



# TRENDS REPORT 2020

ADVERTISING WEEK  
JAPAC

In partnership with



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# FOREWORD



**CLIVE PROSSER**

**DIRECTOR  
ADVERTISING WEEK APAC**

Welcome to Advertising Week's JAPAC Trends Report. It's proven to be an event like no other in a year like none we've ever experienced before.

Probably the most significant thing about this event - aside from the fact it was Advertising Week's first ever virtual conference - was the fact it came together so remarkably quickly. The speed at which things have moved, not just week to week, but day to day during the months of COVID-19 isolation means we've had to rapidly evolve our business model.

This saw the entire program for the JAPAC event assembled in barely a month. Quite the contrast to the roughly half-year runway we have for most Advertising Week events. In spite of this urgency, the result was two days of brilliantly produced content, and for that I owe a huge round of thanks to all our partners, event presenters, and the hard-working team at Advertising Week.

Virtual conferences are still a work in progress for us. But with overseas travel - a cornerstone of our events - likely to be a distant dream for some time yet, we need to keep innovating to bring you the world-class experiences that

you've enjoyed in the past. That's a goal we're very much committed to, and one we believe is most important.

With so much uncertainty in the world and little clarity on what our lives will look like this time next month, let alone next year, sharing thought leadership is now more essential than ever. If the havoc wrought by COVID-19 has demonstrated one thing, it's that we need to help each other out wherever we can.

We understand the power of the wise and respected industry voices we convene at Advertising Week's global events. Experience and a guiding hand to navigate through choppy waters are exactly what people need at present. It's our intention to keep bringing you the world's best advertisers and marketers to help you plot a course into the future, and AW Learn will be the place to arm yourself with that knowledge.

Tough times still lie ahead, but that's all the more reason to commit to learning about the industry you work in, and to upskill. There's a genuine opportunity for us all to try new things and bolster our knowledge in the months ahead. This report hopefully will serve as a great source of motivation while our worlds are still turned upside down.

Speaking of which, I'd like to also quickly thank our partners at Google for supporting this report. Without our fantastic partners, these events and publications simply wouldn't happen.

Our next goal is to bring you the very best of Advertising Week Europe and New York - projects that are well and truly in development as I write. So thank you for your ongoing support. Stay strong, stay upbeat, and we look forward to seeing you at Advertising Week APAC in winter 2021.

## EXECUTIVE SUMMARY

# BE POSITIVE, MAKE A DIFFERENCE

The year 2020 is proving to be, shall we say, eventful, isn't it? In the face of so much history, it's easy to feel helpless, and as though what we do as marketers is pretty meaningless. But that couldn't be further from the truth.

As a quick recap, Australia's once-in-a-generation bushfires rung in the New Year and made global headlines, triggering an urgent discourse on climate change.

Then there was the generation-defining and society-reshaping event that was COVID-19, with 4 billion people worldwide going into lockdown.

Amidst all that has been the rise of #BlackLivesMatter as a global movement, which has started the biggest conversation on race, place, and inclusion we've seen since the 1960s.

It's only June.

In the face of all these historic events (2020 is going to need its own syllabus for high school history students), it can be easy to dismiss marketing as a frippery. Here's why it isn't.

From a purely economic perspective, marketing right now matters more than ever. With most economies plunged into a sudden recession, the brands which keep communicating and build their narratives will be the ones that return to growth first. That's borne out by the data.

But there's more of a need for brands to stand up and be counted for the good of society. We've seen companies of all sizes drop tools and pivot manufacturing for vital hand sanitizer and life-saving protective equipment.

There's also never been a time when your messaging needs to be more on point, reading



**ALEX HAYES**

**AW360 CONTENT/INSIGHTS DIRECTOR**

**"IF I WAS TO BOIL MY MAIN TAKEOUT FOR BRANDS DOWN TO SEVEN WORDS, THEY'D BE: BE POSITIVE, BE PURPOSEFUL, BE THE DIFFERENCE."**

the tone of the markets you operate in and saying something useful, then following those words up with meaningful action. Pledges of solidarity with people of color only carry weight if your organization is seen to walk the talk.

Everything is up for grabs, and what we've included in the following pages is a distillation of some of the most pertinent messages from Advertising Week JAPAC.

If I was to boil my main takeout for brands down to seven words, they'd be: Be positive, be purposeful, be the difference.

# THE QUOTES

“It is like we’ve woken up three years ahead.”

**MARK D’ARCY, VP GLOBAL BUSINESS MARKETING & CHIEF CREATIVE OFFICER, FACEBOOK**

“We need to raise the bar across the whole industry in terms of digital understanding. The fact we’re still having conversations about basic elements of it, we should be further along than that.”

**MATT HARTY, SVP OF APAC, THE TRADE DESK**

“Your brand is no longer what you say it is. It’s what customers say it is to each other.”

**JULES LUND, FOUNDER, TRIBE**

“Move ahead digitally as fast as you possibly can. If you thought it was quick before, it has to be quicker now.”

**SIR MARTIN SORRELL  
EXECUTIVE CHAIRMAN,  
S4 CAPITAL**

“There are a lot of opportunities for you in this time to exploit consumers. Never do that. Just because the consumer is helpless, don’t do it, the consumers will remember.”

**RAJA RAJAMANNAR,  
CMO, MASTERCARD**

“For the first time ever it’s a truly borderless agency and people all over the country are really inputting into clients’ work - the things we want to take forward are that sense of sharing and input.”

**AIMEE BUCHANAN, CEO,  
OMD AUSTRALIA**

“I really do believe that the more ethical you are about data protection and privacy, the more trustworthy relationship you’re going to have with your consumers.”

**BRITTANY KAISER, CO-FOUNDER, OWN YOUR DATA FOUNDATION**

# THE QUOTES

“Be close to your consumers and really understand them. Start from a position of love and empathy.”

**LUBOMIRA ROCHET, CHIEF  
DIGITAL OFFICER, L'ORÉAL**

“We need to become T shaped people because the businesses of today and tomorrow are looking for people who can connect the dots and solve problems in semi-autonomous or even autonomous teams.”

**JONATHAN WAECKER, CHIEF  
CUSTOMER OFFICER, THE  
WAREHOUSE GROUP  
FOUNDATION**

“Glossier is giving us a lot of inspiration and showing there is such a relevant and real place for physical retail, it just needs to be turned on its head.”

**JESS DADON, FOUNDER,  
HOW TWO LIVE, TWOBS**

“We actually had a town hall meeting where we had to tell our people to work less hard, and go and take a break.”

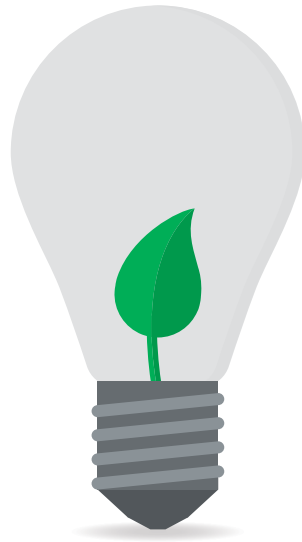
**MICHAEL ROTH, CHAIRMAN &  
CEO, INTERPUBLIC GROUP**

“The framework to approach is not Global or Local. It is Glocal.”

**RAHUL WELDE, EXECUTIVE VICE  
PRESIDENT- DIGITAL BUSINESS  
AND DIGITAL TRANSFORMATION,  
UNILEVER**

“As the world evolves, we evolve too, and it's in line with the way that we continue to evaluate, understand and push forward the policies that will allow us to make sure that people can have meaningful, healthy conversations on the platform.”

**SARAH PERSONETTE, VICE  
PRESIDENT, GLOBAL CLIENT  
SOLUTIONS, TWITTER**



# All it takes is one insight to drive growth.

Unique perspectives, exclusive industry research,  
practical tools, and more – delivered to your inbox.  
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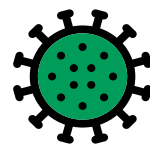
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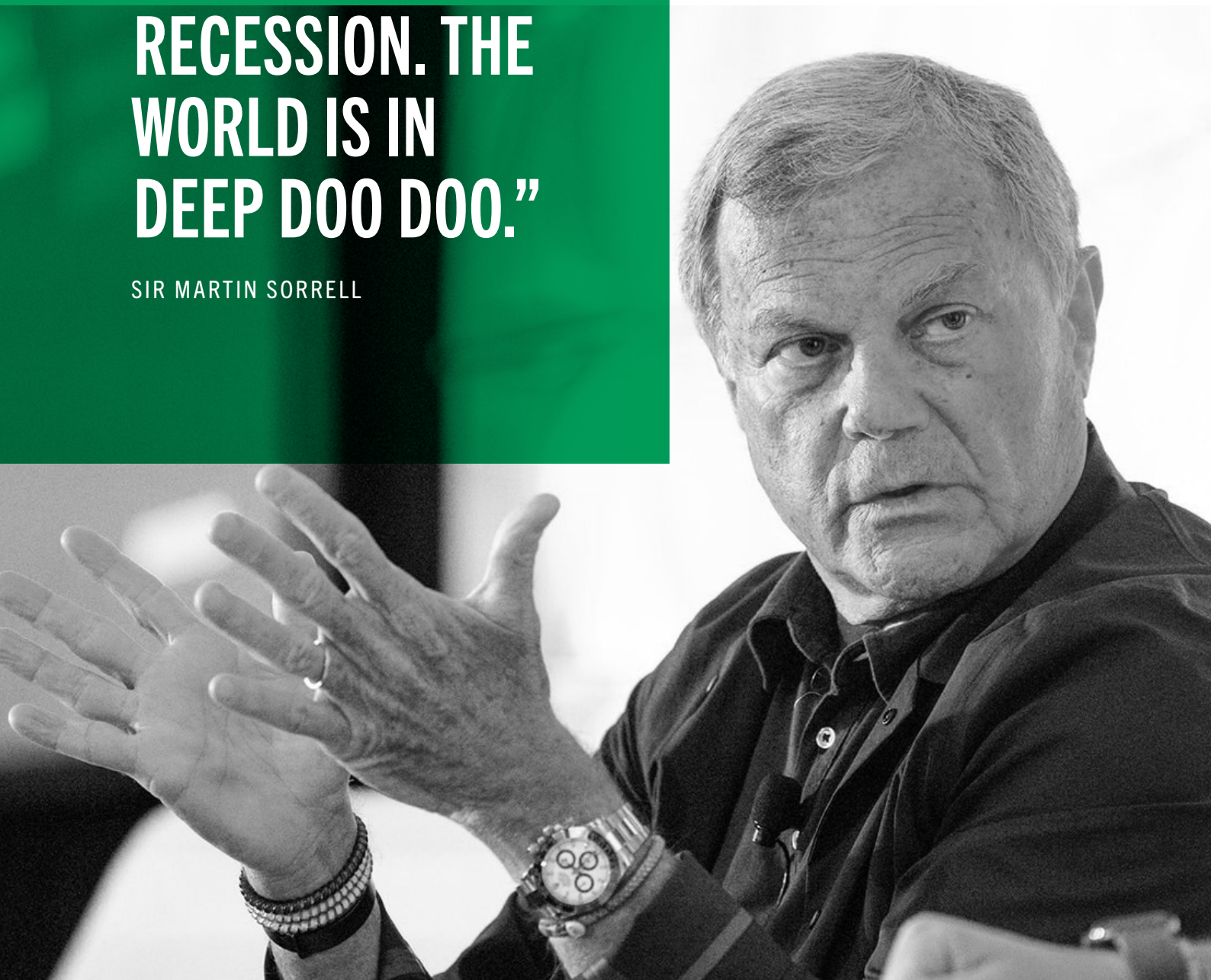


**“COVID-19 IS  
LIKE NO OTHER  
RECESSION. THE  
WORLD IS IN  
DEEP DOO DOO.”**

SIR MARTIN SORRELL



# THE COVID EFFECT





# WORK IS WHAT YOU DO, NOT WHERE YOU GO

Ok, let's get all the cliches out in one paragraph: As we all pivoted and adapted to a new normal in unprecedented times, working from home became standard for everyone.

By now, you'll have heard every piece of advice about WFH (which will be the acronym of the year), and have settled your routine. Which is good, because it looks likely it is going to become something you are able to do pretty much at will.

Leaders in the industry - including IPG boss Michael Roth, WPP's Mark Read, and his predecessor and S4 Capital founder Sir Martin Sorrell - all talked up increased flexibility, now people have proven themselves trustworthy of getting the job done despite the temptations of the sofa and kettle.

Roth flagged a few issues he'd had with staff, explaining: "We had to tell our people to take a break, they were working too hard." They've been told to dial it back, and take a lunch break every day to try and carve out some balance.

Sorrell, meanwhile, has his eyes on the \$30 million plus S4 spends on office space, saying rather than just add it to the bottom line, they would use it to reinvest in their staff.

And Read raised an interesting point around the trend of building bespoke holding-group teams based on-site. He mused, given the success of remote working, what the value of this model would be in the future. He also pledged to entrench these lessons "in our DNA".

His point was elaborated on by OMD Australia CEO Aimee Buchanan (pictured): "For the first time ever, we're a truly borderless agency, and people all over the country are really inputting into clients' work - the things we want to take forward are that sense of sharing and input."

If you haven't already, it's time to invest in the home office for the long haul.

**"We had to tell our people to take a break, they were working too hard."**

**MICHAEL ROTH, CHAIRMAN & CEO, IPG**



## TIME TO GET EMOJI

While we're getting in the groove of remote working, there's something to watch out for - research shows virtual relationships are more likely to degrade over time than in-person ones.

The reason for this, according to Dr. Nick Morgan (pictured), Founder of Public Words, is a simple lack of emotion in our communication. No matter how rational you are, emotion is the main way you make decisions.

We've all received those ambiguous texts or emails which can be read two ways, leaving you wondering if you're being hired or fired. Or been on those conference calls where everyone talks over each other, and some people don't get to contribute at all. It all builds to a lack of connection, which in time creates a lack of trust.



So what is the answer? The first one is to be much clearer and more intentional in the way you communicate, and use more words which convey the emotion of your response.

"If you're not a very funny person, don't start trying to make jokes," says Morgan. "Keep the form and style and content of your communications consistent, that is how people will measure whether or not they trust you."

Appoint an MC for telephone or video calls to help keep discussions flowing and get everyone involved, and don't let them run for too long, as they are more draining than regular meetings. Make sure to check in with everyone on the call on how they are feeling.

And Morgan's most surprising tip? Use emojis.

"When you're sending messages or emails, use the basic emojis," he says. "They are like putting back in the body language that gets cut out of written communications. It'll save you time and misunderstandings."

So the next time you get an email with emojis in it from your boss, remember they're (probably) not trying to be cool, they are just trying to convey the emotions of their message.

### THE GROWTH OF EMOJI USE

**6 BILLION**  
emojis are sent every day

(Source: Emojis)

**94 %**  
of the online population use emojis daily

(Source: Emogi, via Adweek)

The most popular emojis in 2019 were



(Source: Unicode Consortium)

**63 %**  
think positive emoji usage increases your credibility

(Source: Adobe Trends Report)

There are a total of **3019 EMOJIS** in Unicode standard

(Source: Emojipedia)



## 3 THINGS FOR MARKETERS: EMOTIONAL ENGAGEMENT

**Let's Reset's mindfulness coach Kate Delaney discusses shifting culture and performance, being more emotionally intelligent, and using mindfulness to improve performance.**

### **USING MINDFULNESS FOR BETTER AWARENESS**

Mindfulness means to be fully present in our lives. The first thing to consider is awareness of thoughts and feelings. Our mind is a fantastic resource for thinking, problem-solving, and coming up with solutions. However, it can also be a roadblock. One aspect is ruminative thinking, which is going over and over things in a loop. Around 90% of thoughts we had yesterday, we have today. The other is negative automatic thinking, which is negatively framed interpretations of what we automatically think is happening in response to a trigger. The key is to be aware of these thoughts, otherwise we get lost in them.

### **THINKING LESS TO IMPROVE PERFORMANCE**

Many professionals know how to use their mind for problem-solving, and are taught to value this part of the mind. It's a brilliant ability, however, when it happens continuously, it can generate thoughts we don't need - ones that put us down about our work, affect our mood, and lessen productivity. If we're constantly problem-solving and overthinking, we become less resourceful. When we step out of critical thinking, problem-solving or negative automatic thoughts, we can become more present, and then tap into our conscious mind to gain insight and better self-awareness, which can benefit our performance in work and home life.

### **STEP INTO AWARENESS WITH FEAR**

A strategy to help manage evolving circumstances to help you and those around you perform better is the FEAR framework. F is for feel - check how you're feeling, and notice where you feel different when relaxed. E is for enquire - examine feelings and ask yourself why you feel that way. A is for accept - learn to accept those feelings right now. R is for review - re-check in with yourself. When your mind keeps going over a problem stopping you from performing your best at work, try this process of accepting your thoughts and learn how to react to them. If not, what resists persists.

# THE WORKPLACE TRANSFORMATION



**“Connecting with people over Zoom is not the same as when you meet in person. The stories become different and we realize even more the importance of meeting in real life.”**

**JUN AOKI. ARCHITECT**

Reimagining companies means not just changing the physical spaces we work in, but also the very structure of businesses.

As architect Jun Aoki (pictured) points out, virtual meetings and WFH are limiting for creativity: “In a Zoom conference, the meeting attendees are decided in advance, so there is no natural way to meet anyone unexpected. Connecting with people over Zoom is not the same as when you meet in person. The stories become different, and we realize even more the importance of meeting in real life.”

So as companies look to downsize offices and take a more flexible approach, their needs will change, presenting an opportunity to come up with a different looking space, and ask what will we need to encourage connections in the future.

Ed Mitzen, founder of healthcare agency Fingerprint, says the company has deliberately always opted for workstations and eschewed offices in its buildings to encourage collaboration and create a more open workplace.

He explains the agency is founded on the idea of putting people first, which he insists is not about being “touchy feely,” but rather taking away distractions to allow teams to focus on work. To that end, they have also done away with job titles, in a bid to kill the idea of hierarchy and encourage everyone to have a voice.

“I think a lot of the time hierarchy can stunt the growth of a company, and it becomes a distraction for people reaching for that title, which isn’t as important as the responsibilities and work we give people,” Mitzen says.

“The work will be better and more collaboratively created, and people are happier to share credit.”

If we’re building more open-border work cultures, doesn’t it make sense to empower everyone and enable them to collaborate more openly?



## TRENDING ON YOUTUBE: HOW PEOPLE ARE USING THE PLATFORM TO LEARN AT HOME

**Mark Wheeler, Head of YouTube and Large Customer Ads Marketing Google AUNZ**

Our new reality of doing almost everything at home can be challenging for anyone. But millions of people across Australia and New Zealand are using this time as an opportunity to upskill, learn, and grow. Watch time trends around learning on YouTube are proof of this, and we're seeing people turn to #WithMe content and how-to videos in new ways. Here are three behaviours we've seen emerge while much of the world has been on lockdown.



Global watch time of how-to videos that include "at home" in the title has increased by more than 50% YOY.

### A RISE IN CREATIVITY

Many of us have been inspired to find new creative pastimes. Global watch time of how-to videos that include "at home" in the title has increased by more than 50% year over year, and in a recent study, almost half of Australians said they believe self-isolating will allow them to rediscover their passions. Beyond learning new recipes – which 41% of Aussies have done over the last month – we're seeing a rise in gardening in isolation too. There are amazing stories like Cree Monaghan and Tim Hall, who turned a blank canvas of 100 acres in the Margaret River Region into a sustainable, regenerative farm and cooking school from watching how-to videos, and it seems Aussies and Kiwis are turning to

their backyards to cope in recent times too. Google searches for "gardening" have jumped by more than 105% since March 15.

### PEOPLE ARE INTO E-LEARNING

It's no secret that this is a key moment for online education. Recent research found that 49% of consumers who regularly watch YouTube do so to learn about a topic, and since March 15, searches for "study with me" have climbed more than 300%. From math lessons with the inimitable Eddie Woo, to educational activities for little ones, there has even been a social distancing video by The Wiggles.

### PEOPLE ARE SPENDING THEIR DOWNTIME UPSKILLING

For many of us, pursuits such as personal projects at home, to skills development are brand new: we've seen global watch time of how-to videos containing "for beginners" or "step by step" in the title increase more than 65% YOY.

Which topics are people gravitating towards? They range from popular pastimes to niche endeavours. Across Australia and New Zealand, YouTube views on everything from handstand training to playing the guitar are on the up, and 1 in 5 Aussies say they want even more how-to content or tutorials to help them learn new skills. Trends like these help us understand consumers so we can continue to support them when they need it most.

Find out more on [Think with Google](#).



## REFLECT YOUR TALENT

There are many advantages to remote work, but there are also several disadvantages. Communication is one fundamental issue, but as companies start to recover, and restart hiring and promotions, there are other problems to overcome.

Not least is the issue of training up staff. The obvious people who suffer in WFH environments are junior staff members embarking on careers or starting with new companies, who lose all of the hand-holding of induction, and the training that comes with it.

In particular, on-the-job training will be severely impacted, and that, for many in the marketing industry, is the way a lot of important knowledge is passed down.

Daisuke Otobe (pictured), CEO of Coup Marketing, explains: “People just work to complete work, with no end goal in mind. In such a situation, how do you grow people to become better?”

“In an office, your boss helps you out, and your teammates are there, and we can have casual hallway conversations where we can get a lot of information. In this virtual world, none of that exists, and we need to find ways to reintroduce those elements.”

According to Otobe, one way to get past this is to give staff purpose, and start them on the path to development for their next role, even if it is a way off. He likens it to a sportsperson who practices and develops skills to play matches, rather than developing skills by playing matches every day, which is what many of us do.

He also advises us to “standardize training to make it easier to understand how people acquire new skills.”

How can organizations adapt to improve? According to Otobe, it’s all about reflection, and taking the time as a team to look back at what you’ve just done and learn from it. He adds: “By reflecting, the experience becomes knowledge, connecting one task to the next. By building an organization focused on reflection, every employee will benefit and the organization will grow stronger and maintain the workforce.”



**“People just work to complete work, with no end goal in mind. In such a situation, how do you grow people to become better?”**

**DAISUKE OTOBE, CEO OF COUP MARKETING**





# THE BIG PICTURE

## EMERGING FROM ISOLATION STRONGER



**With the world coming to terms with the impact of COVID-19, content maestro Gary Vaynerchuk outlines his views on marketing, leadership and more.**

### MARKETING OPPORTUNITIES

We are now heading into a phase where brands can speak. So, rule number one is to look at the creative and make sure it's not opportunistic. Next, let's be gracious for employees, customers, and medical staff - we have permission to say thank you.

Now is also the time to create. Think about handmade things, such as animation, using employees as actors or actresses - there are a lot of DIY content opportunities.

Humor is a really nice play too, but make sure it is not tone deaf. It's also a good time to think about live streaming, and losing high production value for authenticity. Consumers love real and aspirational.

### LEADERSHIP

Our changed working habits, personally, have made me even more engaged and a more hands-on leader. It's a great chance to embrace this role.

Alongside this is the opportunity to show compassion, sympathy and care - be there for other people. We're seeing more humanity outside of a professional environment. Humanity plus tech like Slack and Zoom is a huge opportunity for leaders.

### BECOME A PRACTITIONER

It's amazing to me how many senior people aren't hands-on with some platforms their companies use. Take the time now to learn TikTok, and understand LinkedIn. Find 15 to 50 hours to learn these things. Learn about text marketing, and make a piece of content and post it on Instagram. Or make an ad for something in your home.

### THE FUTURE

Every Friday I'm working from home now. I find I'm more concentrated and less '15 minutes behind'. The pandemic means we're seeing a lot of non-reversible consumer behavior; some of my team now see that drinking a beer with friends via Zoom is more fun than doing the same with colleagues. And people have started buying things online they've never bought before, and they're not going back. Things have changed, and arguably for the better.

**“LOCKDOWN HAS ENABLED  
PEOPLE TO EXPERIMENT AND  
THINK ABOUT THE CONTINUUM  
OF PRODUCTION VALUES.”**

STACEY MINERO, GLOBAL HEAD OF CONTENT CREATION, TWITTER



# THE RISE OF CREATIVE ENTREPRENEURSHIP

One constant theme which has emerged is the need for creativity in the world today. It's been something of a trope for the advertising industry to stress the importance of creativity for business (and too often to be roundly ignored by the bean counters), but it feels like we've hit an inflection point where creative thinking can make a real difference.

With every business impacted by lockdown, the need for innovation and clever thinking has never been more apparent. Overnight 10-year plans were fast-tracked to be ready inside a week.

But while we emerge from the lockdown phase, the next challenge will be rebuilding businesses, and entire economies. This, according to Facebook's Chief Creative Officer Mark D'Arcy, is an amazing opportunity.

"No matter what technology is available, creativity is what unlocks the value of it," he explains. "Technology used to be expensive, but those barriers have fallen away and there's a democratization of opportunity, so someone with a mobile and a really good idea has the ability to start a business, and share and garner support for their idea, which is incredible."

From a pure advertising perspective, creativity is what will allow companies to stand out to consumers at a time when it is "very hard to stand out," according to WPP CEO Mark Read.

Movember's ANZ Country Manager Rachel Carr (pictured) believes the tone of voice which is going to stand out and attract support from customers is a positive one.

"This year has been a particularly dark year, and what we really hope for is that by the time we get to November, we'll be able to bring some light into people's worlds, have an opportunity to connect, and have that sense of belonging and purpose once again," she says.

Spreading that light and keeping your head up for opportunities are the watchouts for the second half of 2020.



**"This year has been a particularly dark year, and what we really hope for is that by the time we get to November, we'll be able to bring some light into people's worlds, have an opportunity to connect, and have that sense of belonging and purpose once again."**

**RACHEL CARR, ANZ COUNTRY MANAGER,  
MOVEMBER**



## VIDEO EFFECTIVENESS AND THE CORONAVIRUS

**Ben Jones, Global Creative Director at Google's Unskippable Labs**

We might be several months into the coronavirus pandemic, but the uncertainty of the times has most advertisers asking, “What do I say and how do I say it?” To explore this question, we reviewed 1500 of the best- and worst-performing video ads that ran on YouTube in March and April.

We gauged performance using four Brand Lift metrics: ad recall, consideration, favourability, and purchase intent. Then we compared their performance to the best- and worst-performing YouTube ads from March and April 2019, using the same metrics. Here are four findings that may assist brand marketers and creative teams trying to find their footing amid the turbulence.

### **#1: YOU DON'T NEED TO MAKE A CORONAVIRUS AD**

While we saw an uptick in April of video ads that explicitly or implicitly referenced the pandemic, the vast majority of ads running were “business as usual,” not crisis related. In fact, more than 80% of the ads we reviewed had no change in tone, expression, or messaging.

Crucially, the business-as-usual ads showed no observable decrease in performance across brand metrics; they continue to drive recall, consideration, favourability, and purchase intent.

### **#2: CORONAVIRUS ADS BOOSTED AD RECALL BUT BARELY AFFECTED OTHER METRICS**

When looking at ad recall only, 35% of YouTube's top-performing ads in April were coronavirus related, compared to only 5% of ads that were virus-related in March. While an ad's acknowledgment of the crisis seemed to

improve ad recall, it didn't significantly influence shifts in consideration, favourability, or purchase intent. Our hypothesis is that the relevance of the ads triggered recall, but that many ads over-indexed on the crisis itself, without creating a strong connection to the underlying brand.

### **#3: THERE ARE A RANGE OF VIABLE PRODUCTION OPTIONS**

Most of the ads that ran in March and April were produced before the pandemic and reflected typical production quality. But as the coronavirus began to restrict video production capabilities, we've begun to see a shift to more user-generated content, hand-held shots from mobile phones, and alterations to voice-overs and graphics. For brands toiling over what to do next, making slight alterations to an existing ad has the potential to acknowledge the current context while also staying true to your brand values.

### **#4: THIS CRISIS IS BRINGING OUT THE BEST IN BRANDS**

We are now in a place where immense challenge and uncertainty pervades, but also where your brand can be the best version of itself. This can be the moment to invest in brand building and a time to experiment with ad formats, approach, and whatever part of the marketing funnel your brand typically plays in.

The fundamentals still apply. As consumer sentiment and circumstances rapidly evolve, focusing on the fundamentals — product offering, access, brand equity — will do more for business than an aggressive change in creative expression.

**Find out more on [Think with Google](#).**

# THE GREAT CREATIVITY OF CHINA

“China doesn’t get called creative a lot, and what’s even scarier is a lot of people don’t think they’re creative,” says RGA Executive Strategy Director Rob Campbell (pictured).

But as he explains, this is an impression you form at your peril, and to the detriment of understanding how a huge and diverse market operates.

In lockdown, a lot of the world has moved towards things like contactless payments on mobile and retailers have run hard at ecommerce, things the Chinese have been pioneering and mastering for several years already.

For Campbell, who lived in China for many years, the Western tendency to dismiss Chinese creativity as stealing ignores an entrepreneurial spirit which has been lost in many places. He points to the grand visions for Chinese companies like Tencent and Alibaba as an example of this ability to embrace a grand plan while remaining agile.

“I just cannot see anybody in Europe, as an example, just saying ‘We’re going for this big vision, and we’re going to make this happen,’ because it’ll end up in this discussion around who’s going to fund it, where it’s going to lead,” he says.

They’re also taking entrepreneurially creative approaches to problems in the country, with Campbell pointing to a milk brand which addressed concerns around freshness by creating packaging featuring that day’s headlines, authentically showing consumers at the point of purchase when it was made.

“For me, when you hear stuff like that it’s invigorating, and that is why people should open their eyes to China, rather than just shrug their shoulders at it,” Campbell adds.

Perhaps the biggest case study around Chinese creativity sweeping the world right now is TikTok, more of which in the Impact Makers section.



## CHINESE ENTREPRENEURIAL POWERHOUSES

### TENCENT

**15%** share of global games revenue

(Source: IHS Market)

Building a Monaco-sized “city of the future” in Shenzhen

(Source: CNN)



First Chinese company to hit **\$500 BILLION** market cap

(Source: techtimes)



### ALIBABA

**7<sup>TH</sup> LARGEST** in the world by market value in 2019

(Source: Statista)

Alibaba’s **US IPO was larger** than Google, Facebook and Twitter combined

(Source: Market.US)

**3<sup>RD</sup> LARGEST** retail commerce business in the world

(Source: Forbes)







## 3 THINGS FOR MARKETERS: A NEW ERA OF VISUAL EXPRESSION

**Lives at home have never been more complex, and with that comes the need for different and unique visuals to represent the current climate. Yuri Endo, Getty Images' Senior Content Editor, discusses how our perspective has changed in recent months.**

### GLOBAL SEARCH IN A CHANGED WORLD

The coronavirus outbreak and our social isolation has seen content searches boom and new popular search terms emerge. In Getty Images' global search, the top three new terms since March include COVID-19, coronavirus, and social distancing. Upward trending terms globally that reflect the new reality include yoga (+2508%), working from home (+2506%), and home workouts (+1303%). New keywords, meanwhile, include phrases such as, 'audience free event,' 'antiviral drug,' 'n95 masks,' 'travel ban,' and 'panic buying.' On Getty, one of the top searches was 'diversity.' In Japan, search for diversity grew 1000% since 2019, suggesting a much stronger focus is developing.

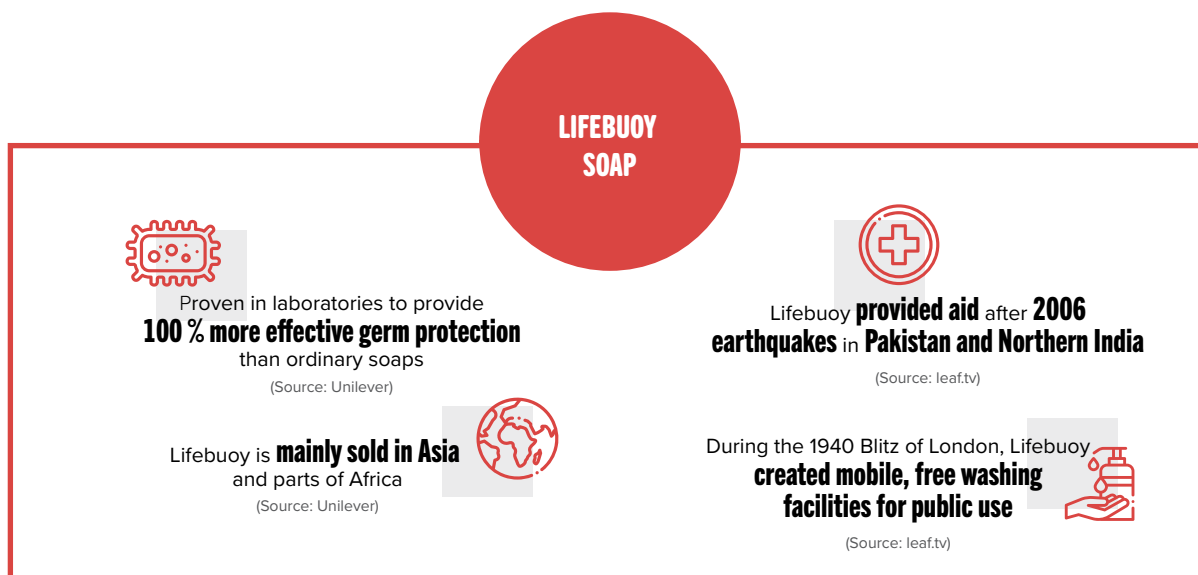
### COMMUNITY AND TECHNOLOGY ASCENDANT

Over the past few months, the changing situation and new norms are being visualized via content on Getty Images. Popular subject matter represented in the visuals include social distancing, virtual connection, working remotely, and home pleasures. Some keywords related to these images include 'community,' 'connection,' and 'support,' while 'virtual connection' has become a new search trend. This may be because people are increasingly seeking connection, education, and entertainment with familiar technologies. Positive awareness of technology is growing, with increased visuals of couples co-working at home, children educating online at home, and events moving from a single screen and audience to individual screens.

### WHAT TO EXPECT POST-COVID

The future and our new normal after the pandemic is not 100% predictable. However, what we can expect is to see people taking a more positive attitude towards technology. Environmental issues, remote work, and work-life balance will remain primary challenges and concerns. In addition, consumers will demand more transparency from brands, while small businesses will be more widespread. There's also been a shift towards the simple pleasures in life, such as reconnecting with nature, human connection, and physical and mental wellbeing, which we can expect to continue in a post-COVID-19 world.





## MOVE FAST AND MAKE THINGS

Has lockdown heralded the death of the big brand ad? A lack of access to locations and talent has forced brands to become more entrepreneurial in the way they approach putting campaigns together.

But as Stacey Minero (pictured), global head of content creation for Twitter, explains: “Lockdown has enabled people to experiment and think about the continuum of production values. Sometimes you want real and raw, and sometimes glitz and glam, and it doesn’t have to be one-size-fits-all. It’s going to be more agile and efficient.

“I think it’s going to make those TV spots or films have more meaning when we see them, they won’t go away altogether. So we’ll still want to see those anthem videos from Nike, but they’re going to mean something more.”

So what are the ways brands have been showing up in this time?

Samsung was launching its new S20 phone, but was suddenly robbed of its ability to be able to showcase it to people in live demonstrations and experiences. So, to build hype they went digital, turning to Facebook to live stream the reveal of the phone, and utilizing a range of digital tools to allow people to get ‘hands on’ - or as close as they could be - to the product itself.

Soap was already an in-demand product, but rather than sit back, marketers at Unilever’s

Lifebuoy brand extended a long-running educational campaign around handwashing - which had been targeted at emerging nations - globally to ‘developed’ markets. Interestingly, the message they spread wasn’t about Lifebuoy, but rather ‘Use soap, ANY soap,’ recognizing the humanitarian need was greater than a product message.

And if you want simplicity, then brands like Taco Bell snuck in early and created some fun Zoom backgrounds to brighten up those video calls (and hide the lack of hygiene standards in your home).





# THE BIG PICTURE

## 6-SECOND MASTERPIECES



**The recent launch of Byte, the latest platform from the creators of Vine, got Contented Brothers' Tom Hall thinking about short form content. Here are his top takeaways for making something short but memorable.**

### BRIEF IS BEAUTIFUL

We're in the era of the micro narrative and the micro budget, which means there's a stack of opportunities to sell with concise messages and smaller outlay.

Why short stories? Well, stories engage the brain and memory in a different way to facts - we are effectively story-making and story-consuming machines. If you can use a story, you're more likely to create something memorable and have your message hit home.

Here's an example, possibly apocryphal. Ernest Hemmingway, when challenged on what a very short novel looked like, responded, "Baby's shoes for sale. Never worn."

### EVOKE EMOTION

Making the audience feel something, even in a very short timeframe, is essential. Airbnb did this

very well in an ultra-short piece that showed a family coming together to cook pizza. All it took was getting away from home, and discovering a new holiday house...

### EVOKE EMPATHY

One of my favorite shorts is called *Deliverance*, and it features a guy racing for the door after the doorbell rings, only to find he'd missed the delivery guy. He lets out a dejected, "But I was *here!*" It's even more relatable given our recent shared isolation.

### DELIVER UNEXPECTED CHANGE

*The Science of Storytelling*, by Will Storr, quotes Professor Sophie Scott of University College, London, who says, "Almost all perception is based on the detection of change." As humans, we look for moments of change and transformation we weren't expecting. It's what really makes us engage with something.

### FOCUS ON THE MAIN THING

You've only got the time for one message, so avoid the pursuit of completism. An incredible example is a Mercedes ad that lasts just 3.8 seconds. It features nothing more than some words and the sound of a car accelerating. Just enough to inform you that's how long it takes the car to go from zero to 60 miles per hour.

### END WITH A TWIST

It's a technique beloved by movie directors, and it sure works. A great example? A short video where two base jumpers leap off a cliff. A few seconds later, after watching them plummet, you see a VR-helmeted employee in a drab office collapse to the floor. Yes, it didn't really happen after all. But it stays with you.

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ANY MORE.”**

SANNE DROGTOP, VP BUSINESS & OPERATIONS  
APAC, MEDIAMONKS



  
**INSIGHT  
DRIVERS**



## HOW YOU SHOW UP MATTERS

In the new world order, you need to stand out more than ever. That much is evident if you've been paying attention through this report so far. But how you show up and stand out is now even more pertinent than ever - all eyes are on who is doing what.

As Mastercard CMO Raja Rajamannar (pictured) explains: "You don't want to get lost in that sea of sameness. When you're standing out, you have to stand out for the right reasons and think authentically. If you are being tone deaf, you'll fall flat on your face. This is the time to exhibit the most empathy."

He points to recent examples of companies gouging customers for things like home office supplies and hand sanitizer, giving an example of his own experience buying an iPad stand which ended up with a shipping fee three times more than the product price.

He explains: "Out of sheer helplessness, I bought it but I hated this brand, and I know when I come out of the other side, I'll never go back to this brand again. As decent human beings, you never try to take advantage of someone who is down and vulnerable."



Seth Matlins, EVP of Culture, Strategy & Insights at agency 160over90, points out that a recent Meaningful Brands poll showed 77% of brands could disappear and no one would care, which in a time of existential threat is a big red flag for businesses.

He adds: "Being of help goes beyond the time of crisis, it's needed all the time. Be of help, be human, speak human, relate as human."

Matlins points out that COVID-19 is a rare communal experience affecting everyone, and giving us insights into the lives of our neighbors and co-workers as we jump on video conferences and meet their pets, partners, and kids when we wouldn't otherwise have done.

However, this doesn't mean running towards the same values and offering as every other company. Instead it's about creating a personality and tone of voice which is compellingly your brand's and speaks to people in a human way.

### THE EDELMAN SPECIAL BRAND TRUST SURVEY FOR COVID-19

55 %

said that **brands and companies** are responding more quickly and effectively than governments



71 %

agree that if they perceive that a brand is **putting profit over people**, they will lose trust in that brand forever



85 %

want brands to **use their power to educate**



(Source: Edelman Special Brand Trust Survey for COVID-19)



# THE BIG PICTURE

## THE GREAT UN-BORING



**Maz Farrelly, Boss Lady at Maz Speaks, is imploring you to do one thing: not be boring. Here, she shares seven tips to help you avoid churning out a dull product.**

### IT'S NOT MY JOB TO BE INTERESTED IN YOU

It's your job to be interesting. If I come up to talk to you at a conference, and you're not interesting, I'm going to nick off and say, "Do you want a coffee?," and not come back. Think about that with all your assets.

### HOPE IS NOT A STRATEGY

We make content so compelling that you can't look away. More young people voted for the winner of Britain's Got Talent than in the General Election. Think about producing everything you do so you have the outcome you want.

### SCHIESSE AT THE SPEED OF LIGHT

Schiesse that comes at you at the speed of light is still schiesse when it arrives. If what you've got is boring when it arrives, I'm not interested.

### LOSE WHITE NOISE

In my world of TV, we lose the white noise. People saying, "I really want to win," or "It's not my time to go," or "I've got a really big decision to make"... you hear that all the time and it's so boring. You have to cut the waffle and make it interesting.

### STICKY INFORMATION

In the world of TV, if we want you to remember something, we make sure you remember it. The same applies in life - when you leave the room, I need to remember you. Renowned creative director and author Dave Trott summed it up well, saying, "If you're at a conference with 100 people and you look like everyone else, then you have a 1% share of attention. But if you look different to everyone else, that share jumps to 50%."

### THINK ABOUT YOUR PRIME REAL ESTATE

First impressions really do last. Grab someone's attention in the first few seconds. Don't be boring in your first line when you meet someone, be colorful.

### TELL A STORY

As a starting point, find something that grabs attention. Then there are three golden rules: make me laugh - comedy trumps everything; make me care about you and your product; and surprise me.

# WHAT DID THE BEST MARKETER IN THE WORLD DO WHEN COVID-19 HIT?



For many marketers the business-changing effects of COVID-19 have seen what they do sidelined in their companies. But for French cosmetics giant L'Oreal, it has moved marketing "to the heart of the organization".

Lubomira Rochet (pictured), L'Oreal's chief digital officer, is the reigning World Marketer of the Year. So in a time of crisis, she's someone worth listening to. So, what has changed for the company over these past weeks?

The beauty sector was hugely impacted by lockdown. A heady mix of lack of access to products and less of a need for people to groom on a daily basis (can't go and see people, webcams can be turned off) means something of a perfect storm for the company.

Rochet explains they did cut media budgets to protect the bottom line, but "we did not go dark at all," instead shifting towards digital and a "skyrocketing" ecommerce business. This gave them a chance to experiment in places they hadn't before.

"The keyword for me is agility," explains Rochet. "Our consumers have been through a rollercoaster and wanted to learn more things as they had more time, and we had to adapt our content, which required a high level of agility."

Suddenly, L'Oreal's teams were having to monitor the tone of voice for each channel and market to mirror public sentiment, get deep on TikTok as the platform "boomed," and started to play in the live streaming space, notably a candid tutorial with "Desperate Housewives" star Eva Longoria dying her grey roots in front of hundreds of thousands of people.

It led to more of an "always on" mentality for L'Oreal, and cemented the need for that more agile structure, with beauty advisers moving their usual in-store consultations with customers online, attracting millions of enquiries.

What does the "new normal" look like? Even a marketer of Rochet's calibre admits "it's very hard to say," and says the way they are preparing is to remain agile in the setup to see what emerges next.





## 3 THINGS FOR MARKETERS: BRAND PURPOSE

Identifying your brand purpose, how to achieve it, and what not to do, with Patricia Corsi, Chief Marketing and Digital Officer at Bayer.

### **A PURPOSE-DRIVEN BRAND IS A SUCCESSFUL ONE**

Purpose aims to benefit both business and consumer by providing value beyond product and services. Brands that focus on purpose see more growth and powerful engagement with consumers. For example, Ben and Jerry's is known for standing for something, and highlights its mission to show the brand's wider purpose throughout its presence. Purpose, therefore, is not something just to be discussed, but something a company exists for. Brands can partner with people who share the same values and vision to engage audiences on a clear message to demonstrate a purpose.

### **DELIVERING PURPOSEFUL BRAND EXPERIENCES**

Brand purpose can manifest in unexpected ways, and from various sources of inspiration. For example, world-leading fashion house LVMH recently gave away hand sanitizer gel to hospitals, making use of alcohol they normally use for fragrances. LVMH identified an opportunity that was in reach and realistic within the company's means to do something for the greater good of the community. This allowed the brand to provide value beyond commercial interests, and to establish a more emotional response with consumers. Brands should look to their product offering and identify what they relate to on a broader, meaningful level to establish purpose.

### **WHAT TO DO (AND WHAT NOT TO DO)**

Marketers should go back to the roots of the brand, identifying information on the DNA of the company, and use that as the starting point to define purpose. Engage stakeholders early on and be open with work in progress so they may help make an informed decision. Keep your purpose simple, don't overcomplicate it, and educate your audience in a way that is easy to understand. Be optimistic but not opportunistic - know what real opportunity your brand has because what works for one brand may not be the same for you. And lastly, your ideas might be loved by some, but they aren't going to be loved by everyone - great purposes don't speak equally to everyone anyway.



### GROWTH OF ONLINE RETAIL DURING COVID-19



Online spending in **Australia** was **5.6 %** higher in **March** than February 2020  
(Source: NAB Online Retail Sales Index)



In **China**, **online sales** rose by **8.6 %** to **\$360 billion** in the first four months of 2020  
(Source: econsultancy)



Ecommerce sales **surged in America** by **49 %** in April 2020  
(Source: Adobe Digital Economy Index)

## THE STORE THAT DOESN'T SELL ANYTHING

While many high-profile pundits are sceptical of how much will change in terms of society once lockdowns lift and people can start to commune again, there is no doubt that ecommerce will be one area which sees increased growth.

China is often held up as the poster child for a potential new model for others to follow, with a mature ecommerce market and more sophisticated experiences offered by retailers.

As Sanne Drogtop (pictured), VP Business & Operations for APAC at MediaMonks, explains, ecommerce becoming the “kingpin” for many brands means they need to re-tool the way they think of the online shopper.

She explains: “We need to look at audiences in a different way. Instead of looking at them as people who know exactly what they want to buy, we need to look at them as people who go online to browse without a clear goal. An online store often isn’t the intended destination for people browsing the internet.”

This means standing out in an even more competitive environment than the average shopping mall. And that is where technology comes in, with augmented and virtual reality and products as well as 3D and more “tactile” digital experiences coming into their own. The idea of having a detailed “digital twin” for your products allowing people to explore is not a nice to have any more, especially for higher-value purchases.

This doesn’t mean bricks and mortar stores won’t exist, but as Drogtop explains, their role is changing with every product just a click away: “I believe new retail should be a one-stop shop to create awareness and loyalty, and maybe new retail doesn’t even have to sell products any more.”

Just as people will put more of a premium on physical experiences, retailers should follow suit and do the same.



## WHAT GOOGLE SEARCH DATA REVEALS ABOUT WHAT PEOPLE NEED IN THIS MOMENT AND HOW BRANDS CAN HELP

By Mel Silva, Managing Director, Google Australia & New Zealand

If you're anything like me, you will have found yourself adjusting to an entirely different way of life over the last few months. Consumer behaviour is changing daily, and marketing professionals are seeking ways to be more helpful to their customers. To help, we have pinpointed four behaviours playing out in Google data across Australia, New Zealand, and the rest of the world.

### **ASSEMBLING CRITICAL INFORMATION AND CONTENT THEY NEED TO GET BY**

Normal life is anything but normal these days and people are looking for clear, specific information about where, how, and when to get the things they need. As people limit their trips to grocery stores, we've seen search interest spiking for "home delivery," with queries like "coles online" and "woolworths for seniors" increasing by up to 1,850%. People are looking to brands to be helpful as their needs evolve: reinforce you're there to help, give people credible, detailed and current information, and keep your communications up to date to make sure your customers are in the know.

### **DISCOVERING NEW CONNECTIONS AND NUTURING MEANINGFUL RELATIONSHIPS**

Even as people physically distance themselves, they're discovering new connections and nurturing relationships. Since we've been practising social distancing, we've seen a rise in "with me" videos, where people film themselves going about ordinary tasks like

cooking, cleaning, or shopping. As brands, look for ways to connect your customers and forge new communities, and consider whether there's a role for your brand in creating or enhancing shared experiences, virtually or otherwise.

### **ADJUSTING TO CHANGES IN THEIR ROUTINE**

As routines and schedules change, so do people's online habits and expectations. For example, search interest for "do it yourself" peaks midday in Australia, while New Zealanders are searching most in the late-night hours. Assess when people are needing you most, whether through your own first-party data or Google Trends, and adjust your communications strategy accordingly, so you're letting people know that solutions are available whenever, wherever.

### **PRAISING EVERYDAY HEROES**

As we navigate these challenging times, it's important to take care of physical and psychological needs - and those of friends and loved ones. There's rising search interest in "virtual" in Australia and "live zoo" in the UK as people look to experience something beyond the walls of home. The more helpful brands can be, the better they'll fare now — and even more importantly, in the long run. Aussies are already choosing trusted brands that deliver safety and value, so let's show up and be there for them in the most valuable way.

Find out more on [Think with Google](#).



**“ARTIFICIAL REALITY  
IN ADVERTISING IS  
ALLOWING FOR THE  
PRESENTATION OF  
MORE AUTHENTIC  
MESSAGES,  
MORPHING FROM  
ADS YOU SEE, TO  
ADS YOU CAN FEEL  
AND EXPERIENCE.”**

NOBUYOSHI NODA, HEAD OF GLOBAL  
BUSINESS, ADWAYS





## THE CHARGE OF TIKTOK

We covered TikTok extensively in the 2019 New York Trends Report, but it's fair to say it really was the platform mentioned by every marketer at AWJAPAC, especially when they were asked what they have had to learn since going into lockdown.

The app has been the most downloaded app worldwide for the majority of this year, with reports it is now averaging a billion daily users. That is a significant number, and it's unsurprising marketers are looking to get their arms around it. With such explosive growth it's not surprising TikTok is opening a slew of regional offices, and looking to integrate its offering into local markets and cultures.

TikTok's ANZ General Manager Global Business Solutions in Australia, Brett Armstrong (pictured), attributes this surge in popularity to the notion of "competitive positivity", brands harnessing the on-upmanship of the platform to encourage acts of kindness, something which has been sorely needed in some bleak times.

RGA's Head of Strategy Rob Campbell explains: "TikTok has been an outlet for creativity - some tragic and some amazing - and it's been a fascinating way people have turned to something to express themselves in a way they wouldn't normally do. It's like their house has given them this illusion of safety to broadcast their terrible dancing to the world."

Movember is one organization which has been tapping into the platform in recent months, initially to find new and younger audiences, but have now evolved to start facilitating conversations. Marketing Director for ANZ Jason Olive says: "It shouldn't be a platform that people are afraid of. Spend some time thinking about the audience you're trying to speak to. I think as marketers, one of the challenges that we often have is relinquishing our control and letting other people have a bit more control. It's OK to let go sometimes."

With creators of all types moving onto the platform, content continues to evolve, and marketers need to start arming themselves for a new way of communicating in mobile video.



### TIKTOK'S GROWTH DURING COVID-19

Record high **downloads of 200 MILLION** for Q1 2020, growth of 28.20%



Downloads **peaked in March** with approximately **75.5 million new downloads**

**India topped downloads with 55 MILLION**, representing 27.5% of total downloads



**In 2019**, TikTok had over **half a billion app downloads** (532.5 million total)

(Source: LearnBonds)



## 3 THINGS FOR MARKETERS: ARTIFICIAL REALITY

**The acceleration of digital transformation across various industries post-COVID is inevitable, but how does artificial reality fit into the advertising and marketing industry mix? Nobuyoshi Noda, Head of Global Business at Adways, investigates.**

### ARTIFICIAL REALITY'S GROWTH IN ADVERTISING

Artificial reality (AR) in advertising is allowing for the presentation of more authentic messages, morphing from ads you see, to ads you can feel and experience. Currently, Snapchat is the most successful platform in the AR advertising space - launching a campaign featuring filter ads customizable for a range of brands and industries. Market size forecasts AR in advertising will hit about 950 billion yen (\$US 8.85B) in 2023. An Adways report also showed that 75% of Daily Active Users (DAU) use AR on a daily basis. And when lockdown went into full swing, the use of AR increased by 25% from the previous month.

### ARTIFICIAL REALITY IN PRACTICE

AR is being used for various kinds of immersive virtual experiences in advertising, from sales promotion on ecommerce sites to advertisements both online and offline, like virtually trying on clothes or cosmetics. It's also used to attract customers into stores with immersive product experiences, as well as an educational tool to inform consumers on how to use a product. Brands can promote a product and increase purchasing motivation through interactive and virtual experiences using AR, and the trend is expected to grow. Companies such as Apple, for instance, are already developing products like AR glasses that connect with your smartphone.

### FUTURE ENHANCEMENTS

Virtualization is expected to increase in popularity, as large gatherings are still unlikely to happen for the foreseeable future. AR will be used for product launches and conferences so people can experience them virtually and interactively. Microsoft announced it will use virtualization for product launches and events at least until the first half of 2020. In ecommerce, for example, AR is being used to enable consumers to get a feel of how products will look on them or in their home. Amazon is doing this for appliances and furniture. A non-advertisement example is the Israeli president visiting people's homes in 3D representation to share a message on Independence Day this year.



## WHAT DO PEOPLE WANT? MORE TARGETED ADS

The Cookie apocalypse is approaching, and the onus is shifting to marketers to shift their targeting to a more “people based” approach online. This is using customer data and “essentially marketing to people who we know who they are,” according to Malcolm Murdoch, Marketing Chapter Lead at ANZ bank.

Murdoch’s team have already started moving towards this practice, and speaking candidly he admits while there hasn’t been a significant performance uplift: “What we have seen is an increase in the certainty of the targeting, and specifically an increase in the volume of the people we can target.”

This means fishing from a smaller, but higher-quality pool, and asking consumers for more information.

But as data activist Brittany Kaiser explains: “Most consumers don’t really understand what their personal data is and how much information has been collected about them since they had their very first device.”

This lack of understanding can lead to some serious issues in terms of trust, and consumers being willing to give away data willingly.

Verizon Media’s Head of Data ANZ, Dan Richardson (pictured), says the research shows that consumers do like personalization, but “we just have to temper it,” and urges the industry to come together to educate consumers and give them control of their data settings: “As government and as an industry, we need to come together and make this a lot easier.”

Increasing levels of regulation coming in across different jurisdictions are also playing a role in how brands approach these changes, as more countries copy parts of the GDPR and CCPA regulations in Europe and California.

ANZ’s Murdoch adds they are already at pains to go beyond the requirements of law, and: “We do need to have a conversation with customers about what we’re doing with their data. We have to be extremely respectful about how we share data, and have due diligence with any partner about how we share it.”





## FUTURE PROOF YOUR MARKET POSITION

Paul Sinkinson, Managing Director, Analytic Partners

Today's brands and marketers have found themselves navigating unprecedented challenges. Here are five key takeaways to help slingshot your brand out of recession and into recovery.

### **DEFEND SOME BUDGET TO ENABLE YOUR BRAND TO HAVE PRESENCE IN MARKET**

When markets are shocked, everyone knows ad budgets are first to go. If you have to cut your budget, make sure it's not all the way to zero. Focus on defending at least some of your budget so you have a presence in the market and don't have to spend more during recovery just to get back to where you were. We've seen strong increases in ROIs from digital channels since the pandemic hit. Why? Not only are more eyes on screens but advertisers have left the market, leaving more spots up for grabs at reduced costs. According to ROI genome, media consumed at home increases effectiveness by as much as 58%, so it's more important than ever to invest where people are spending their time.

### **REPURPOSE CREATIVE FOR LONG-TERM INVESTMENT**

When planning how to spend a limited budget, approach it as a long-term investment. Rather than leading with opportunistic product or promotional messages, lead with brand messages. And you don't need to make a new piece of creative - the brand messages that you have had in the past are still going to work now. When airing these brand campaigns, look to channels that have demonstrated a clear ability to deliver long-term ROI: TV and online video.

### **EXPERIMENT AND REFINE YOUR MARKETING TO ENSURE YOU HAVE A COMPETITIVE ADVANTAGE**

Now is a great time to experiment with everything from your media mix to the amount of branding on your creative to executional elements like audience, location, and duration of the campaign. We've found that fostering a test-and-learn culture has the single biggest impact on future ROI.

### **BE OMNICHANNEL AND TAKE ADVANTAGE OF MEDIA SYNERGIES**

The pressure for brands and marketers to move to an omnichannel approach is greater than ever. We measured the synergies of media channels and found that ROIs for both TV and online video are 35% higher when they're strategically integrated, and we're seeing 25% ROI when combining TV with paid search. We also found that returns on paid search more than doubled when brands shifted to online fulfillment.

### **INVEST IN THE HIGHEST PERFORMING MEDIA CHANNELS**

The high-performing channels of the past - TV, online video, social, and paid search - are performing even better now. Invest in these proven channels, monitor performance, continuously optimise your media mix, and adjust your ad spend accordingly. If you're investing in other media, ensure the amount you're spending makes sense.

Find out more on [Think with Google](#).

# IT'S TIME TO GET YOUR HEAD AROUND PROGRAMMATIC

The word programmatic inspires two reactions with people in the industry - either a leap for joy for those who understand the space, or an eyeroll from those who put it in the 'too hard basket.'

But digital is not a new channel, and according to Matt Harty, SVP of APAC for The Trade Desk, the conversation has to change: "A lot of people are having basic conversations, agencies are having even more basic conversations and their clients have got an even lower level of digital understanding."

"So we need to raise the bar across the whole industry in terms of digital understanding. The fact we're still having conversations about basic elements of it, we should be further along than that."

The fact is, there is no longer an option to stick your head in the sand about programmatic, and it's time to skill up. Internet usage has absolutely exploded over the lockdown, with most publishers and brands reporting record traffic levels.

So what are the growth areas people are looking at?

Connected TV has seen a surge across the region - as audiences seek out different content. In Australia, digital video consumption is up 80%, according to IAB statistics, and that is despite the pandemic.

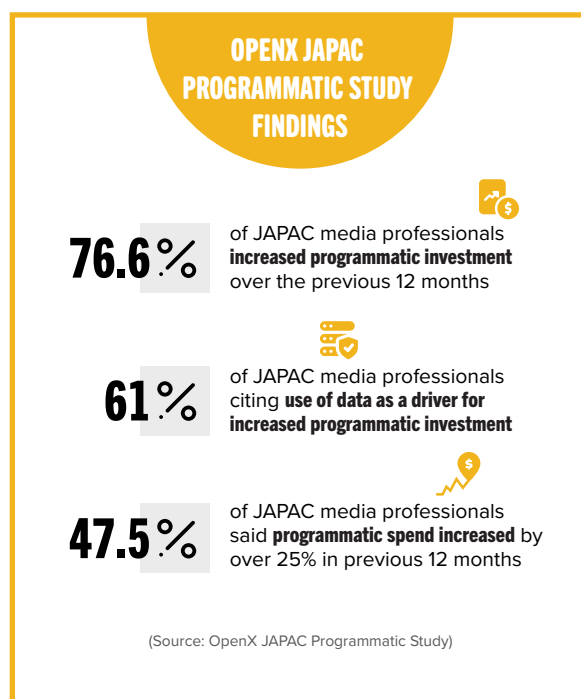
According to Yun Yip, VP AUNZ of MediaMath, it's not youngsters who are indulging with the catch up TV experience: "There's more people 65-plus than 18-24 streaming content at the moment."

While the Out of Home (OOH) industry has taken a hit during lockdown for obvious reasons, Digital Out of Home (DOOH) was cited as the most promising channel for future investment in an OpenX survey conducted across JAPAC, ahead of connected TV.

OpenX's APAC MD Andrew Tu puts this down to the fact that DOOH is "more tangible and easier to reach" for buyers now compared to

TV, as well as the ability to shift budgets for the channel more easily.

As audiences continue to move to digital channels and disperse, more than ever before the need to understand the principles and basic capabilities of programmatic trading is non-negotiable. It's up to you to skill yourself up, and there are a lot of partners out there willing to help.





# THE BIG PICTURE

## LEADING THROUGH THE GLASS



**When Lisa Gilbert, IBM's Japan CMO, travelled from Japan back to the US a few months ago she didn't realize that the coronavirus would keep her from her adopted home indefinitely. Here are her tips - the five Cs - on what it takes to manage through the screen.**

### #1 CREATE AND UNDERSTAND CONTEXT

There are two kinds of context to be aware of as a manager. First, there's personal context, which is about understanding what's happening around you in your life, and your colleagues' lives. The second is professional context. This is about finding clarity around the 'why.' It's about understanding why your business is doing something, or making sure your colleagues understand why you've asked them to do something.

### #2 CLARITY IN COMMUNICATIONS

If you're leading from afar, communication is essential. I do daily standups and monthly all-hands meetings. Video fatigue is a real thing, so reducing the length of meetings to 20 and 45 minutes, and giving people a breather, is crucial. And be courteous - if you're in a different timezone, try not to stress people out with emails in the middle of the night.

Lastly, embrace what I call 'radical candor.' This is all about getting straight to the heart of the matter. Because without clarity, your minds can go to a negative place.

### #3 COLLABORATION

Collaboration in a virtual world is hard, but when done right, it can lift productivity, boost morale, and drive innovation. One thing we miss from working in the office is the face-to-face nature of business - those great ideas hatched over a coffee or a lunch. It's so important to think about all the different ways you can encourage collaborative exercises, even if you can't do them in person.

### #4 CARING

At IBM Japan, from our CEO down, we have committed to eight pledges to show care to our fellow employees:

- To be family sensitive
- To support flexibility of personal needs
- To support non-camera moments
- To be kind
- To set boundaries to stop video fatigue
- To take care of myself
- To frequently check in with people
- To be connected

### #5 CULTURE

After two years in the country, I now have a better understanding of the Japanese culture and what works and doesn't work. And that's different to US culture, German culture, or Israeli culture. So, take the time to acclimatize to the culture you are immersed in, and tailor your approach to suit. It will make a big difference in the long run.



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