

Brand Building in uncertain times

24th Feb 2021



On this Webinar....



KANTAR

Pablo Gomez
Chief Digital Officer
Insights Division
KANTAR



KANTAR

Irene Joshi
Regional Creative Head
APAC
KANTAR

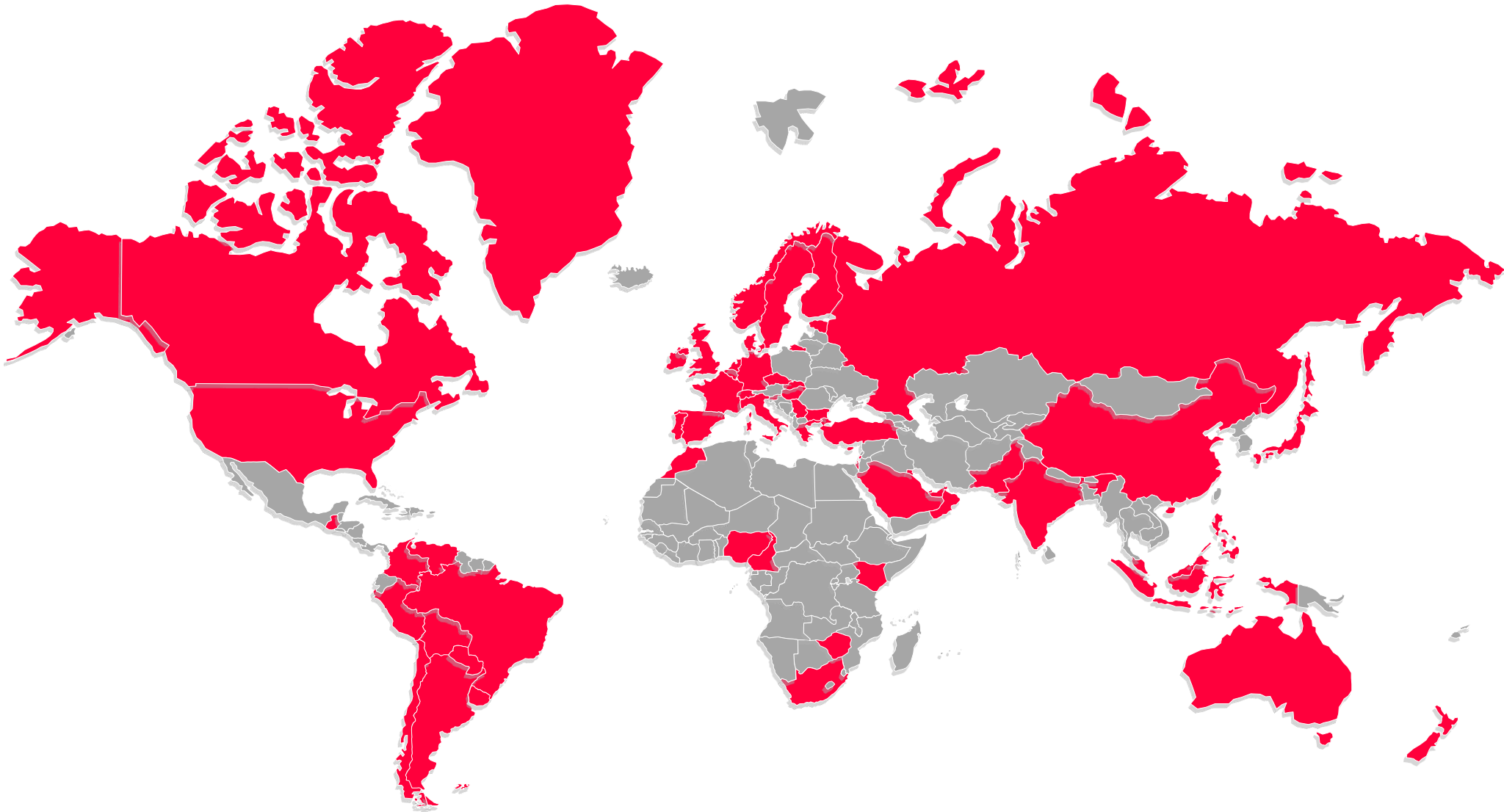


Ranji David
Director - Asia
Marketing Services
WFA



Joel Gan
Manager - Asia
Events
WFA

Putting the **World** into the **WFA**...



A Global fraternity of 125 Brands



Our Purpose?

- Capitalizing on the collective intelligence and resource of our network.



- Safeguarding & championing our members' ability to market their products and services.



Global Marketer Week 2021

Taking place remotely from **20 to 22 April**, the event will offer unparalleled insight and thought leadership into how marketers can be a positive force for change as the world looks to build back from the pandemic.

Meeting for breakfast in the Americas, lunch in EMEA and dinner in Singapore, the event will feature outstanding content and virtual member-only networking opportunities.



April 20-22
wfanet.org/GMW

Agenda

Day 1	BETTER SOCIETY	Raja Rajamannar, Mastercard Jane Wakely, Mars Inc. Marc Pritchard, P&G
Day 2	BETTER WORLD	Conny Braams, Unilever Gail Gallie, Project Everyone Rupen Desai, Dole
Day 3	BETTER GROWTH	Andrew Wu, LVMH Mark Ritson Cheryl Goh, Grab Chatri Sityodtong, ONE Championship



Confirmed speakers include:



Conny Braams
Chief Digital & Marketing Officer, Unilever



Marc Pritchard
Chief Brand Officer, Procter & Gamble



Tom Fishburne
Founder, Marketoonist



Rupen Desai
Global Chief Marketing Officer, Dole



Raja Rajamannar
Chief Marketing & Communications Officer, Mastercard



Gail Gallie
Co-founder, Project Everyone



Cheryl Goh
Group VP Marketing, Grab



Jane Wakely
Lead CMO, Mars Inc.



Mark Ritson
Brand consultant, Marketing Week columnist



Andrew Wu
Group President, Greater China, LVMH



Chatri Sityodtong
Founder, Chairman & CEO, ONE Championship

Tickets and registration

Non-member tickets normally cost €300. However...

... **WFA Members can attend all sessions COMPLETELY FREE OF CHARGE**



Sign-up and find out more at:
www.wfanet.org

Brand building in uncertain times with KANTAR

24th Feb 2021



A top-down photograph of four hands stacked in a circle on a dark wooden surface. The hands are arranged in two pairs, with the top pair overlapping the bottom pair. The person on the left wears a black leather watch with a silver buckle. The person on the right wears a silver bracelet with several round, textured beads. All four hands have light-colored nail polish. The background is a dark, vertically-grained wooden plank surface.

KANTAR

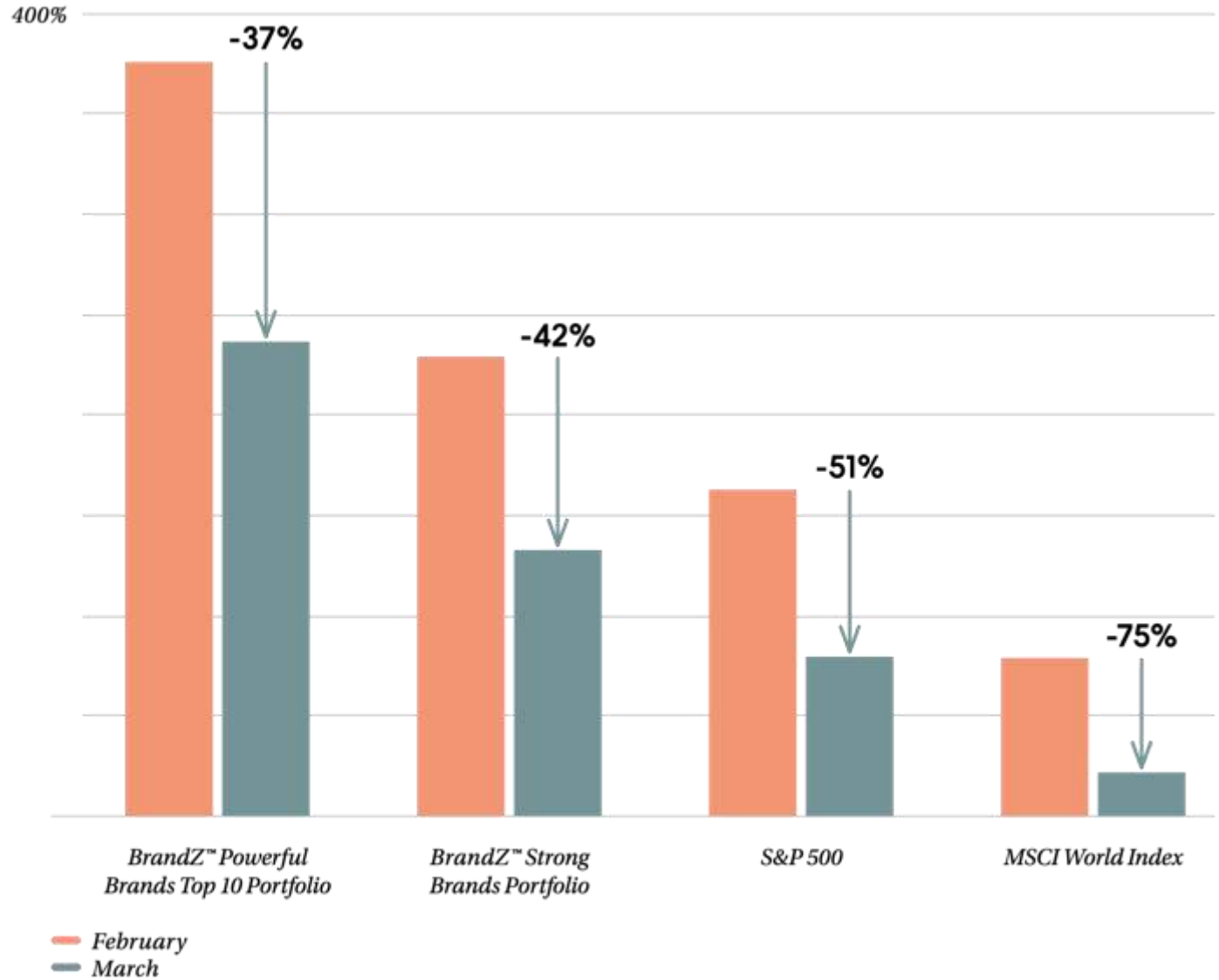
Building brands in uncertain times

Media and Creative Insights
2021

Strong brands deliver superior shareholder returns even in tough times.

During the five weeks from Feb 14th- March 20th, 2020: S&P 500 dropped 51%, MSCI World Index dropped 75%

BrandZ Strong Brands Portfolio dipped 42% and BrandZ Power Portfolio dipped only 37%.

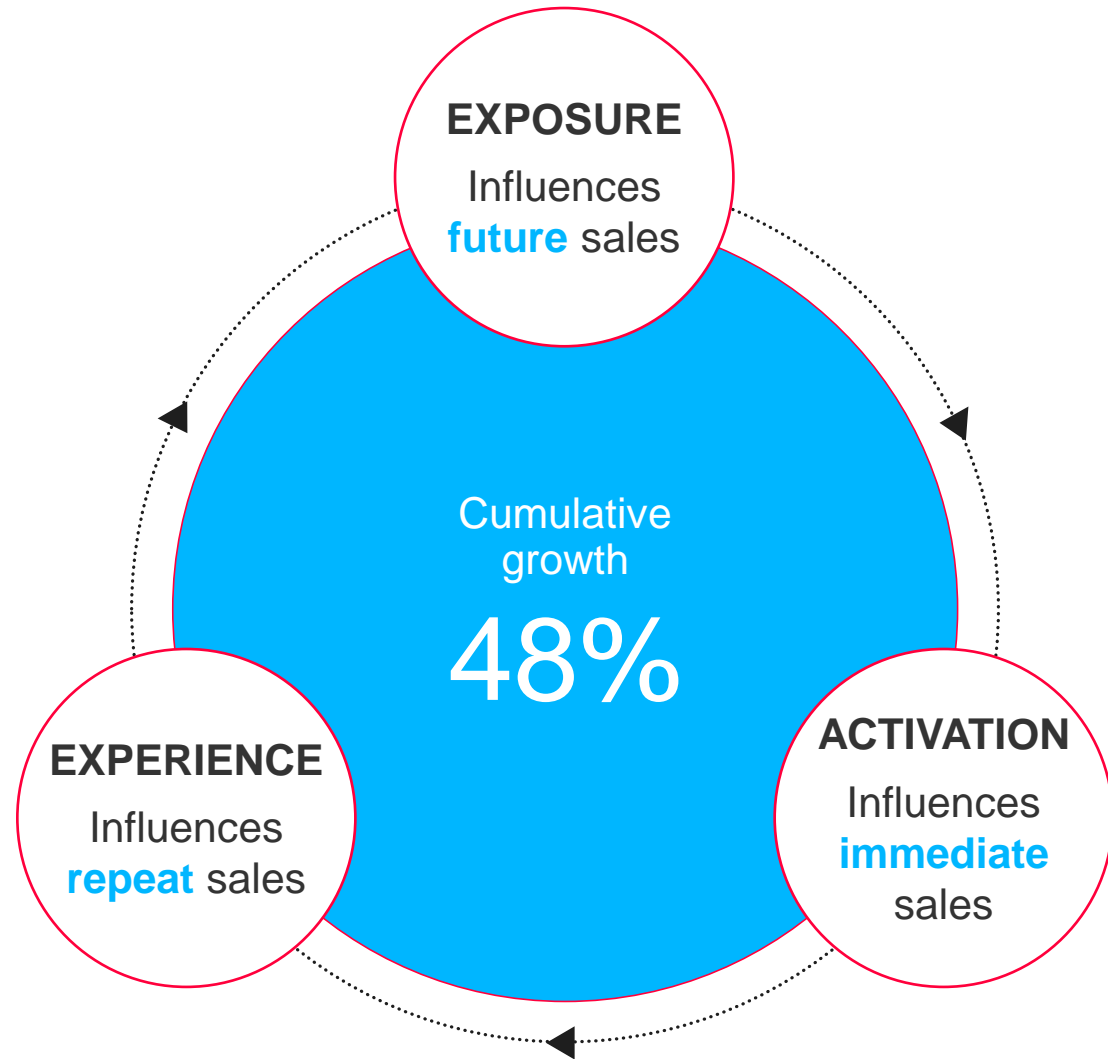


The BrandZ™ Powerful Brands Top 10 Portfolio is made up of Top 100 brands with the highest scores in Power, a BrandZ™ metric of brand equity, the predisposition to select one brand over another. The BrandZ™ Strong Brands Portfolio is made up of Top 100 Brands with the highest scores in Brand Contribution, a BrandZ™ metric of how much brand alone predisposes consumers to choose a brand and pay a premium for it.

Source: BrandZ™ / Kantar (including data from Bloomberg)

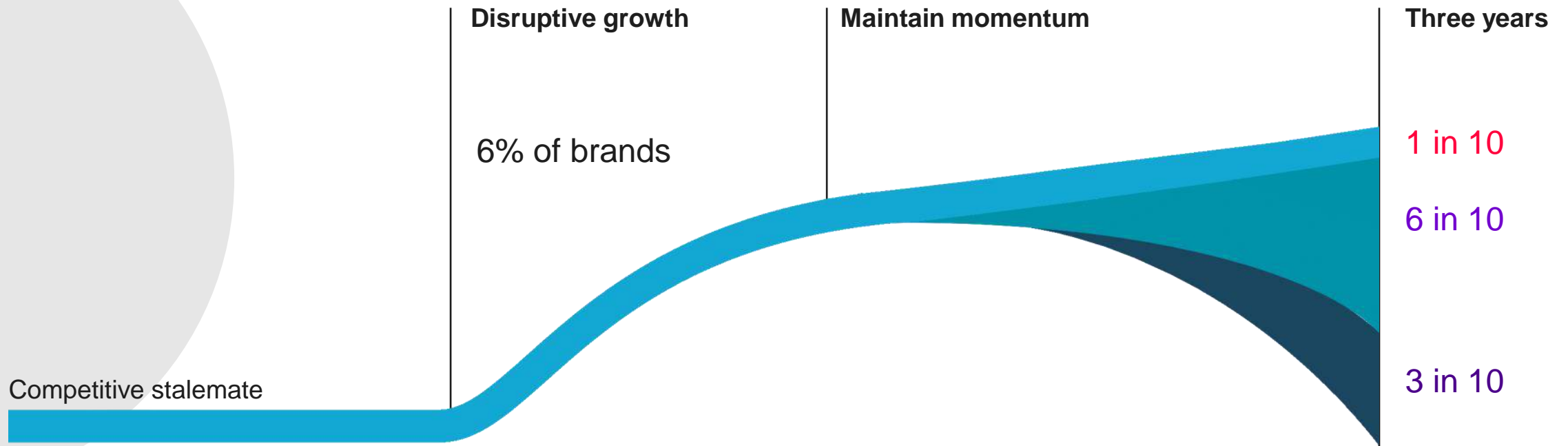
Each stage of the buyer lifecycle helps influence growth across different time frames

Less than 4% of brands over-performed across all three stages of the buyer lifecycle, but they grew an average of 48% over the three year time frame



Few brands manage to maintain momentum following a year of growth

Momentum is lost because brands do not maximise their growth potential across the buyer lifecycle



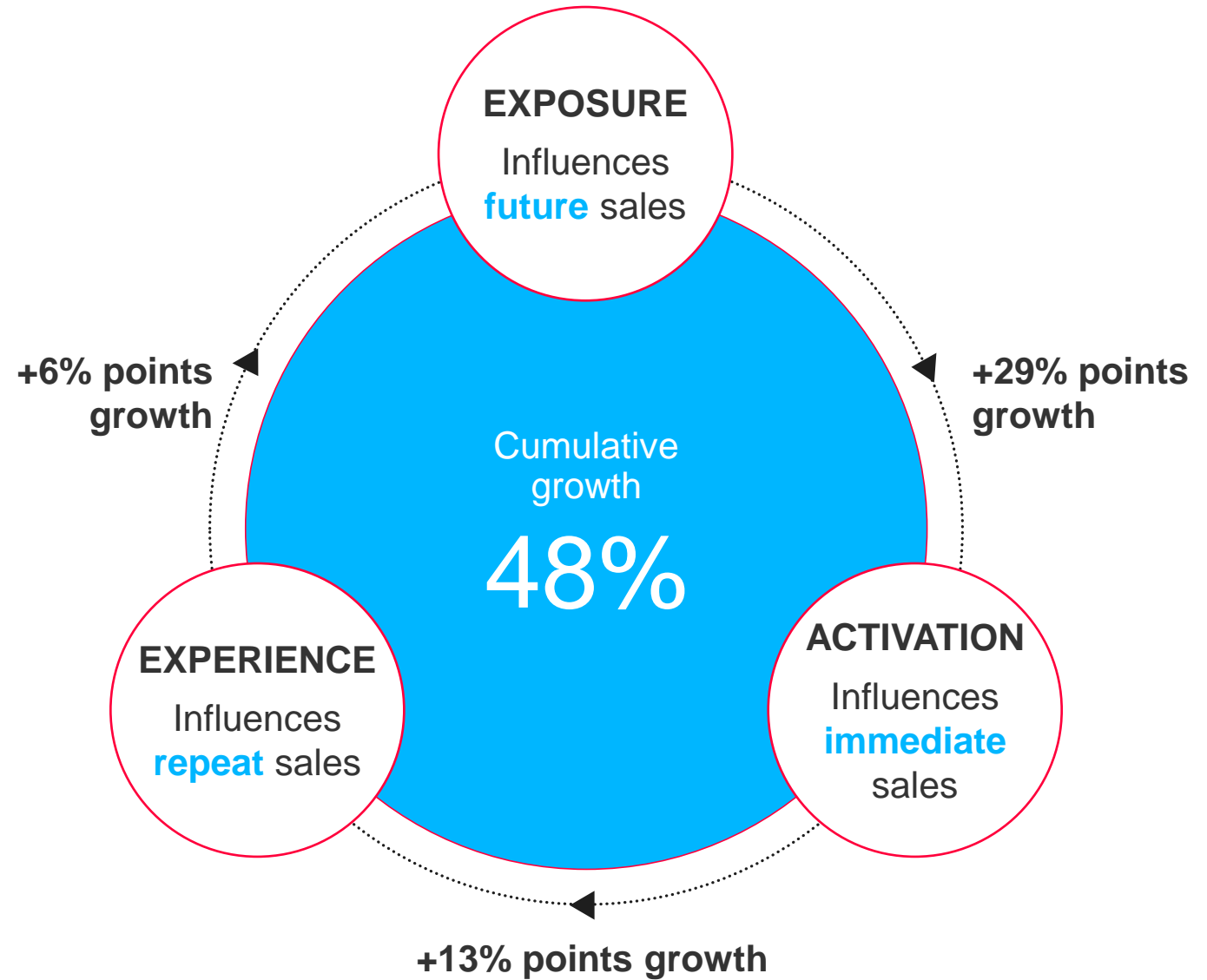
Source: 2,393 brands measured across both a one and three-year time frame

Each stage contributes to overall growth

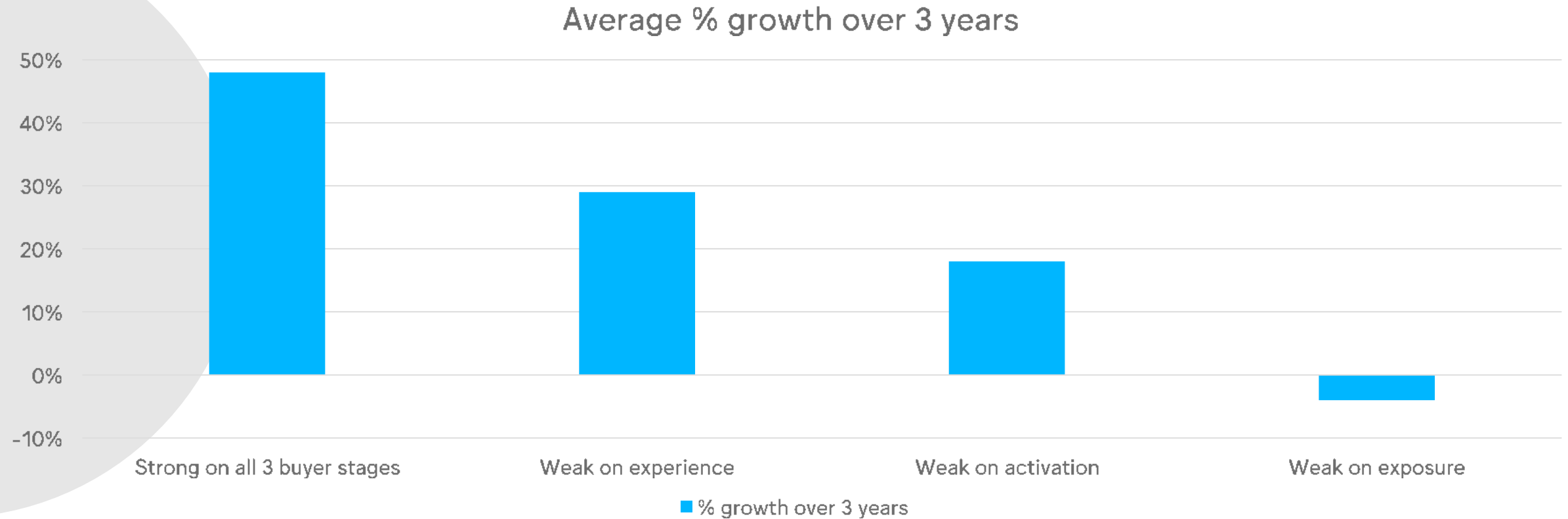
Positive experience helps retain existing customers. Every retained user is one less new user the brand needs to acquire in order to grow

Exposure has the most impact on growth by predisposing new users to choose the brand

Activation ensures that predisposed shoppers buy the brand or convinces the undisposed to choose it during search and shopping



A weakness at exposure cannot be compensated for by strength at the other two stages



Brands win through strong connections with consumers

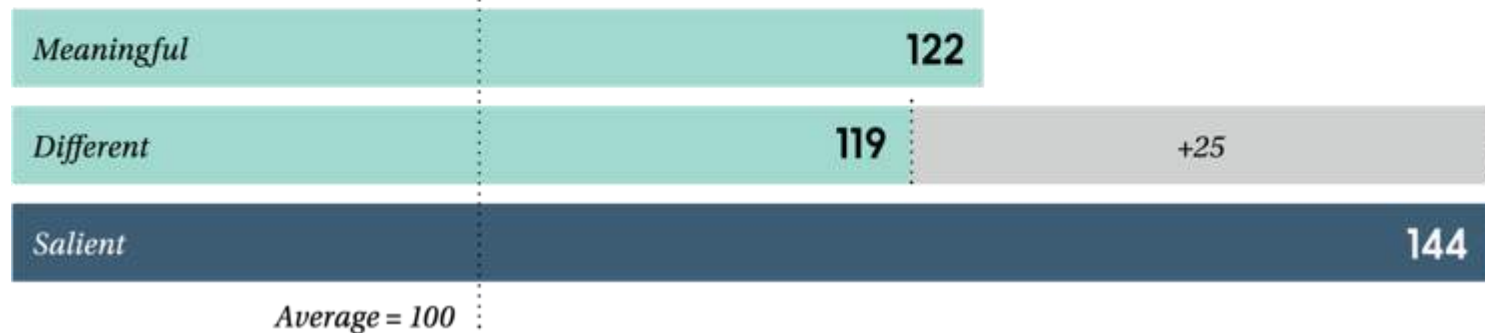
Brands that increased in value YoY are more meaningfully different than brands that declined.

Brand Equity | Salience Gap

Brands Growing in Value

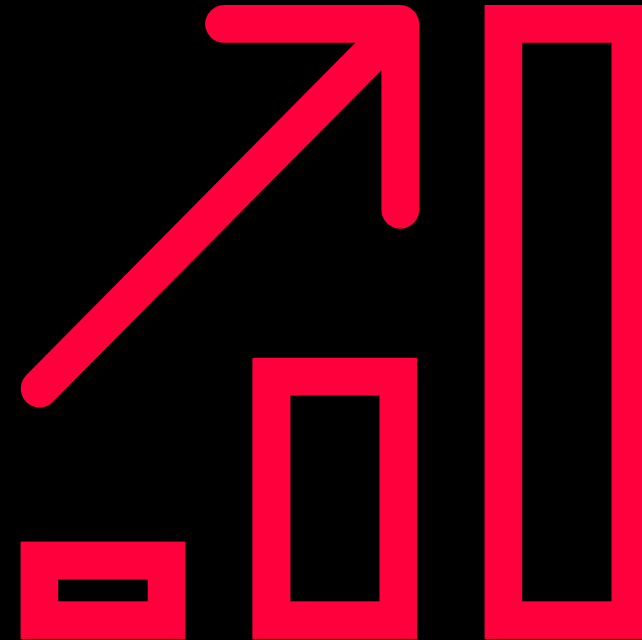


Brands Declining in Value



Meaningful difference, properly amplified, is the key to

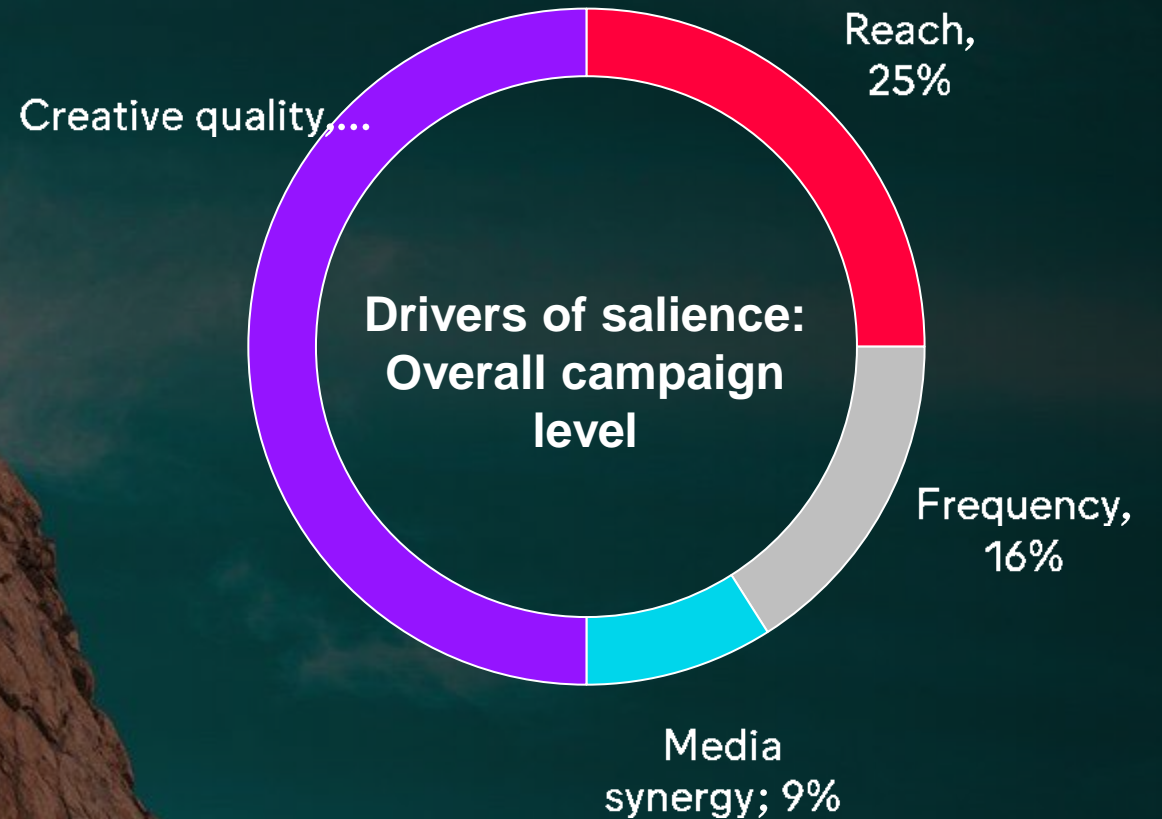
MAXIMISING A BRAND'S GROWTH POTENTIAL



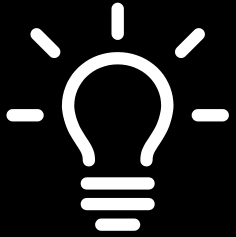
Source: Validation data set comparing Kantar Millward Brown data with market share data



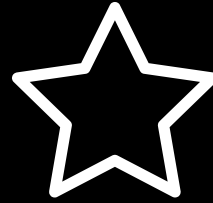
In digital, platforms are important, but it all starts with the creative!



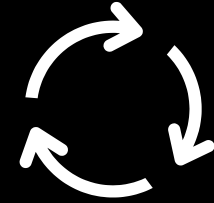
Creative effectiveness calls for a back-to-basics strategy



Have a strong creative idea



Create lasting impressions



Integrate the brand



**SHOOT FOR
INSTANT
MEANING**

Meaning: meets consumer needs & builds affinity

Connect with consumers through real-life moments, demonstrating “what is in it for me”?

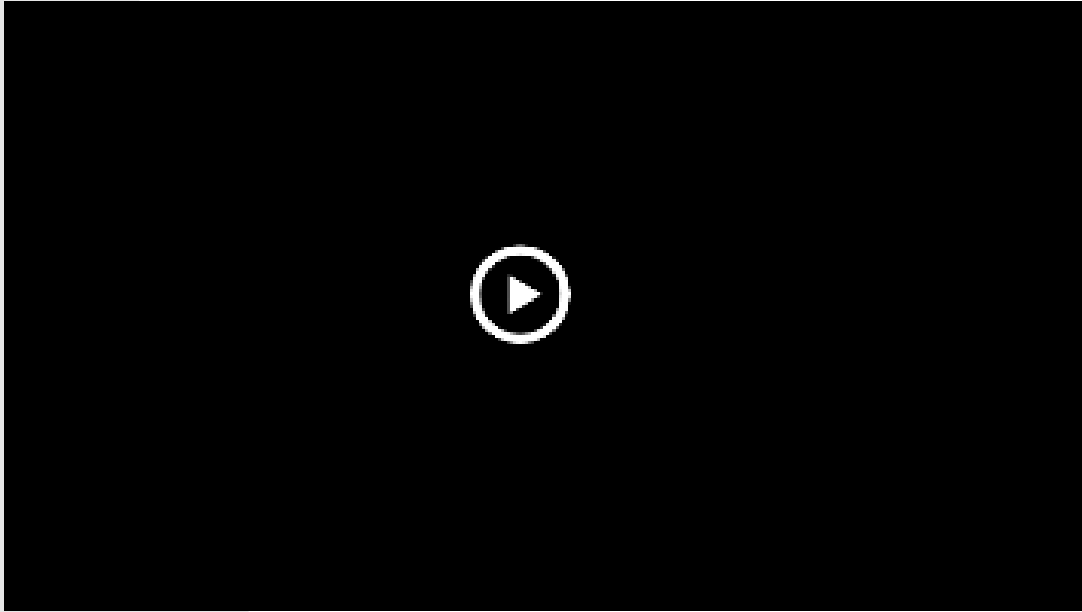




**MAKE
PEOPLE
'FEEL'
SOMETHING**

Emotions: drives engagement and memorability

Making consumers feel something, feel unique is a critical part of good story telling



Why should girls have all the fun? Prior



Branding: integrating the brand into the story

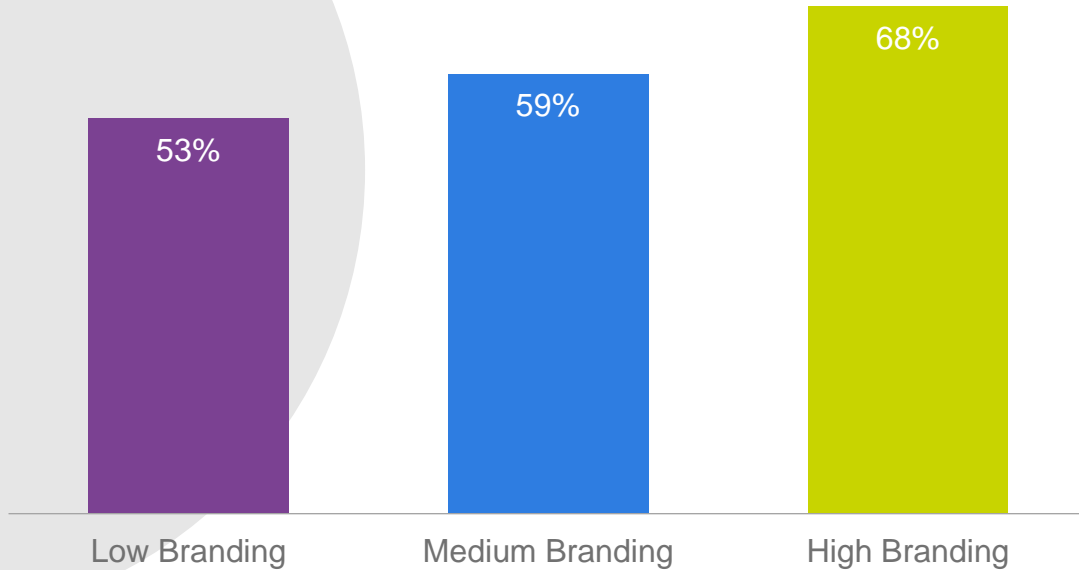
Creating a story that is central to the brand with strong iconography



Branding is the best single predictor of in-market effects

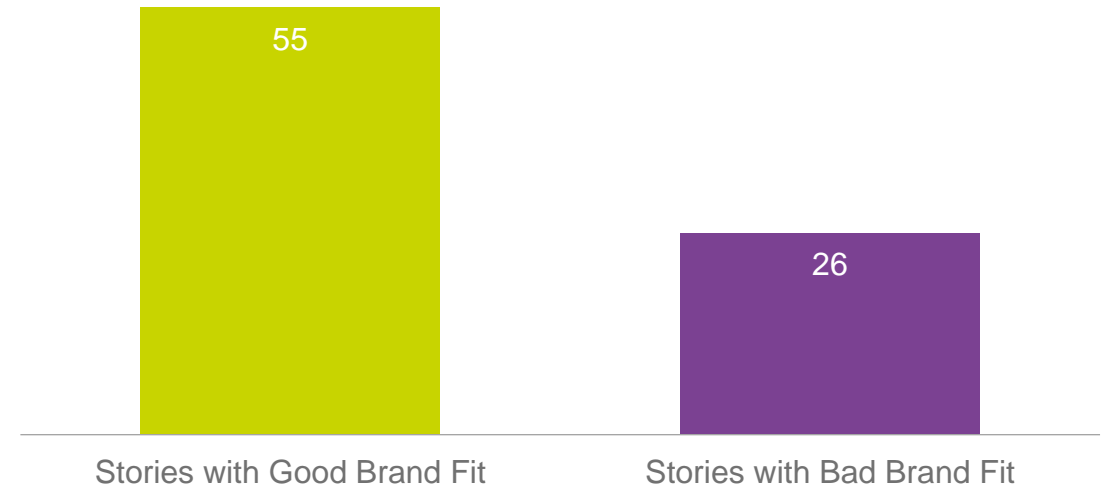
High branding scores related to stronger sales effects

Short Term Sales Increase (%)



Brand 'fit' is vital in making story ads compelling

Motivation

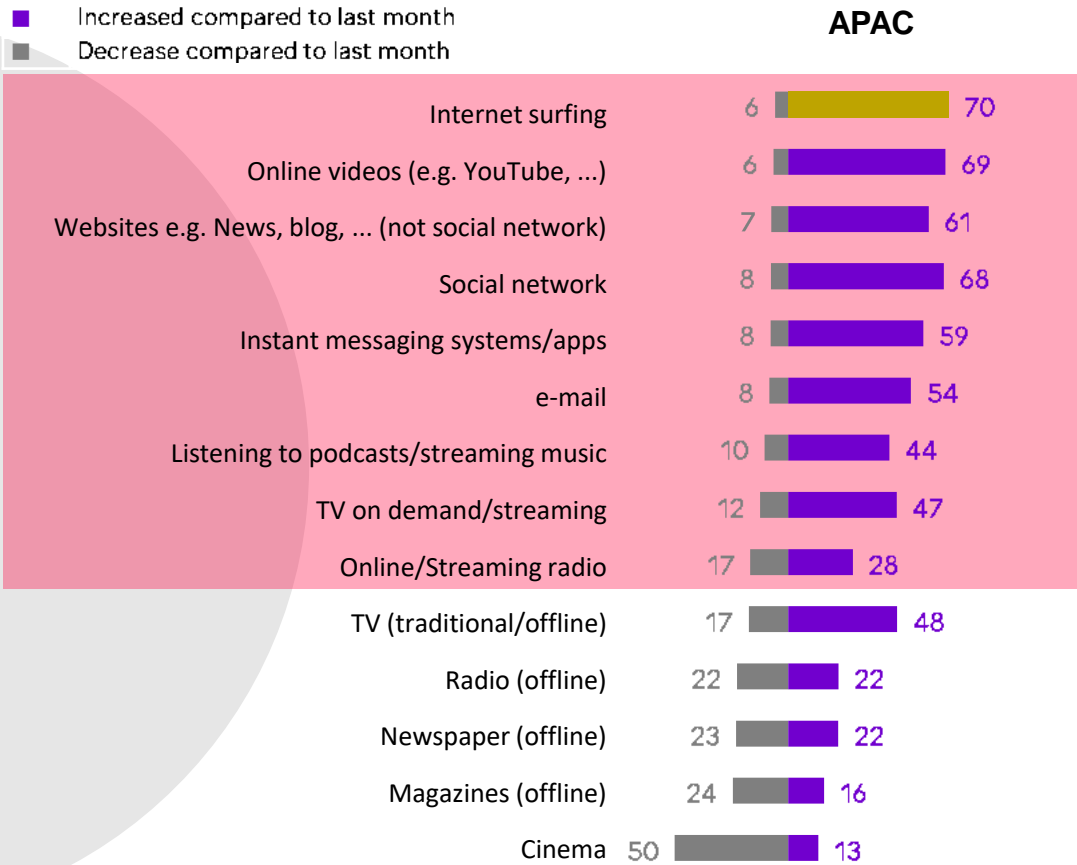


KANTAR

**How to create
maximum impact in
uncertain times**



Covid is accelerating the digital transformation of companies... and consumers



Base

n=2500



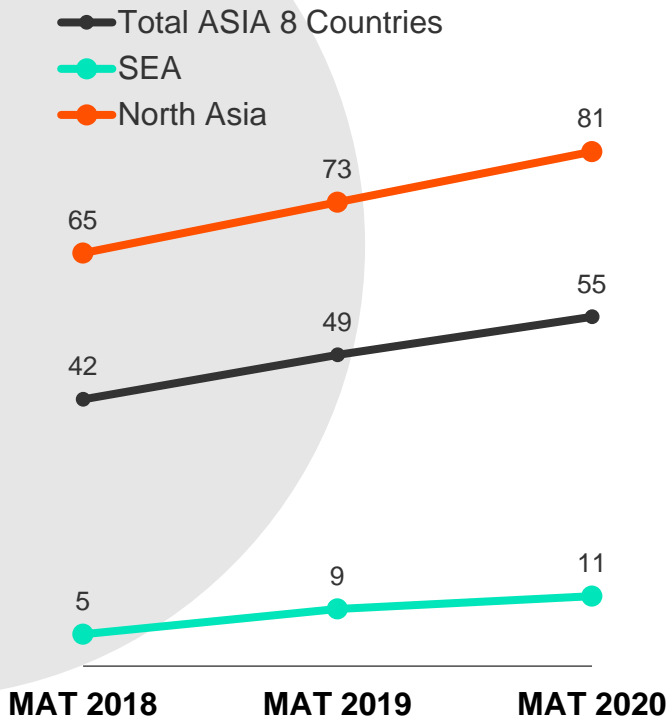
Source: Q10. In general, how has the coronavirus situation impacted your use of media? With reference to the last month, are you using the following media... (SC for each row) – Wave 5 data

e-Commerce adoption have finally happened

At least 185MM households have bought FMCG on e-commerce now in Asia

+50% of the online shoppers in SEA are new

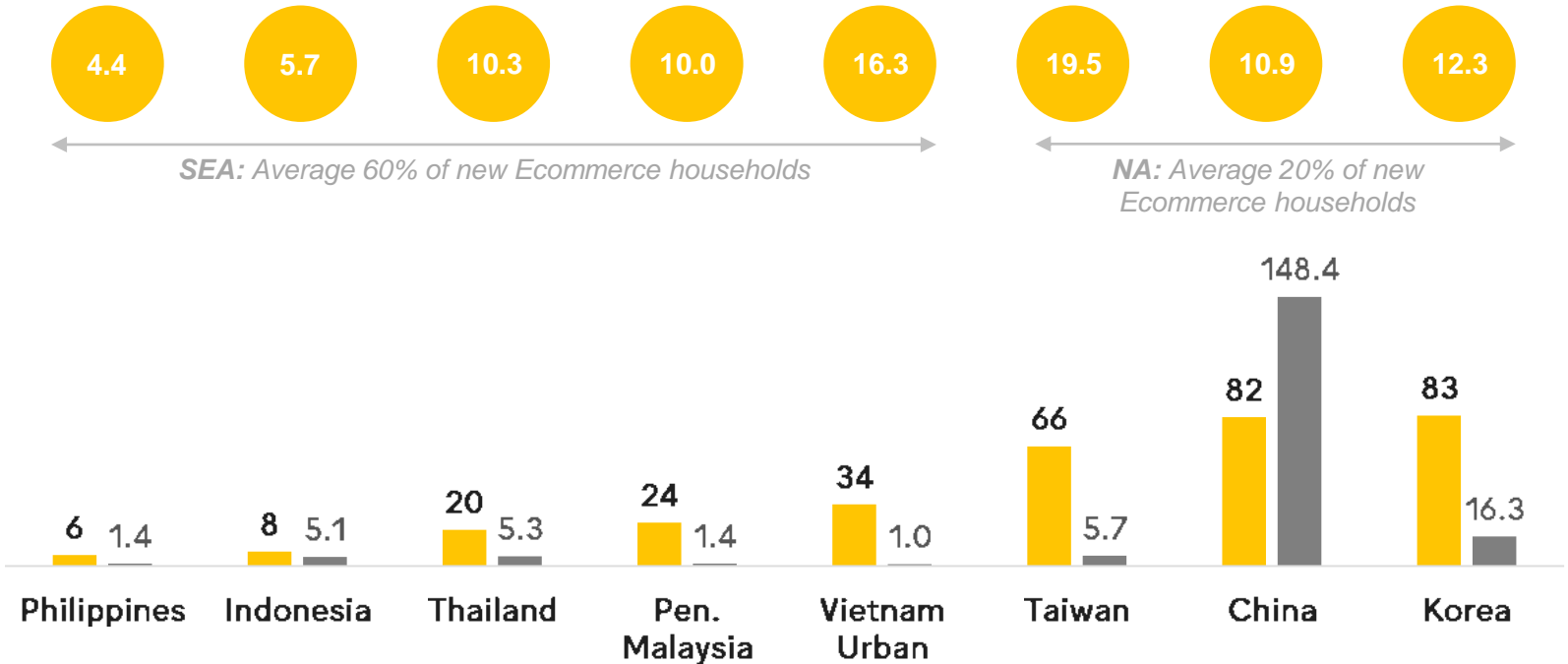
Penetration Points - Ecommerce



ASIA E-commerce Penetration vs. Households (MAT May 20)

■ Penetration ■ Million Households

Penetration – New Ecommerce Households in 2020



* Philippines up to MAT Apr 2020

KANTAR

This happened before

SARS has been considered the "genesis" of the ecommerce in china, when Chinese people Unwilling to go out for anything but the essentials, began shopping online.

Source: Quartz April 2016: China's Internet got a strange and lasting boost from the SARS epidemic.

CNBC: The SARS epidemic threatened Alibaba's survival in 2003



Digital is a particularly cost-effective extension to TV

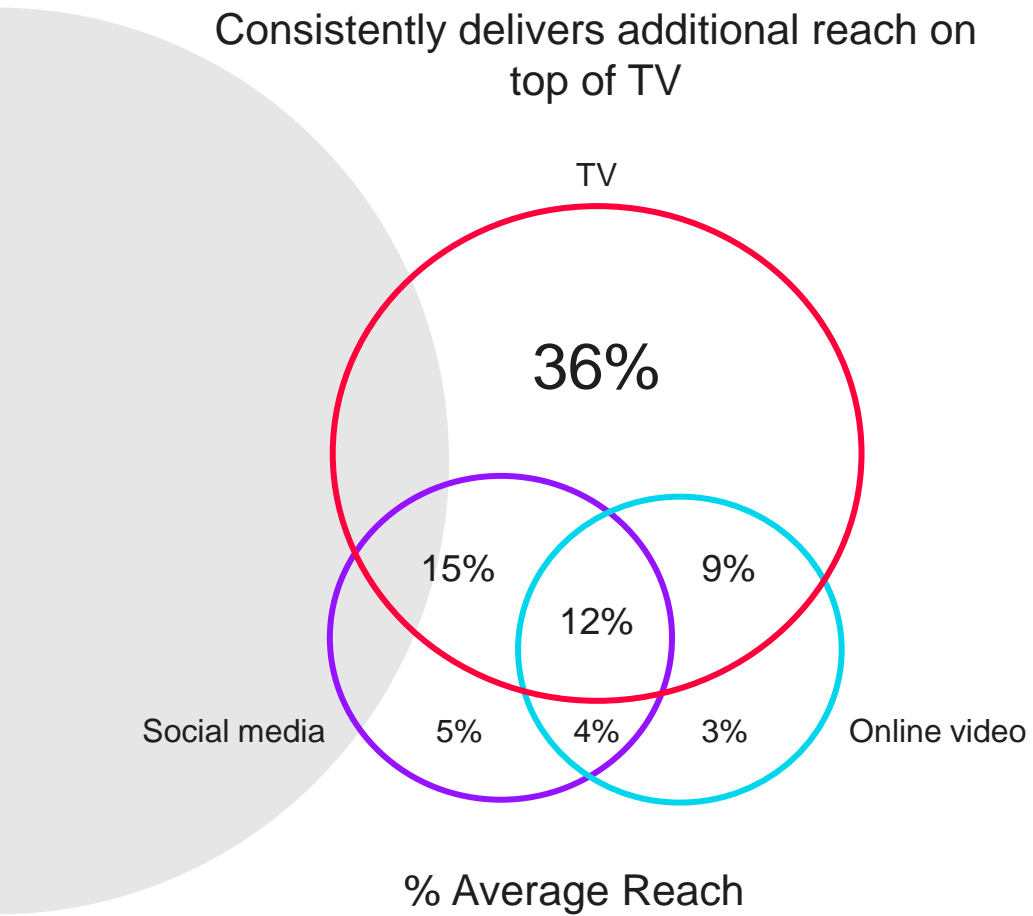
Sales ROI by Platform/Combination



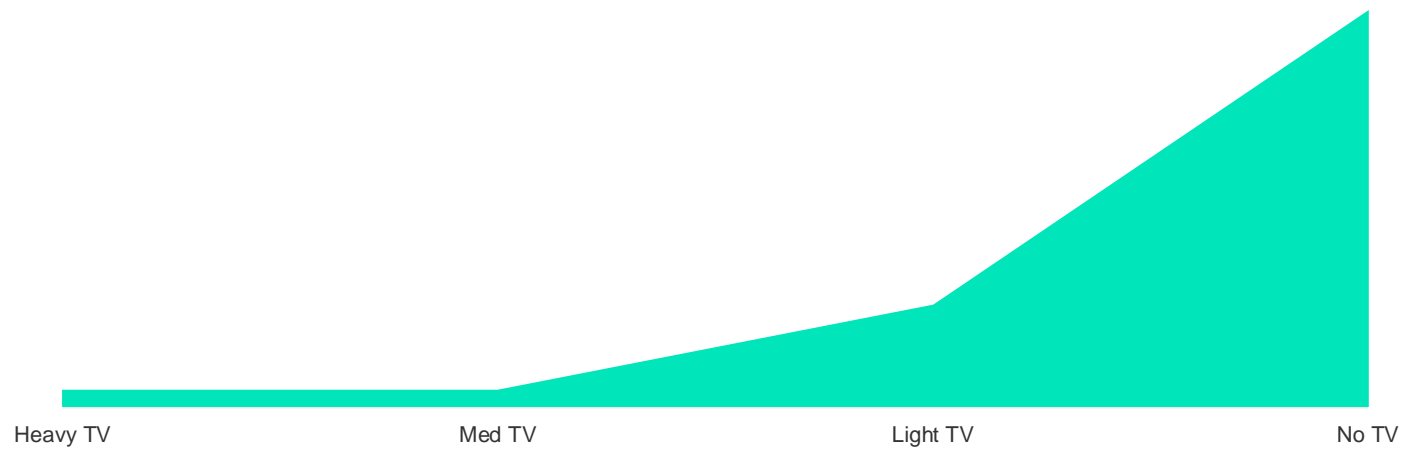
Source: ARF Ground Truth How Advertising Works, March 2016

Analytic Partners 2016 analysis based on over 3,200 campaigns from 2010–2015. Digital includes video and display advertising on desktop and mobile devices. Results are indexed to TV

There are two straightforward reasons why digital complements well TV

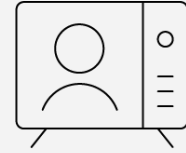


Digital has a higher impact among light or non-TV viewers



% Digital Reach by type of TV consumer

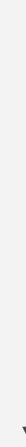
Multiscreening is prominent, specially during Prime-Time!



7,983
TV Exposure

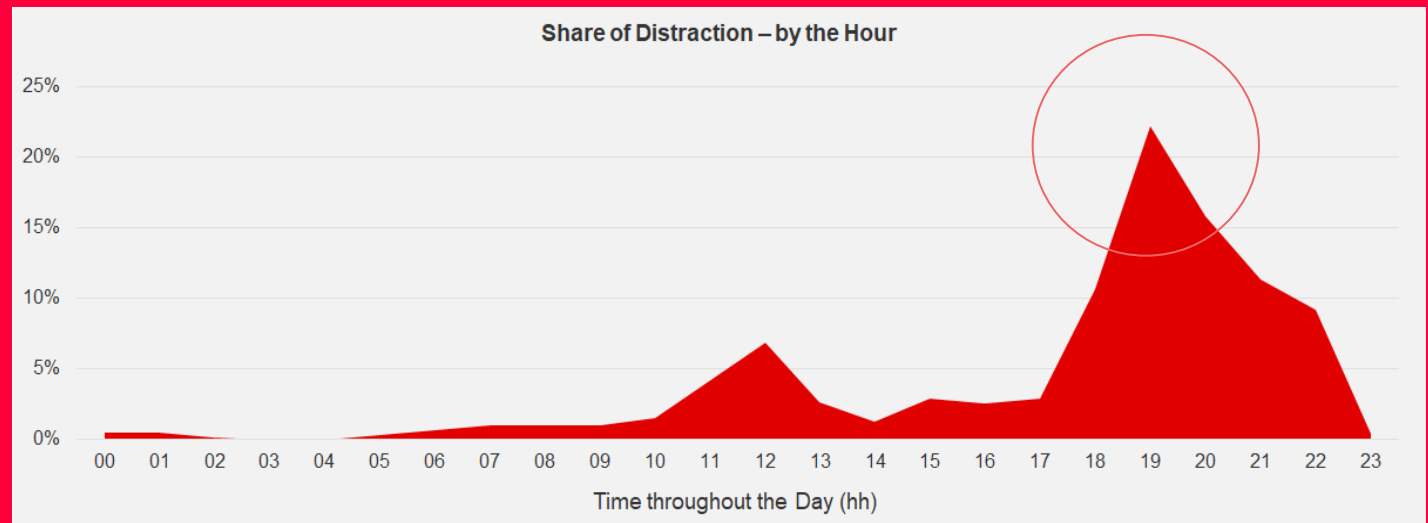


2,645
instances of TV exposure
overlap with mobile activities



33%

percentage of
multi screen
impressions



Source: Vietnam Passive Metering Research 2020

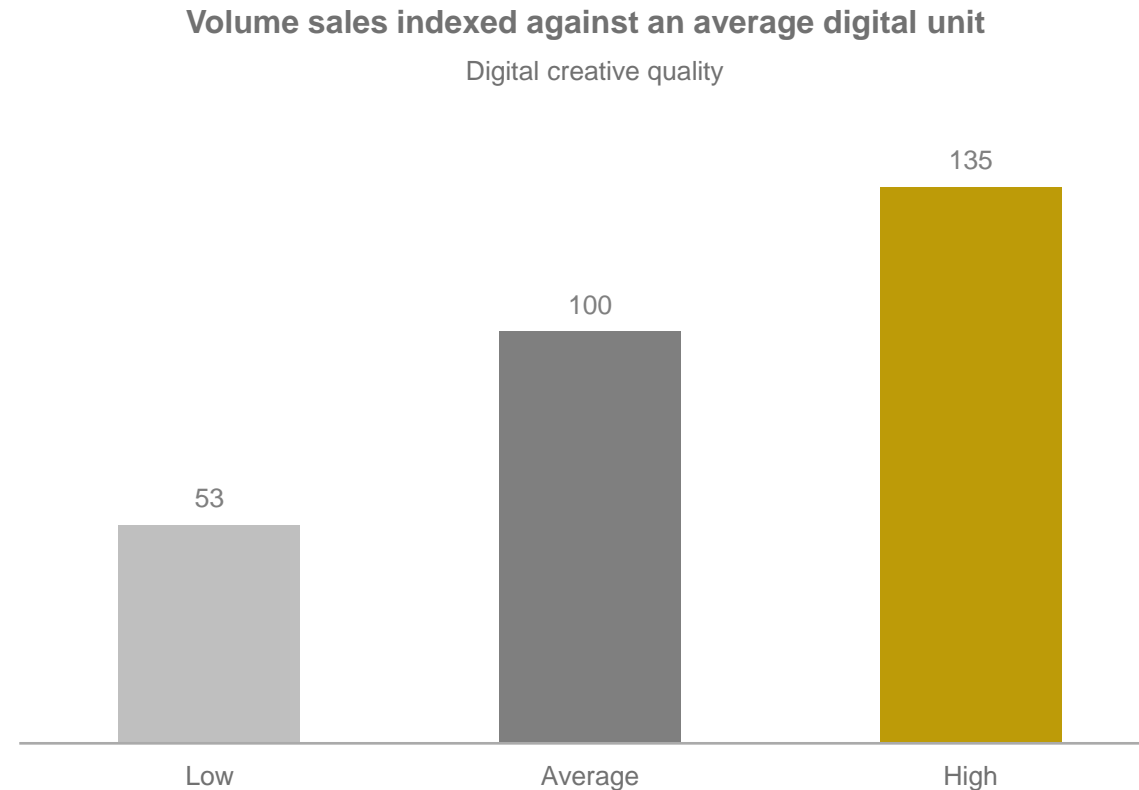
Beyond instant messaging they also consumed content in Social Media or YouTube.

Top 10 Categories Used	% of Category of apps used when distracted
Instant Messaging	22%
Social Networks	19%
Web Browser	9%
Video streamer	9%
Games	4%
Search	3%
Email	3%
Video / photo editor or viewer	2%
Voice	1%

Top 10 App Used	% of apps used when distracted
Facebook	17%
Facebook Messenger	15%
YouTube	8%
Chrome Browser - Google	6%
Zalo	6%
Google Search	3%
Google Play	2%
Instagram	2%

Source: Vietnam Passive Metering Research 2020

Digital assets with high creative quality will produce about 35% more sales per impression relative to their average digital creative

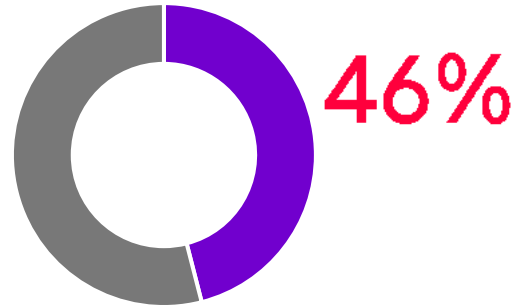


*Creative quality is defined by the Short-Term Effects Likelihood, a summary metric of Impact and Persuasion
Client specific validation

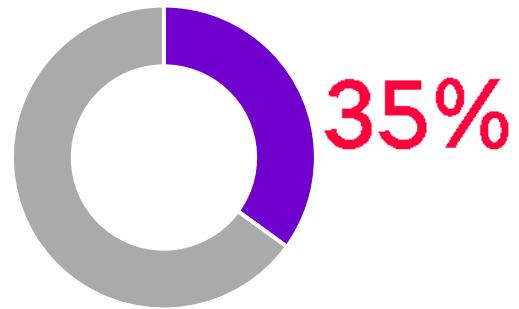
First step to win in digital is to have clear set objectives

EFFECTIVENESS SUCCESS RATE %

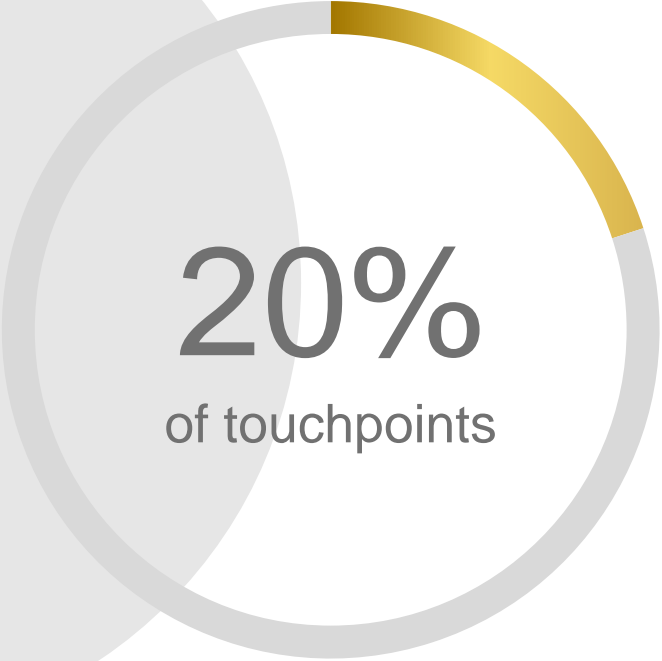
Campaign's objectives
specified



Campaign's objectives
not specified



Choose the right touchpoints, only 20% of them generate 80% of impact



20%
of touchpoints



80%
impact

Understanding the role of the digital channels

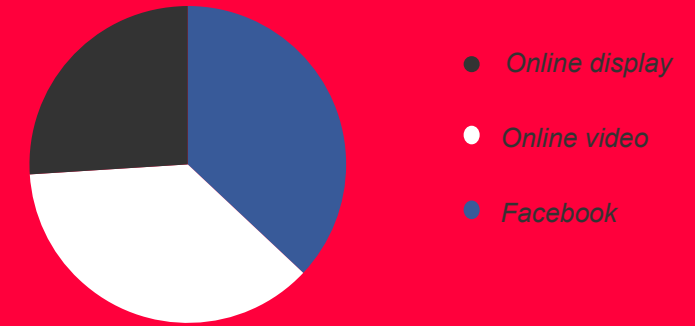
Understand how each digital platform works

No two digital platforms work in the same way:

- **Facebook** delivers greater impact per dollar spent..
- ...whereas **YouTube** is more effective in driving higher impact per impression
- That means that to create a rapid campaign impact you should use YouTube (e.g. Masthead)..
- ..while Facebook will benefit more from 'always on' investment.

SOURCE Kantar & Facebook white paper - Squaring Reach and Impact The Role of Digital in Optimizing Ad Spend in SE Asia.

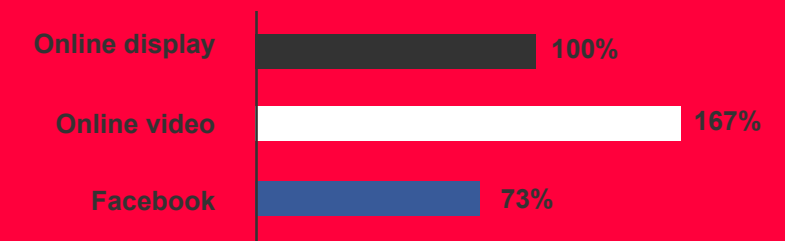
Contribution by channel to consideration across all campaigns



Impact based on ROI









Impact per impression

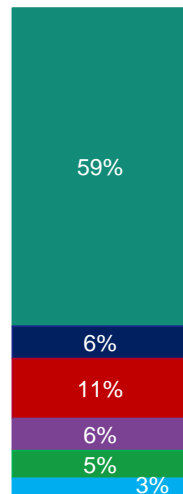


Some digital formats generate high reach very quickly and complement TV

Formats like YouTube's Masthead allow to generate a high impact in just one day. In this example Masthead was planned ahead of TV. It generated all the Awareness growth. Then TV ad helped consumers to understand the story more in depth impacting on the perception of the brand (Associations)

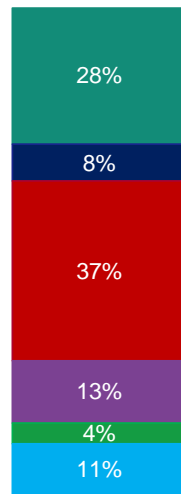
MEDIA CONTRIBUTION TO IMPACT

-  TV
-  Facebook & Instagram
-  YouTube
-  Programmatic
-  Video Streaming
-  Twitter



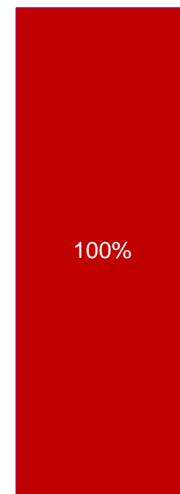
Spends

+6.6



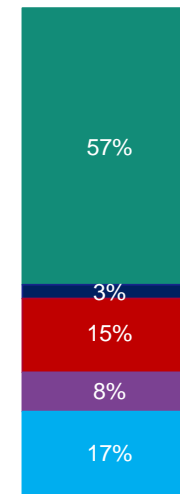
All KPIs

+2.1



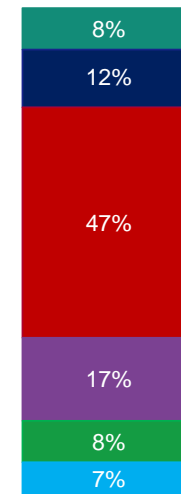
Create Awareness

+6



Build Associations

+9.6



Drive Motivation

All digital platforms are not the same, Facebook and YouTube play a different role in the consumer funnel

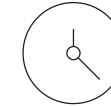
Average Uplifts %



	Bumper	Video 6 secs.
Total Unaided Awareness (Unaided Awareness and TOM)	+11%	+17%
TOM	+8%	+20%
Association	+5%	+2%
Purchase Intent	+6%	+2%
Brand Favorability	+8%	+2%

Cases : 16

Cases : 41



Force view with sound on gives YouTube Bumper advantage to impact beyond awareness, with sufficient time to communicate messaging.

Even within YouTube there are differences by platform

Average Brand Uplifts

	YouTube Bumper	YouTube 15-30s	YouTube More than 30s
Total Unaided Awareness (Unaided Awareness and TOM)	+11%	+9%	+12%
TOM	+8%	+14%	+22%
Association	+5%	+3%	+4%
Purchase Intent	+6%	+5%	+3%
Brand Favorability	+8%	+4%	+3%
	Cases : 16	Cases : 34	Cases : 32

Instagram is increasingly playing an important role to discover what's new

60% of consumers say they discover new things on Instagram

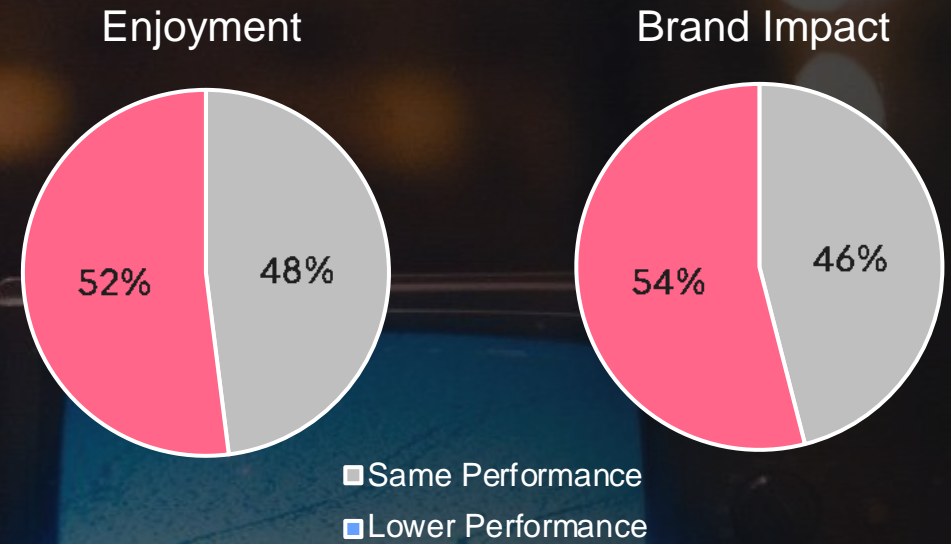


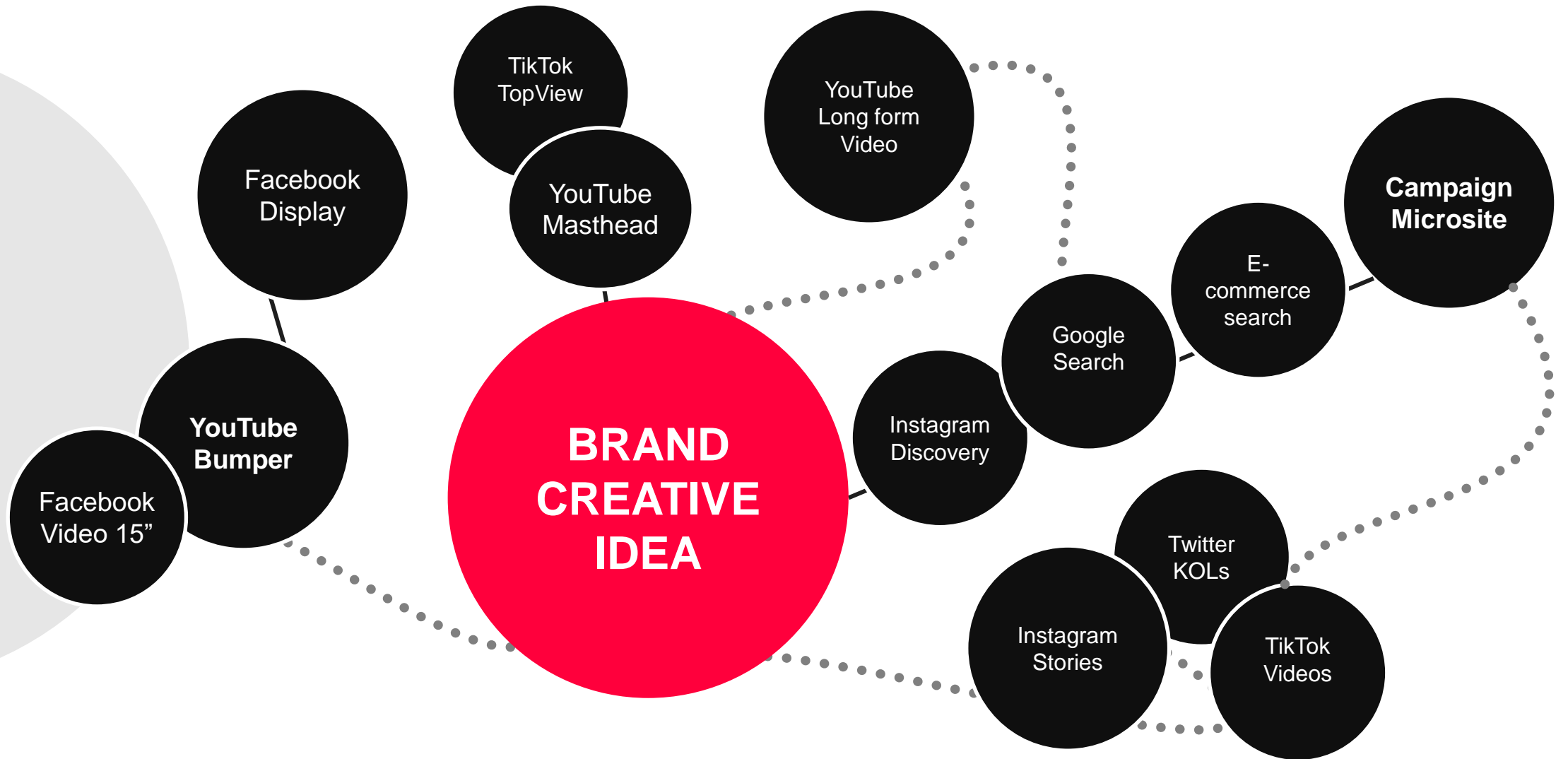
Base: 533

Source: Kantar Cross Media & Japan Instagram user Stories

Ads that perform well on TV has ~50% chances to do the same on Digital

We know that transference from TV is like flipping a coin

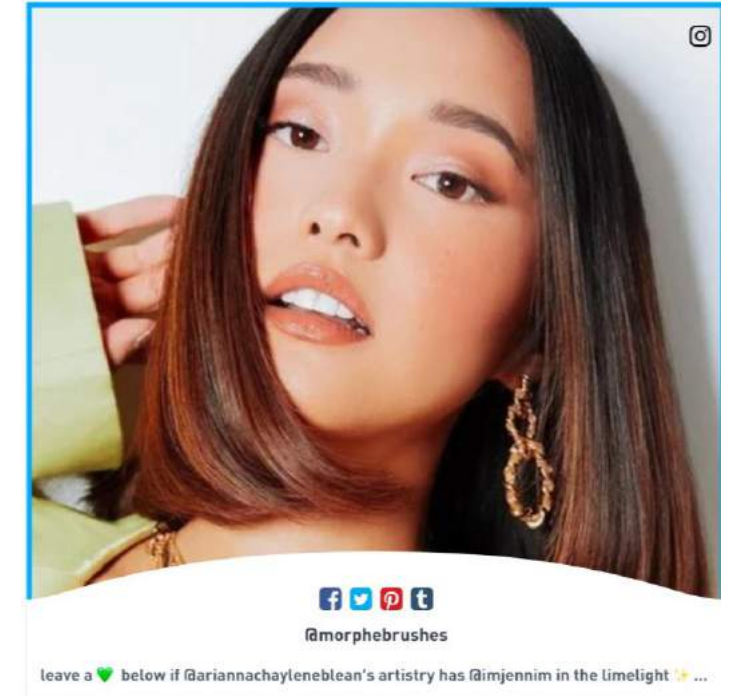




NEXT: How to win in eCommerce? DTC and CPG are coming together

How DTC approach consumers, are fundamental for CPG to win online:

- Brand Authenticity
- Personalization
- Digital By Design
- Build a Community
- Strongly rely on Data.



<https://www.forbes.com/sites/forbescommunicationscouncil/2020/10/08/how-cpg-brands-are-using-dtc-to-stay-competitive/?sh=77004c294fca>

<https://hbr.org/2020/03/reinventing-the-direct-to-consumer-business-model>

Key Takeaways

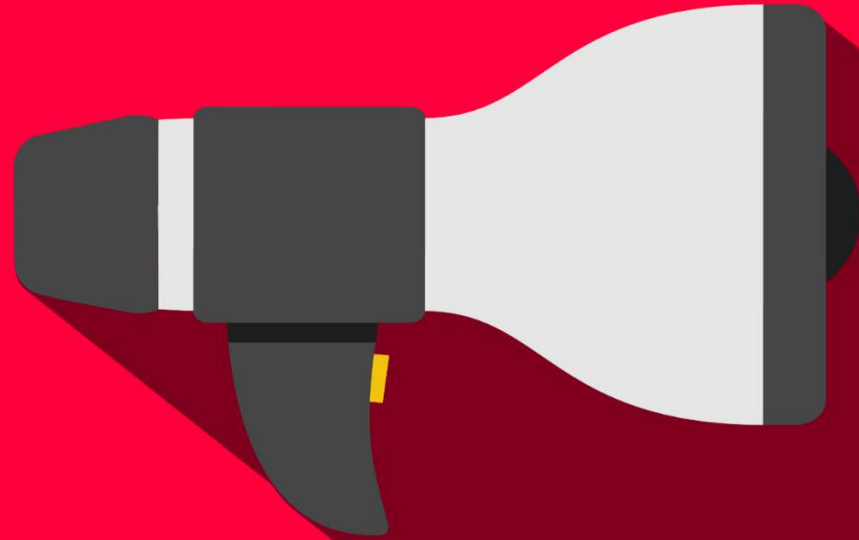
- Strong brands deliver superior shareholder returns even in tough times.
- Exposure (influencing future sales) has the most impact on growth by predisposing new users to choose the brand.
Creating an strong connection and are perceived as meaningful different significantly increased in value YOY.
- How to create that connection? It all starts with the creative.
- Creative effectiveness calls for a back-to-basics strategy: have a strong creative idea, creative a lasting impression and integrate the brand.
- Digital is the platform that will create maximum impact in uncertain times,
- Consumers are more in digital than ever before, and ecommerce adoption has finally happened.
- Digital is a great complement to TV investment, but we need to be clear what role is going to play.
- Objective is to create an ecosystem where everything stiches together, content and platform.
- Digital by design companies will help us to understand what takes to win in the digital space.

KANTAR

Thank You!



Questions?



24th Feb 2021

Upcoming events...

18th Mar 2021

#BuildBackBetter: Can marketing be a positive force for change in a post-COVID world?

A virtual event for anyone interested in how marketing can be a force for good

Thursday, 18 March 2021 from 15:00 to 16:20 (CET)

World Federation of Advertisers

#BuildBackBetter: Can marketing be a positive force for change in a post-COVID world?

Speakers:

- Patricia Card, Head of Marketing, B&W of San, Brazil
- Paul Kemp, Publisher, Co-Founder, Compuserve
- Anna Eckstein, Marketing Officer, German Telekom
- Stephen Kishor, President & CEO, AIP Parts, Lebanon
- Wahneema Lubiano, Director, Amazon, Consumer International

RELATED POSTS

- WFA Senior Marketing Panel Ep 2: Digital transformation with LinkedIn's Lubiano Rocket →
- Food Marketing to Millennials - Heatmap →
- SAC Programme Meeting Overview (February 2021) →
- WFA Global Privacy Map →
- Introduction to WFA's policy groups →

1st Apr 2021

Spotlight: Building Your Brand in an eCommerce Environment

Amidst the hustle and buzz of livestreaming, shoppertainment and blockbuster single-day shopping sprees, what do brands need to consider to avoid becoming just another commodity to consumers?

Thursday, 1 April 2021 from 09:00 to 10:00 (CST)

About Register

20 – 22nd Apr 2021

WFA Global Marketer Week 2021

Book your seat now

WFA Global Marketer Week is back under a new remote format from 20 to 22 April 2021.

Taking place remotely from 20 to 22 April, the event will offer unparalleled insight and thought leadership into how marketers can be a positive force for change as the world looks to build back from the pandemic.

Meeting for breakfast in the Americas, lunch in EMEA and dinner in Singapore, the event will feature outstanding content and virtual member-only networking opportunities.

DATE & PLACE

April 20-22, 2021

Remote

List of events:
wfanet.org/connections/events/overview