12M in audience-led cross-platform campaign

As one of the biggest players in India's food and beverage scene, PepsiCo is always looking for fresh ways to attract new customers.

For its Slice fruit drinks campaign, PepsiCo recognised the need for a fresh approach to make a significant impact. This involved working with their agency, Publicis Media India, to move beyond traditional linear TV advertising.. to a more targeted strategy, reaching audiences where they actively engage.

To achieve this, PepsiCo harnessed its valuable first-party data and leveraged third-party data segments on The Trade Desk to create a custom audience segment. Specifically, they targeted

cord-cutters ages 18 to 34 who actively consume OTT content.

By adopting this audience-centric strategy and combining it with The Trade Desk's cross-device targeting solution, PepsiCo was able to extend its reach across the various devices that consumers use, while optimising ad frequency for maximum impact.

100%

of reach goal achieved

12M+

unique viewers

13%

media efficiency

81%

view rate

# Many advertisers are seeking greater agility and cross-channel measurement capabilities

The programmatic landscape is adapting to advertiser calls for greater agility and the ability to measure ads across channels. These demands reflect the need for a more open and accountable advertising ecosystem.

Making sense of disparate ad metrics has long been a complicated task. Since tech giants and media companies each have their own way of tracking ad performance, it's hard for advertisers to compare how their ads are performing across different platforms.

Now, advertising leaders are speaking out on the importance of having a panoramic view of ad performance across all the channels they invest in. Modern programmatic, an advancement from the conventional PG approach, empowers brands to assess and compare ad performance across different channels on the open internet such as news/websites, music streaming, OTT/CTV, and online gaming. In this way, advertisers can allocate budgets in a more effective manner for optimal outcomes.



When it comes to PG, assessing ad performance is akin to students grading their own homework. I'd much prefer the objectivity of the open internet. The independence and transparency that come from external verification give credence to our success. »

**Arvind B Sainath**  
Head of Marketing Effectiveness  
and Media/Digital Planning  
Diageo

---

But it's not just cross-channel measurement capabilities that advertisers want – they want it in real time. With audience-led programmatic advertising, advertisers possess the agility to swiftly adjust campaigns almost instantly by leveraging real-time data-driven insights derived from how their target audience is responding to the ads. This eliminates the need for brands to wait until the campaign has ended to gather insights on campaign performance.

This newfound agility means being able to kick off or pause campaigns, adjust your spend, swap out ad creatives in a heartbeat, and finesse your messaging – all while a campaign is ongoing.

With this agility comes the ability to look forward. By collecting insights on how audiences are interacting with your ads, you can plan your future strategy with confidence. This means making smarter, faster, data-driven decisions in brand-safe environments that can pay off in the long run.

As India increasingly wakes up to the potential of modern programmatic strategies, advertising leaders expect brands to back away from fixed-price deals made ahead of time in favour of a real-time, audience-led approach – where they can dynamically bid for ad spots based on how valuable they think it is to reach their target audience.



Programmatic advertising has changed the way brands orchestrate their presence across display, video, mobile, and social media. This multi-channel approach ensures a cohesive brand experience that reflects the diverse preferences of the Indian consumer. »

**Shashidhar Sharma**  
Head of Programmatic  
Group M



# Scale of the open internet prioritised over convenience of walled gardens

Advertisers are starting to step out of their comfort zones, shifting their focus from the convenience of traditional advertising environments, like search and social media, to the fast-growing open internet. This modern approach to programmatic advertising is set to redefine media strategies.

Audience-led programmatic advertising expands access to online inventory that is beyond the reach of walled gardens. Large-scale campaigns that once took enormous effort to coordinate can now be rolled out rapidly.

A striking 600 million consumers in India are spending their time surfing the vast expanse of the open internet. That's 62 million more than those who prefer to stay in the cosy corners of walled gardens like search and social media.<sup>2</sup>

While some advertisers find comfort in the convenience of the PG approach, where ad deals are set in stone well ahead of time, there's a fresh wave of understanding that brands don't have to choose between the predictability of walled gardens and the potential scale and reach that await in the open internet.

## The open internet versus walled gardens

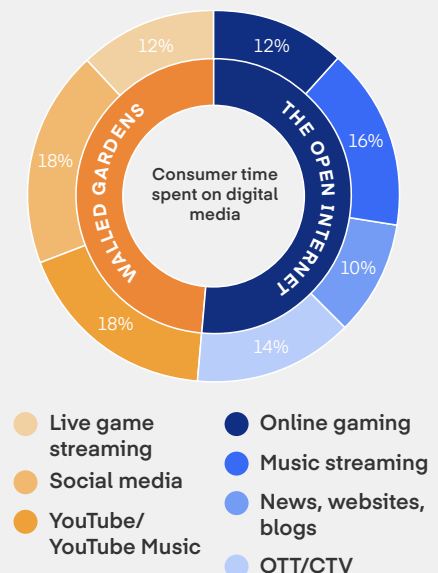
### The open internet

The open internet is not controlled by any individual, business, or government body. It refers to online media properties (websites, platforms, and apps) across gaming, news, blogs, music, and OTT/CTV.

### Walled gardens

Walled gardens are closed ecosystems that are controlled by a few tech giants. They own the content and media and have full control of the technology used to target, place, and measure ads. These include Google, YouTube, Facebook, Instagram, etc.

52% of consumer time is spent on the open internet



<sup>2</sup>The Trade Desk and Kantar, *Gateway to the Open Internet*.

Savvy advertisers are already moving away from conventional direct programmatic deals toward modern programmatic advertising, where they have the freedom to tap in to the much larger and more diverse ad inventory that the open internet offers.

By leveraging every data point to determine the value of each ad impression, advertisers are ultimately purchasing only those impressions that reach their target audience. In doing so, brands can achieve more effective business outcomes through better precision and targeting.



Programmatic advertising has transformed the way we launch large-scale campaigns. It allows us to connect with a vast audience rapidly, bypassing the slower, traditional publisher-by-publisher approach.

**Prabhvir Sahmey**  
Senior Director  
Samsung Ads

### Premium content on the open internet builds better credibility and trust



Brands advertising on OTT/CTV are

**33%**

more likely to **be perceived as premium** compared to video ads on walled gardens.



Consumers are also

**17%**

more likely to **purchase products advertised on news/websites** compared to ads on social media.

# The driving forces of modern programmatic

Projections indicate that global programmatic ad spend will likely reach \$919 billion by 2027,<sup>3</sup> and 84% of this spend will be transacted programmatically.<sup>4</sup> Notably, India's programmatic ad spend share grew 72% in the past five years (2019 to 2023) and is expected to encompass 44% of all digital ad spend in the country by the end of 2024.<sup>5</sup>

As the winds of change sweep across India's programmatic landscape, advertising leaders predict three key drivers for the rapid adoption of audience-led programmatic advertising.

## 1 New and premium inventory to spur programmatic momentum

Advertising leaders are increasingly excited as new media types, such as CTV, digital out-of-home, and retail media, integrate into the programmatic landscape. Anticipation is also mounting for the inclusion of highly sought-after premium inventory, such as live sports and digital billboards, within the programmatic realm. This new ad inventory can create a broader spectrum of programmatic options for advertisers, providing them with unmatched accuracy in connecting with diverse audiences.

## 2 Quality data: The cornerstone of modern programmatic advertising

Success in programmatic hinges on quality data. As we transition into an era of consent-based marketing, advertising leaders emphasise the pivotal role of data in unlocking the full potential of programmatic advertising.

Today, advertisers have a treasure trove of data at their disposal – from leveraging their very own first-party data to utilising top-quality data marketplaces. By harnessing these resources, brands can discover new potential customers and reconnect with existing ones in more meaningful ways, which can ultimately help boost media ROI.



Access to comprehensive data sources allows us to effectively engage with our audience through compelling messages. Audience-led programmatic excels in this regard as it enables collaboration with diverse data partners. »

**Om Jha**  
Head of Media Strategies and Partnerships  
PepsiCo

<sup>3</sup> eMarketer.

<sup>4</sup> Statista, 'Advertising – Digital Ad Spending Share (Non-) Programmatic.'

<sup>5</sup> Statista, 'Distribution of Programmatic and Direct Media Spending in the Digital Advertising Industry in India from 2016 to 2022,' 2024.

### 3 AI advancements to catalyse programmatic innovation

The integration of AI into ad tech has granted advertisers insights and capabilities once unimaginable. Brands that embrace these advancements will gain a competitive edge, benefiting from agility and deeper analytical acumen. Whether it's through real-time bidding precision, dynamic ad creation, or predictive analytics for audience behaviours, the relentless progress of AI promises a continuous stream of new innovations that will only entice more brands to pivot towards audience-led programmatic advertising.

## AI's applications in media buying



### Target with more precision

AI goes beyond basic segmentation and refines ad targeting by analysing demographics, shopping habits, and online activities. This leads to more tailored campaigns with improved chances of reaching the intended audience.



### Real-time campaign optimisation


Real-time analytics powered by AI allow advertisers to track, adjust, and optimise campaigns while they are live. Forget waiting for the campaign to end to see what worked.



### Strategic media decisions

AI lends foresight by offering predictions backed by solid data. It helps advertisers to pinpoint market gaps, distribute media budgets, and predict media outcomes, which can ultimately help boost cost-efficiency.



Seamless automation in modern programmatic revolutionises once-manual tasks. Embracing automation is key to the future. 

**Paras Mehta**  
Business Head of Programmatic Solution  
Matterkind

# Recommendations from advertising leaders

With the proper mindset, strategy, and technology, advertisers can harness audience-led programmatic advertising for more efficient, wide-reaching, and targeted campaigns. Here's advice from industry experts on how you can embark on your journey to modern programmatic advertising.



## Define your objectives

Clearly outline your goals, KPIs, and realistic timelines for assessing the performance of audience-led programmatic strategies.



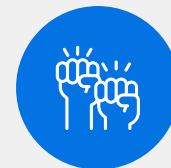
## Upskill digital teams

Training team members is essential to harness the full potential of your chosen audience-led programmatic advertising platform.



## Create a custom playbook

Develop a playbook with the dos and don'ts of data-led programmatic advertising, shaped by your specific objectives, to garner further advocacy and adoption across your organisation.



## Cultivate advocacy

Identify internal champions to nurture belief in the benefits of audience-led programmatic advertising to spearhead adoption.



Under pressure to demonstrate media ROI, many agencies and brands are adopting audience-led programmatic for enhanced ad efficacy. »

**Meeta Gupta**  
Lead Associate Account Director  
The Trade Desk



## About The Trade Desk

Delivering highly personalised ads on a grand scale is no easy feat – it demands cutting-edge technology that’s both powerful and user friendly. The Trade Desk is the world’s largest independent media-buying platform, processing 15 million ad impressions every second. Brands can use AI-driven data insights on our platform to help them figure out which ads to buy and at what price.

By providing access to a robust data marketplace, third-party measurement tools, and a selection of premium inventory, The Trade Desk is empowering the world’s leading brands to engage with their target audiences with more relevant ads across the open internet.

We are unbiased. We do not own or operate any media, so you can be assured that your ad budget goes where it would make the biggest impact – no hidden agendas, just results.

With The Trade Desk, navigating the complexities of digital advertising has never been this intuitive, transparent, and efficient.

Curious to learn more? Contact us at [info@thetradedesk.com](mailto:info@thetradedesk.com).