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# THE RETURN TO WHY

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**ahead 2022**

Thoughts to guide us on our year head.

Presented by:

**dentsu** **x**

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## EDITOR'S NOTE

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**SANJAY NAZERALI**

Global Client and Brand President, dentsu X

We find ourselves as a society in a moment of transition. Not yet post-pandemic, not yet endemic. Some societies are coming back together, borders are beginning to reopen, and travel restrictions start to ease. Amidst times when digital divides appear greater than before, and growing climate crises exist in each region of the world, it can be easy to be overwhelmed by not only the pace of change, but the sheer tour de force of change that seems to have happened in our lives. We must take pause, noting what we have lost, and what we need to regain.

In the midst of asking what has changed, we also ask why. Understanding, care, and empathy should now be placed at the forefront of our thinking. **Why** should a consumer care about a products or brands? An explosion of content and digital behavioural data means that **why** is a question we rarely ask today. We know the **what**, but we don't usually know the **why**. At dentsu X we look for the motivation in everything. In each action, each choice, each intention. We believe that if we understand why brands should matter to consumers, then we are all in a better place to build experiences which earn their attention and drive action.

This spirit has led 15 of our leaders across the world to ask **why**, in our second annual issue of **ahead**, and share thought starters that look at the motivational shifts leading the most impactful changes across media today; Why have consumer attitudes shifted so much? Why can joy be a motivator? Why is the idea of the neighborhood, more important than ever before?

If each of us continue to ask why, to take pause, this moment of transition can be one for a rise of understanding, a call for a groundswell of empathy.

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# 1. WHY IT'S TIME TO START SAYING WHAT YOU REALLY THINK.

## A Thought Starter On The Power Of Truth

Amy Watt, Chief Strategy Officer, dentsu X UK

It is a truth universally acknowledged that a new mother, in possession of a tiny screaming babe, must be in want of answers.

Why is it crying? What am I doing wrong? How can I make it stop?

There is no time for pussyfooting around. You learn very quickly to cut out everything nonessential, roll up your sleeves, and get very real. It's the oldest experience in the world but an entirely new semantic field. From the off, you must say what you really think. Your body and your baby depend on it.

In the last few years, there has been a brilliant run of advertising that reflects this searing honesty, largely in the female care category. Bodyform's *Womb Stories*, Tommee Tippee's *The Boob Life* and Frida Mom's *Fourth Trimester* are great pieces of work because they are profoundly truthful. They have thrown a grenade at the conventions and tropes of their category and made us ask in disbelief – why has this gone so long unsaid?

This radical honesty has been breaking through in other places, too, especially in beauty, (think Beauty Mark from CVS), and in retail (think Carrefour's Black Supermarket and Ikea's Trash Collection). All good examples of a brand calling a spade a spade to force radical change and reappraisal.

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Having recently returned from maternity leave with fresh perspective, I see an urgent need for more cut-the-shit advertising. This doesn't mean unvarnished work, but it does mean unvarnished truth. This takes skill, because it is often hidden, mixed up between thoughts, feelings and behaviour. It sits squashed between things. It requires patience and empathy, and diligent sifting through the quotidian with a repetitive question – why? Why? Why? Like submarine sonarmen, we must practice active listening until we get to the innermost beep of an answer – a motivation. Desire, fear, reward, threat. “Why” is the most important question we can ask. It gets us to the truth of the matter.

Now, if we zoom out and reflect on the scale of technological acceleration, climate change, geopolitical frictions, labour market convulsions and throw in a global pandemic, bilious State hypocrisy, and more fake news than we ever could have imagined, it would be reasonable to say that the world is akin to a screaming babe.

And we're all tired and not enough people are telling the truth.

So, if you do one thing with your clients this year, say what you really think, because at the bottom of the truth lies magnificent work.

In other words, pick up the baby. She is yours.





A laptop screen displays a soccer team celebrating with a trophy. The text "2. WHY A STREAMER GETS AN EXCLUSIVE INTERVIEW WITH THE BEST SOCCER PLAYER IN THE WORLD" is overlaid in large white letters. The laptop is a MacBook Pro, and the keyboard is visible.

## 2. WHY A STREAMER GETS AN EXCLUSIVE INTERVIEW WITH THE BEST SOCCER PLAYER IN THE WORLD

**A thought starter on the hybridization of communication**

Oscar Herriaz, CEO, dentsu X Spain

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Sports broadcasting titans were left in shock on August 2021, when Ibai Llanos, a Spanish streamer (one of the top ten most watched global content creators on Twitch) conducted the first interview given by Leo Messi. Wearing the PSG shirt after his dramatic departure from FC Barcelona, Ibai was somehow ahead of the most renowned and traditionally respected sports press. With one interview, his popularity skyrocketed and Ibai established himself as a media phenomenon, crowned as a best-in-class specialist on new communication.

But just who is Ibai Llanos? He started playing video games at his parents' house in northern Spain to later become a caster in eSports competitions. His approachable personality and spontaneity made him worthy of great popularity among the younger audience. After his resignation from the G2 Artix team, he created a Streamer's Mansion where he and a group of his friends and content creators began to turn current communication upside down, challenging the status quo, and igniting a silent rebellion against mainstream media.

Ibai now manages a diverse set of entertainment properties. Together with his partner Gerard Piqué who is a FC Barcelona player and businessman, he purchased Copa America & League 1 streaming rights for broadcasting the competition on his Twitch channel, he has interviewed the trendiest sports and music personalities, and has even made his own version of a high-ratings national television dating show.

Named by Forbes Spain as the best influencer of 2021, one of his most recent events was an amateur boxing tournament among streamers that garnered more than

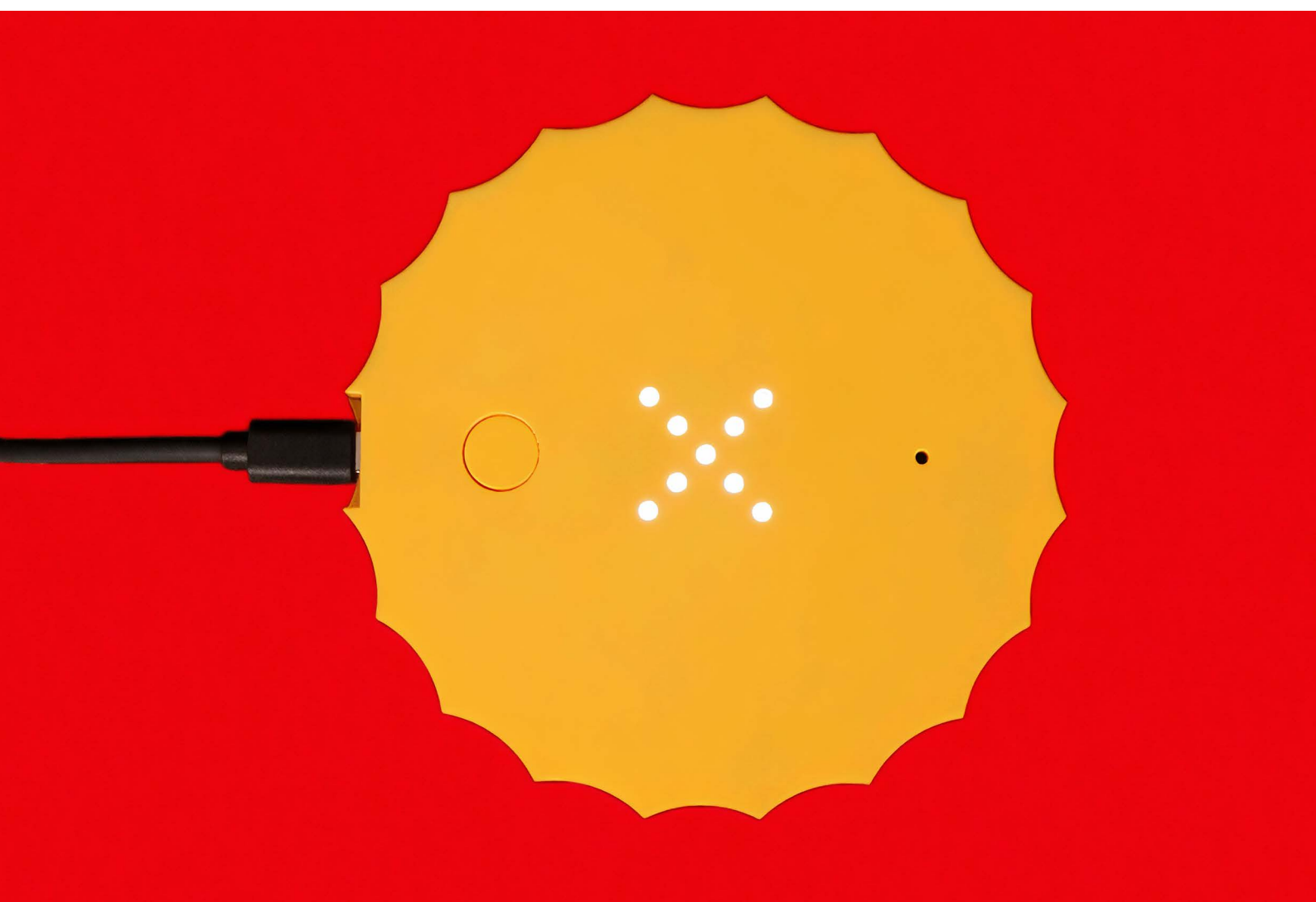
1.5 million live viewers. Step by step, he has become a media phenomenon not only for Spanish younger audiences but for the whole Spanish-speaking community, with an influence that transcends generations. He has achieved what few have done before. Successfully creating a hybridization between Internet and traditional media, he has caused media and brands to take Internet-only content production seriously and not as a simple extension of existing formats, making traditional media rethink their own operation and strategies in a short to medium term.

Llanos is the best example of the emerging transformation of communication; he offers a unique combination of access to global and local content with unprecedented success, all without erasing cultural identity. Inherently, we are seeing consumers being more drawn to communication that is leveraged on universality and defends immediacy, truth and spontaneity, sharpness, and proximity. Humans are constantly motivated by this type of communication - one that feels boutique, inherently personal and uniquely ours. It uses current news as a propellant, making its way through the mass of mobile devices, webcams and mobile connectivity forming the infrastructure that enables a widespread social diffusion of these new entertainment and cultural consumption habits.

The phenomenon proves to brands that communication is more appealing and natural when there is room for co-creative spaces between new formats and traditional. When collaborative hybridization is generated between traditional powers and the newest vision which will be increasingly present in the communication and media landscape, the results could just be an exclusive interview with the world's best footballer.

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### **3. WHY YOUR NEXT CAMPAIGN'S CREATIVE WILL BE DESIGNED BY AI**





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## A thought starter on intelligent creativity

Quentin Delamotte, Senior Strategy Planner, dentsu X France

For as long as we can remember, creative decision-making has been a matter of subjectivity. Over the last decade, however, this has begun to change. As artificial intelligence (AI) continues to transform more industries, this is an especially interesting area of innovation for creativity. Already, AI has helped write pop songs, mimicked the styles of great painters, contributed to the design of buildings, and informed creative decisions in filmmaking.

Therefore, unsurprisingly, AI has started to appear in creative and brand content advertising, whether tagging content with the most relevant keywords or helping the copywriting process itself thanks to automated tools such as CopyAI, Wordtune, and Copysmith.

Today, machine learning can help optimise digital ads at scale not only for display ads, but now also for OTT video ads by analysing what features and combinations of features are the highest performing in ad visuals. And this is just a first step.

Without a doubt, 2022 will be the year of rising AI creativity optimisation. It will show how powerful creative data can be in shaping the close future of ad creativity.

With Apple's end to the IDFA (ID for Advertising) announced last July and Google phasing out third-party cookies in early 2022, it will be more difficult for brands to figure out which micro-targets are responding to different display ads as they apply the traditional strategy right content, to the right people, at the right moment.

2022 will be the year when AI will go beyond traditional A/B testing and DCO to make predictions about how creative will perform even before the campaign goes live. When AI will act as a co-creator that can produce many ideas or concepts, which a creative person can use to inspire their own creative process. It is this marriage, of people and AI that will allow us to unearth the most genuine human intent, one that mirrors the emotion and passion of humans and the consumers we market to, with the scale, speed, and precision that AI can offer. It will be those brands that lean into this powerful shift, that will feel the greatest impact on their creativity.

The use of artificial intelligence for building more effective ads is still emerging, but one thing is clear: AI is already impacting everyone who does marketing and communication across the world. Possibilities are innumerable. And being ahead of this disruption is essential.

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## 4. WHY EVERYONE IS BUYING PICTURES OF APES

### A thought starter on the latest gold rush of Crypto, NFT's and Land

Sam Down, Client Partner, dentsu X Australia

When you look at the psychology of investing for the masses, it is clear to see that the *winning ticket* mentality has been front and centre for many years. From Wolf of Wall Street investment firms promising huge profits for the average Joe to young investors gambling their student loans on cryptocurrency with the view to paying off university debt, the get rich quick mentality of investing has always been present and remains so.

During the COVID-19 pandemic – fuelled by uncertainty of finances for many and combined with months of lockdown spent indulging in social media – it is easy to see how many have been tempted by TikTok guru's touting huge returns in short timeframes, not dissimilar to the gold rush of the 1850's. The motivation is clear – I do not want to miss out on my fortune.

In the past two years we have seen a boom in crypto trading, with the marketplace estimated to be worth more than \$1.9Tn USD and growing, showing that there is real potential for savvy investors. However, in 2021 a new gold rush came to town - NFT's (non-fungible tokens), with the market increasing from a respectable \$17m in transactions per month in January 2021 – to an eye-watering \$2bn per month in December.

NFT's seem to make no sense to the average person – I like cool pictures of apes but why did someone pay \$2.9m USD for an ape with laser vision? Well it is not just the fact that you get access to an exclusive club with the likes of Post Malone, Mark Cuban and more, but mainly the fact that these are finite. And this exclusiveness brings us onto the next boom - Land.



No, not buying a one-bedroom apartment in Bondi Beach – we are talking about the metaverse.

Again, it is limited. Each platform only has a finite number of spots, like a sandbox with 166,000 plots of land. But how do these non-real, non-physical assets that on the surface look to be driven by hype and speculation actually make a return?

Investment companies are buying land in the metaverse hedging that this will be a place where millions of people come together, just like Twitter or Bondi Beach. The first mainstream examples of this have happened already, with Justin Bieber performing recently, and Splendour XR hosted on Sansar gave Australia its first mainstream Metaverse Music Festival experience, at scale. Whilst events like these can leave a lot to be desired, as more get access to the hardware, this industry will take off, and the land that hosts the festival could generate huge profits in rent. With the VR Hardware becoming more accessible, this is fuelling these virtual experiences and, with that, landowners can begin to see returns on some sizeable investments.

Landowners can also pick their neighbours, with some deciding to live next door to Snoop Dogg and his NFT Gallery in Sandbox. Consumers rooted in virtual experiences, see proximity to real world celebrity and influence as a key driving force behind purchasing intent – be it in the metaverse or not. As the prime real estate goes fast, scarcity will drive up prices meaning this could be the next gold rush for years to come. So it is clear that with both Crypto and NFT's, the motivations for the masses are largely around 3 key things, being early adopters, the fear of missing out, and making huge profits.

So why should you buy any of this? It could just be your lucky ticket.



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# **5. WHY BRANDS HAVE A UNIQUE MOMENT TO CREATE JOY IN CHINA**

**A thought starter on how new  
consumer brands and traditional  
brands are at the same starting point**

Jackie Xu, Head of Experience Design, dentsu X China



In China, tech giants' domination of social discourse has promoted pervasive opportunism. Be it a new consumer brand or a traditional brand, there is a tendency that China's marketers are accustomed to using a ready-made formula for marketing. Indeed, modern technologies, new platforms, and new ad formats have driven unignorable rapid growth for some brands. Should we expect such a pattern to continue, or is it time to revisit? Are brands thinking much more how than why?

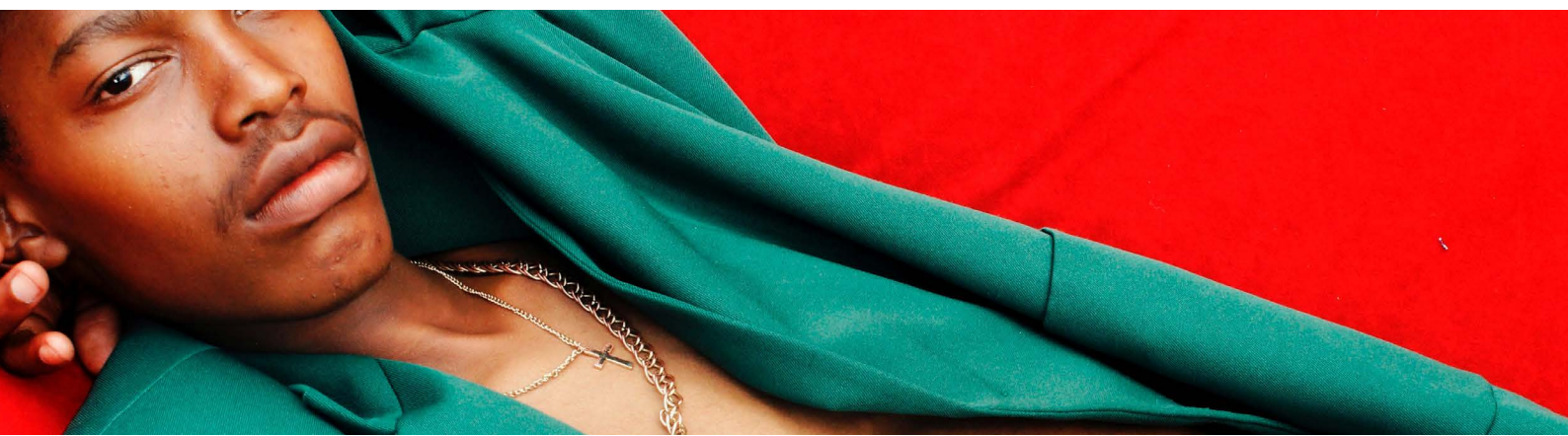
The pandemic resulted in huge uncertainty in the society where all dividends are gone. Tightened regulations related to anti-monopoly and personal privacy protection, as well as limitations on some marketing tactics (e.g., social seeding, live streaming), are shattering marketers' speculative mentality.

As the resulting impact of these radical societal changes, people start to face the uncertainty and re-examine all aspects of their lives, to deal with the so-called involution (Nèijǔǎn 内卷 in Chinese is the buzzword used to represent the fierce competition in workplace or academic settings where individuals are compelled to overwork because of the standard raised by their peers who appear to be even more hardworking) – the word that is said to sum up the anxieties of the time.

People reflect on the meaning in work, taking a self-as-a-model approach instead of meeting outside expectations. They create daily rituals or elevated moments, enjoying what they already have, to get a sense of healing and control over their lives. They become more rational in consumption, discerning between real needs and empty desires, to avoid excessive consumerism. The 2021 Double 11 (China's biggest online shopping festival) had its lowest year-on-year growth over the past decade. In contrast, sales of social science and philosophy books hit a new high. People are seeking something from within to hold.

Under the circumstances, brands find that there is no longer a ready-made formula to apply. The market is calling for a reshaping of marketing logic. Both traditional brands and new consumer brands are facing challenges. Traditional brands see challenges in connecting to new category narrative shaped by a new generation of consumers (among which global brands need to figure out how to make the brand story locally relevant enough, given that there is a remarkable rise of local cultural confidence). New consumer brands need to consider brand sustainability after a dividend-driven high growth in early stage. In capturing the next wave of growth, both are at the same starting point.

Instead of trying to figure out what kind of marketing activities the new generation of consumers would like, a promising perspective can be what role a brand can play and what value a brand can offer in helping consumers deal with the uncertainty, find lasting meaning, and create joy in life.



## 6. WHY INFLUENCER COMMERCE IS NOT NEXT, BUT NOW

**A thought starter on the need to think differently on advertising in social media advertising and start taking advantage of influencer commerce**

Aditya Sofyan, Strategic Director, dentsu X Indonesia

**“Good marketing talks about the buyer, bad marketing talks about the seller”**

– Simon Sinek

Imagine yourself going to your regular favorite grocery store, the one that spoils your senses. The one with perfectly lit spaces, color-coordinated product placement, fresh smell of ground coffee and bakery, with just the right music on the playlist, even to the smallest detail that all choreograph to provide the shopping vibes and build that familiar experience for you.



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Now imagine what their website looks like? will it match the experience? I doubt so. The absence of senses what makes it harder to make people buy things online (*despite other technical difficulties like delivery problems and in some countries a secure and convenient payment system*).

We all know that social media platforms have a global audience of billions and since the start of the pandemic, 70 million people have become digital consumers. Facebook & Bein company predicted by the end of 2021, SEA population of 15-year-olds and above will be digital consumers by the end of 2021. This region also saw online retail penetration projected to grow 85% YoY by end-2021. This will take us to a gross merchandise value of around \$254bn in Southeast Asia in five years' time. From discovery stage to purchase, most of the touchpoints that consumer use to search, discover and understand product are now online.

Social media has taken central stage of our lives and our reliance on our device fuels the addiction. We are now seeing social media platforms adapt as they became the one stop shop for Realtime interaction, entertaining content, shopping inspiration. This is where the lines between app users, retail consumers and content creators are getting blurred. Most platforms are evolving to facilitate social commerce so their users can buy products from third-party retailers without leaving the app.

Before social commerce, we see influencers just as a part of brand exposure effort in extending the awareness of the product. The lack of attribution power to manifest the lower funnel success is troubling. Now, through social commerce, we see the introduction of hyper-personalized end-to-end shopping experiences built through collaboration with influencers.

In 2020 we saw Instagram launch their shopping tab as a way for users to explore products and get one step closer to the bottom of the funnel in closing the loop. Now we see the meteoric growth of TikTok which shows potential in activating collaboration with influencers. Through social commerce we see the introduction of hyper-personalised end-to end shopping experiences built through collaboration with influencers.

With live streaming enabled within Instagram and Facebook, we expect to see in 2022 an increase of mobile live commerce coming our way building in collaboration with influencers. This is a big opportunity to cater to shoppers, retailers, and creators.

A great influencer that tells a story can transport your mind into thinking of you interacting and experiencing the product while watching them experiencing the product first-hand. They have the power to influence you just like how your favorite grocery store meticulously placed and arrange everything to provoke your senses and finally help them with the bottom line. As often heard happy consumers spend more. Influencer brings those senses back for you to finally experience the interaction, beyond a simple product exposure in a form of endorsement. With social commerce capabilities, the friction that could lead you to abandon the purchase will be reduced. There is no need for you to switch platforms from social media to brand websites. Everything is a click away.

As brands build collaboration with creators, consumers will feel it's more about them rather than the brand. The consumer will feel the need to be lulled by the influencer just like the way consumer retail spaces spoil their consumers. And this will bring consumers closer to the bottom of the funnel as well as help with quantifiable conversions.

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# **7. WHY SMALL AND LOCAL IS BECOMING A KEY MOTIVATOR IN LATIN AMERICA**

**A thought starter on  
motivation among Latin  
American consumers**

Daniela Cori, Head of Business,  
dentsu X Chile



Faced with natural or social disaster, the human reaction we see during the first days or weeks is always the same: a contradiction between those that band together to help each other and those that are looking out for their own interests. Among the latter, we see social disruption, hoarding of toilet paper and sanitization products at the beginning of a pandemic, which are some examples of what have become postcards of the last ten years of Chilean history. But these acts of individualism taken to the extreme, have also triggered an opposite response that has opened the door to a society that acts in solidarity, with a strong sense of community.

As we moved to the next stage of the pandemic, we witnessed how Chileans' consumer behavior shifted from one that used to always prefer legacy brands to one prioritizing local or smaller. Why the change? The answer is twofold: 1) After experiencing a period of panic-buying wholesale toilet paper and sanitization products in early 2020, today they have become informed and aware of the consequences of their buying behavior. As a result, 85% declared that the pandemic has led them to limit food waste and 70% are making more environmentally sustainable or ethical purchases.<sup>1</sup> 2) The health, social and economic instability brought about by the pandemic has led many Chileans and Latin Americans to consider entrepreneurship as an option for generating income, and as consumers, choosing to buy local and small has become our way of showing solidarity.



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Prior to COVID-19, we observed a trending preference for buying local and small by a more conscious consumer, and after the arrival of the pandemic, this trend has continued at pace. Today, 41% of Chileans have increased their purchases from small and/or local brands, while only 12% has declared to increase their preference for large and legacy brands. On the flip side, although 3% of Chileans has decreased their purchases from small and local, 28% has decreased choosing large and legacy brands.<sup>1</sup>

But reality says that to generate a sizable pull of entrepreneurship with a real chance to make a long-lasting impact, societies need more than just consumer demand motivated by a pandemic that will eventually end. In juxtaposition, we see different fields of technology at the service of this trend that are helping to bridge the digital divide. On one hand, social networks have served as a showroom and foot traffic for entrepreneurship: 85% of small and medium-sized companies in Mexico use social media as a vehicle to sell their products,<sup>2</sup> and this itself has meant that 75% of Facebook's ad revenue comes from these types of companies.<sup>2</sup>

Latin America is a region with a high penetration of social platforms, but it also leads in time spent on them. If brands, big or small, can't find us there... then where? Social networks are becoming the place where users go in search of new products, without something specific in mind; window shopping has become screen shopping thanks to them, with the user carrying

out their entire Consumer Journey online, from discovery to purchase.<sup>3</sup> But small and medium-sized companies cannot just thrive and survive from the benefits of social media. They also need backend and frontend Martech solutions that are easy to use and affordable. Among these, we now have several options of CMS platforms such as Shopify or Latin American unicorn VTEX, which facilitate the creation of online sales platforms, or fintech companies that democratize banking products for consumers and payment methods for brands.

What has been the response from large and legacy brands, especially big Latin retailers? If you can't beat them, join them. In the last few years, we have seen acquisitions of these technological partners by legacy retailers as their main focus to stay relevant. Falabella bought the Linio Marketplace, where 84% of its products are offered by SMEs.<sup>4</sup> Ripley's response, meanwhile, has been to launch and strengthen its own Marketplace. And although Cencosud's strategy does not seem to follow this same tactic to the letter, its recent purchase of Cornershop is not far away either, whereby providing technological and logistics solutions for all types of companies, they have also managed to remain current in the world of entrepreneurship.

Brands that ask why consumers are moving towards more entrepreneurial brands, may need to stop seeing scale as priority, and position motivation as the key factor driving consumer intent.

1 <https://www.anda.cl/wp-content/uploads/2020/08/PPT-Consumer-Pulse-Check-Chile.pdf>

2 <https://www.marketplace.org/2020/07/02/why-small-companies-probably-wont-suspend-facebook-ads/>

3 <https://content-na1.emarketer.com/insider-intelligence-latin-america-trends-watch-2022>

4 <https://www.anda.cl/revista/el-protagonismo-de-los-marketplaces/>





## **8. WHY CANCEL CULTURE COULD BE COMING FOR BRANDS**

**A thought starter on how social media can curtail brand willingness to get involved in cause marketing**

Maxine Hands, General Manager, dentsu X Ireland



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One of the fundamental benefits of social media is that it provides a platform for everyone's voice to be heard, without filter – ultimately enhancing free speech. In a utopian world it facilitates healthy debate where it is okay to disagree with others and well-reasoned arguments can be presented by both sides. Typically, most people fall into a middle ground where they listen to the debate but rarely post views one way or another.

Dentsu research, our Consumer Connection Survey, shows that whilst 61% of the UK population read other people's posts on social media every week (71% at least monthly), only 23% actively post on social media every week (40% post monthly). These figures are similar across multiple markets; only 34% post weekly in the USA and Spain, and drops to 31% in Australia, 27% in New Zealand, 23% in Taiwan, 18% in France, 15% in Germany and 14% in Japan.

What we increasingly see is social media being used as a turf war between the smaller numbers of more extreme opinions, each trying to outshout the other without listening to counter arguments, which ultimately shuts down debate. So rather than being a platform for healthy debate, Social becomes a divisive platform for polarising extremists. A majority of Britons (57%) say they have, at least sometimes, stopped from expressing their political or social views for fear of judgement or negative responses from others.

This is leading to what some are calling a 'cancel culture phenomenon' where those with strong views try to cancel another person or a brand whom they disagree with, or, in the extreme, dox someone – where they search for and publish private or identifying information on the internet, typically with malicious intent.

The perceived threat of no-platforming by some has become such a concern in the UK that in 2021, it led to the Higher Education (Freedom of Speech) Bill, which covers England's universities,

giving people who believe their freedom of speech has been impinged the power to go to court to seek financial compensation.

Paradoxically what this means is that we run the risk of social media suppressing free speech for fear of cancel culture. Many people argue that cancel culture does have its benefits, such as allowing less powerful people to have a voice, helps marginalized people hold others accountable when the justice system doesn't work, and cancelling is a tool to bring about social change.

What is clear is that not all actions or events create a social media storm or progress to the, so called, cancel culture. Social movements take off, more often, due to a perfect storm of circumstances. Several things occur at the same time and generate the motion to drive a cause forward. Generally, they have 3 common elements; a newsworthy or shocking revelation; social media connects people fast and allows an idea or sentiment to spread in a flash; and an underlying issue or sentiment has bubbled to the surface leading people to finally express their views.

From a brand perspective the concept of cancel culture has implications on future actions and engagement with potential consumers. Brands are being held more to account and there is no hiding. That is a good thing, but culture changes and what is socially acceptable today may not be in ten years' time, and while there is a statute of limitations for criminality, it seems there is no such forgiveness for art, music, entertainment, opinion, or expression. A 2018 Edelman global study showed "Nearly two-thirds (64 percent) of consumers will buy or boycott a brand solely because of its position on a social or political issue." Brands should take note that "A majority (60 percent) of respondents say brands should make it easier to see what their values and positions on critical issues are when they are about to make a purchase."

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The 'Why' behind consumer reactions to brand behaviours is called out in an article on Pop Neuro (a neuromarketing blog on consumer psychology). "Cancel culture, or call-out culture is the public backlash celebrities, brands, and influencers face after contradicting consumers' beliefs. Cancel culture exists because social identities exist. We follow brands and celebrities, in part, as a form of self-expression. And at an extreme, we also "cancel" them as a form of self-expression." [i] Basically, consumers' motivations to support or vilify a brand relates back to their own self-perception and it is important to them that brands represent their shared values.

In the wake of the killing of George Floyd, a number of brands voiced their support for the #BlackLivesMatter movement, but many were accused of hypocrisy with consumers asking whether they were genuinely involved in the anti-racism cause, or if they were just trying to raise their profile and tailgate on culture. Nike was one of the many brands voicing their support and backed it up with public actions and ad campaigns, yet attention was drawn to the fact that in 2019 less than 10% of its 300-plus vice-presidents worldwide were black.

Pride has gained considerable support over recent years and many brands have been seen to support Pride campaigns using the rainbow to identify with the pride sentiment. But increasingly campaigners are flagging that it can feel tokenistic if the brand is not making meaningful change and they accuse many of rainbow capitalism. Consumers expect a brand's actions to live up to their claimed support.

Additionally, brands need to remember that their actions can come back to haunt them after the event. Star Wars actor Jon Boyega quit as brand ambassador for perfume brand Jo Malone after he was removed without his knowledge or consent from the Chinese version of an ad he shot for them. The campaign featured Boyega traveling through his hometown of London but in the Chinese version he was replaced by a Chinese actor. Jo Malone apologized and removed the offending ad. Yet they later tweeted their film featuring John Boyega won The Fragrance Foundation Virtual Awards 2020 for Best Media Campaign, and the reaction in social media was not what they hoped.



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Having said that, owning up and taking responsibility for poor historical behaviour can be redressed if handled well. In June 2020, L'Oréal Paris made a statement about supporting the Black Lives Matter movement in the wake of George Floyd's death, but Black model Munroe Bergdorf tweeted that L'Oréal was being hypocritical after the way it treated her (they had fired her over a Facebook post that spoke about white supremacy following the Charlottesville riots). Her words sparked a boycott, with many of Bergdorf's followers saying they would not purchase the brand again. L'Oréal Paris Brand President Delphine Viguier addressed Bergdorf in a statement, hired her to be part of a new U.K. Diversity & Inclusion Advisory Board, and donated \$50,000 to transgender organization Mermaids and U.K. Black Pride. She addressed their inferior performance in the past and took solid action to show they were working on being better.

Conversely, there are brands out there getting it right and living their values as a company. Ben & Jerry's also came out in support of #BlackLives Matter in 2020 and posted on the need to recognise and tackle "systemic and institutionalised racism" including a statement that denounced a "culture of white supremacy" in America, matching a stance and consistent position which they had been promoting 2014.

Finally, one could say that there are positives to be achieved when the voice of the masses calls out actions or behaviours they feel are no longer acceptable, as it can drive change for brands as they become socially aware of their own heritage. Notable examples are the rebranding of some old and much-loved products, where their brand owners understood that their historical branding had negative connotations: Aunt Jemima, Mrs Butterworth's, and Uncle Ben's to name just three.

With the ever-increasing impact of social media, if brands want to be vocal about social issues, or in fact connect with their consumers in a more intrinsic way, 2022 is the year brands need to get their houses in order and be authentic.





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## 9. WHY IDEAS THAT LOOK DISTANT AND IRRELEVANT MAY BE CLOSER THAN WE THINK

**A thought starter on. a global tech giant and a local traditional publisher formed an alliance**

dentsu X Japan



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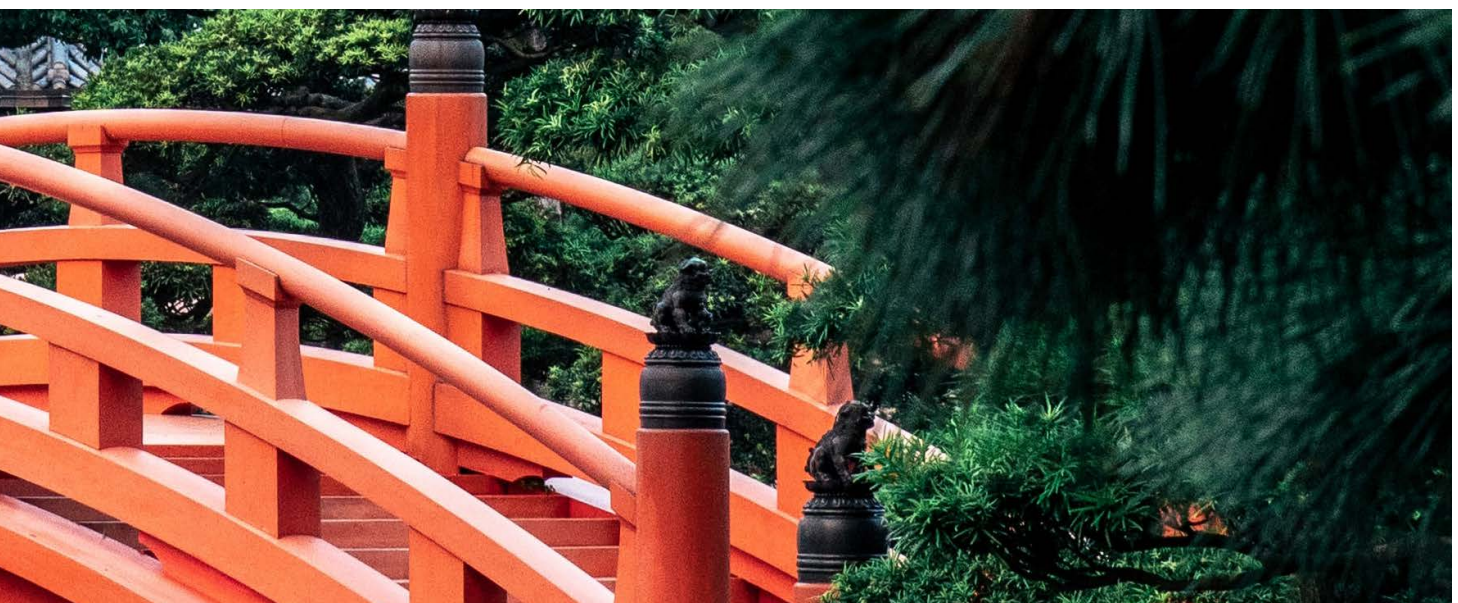
Humans can and have shown a trend of being attracted to the unexpected. We see consumers lining up for the newest collaborations between brands that shouldn't - like H&M and Karl Lagerfeld, Heineken and Bathing Ape. It is this precise element of unfamiliarity can cut through consumer attention.

For global tech giant Meta to decide to partner with a local Japanese traditional magazine publisher Shueisha to accelerate growth of their VR headset in the Japanese market might sound ineffective or irrational for a global tech company. This kind of collaboration can seem foreign to the digital or tech industries when the influence of traditional media has been decreasing in this digital era.

Shueisha, a publisher with its own strong manga contents distributed broadly both online and offline, has high affinity with the target audience for Meta Quest, and a partnership focused on attention and awareness from a new audience is an effective channel of growth for Meta. Through this collaboration, consumers' interest in Meta Quest was instantly evident across social media.

Now that brands are competing to obtain consumer attention and discretionary time across industries, conventional category boundaries no longer make sense, and disruption can occur from anywhere. In this new age, linking ideas, consumers, and interests that look distant or irrelevant at first glance would be a key driver for even more innovation and disruption – placing the motivation of consumers at the heart of communication strategies.

Today, ROI, media performance, and efficiency linked to sales are more heavily valued than ever in marketing activities, especially in media. However, it will become increasingly crucial to think outside of the box of ROI and a sales/performance-driven perspective and take on new challenges such as putting quite different and distant ideas together to make profound impacts and breakthroughs to consumers.







# 10. WHY A LOCAL FLAMENCO SINGER BECAME A WORLDWIDE POP-CULTURE ICON

**A thought starter on the  
universalisation of talent**

Elisa Brustoloni, CEO, dentsu X Spain

As we see content, entertainment, and culture being pushed from previously unprecedented regions – such as the rise of Squid Games, we see consumers being more risk inclined. Now they are willing to engage with a format, media, and even language that is unfamiliar to them.

It is this willingness, and innate motivation for humans to explore the unknown that introduces us to Rosalía. Rosalía is a Spanish flamenco singer who has gained the badge of global pop music phenomenon in the last few years.

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A talent so evident that she has broken linguistic and geographic boundaries, Rosalía is a conceptual artist who has revamped traditional flamenco and turned it into a universal interest through a conversation about race, heritage and what is soulful. Creating a global phenomenon out of a niche genre, she has shaken it up and transformed it into something new that appeals to the entire planet; her Con Altura music video has nearly two million views on YouTube.

Moving around the world in search of the best sound studio, the most appealing collaboration, or the largest indie festival, she has nomadised her presence and the world appears to repay her with unprecedented interest in return. Rosalía is emblematic for a larger sociological movement where people who have talent in a certain activity are sought after & admired by others around the world, regardless of cultural, geographic, or linguistic boundaries.

In a world where most of the economy was able to function suddenly at distance, customers realized that location is no longer an issue. Our previous standard of living where getting stuck on big traffic jams, commuting for hours, living in small city spaces, or paying insane amounts of taxes are now being questioned as working remotely has turned into a wider spread possibility. People discovered new & better living conditions into being able to work their jobs remotely and upgrade their quality of living. This is leading to a redistribution of household budgets, where accommodation spend lowers and it's redistributed into other categories, such as automotive, leisure, travel, etc.

The globalisation of a local celebrity illustrates how a brand can take advantage of this new customer state of mind and expand its role from local player to the global stage and how people will respond

to the new scenario. Now that society faces a deeper sort of globalisation where, through digital, world competitiveness is being restructured, a more agile supply chain development based on artificial intelligence, digitised physical borders, and countries open to digital nomads is enabling international commerce in ways never seen before. Nowadays, it is not rare to have a friend that lives in Bahamas, works on a position based in Spain but from an American company, with a Brazilian passport.

And this is the game changer. It is universalization.

For agile brands this is a great opportunity, proven by remote sales exponential growth, as tech capabilities and new business models were able to take advantage of those new distances. According to eMarketer, ecommerce sales have been growing double digit since the pandemics and will reach \$6,17 trillion by 2023. Companies with no remote or international experience must be prepared and ready to manage the required coordination for borderless trades. Those with experience will need to rethink their supply chain and production to be fast, flexible, cost efficient and at the same time reduce the impact of their activity on the planet.

So, in the post-pandemic world your company should act more like Rosalía by considering placing your efforts into people connection regardless of their cultural, geographic, or linguistic boundaries, empowering the company's craftsmanship & values. That will help speeding the upscale of your niche's relevance, nurturing it with meaningfulness & soul, while orchestrating your business into a borderless environment. And as Rosalía's motto says: *trá trá*.



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# **11. WHY YOU GET TO HAVE YOUR CHARCUTERIE BOARD AND EAT IT, TOO**



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## A thought starter on the plant-based food boom

Jackie Mockridge Mattina, Chief Strategy Officer, dentsu X

Increasing concerns about climate change, environmentally destructive farming practices, and negative health impacts stemming from the consumption of meat and dairy have helped boost consumer perception of plant-based foods. The recent proliferation of flexitarian and climatarian diets indicate that increased consumer adoption of plant-based foods into their diet is, in part, fuelled by consumers' concerns over personal health and their carbon footprint. Advances in food production practices have also improved the taste and texture of plant-based products, making meat substitution easier and tastier. In the second half of 2021, McDonalds began testing their vegan McPlant burger in the UK, with a US nationwide rollout anticipated in late spring 2022, and Jack in the Box started offering Impossible Burgers as a substitute for their beef patties in the US. As more players enter the market, plant-based foods are increasingly available and more affordable, which points to an impending boom in plant-based food consumption.

In 2022, we can expect to see plant-based foods continue to gain popularity via this intersection of consumer health and environmental concerns. After nearly two years of a pandemic that has tried our mental and physical health, consumers will be more motivated than ever by a desire for wellness that includes seeking out a more balanced diet that also treads lightly on the earth. Before the pandemic, an initial barrier for consumers was uncertainty around how to prepare plant-based foods; but as more people began experimenting with meat alternatives amidst food supply

issues during lockdowns, combined with greater variety in available plant-based product lines, that barrier to entry has fallen to the wayside. Brands will continue to innovate and expand their ranges of products that mirror animal-based ones, making the transition to a more plant-based diet more palatable for consumers who struggle with the idea of relinquishing their favourite meat dishes (for example, UK-based food brand Squeaky Bean has recently created a plant-based charcuterie board). Simultaneously, consumers' awareness of climate change implications will continue to grow, spurred by high-profile news coverage of record-breaking weather events across the world and consternating UN climate reports, creating the perfect storm for consumers to seek out more plant-based foods.

The combination of wellness and climate change motivators and increased diversity of available products will drive further demand for plant-based alternatives. Beyond the food and beverage industry, this trend has wider implications for other sectors as consumers at large increasingly expect brands to provide options for holistic wellness and to demonstrate how they are minimizing their environmental footprint. Tapping into diverse product lines shows how brand offerings can help consumers choose what works best for their health and wellness today, even if every day is different. Brand messaging should connect with cultures and communities that overlap with healthy, environmentally sustainable lifestyles that are attainable and flexible.

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# 12. WHY EVERYTHING IS EXHAUSTING

## A thought starter on why consumers tuning out ads

Theresa Peterson, Senior Manager, Insights,  
dentsu X US

Consumers are exhausted.

The pandemic that was to end by Easter 2020 has marched on into 2022, and many of the anxieties and open questions of the early days have persisted and evolved. Through it, consumers have reacted to ever-changing guidelines with anxiety and strained social relationships. They've consistently formulated complicated calculi for determining the acceptability of social interactions, shouldered the burden of mitigating individual and collective risk, and adapted on a dime to school, business, and office openings and closures. On top of COVID fatigue, inflation, rising gas prices, supply chain issues, climate change, and polarizing debates disrupt consumers' sense of certainty.

The ensuing exhaustion will shape consumers' expectations in 2022, permeating every aspect of their lives and transforming how they engage with brands. Limited patience is a key manifestation of consumer exhaustion that brands should consider.



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Consumers are unwilling to sift through a mountain of information or products to find what they need. Avoid overwrought, emotional messaging and instead opt for clear and straightforward communications that provide essential information. Ensure that inventories are up to date on the website so that consumers do not make an unnecessary trip to pick up an item that is not available. Offer personalized product choices, where available, to reduce the weight of decision-making and product research.

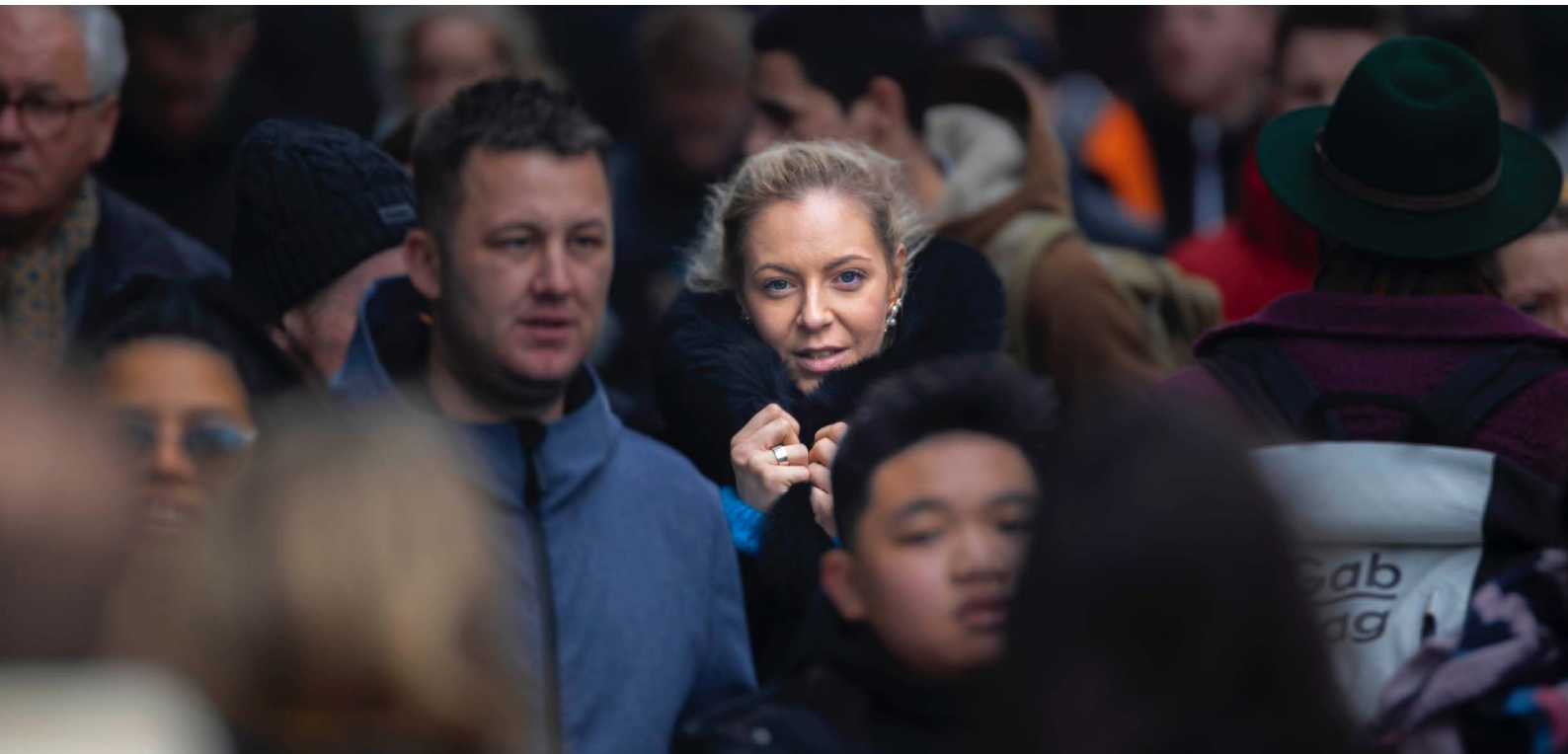
The antidote to consumer exhaustion is rest—true rest, with no distractions or stimuli. Brands must be sure that their messaging offers succour instead of overstimulation.





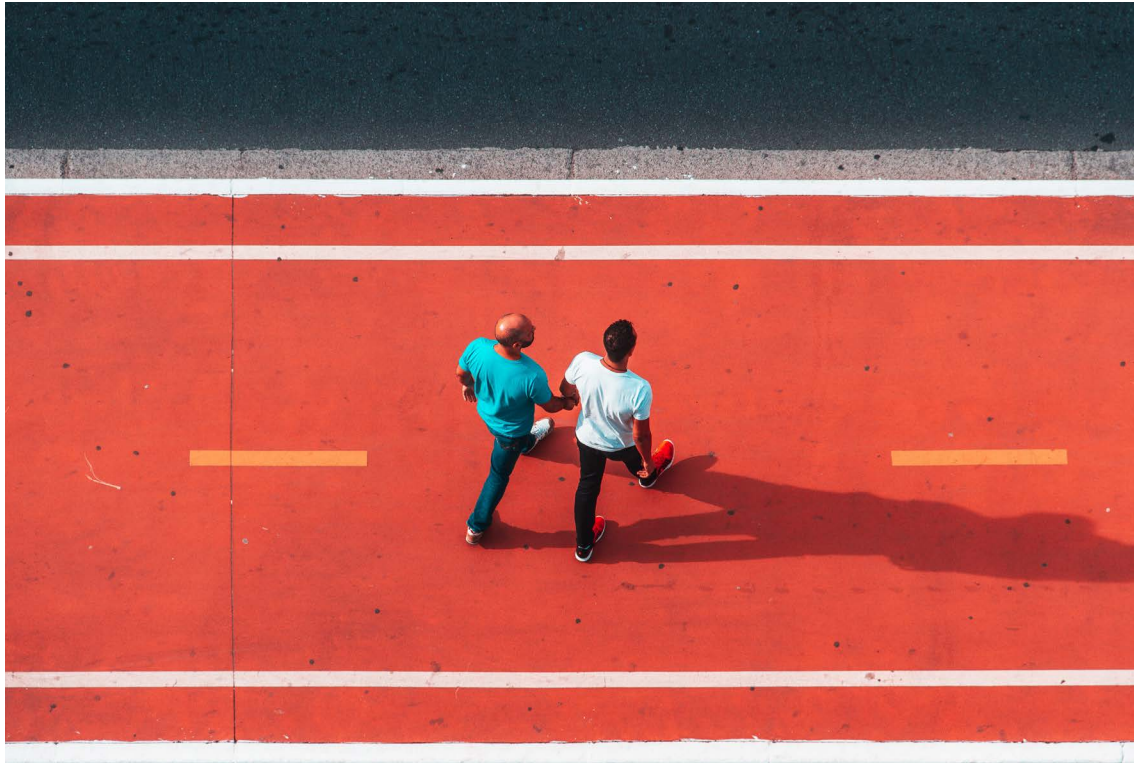
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# **13. WHY DISTINCTION IS BETTER THAN DIFFERENTIATION**



**A thought starter on the power of  
the modern brand**

Inge Hofstad Kjeilen, Innovation Director, dentsu X Norway



It is well known and established that building brand strength is an important part of the task of marketing and communication, and that we as an industry are dependent on working with both short-term sales triggering measures as well as long-term brand building activities. The challenge, on the other hand, arises quickly when defining brand strength. What makes one brand stronger than the other, and thus results in someone choosing X over Y? Here there is a wide variety of concepts, from so-called Top-of-Mind, unaided / assisted knowledge, preference, and the like. The big question is therefore which is the one that has the largest correlation with sales and thus should be the goal for marketing?

We at dentsu X Norway often run into a lot of talk about campaigns “raising the Top-of-Mind x%” or “increasing preference by x%.” The simple reason why these are the stats we talk about and use is they are available, often in brand trackers of various kinds along with a set of associations and feelings related to the brand. There is no doubt that this is important and can help drive sales, but is it most important? In our opinion, No.

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What is difficult and demanding about these is that, for example, increased top of mind is expensive to realise and something you only buy temporarily because of increased investments, while the proportion of the population that is in the market for your product there and then often only constitutes a fraction. Are we really going to use marketing and branding to optimise for such a small group of people? The same applies to associations and feelings related to the brand, which for large and established brands do not change significantly regardless of what you do or how much you invest. Are these, then, good proxies for sales or brand strength? No, and this is where Category Entry Points come into play.

The most important thing marketing and investing in brand strength can do is to ensure that your brand is only triggered in situations when the need arises. By measuring what triggers a brand in a given category, we can better understand the situations where brands are relevant in our lives. It is as simple as the brands that are triggered first in the situations that happen most often and with the most people, are the ones that will sell the most. This is precisely what we have worked on a lot and have hence developed analyses and methods both to uncover situations as well as to analyse which ones are most important for brands to focus on. This may sound logical and simple, but how do you really go about succeeding with this?

Unfortunately, the answer is that it is much more difficult than it may sound because this approach requires that communication and media buys are centred around the most important situation / situations for a category. The only problem is they are not brand specific, but rather about what triggers the need for an entire category. Therefore, the danger of building category and competitors as much as your own brand is both great and very real, especially when you are not a market leader and want to grow. This is where so-called Distinctive Brand Assets come into the picture as a tool to maximise the percentage of marketing that is attributed back to your brand and minimise what either goes to competitors or to completely distinct categories. In short, to stand out in the crowd.

That differentiation has received far too much attention in marketing, partly undeserved, while distinction has simply been forgotten - until now. This is the smartest way to ensure that a brand is recognized, noticed and stands out, which has only become more important in the digital economy where time and attention are in short supply.

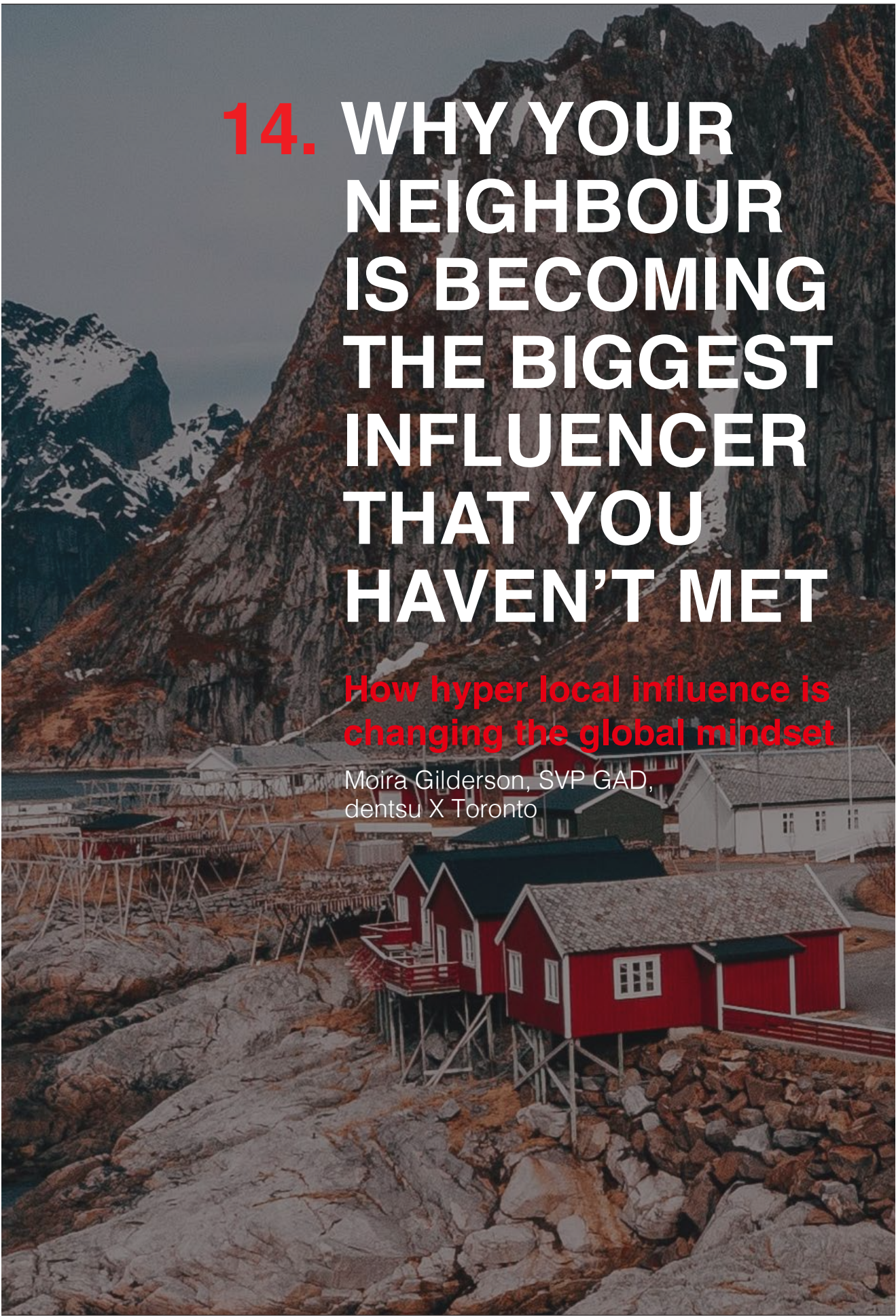


Distinctive brand assets can be anything from colour, logo, slogans, symbols, characters, to advertising styles and are intended to make it easy for the public to recognize the brand. And this is important: if a brand has a media budget of 5 million and an average sender identity in communication of 30%, it means that only 1.5 million strengthens the brand and sales. If, on the other hand, we actively work with distinctive assets and manage to raise this to 40%, it amounts to as much as 0,5 million more, just through smarter use of the existing funds. There is hardly a CFO in the world who does not love his CMO if someone comes and shows him this. At the same time, this is the best way to ensure that as much of the situation related communication as possible is attributed back to your brand.

This is something we can easily do by analysing all the elements related to the brand across image and sound. The goal is to uncover which ones are both unique, in the form that they are not largely attributed to other brands, and which at the same time are known enough that they can drive the sender identity for your brand. Then everyone is categorized based on four groups: ignore or test, avoid, use or lose, and invest to strengthen. This makes it possible to develop a proven strategy to maximise the return on investment in marketing as well as to ensure that your brand is triggered first in the most important situations.

<sup>1</sup> <https://www.anda.cl/wp-content/uploads/2020/08/PPT-Consumer-Pulse-Check-Chile.pdf>





# 14. WHY YOUR NEIGHBOUR IS BECOMING THE BIGGEST INFLUENCER THAT YOU HAVEN'T MET

**How hyper local influence is  
changing the global mindset**

Moira Gilderson, SVP GAD,  
dentsu X Toronto

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“Does anyone know anyone that can fix...” is the start of a lot of questions on socially oriented, hyper local sites. The fact that the person asking the question and the people providing suggestions have ever met is not as important as the level of trust placed in the response which results in creating new opportunities for local businesses. Influencers, especially family and friends, have been shown to have a great deal of weight on key purchasing and media consumption behaviours. In a unique way, the influence of the neighbour is the digital version of “that guy down the street knows a guy who..”

In urban centers and smaller towns across the globe, the trend has been developing in interesting approaches. People living near each other that have never met are helping each other out on a regular basis through Yelp, Facebook and local social groups such as school systems and condo groups. When NextDoor a neighborhood connection site, launched, it started extremely slowly but has recently grown at a furious rate. In Canada alone, NextDoor, has grown by over 1,419% since its local launch in 2019 – a considerable jump considering that registration is not instantaneous due to a need to qualify the new joiner. Most people are aware of the power of Facebook Marketplace to connect to local markets, and which has expanded considerably from selling or giving away items to providing a forum to sell local crafts and art.

Covid has had a strong impact on the increase of these types of connections. Neighbours and local businesses are connecting in new ways to overcome lockdowns such as helping to deliver items from a store or changing how a local store that wasn't digitally savvy before sell to a larger, less mobile population. But globally, there have been big successes in a hyper local approach all driven by the need to still purchase items or services supported by the growth in technology and adoption of ecom.

An example of that growth is shown in Walmart's recent partnership with NextDoor by setting up a “Neighbors Helping Neighbors” program that allowed customers to shop for their neighbors while doing their own shopping at Walmart. A great demonstration of a larger activation being created out of a more local adoption.

Mintel has been actively tracking this trend and features key reports on the rising power of the neighbourhood. Examples exists from simple delivery systems from a local store to creating meals for a neighbourhood to launching out a new business from a home. Their report Identity 2021: Coming Together (November 2020) predicts the influence of community in coming years and how it will continue to develop beyond my local street into a global presence.





## **15. WHY ‘WHAT’S IN IT FOR ME?’ IS KEY TO BREAKTHROUGH IN A MODERN NIGERIA**

**A thought starter on how to use motivation when data just doesn’t exist.**

Adekemi Alegbeleye, Media Director, dentsu X Nigeria

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While Nigeria is one of the most exciting and dynamic countries for brands not just to enter, but to thrive, is not yet a mature advertising market due in part to the fact that there is no multiplicity of data sets available to advertisers. Access to useful data can be expensive, but when accompanied by a smart strategy, built on the motivation of Nigerian consumers, brands can hold an edge that delivers results.

Data presently available helps us to understand the Nigerian landscape, competitive activities, the target audience and how they relate to media and brands. However, this data is not readily accessible in Nigeria and is not available in real time. It tends to skew to urban areas due to the security and socio-religious situation in the country. Therefore, the data has an error margin of 10-15% and the sample size is not necessarily representative. This sees media agencies in Nigeria use either industry or proprietary data sets or both. Strategy and Planning data is used across TV, Radio, OOH and Digital.

Yet even accompanied by this data, brands must understand that the biggest motivator for the Nigerian consumer is incentives. Nigerian consumers expect to understand a sense of entitlement of What's in it for me "WITFM" and will rarely engage with a brand except there is some sort of reward scheme, incentive, promotions, or discount tied to the brand and product activation.

While the reason for this transactional nature may be rooted in the very DNA of Nigerians, it still is used by the most successful brands in the country to attract and maintain consumers.

Brands looking to target audiences in Nigeria and across MENA should invest in meaningful causes which are important to Nigerian consumers as this is key to building relevance. Nigerians are driven by true ethical relevance and transparency across these causes is key. Brands who invest in product improvement through R&D will gain broader consumer access and appeal as the Nigerian consumers will have a sense of them contributing to the improvement of their well-being. Those brands who forge partnerships and invest in educational customer experiences will become 'Titan' brands and be top of mind for the Nigerian consumer.

Brands must consider these key consumer behaviours and use them to build and guide marketing objectives, targeting available media platforms relevant to consumers, media consumption patterns, regulator limitations and advertising policies. Brands wishing to thrive in a modern Nigeria must aim for the perfect combination of incentivisation, saliency, physical availability, and competitive pricing in the marketplace to achieve holistic success not just in Nigeria but set themselves up for further success across the African continent.



# GO FORTH



dentsu X is an integrated agency network combining best-in-class communication and media planning services, content creation, technology, data and behavioral insights. dentsu X helps brands create integrated and personalized marketing solutions to cut through the noise of a saturated media market and meet rapidly changing consumer demands to deliver 'Experience Beyond Exposure.' They have more than 3,500 experts in 52 markets. Key clients include Jaguar Land Rover, LVMH, Kao Corporation and Netflix.

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