



THE CHALLENGES OF
BRAND BUILDING
ADVERTISING
IN A DIGITAL AGE

iab.
australia

MEASURE
10.10.2017 CONFERENCE

KANTAR

RE-IMAGINING
MARKETING

OCTOBER
2017



IS BRAND BUILDING ADVERTISING DYING?

The challenging trend of brand-building through advertising



79%

of people say there are more ads than three years ago*

7 OUT OF **10**

of people say that advertising is more intrusive/annoying today than 3 years ago*

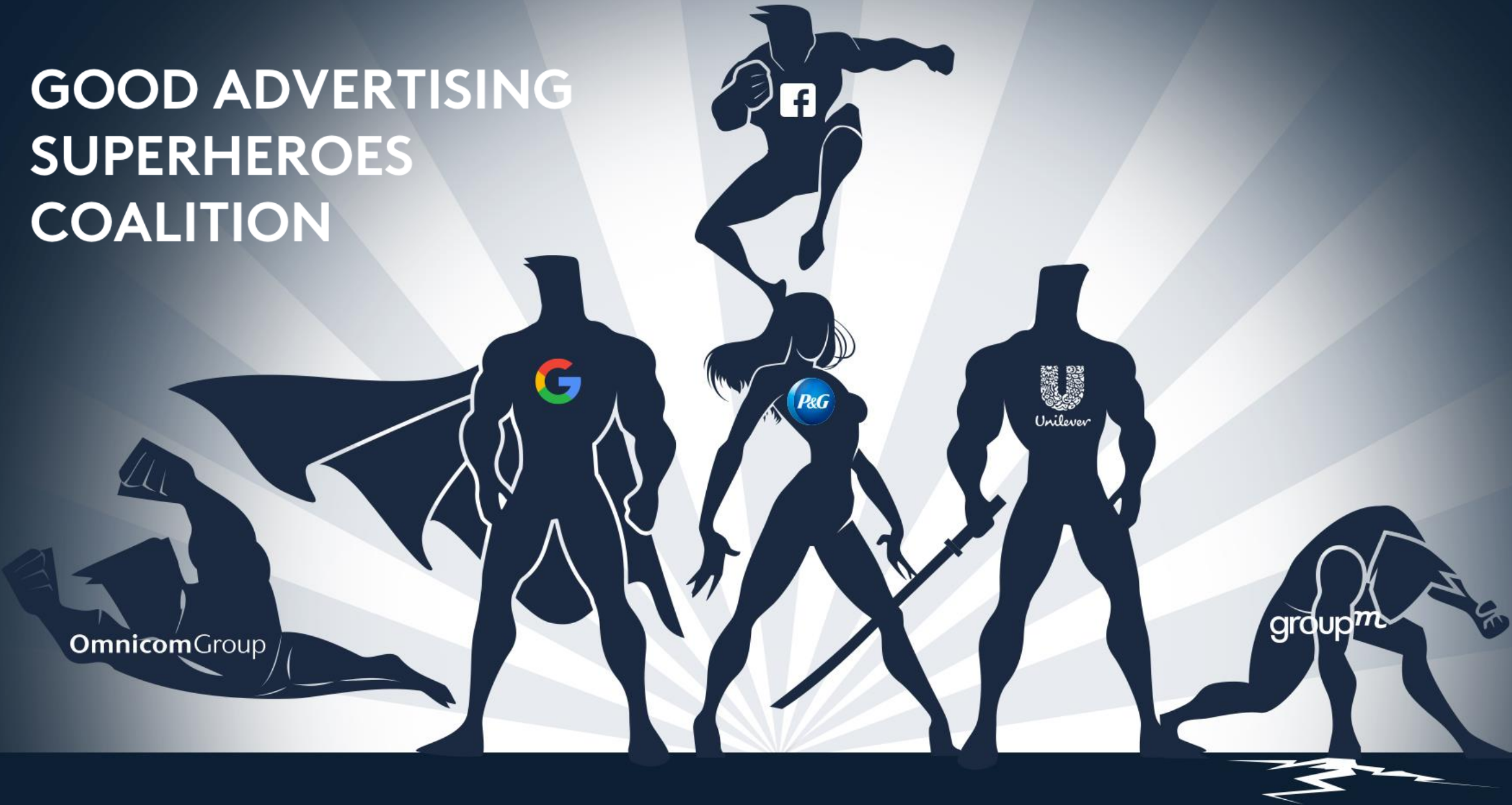


AND ULTIMATELY CONSUMERS ARE ACTING ON THIS:

36%

of Gen Z in Australia have installed an ad blocker**

GOOD ADVERTISING SUPERHEROES COALITION





01

ALL ABOUT THE DATA:

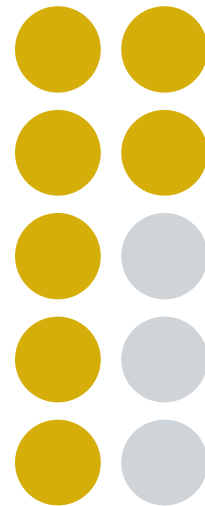
Programmatic is the future, but very inconsistently delivered in the present

“Digital offers the opportunity to serve an ad to the right person, with the right message, at the right time”



1/10

Remember seeing an online ad that was relevant to them at that point in time in the last week



7/10

Of those remembering seeing advertising online claim that it was not relevant to them

And now a bit more of a qualitative experience...



Is this really **surprising?**

The data is conclusive

5/10

impressions served
outside the target audience



SERVED OUTSIDE TARGET AUDIENCE

BY CATEGORY

7

Consumer goods

4

Health

BY AGE GROUP

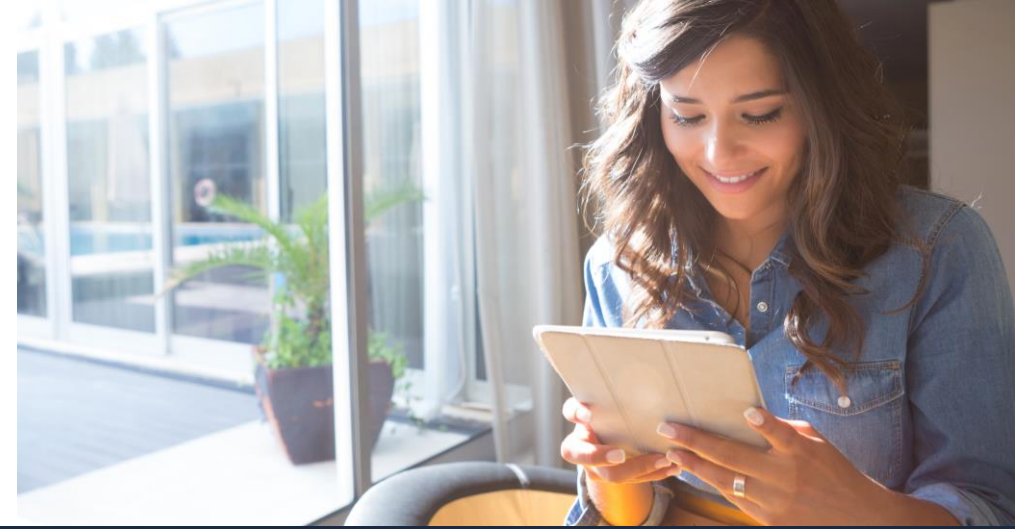
7

15-24 year olds

3

25+

It is important that the industry is disciplined in understanding **which audience** we have reached...



A

AUDIENCE

Who did I speak to and **how often**?

B

BRAND LIFT

How much did the marketing activities change consumers' **attitudinal response** to the brand?

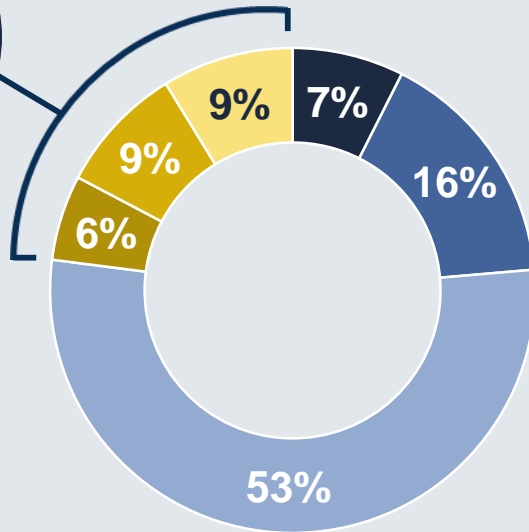
AUSTRALIAN FMCG CAMPAIGN

Despite targeting families with kids only 24% of those exposed had children ages 0 to 19 in their household!

EXPOSED

HOUSEHOLD MAKE-UP

24%
Children
0-19yo in
HH

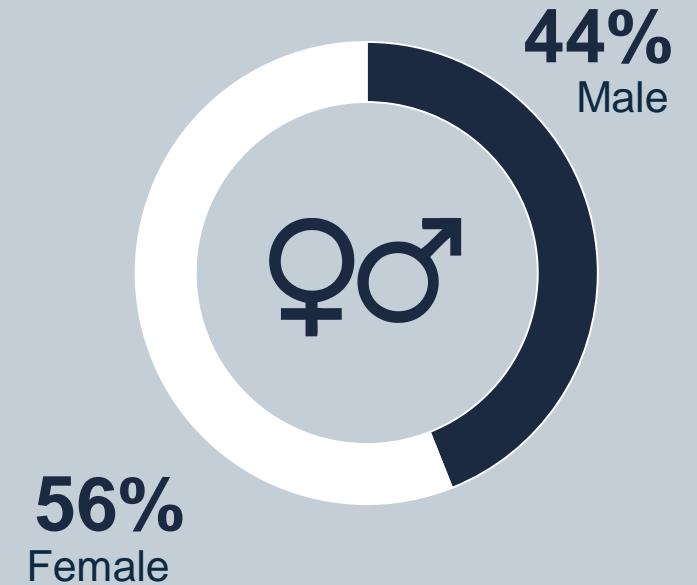


This is not an uncommon result in the digital landscape. Targeting is difficult to predict and manage across large networks

- 18 to 34 no Kids
- 35 to 54 no Kids
- 55+ no Kids
- Family Kids 0 to 6
- Family Kids 7 to 12
- Family Kids 13 to 19

Base: n=453

GENDER



Base: n=453

Some brands are going beyond online behaviour to understand the impact of brand attitudes

1

Kantar TNS
ConversionModel research
identified **consumers
open to staying at
Holiday Inn**



2

The audience was scaled
by a leading Data
Management Platform to
find **25 million similar
consumers** through a
look-alike model



3

The **25 million unique
cookies** were added to
the media plan and
targeted directly



The results

38%



Lift in **brand consideration**

164%



Consideration lift vs. average of all other publishers

514%



Lift in **site bookings**

I guess the key question is

how can we explore further collaborations to have survey data integrated into the DMP efforts what implications does this have on the approach for tracking?



02 Balance “buy me now” advertising with strategies that drive present and future mental availability

There are a number of reasons that are driving greater use of short term tactics in advertising

Growth is harder to come by... multinational brands are losing share to locals

Less time to probe success: in Australia average time of a CMO is declining



Simplistic understanding of HBG: just be distinctive and loud!

Digital metrics driving success and optimization

Digital advertising can be measured, and influence the consumer at specific moments of truth

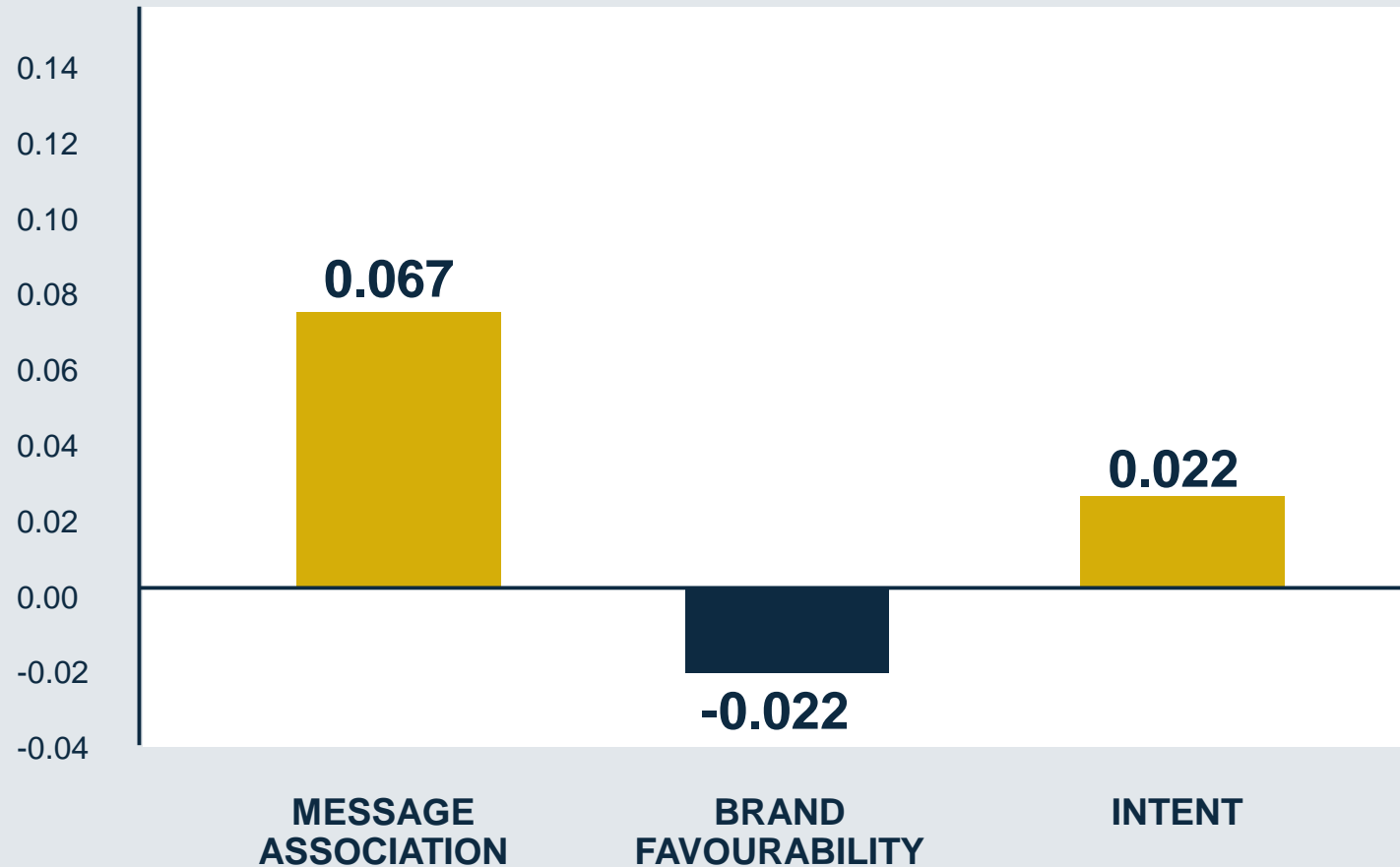
DIGITAL HAS BROUGHT TO REALITY A NUMBER OF
PERFORMANCE METRICS THAT ARE EASILY AVAILABLE



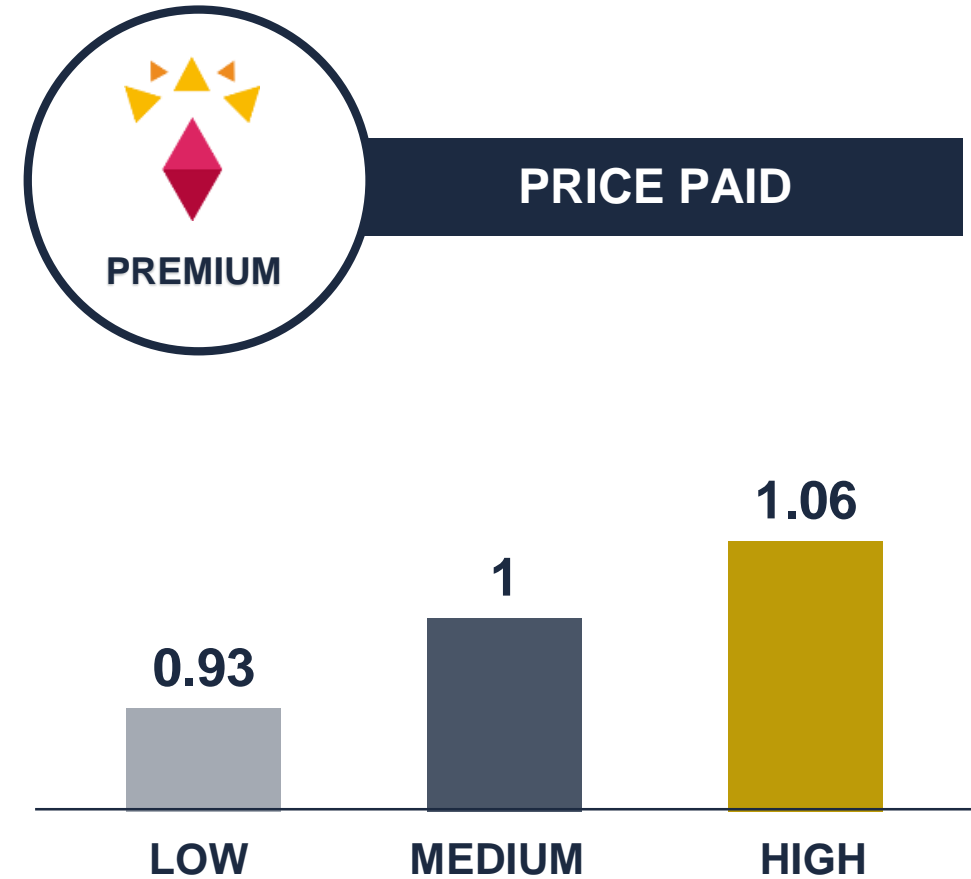
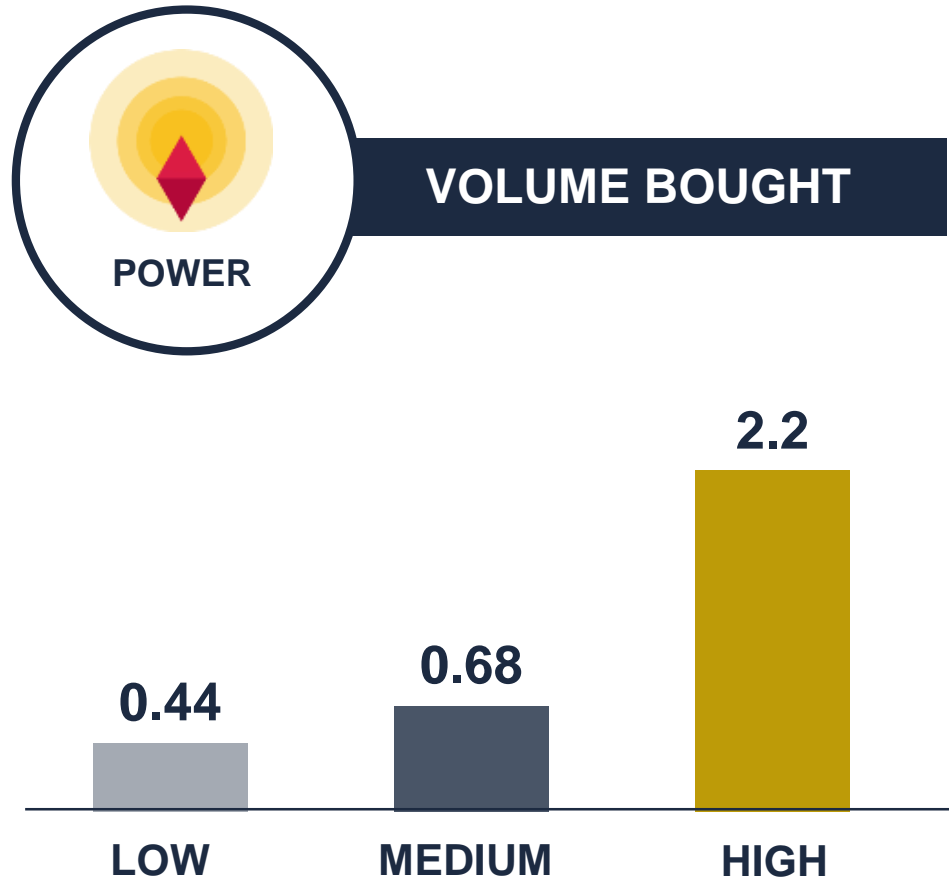
Many of them can
be used for
**performance-
based** advertising.

This leads to **short
term strategies**
that are not always
related to **brand
building**

Not everything that can be measured counts, and not everything that counts can be measured



Building strong brands is simply good business



And short-term strategies are not always as efficient

BEFORE

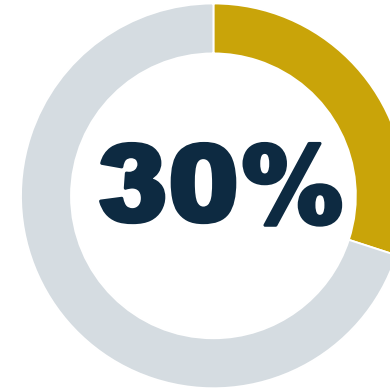


Effective campaigns presented to IPA were short term focused (2011)



Awarded campaigns were more efficient than non-awarded ones

NOW



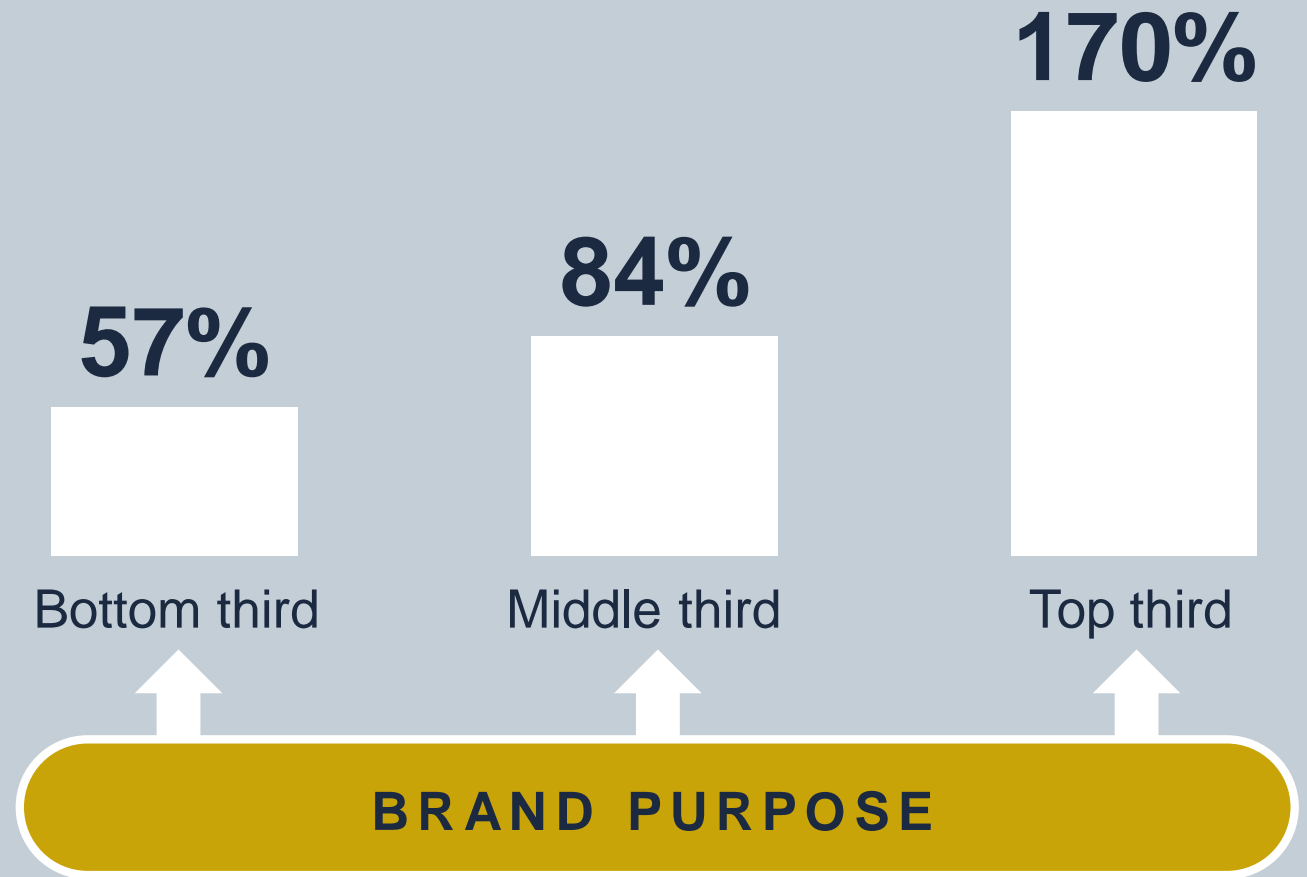
Were short term driven...and 45% of the awarded!



Awarded campaigns are more efficient than non-awarded ones

In the long-term, brands with a clearly defined purpose in consumers' eyes grow faster than others

A better **brand purpose** underpins value 12 years' brand value growth



As Insights our value still is to find the elements on the brand that can help to drive growth



BLACKMORES®



THE DILEMMA

In 2014, Blackmores, the pioneer of the Australian vitamin market, found itself in an increasingly cluttered and commoditized market.

Price wars and celebrity endorsements were the norm driving value and differentiation from the market.



HOW TO STAND OUT FROM THE CROWD?

The Insight: The key to wellness isn't a magic pill... it's knowledge

'Be a Well Being' integrated brand campaign launched with the new brand purpose being extended throughout the whole business

As we know that investing in brand building contributes to drive Brand Power and sales!

BLACKMORES®

THE RESULTS

STRONG GAINS IN PRODUCT EFFICACY AND VALUE:

33% increase in 'Is proven to work'

31% increase in 'Is good value for money'

27% increase in 'Would be my first choice'

25%
uplift in
conversion from
Awareness to
Trial

10%
uplift in
Loyalty

+3
percentage
point value
share increase
for Blackmores



03 Give up control! Be
100% consumer centric
with your formats

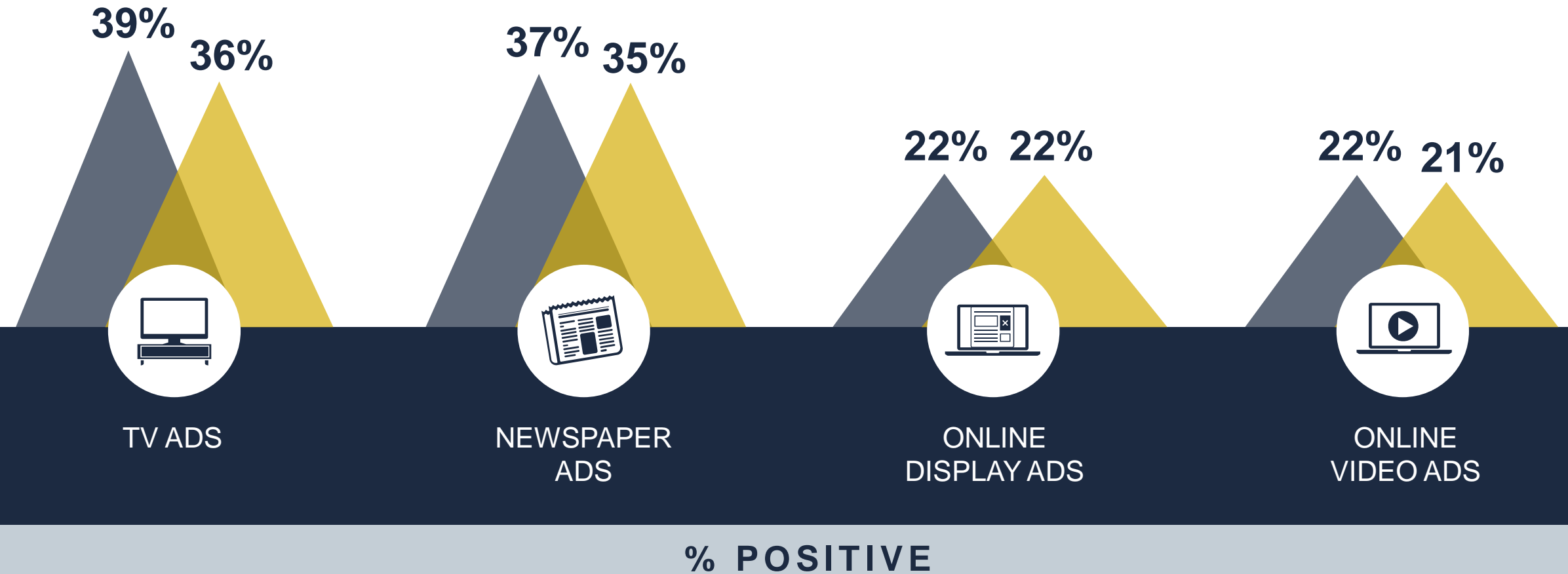
Consumers are open to advertising, but digital ads are not viewed as favourably, especially amongst Gen Z



AUSTRALIA



GEN Z



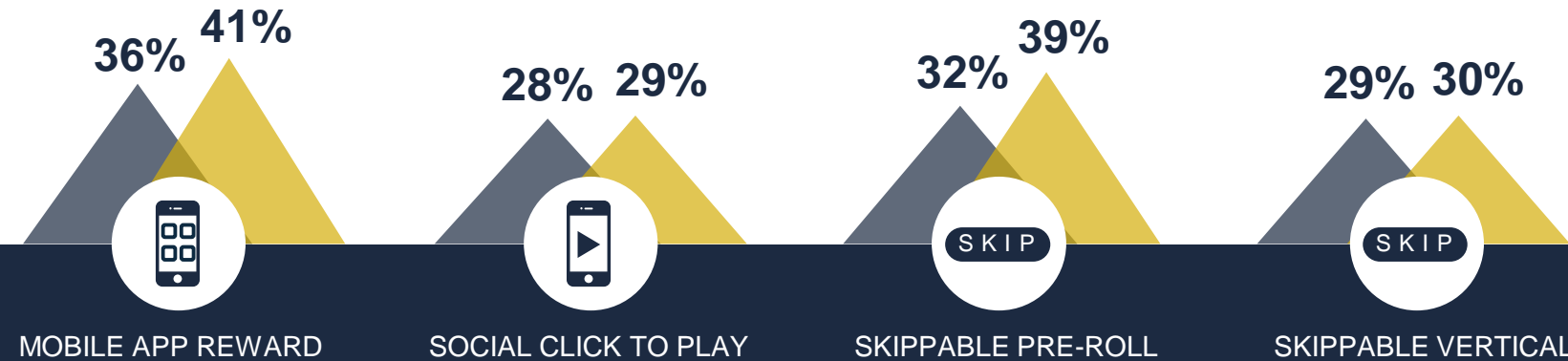
But this can be improved with consumer-centric formats that give control to the viewer



AUSTRALIA

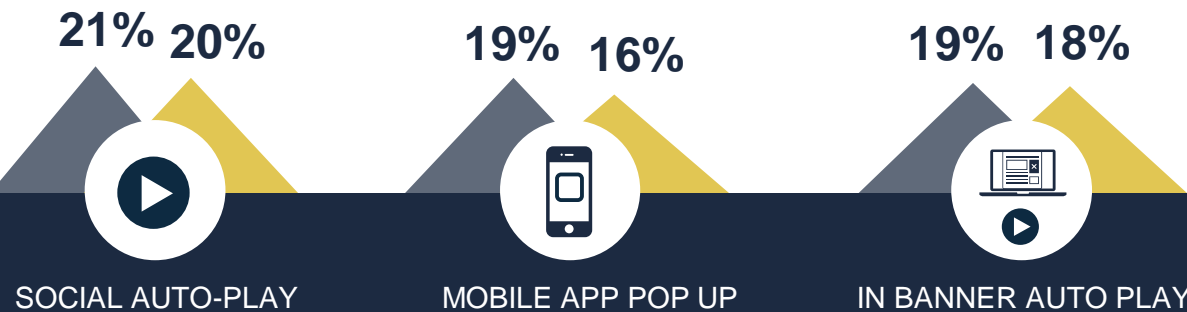


GEN Z



Only 22% are open to receive online video advertising

....or we can make it even worse!



44% are actually highly annoyed with it!

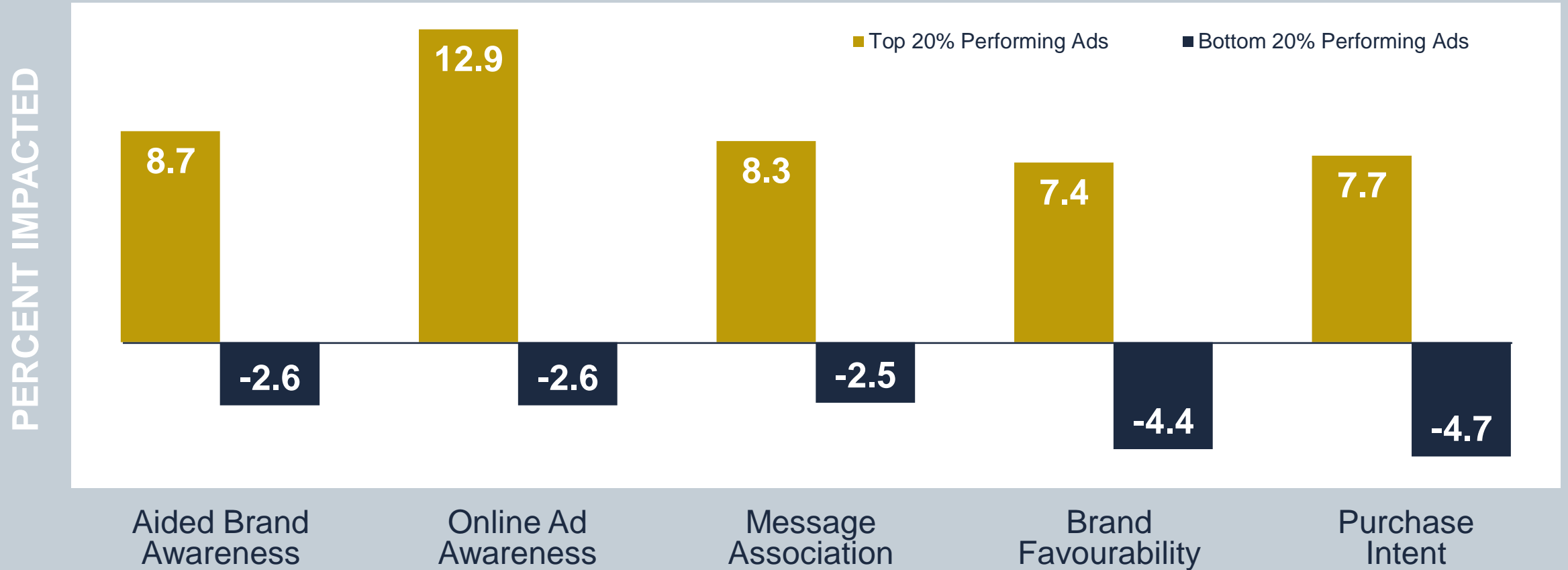


% POSITIVE

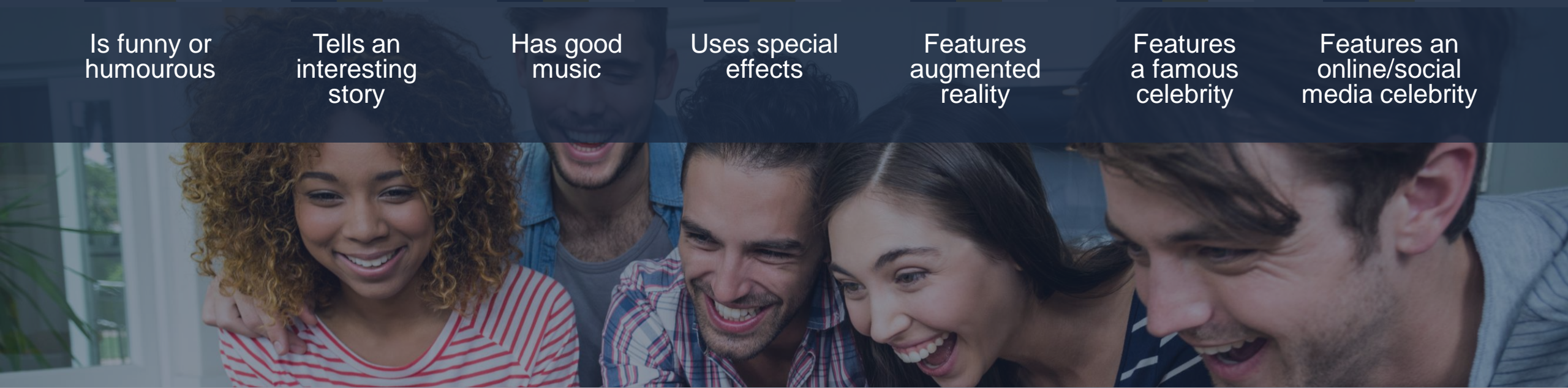
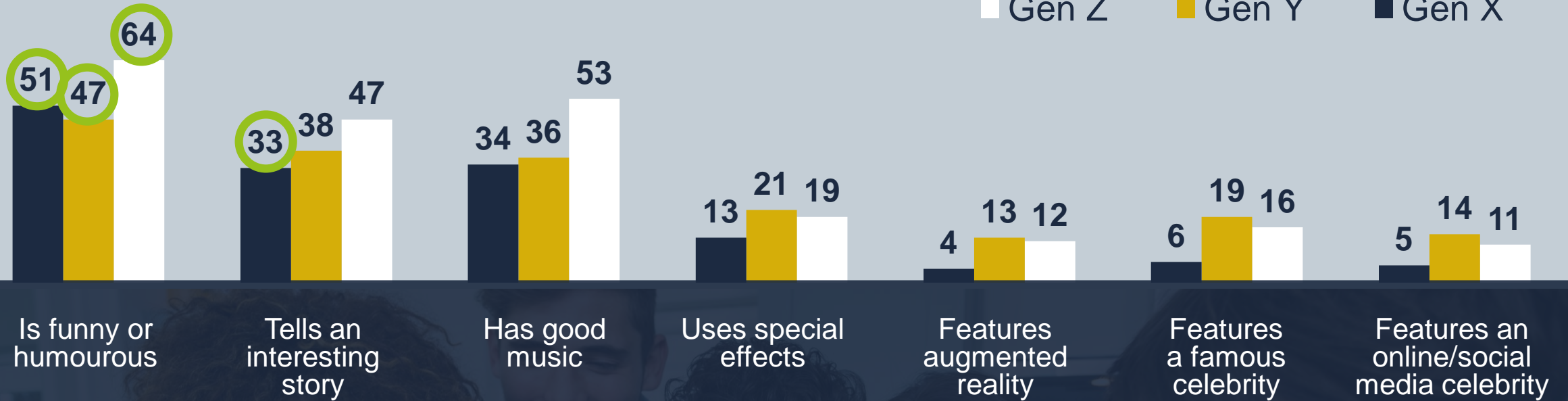


**04 BUILDING
ENGAGEMENT
THROUGH CROSS
DEVICE CREATIVITY**

Creativity also matters on digital...and bad creatives can drive a negative brand impact



Consumers want to be engaged and entertained



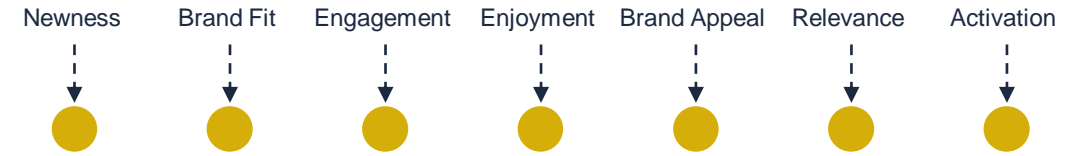
How pre testing supported Volkswagen with overnight improvements



SILVER LION, CREATIVE EFFECTIVENESS



One of the best automotive video/TVC ever tested

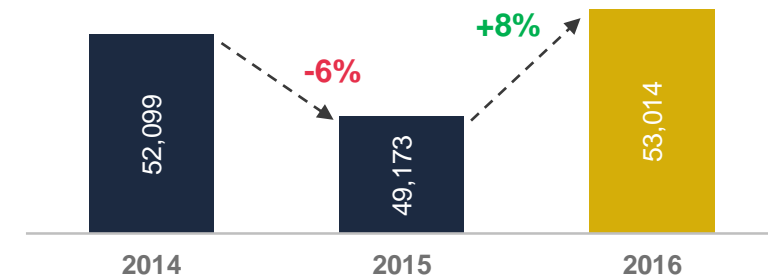


36,000,000
views after across
all platforms



2,100,000
YouTube views after 1 month
95% Likes (1700 ratings)

Tiguan sales increased



AND AS OPPOSED TO IN MARKET PERFORMANCE, WHEN OPTIMISING WE CAN REPLICATE ANY PUBLISHER ENVIRONMENT AND IN ANY DEVICE!

And in market measurement is able to deliver different perspectives of the brand funnel...as well as the creative

- 1** First, consumers need to be aware of a brand.
- 2** Then they need to understand the value to them, or what the product is used for.
- 3** The consumer forms an opinion about the brand
- 4** Finally, the consumer decides whether he or she is likely to purchase the brand.

BRAND AWARENESS/FAMILIARITY

Measures the level of familiarity respondents have with the brand (aided and unaided)

MESSAGE ASSOCIATION

Measures the extent to which respondents can match the messages and/or concepts in the creative to the brand

BRAND FAVOURABILITY

Measures the extent to which respondents have a positive or favourable opinion of the brand

PURCHASE INTENT

Measures the likelihood of respondents to purchase the brand in the future

AWARENESS

PERSUASION

As well as understanding the effect of both

1

The Creative

2

The formats

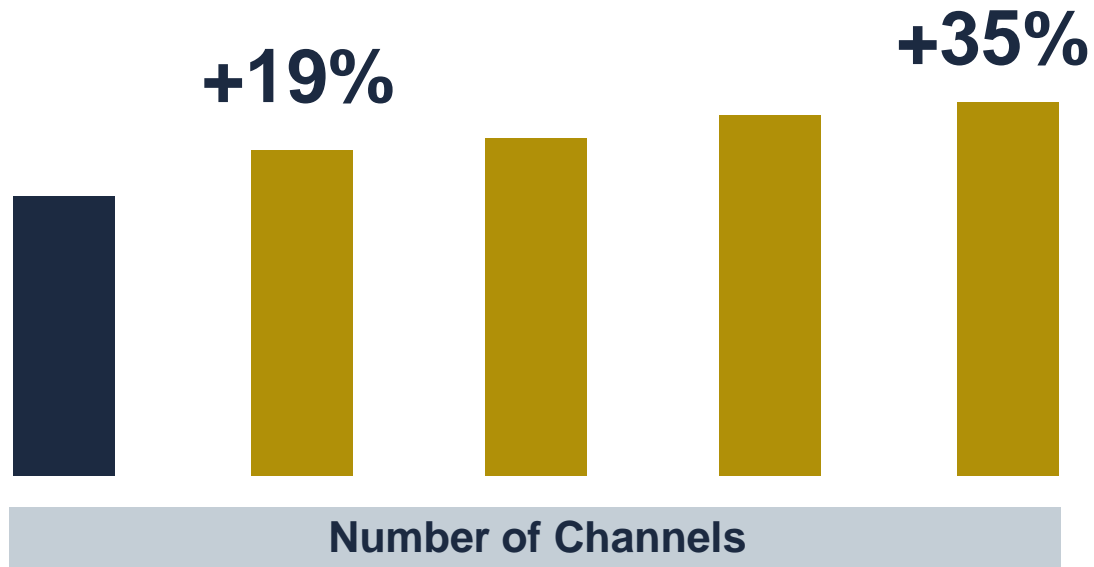
3

The placements (frequency...)

But creativity needs to make the most of the multiple channels available...

THERE IS PLENTY OF EVIDENCE THAT MULTICHANNEL CAMPAIGNS TEND TO BE MORE EFFICIENT

Incremental Impact of Media Channels on ROI

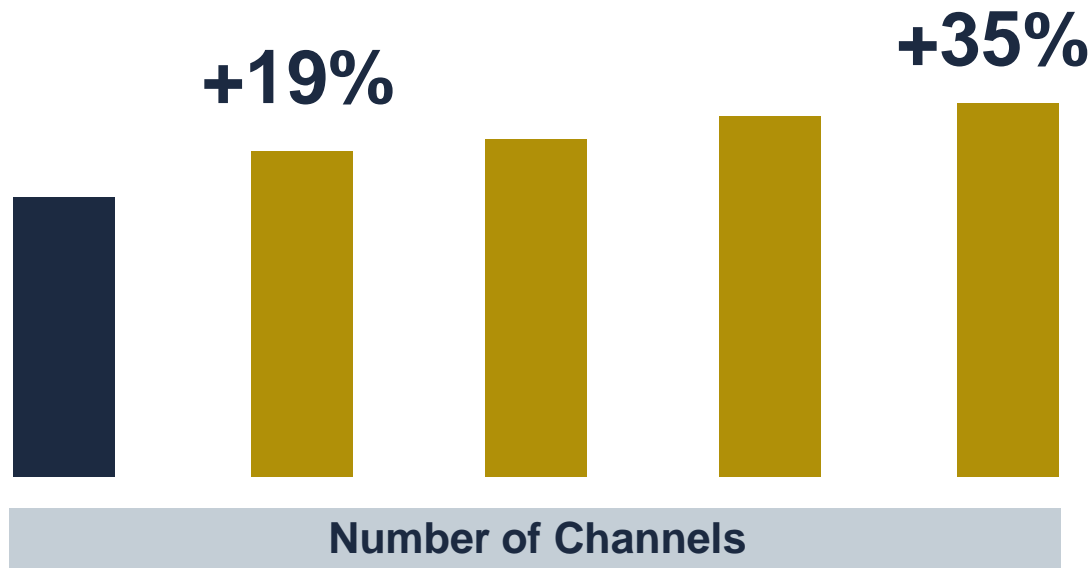


Source: Ad Age's summary of the ARF's "How Advertising Works Today" (2016) which analysed 5,000 campaigns for 1,000 brands in 41 countries

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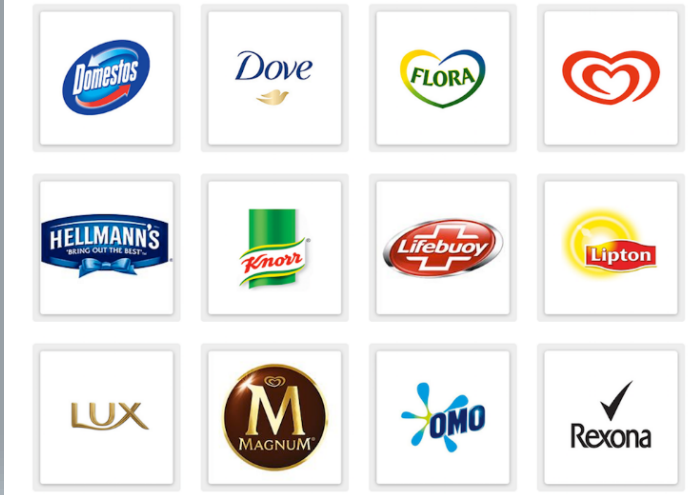
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...without leading to brand fragmentation

Unilever's Keith Weed: 'Brand integration keeps me up at night'

Unilever's marketing boss Keith Weed says fragmentation is a "massive risk" to brands as it lessens their power and consistency.

By Leonie Roderick 20 Jan 2017 2:44 pm

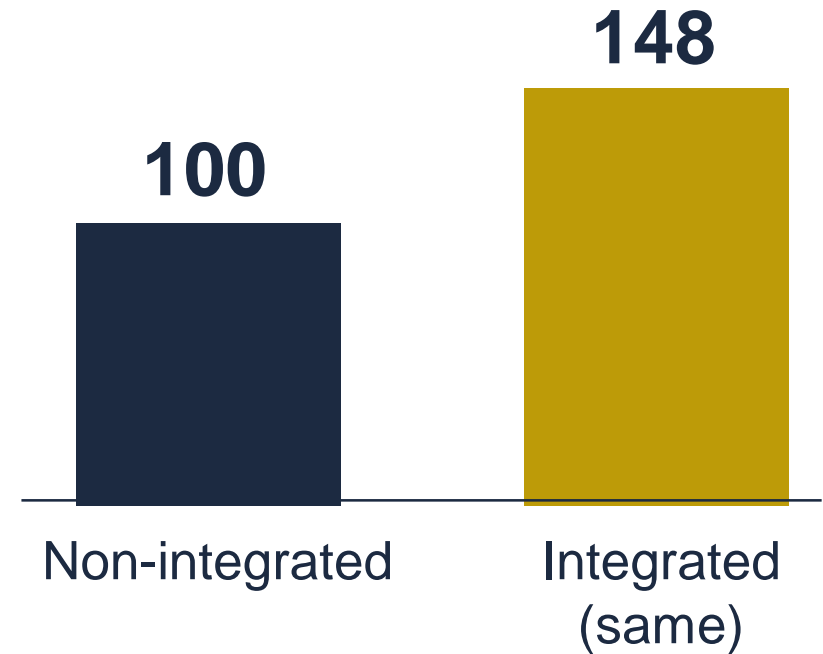


Consistency is key

KANTAR MILLWARD BROWN'S WORK WITH THE ARF:

When there is a unified approach to the creative strategy, the ROI is much higher

Indexed impact of different types of cross-platform creative strategy on equity metrics

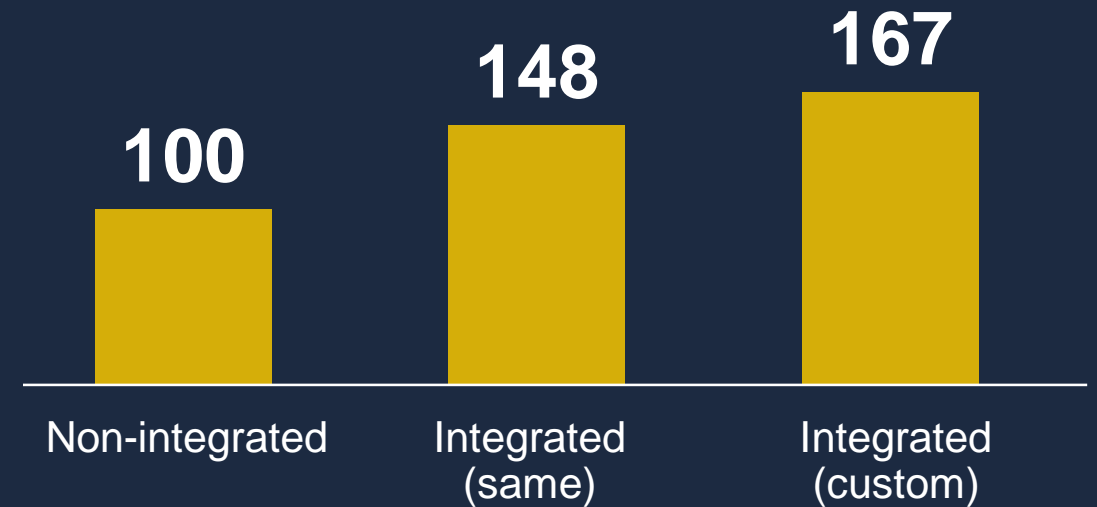


Invest in customising for the right touchpoint

Kantar Millward Brown's work with the ARF:

But that does not mean simply taking the same video across ...adaptation to the platform also helps to increase impact

INDEXED IMPACT OF DIFFERENT TYPES OF CROSS-PLATFORM CREATIVE STRATEGY ON EQUITY METRICS



KEY TAKE OUT

Identifying and deploying advertising ideas (before execution ideas) is today more important than ever

The power of this campaign came from synergy due to the consistent visuals and simple theme around the Cellular brand



TVC



FACEBOOK

77%
SYNERGY EFFECTS
Brand impact as a result
of synergy effects
between paid
media



POINT
OF SALE



MAGAZINES

An synergistic campaign (messaging and creative) proves its worth achieving the highest ROI of all NIVEA campaigns measured



EACH CHANNEL HAD A CLEAR ROLE TO PLAY



TV

The main driver of awareness, it helped to setup reach and synergies when other touch points via messaging/creative look and feel



Magazines

Consistency in creative look and feel delivered synergies with other touch points



Facebook

Helped to layer messages that could not be communicated in the TVC. Provided strong ROI as well between \$ and brand impact



Point of Sale

Delivered significant brand effect as the business planned from the offset for alignment with other media to capitalise on synergy

The Cellular launch had more than

3x
the impact

per \$1 spent than the average NIVEA campaign

Advice on measurement of marketing investment to drive better ROI...be disciplined!

1

Start with what is easy to measure, and has great impact on marketing investment

Do I have a strong advertising idea?

Is my creative strong?

Is it well integrated across different media?

What can I measure BEFORE I commit the spend?

2

Measure what matters (not what we can)

How can you ensure you have the right Brand Strategy that will drive growth?

Use BRAND as key KPI to measure impact...and VALIDATE your AUDIENCE.

Use logical performance metrics if tactical campaign

3

Avoid perceived “perfect” measurement...in SILOS

Be open to probabilistic measures that give an overall perspective of the investment

Measurement of synergies more relevant than touch points on their own

4

Explore how survey data can enrich your internal data

What measures do you need to drive better targeting?



Q&A



Thankyou

iab.
australia

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