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Branding and Marketing in the new Abnormal

Exclusive Webinar
GfK – CampaignAsia Survey Report

29 September 2020



GfK Presenters



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Asia Pacific and Middle East



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About GfK



We turn **knowledge** into an engine for **sustainable growth** for the **shapers of tomorrow**

We are a digital organization with a global presence

60+ countries

8,000+ employees

10,000+ clients

2m+ consumer panelists in 15 countries

180m+ Products tracked

100,000+ Retailer partnerships

2m+ SKUs

+20% CAGR in data volume

Our Solution Categories



Brand Insights



Consumer and Shopper Intelligence



Marketing Effectiveness



Market and Retail Intelligence



Media Measurement

What is today about

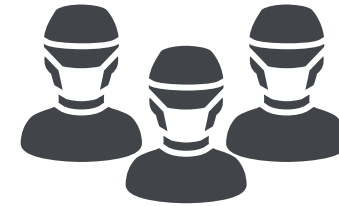
Branding and Marketing in the New Abnormal in Asia



Effect
of pandemic



What has **changed** for
brands and marketing to
consumers...
priorities, tactics and KPIs?



Are brands and marketing
leaders **prepared for**
the New Abnormal?



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The New Abnormal



The New Abnormal



Pandemic with deep and far-reaching economic and social impact



Over 1/3 of the World's Population was/is in lockdown



IMF: Global downturn 'way worse' than 2008 global financial crisis



Rise of "Online", "No-Touch / Contactless" as way of life

Global Crisis: It's different this time



The COVID-19 pandemic is unique because it is affecting virtually every aspect of life for people around the world simultaneously

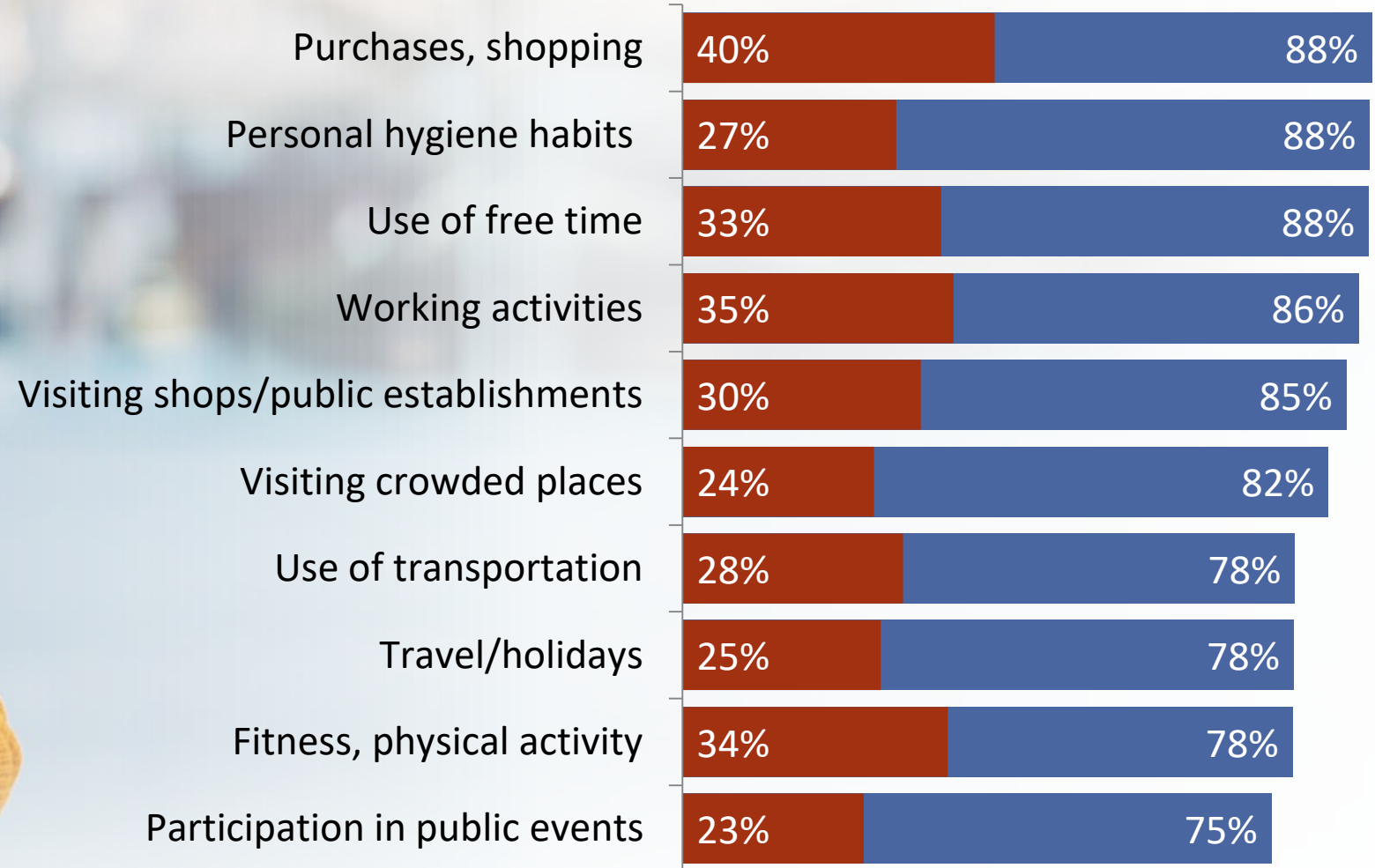


Today's disrupted world

Life has changed across the board



Changed habits due to coronavirus



APMEA 7 Average

■ Yes, significantly ■ Yes

Can you tell me whether, as a result of coronavirus, you have changed/had to change your habits and behaviour, particularly in relation to ;

We are farther apart, but closer together

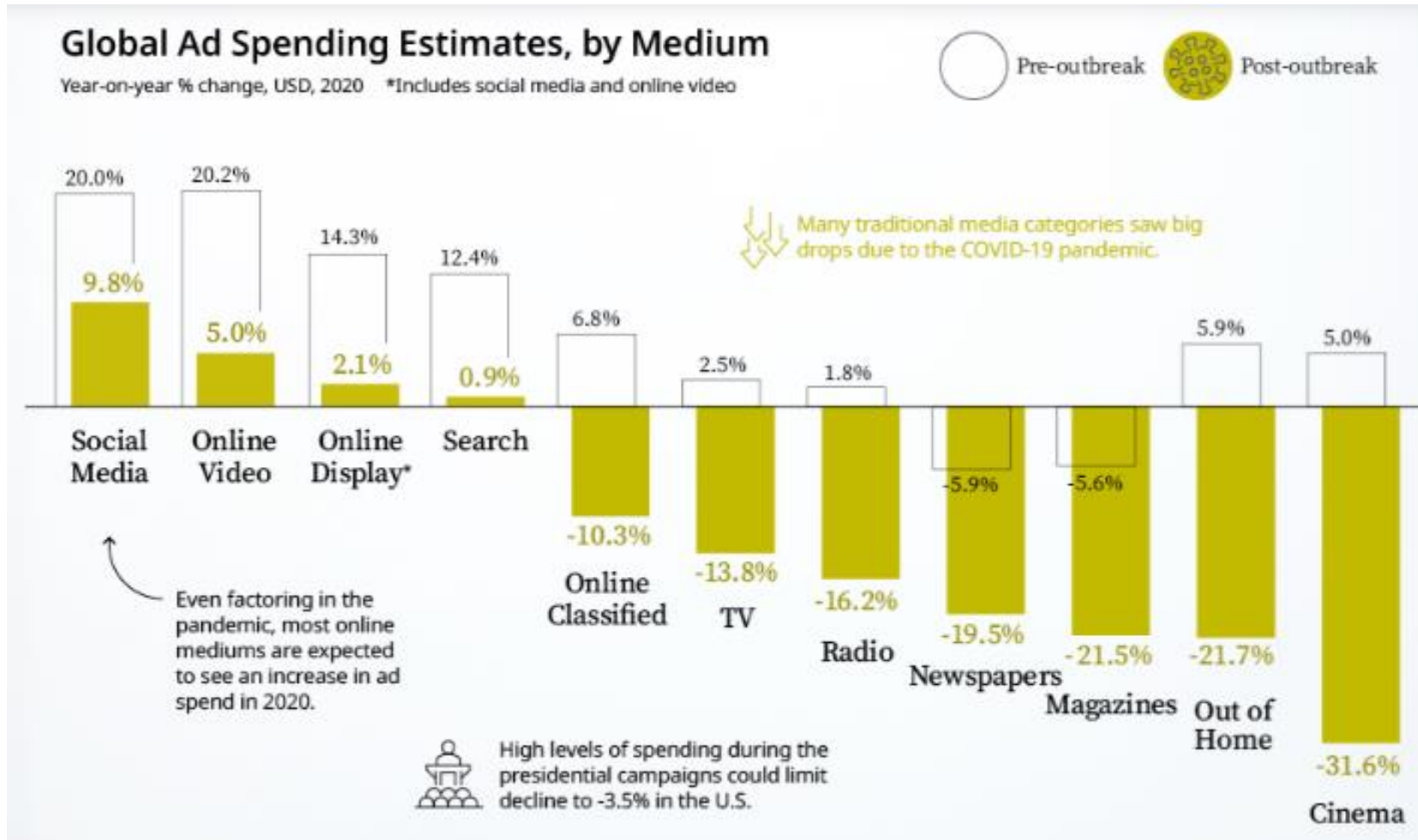
More Digital experiences as Stay at Home becomes a norm



Doing more of than usual ... APMEA 7 Average

Global advertising spend is set to fall by 8.1% (\$49.6bn to \$563bn)

Severe cuts in investment among major product sectors as a result of the COVID-19 outbreak



Source:
WARC report,
2020



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What has changed for Brand and Marketing Leaders?



About the study

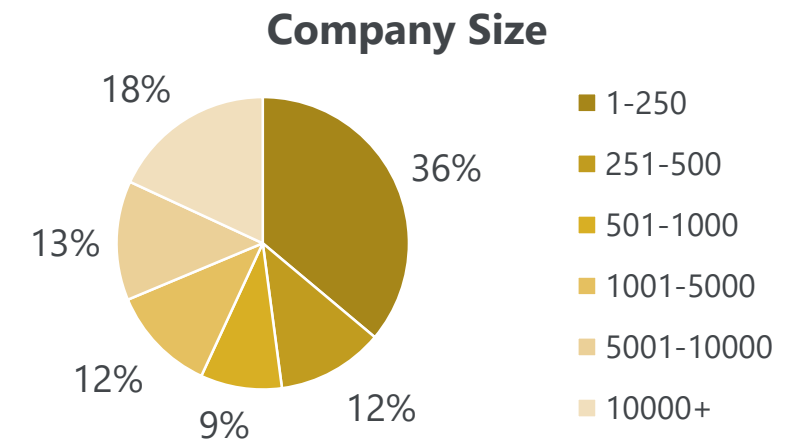
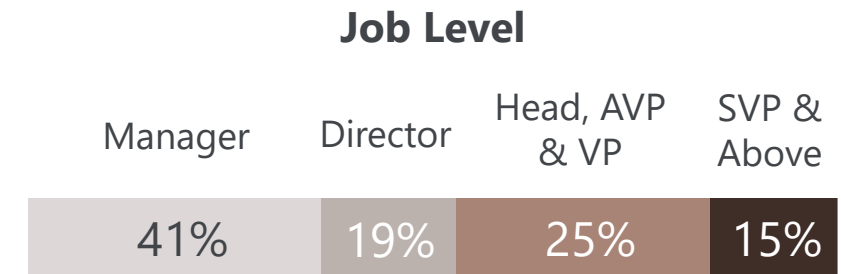
campaign



Branding & Marketing in the new Abnormal Study, Asia, Aug 2020

144 B2C brand and marketing professionals, 13 Countries, 11+ industries

Asia Pacific: 13 Countries		Industries	
Australia	3%	Automotive	4%
Greater China	28%	Financial Services	14%
India	10%	FMCG	8%
Indonesia	8%	Healthcare	4%
Japan	10%	Manufacturing	9%
Malaysia	8%	Media	5%
Philippines	10%	Retail	7%
Singapore	10%	Tech / Telecom	13%
South Korea	4%	Travel	19%
Thailand	8%	Others	18%
Vietnam	2%		
144 responses			

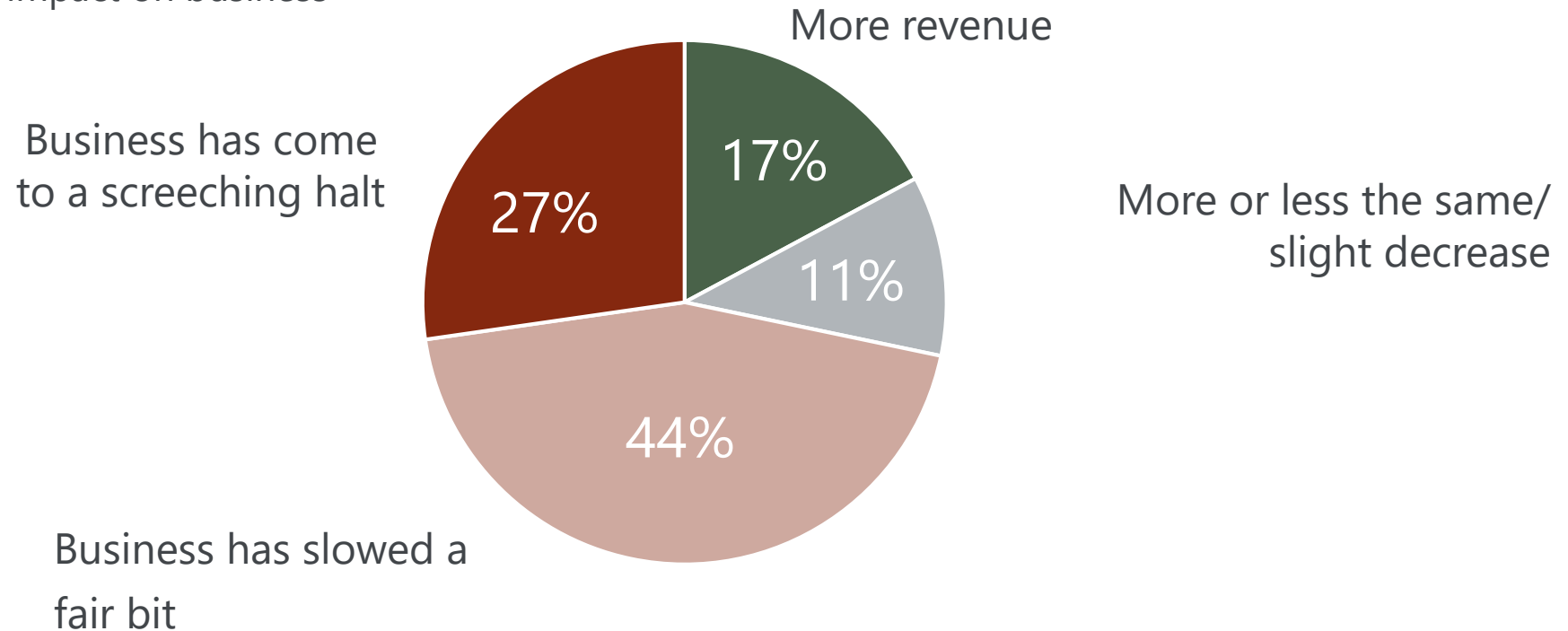


What has changed for Brand and Marketing Leaders:



#1. Business Impact has been high

% of respondents on impact on business



Source: GfK Branding and Marketing in new Abnormal Survey, Asia Pacific, 144 respondents, 11+ industries, 13 countries, Aug 2020
Qn10: To what extent has Covid-19 disrupted the category/ies your brand is present in? Pick one.

Live Poll 1:

Has your marketing budget changed?

What has changed for Brand and Marketing Leaders:



#2. Reduced budgets

% of respondents



Indicated **decrease**
in budgets



48% indicated budget shift from
**long term brand building to
short term ROI activities**

Source: GfK Branding and Marketing in new Abnormal Survey, Asia Pacific, 144 respondents, 13 countries, 11+ industries, Aug 2020

Qn16: How has your overall marketing budget changed since COVID-19?

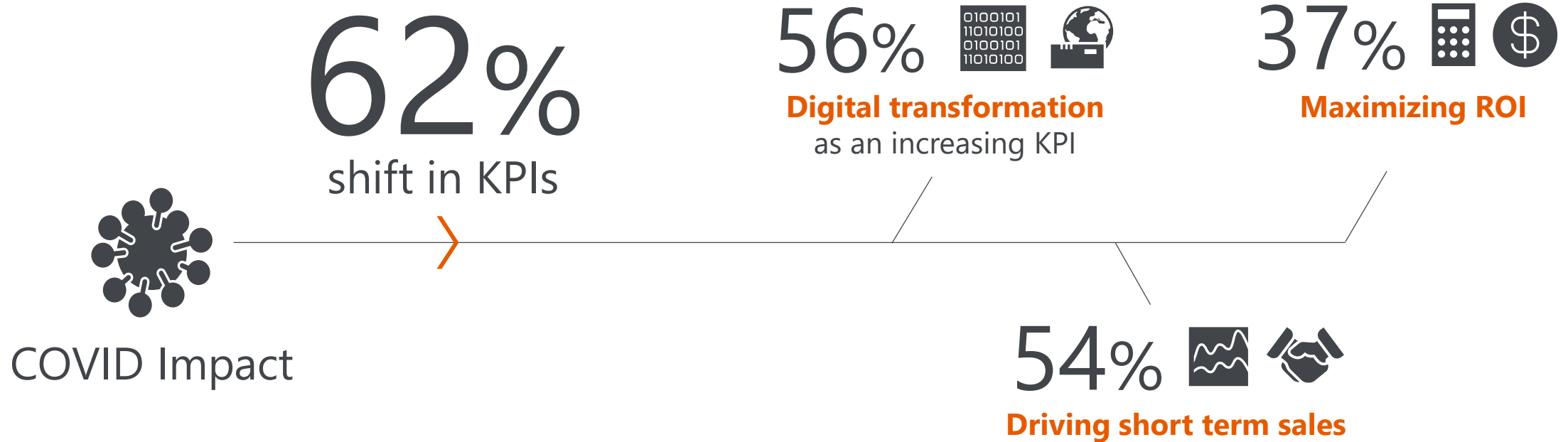
Qn18: Do you see budgets shift away from activities that drive short term ROI to long term brand and reputation building?

What has changed for Brand and Marketing Leaders:



#3. Shifts in KPIs post COVID...

% of respondents



Source: GfK Branding and Marketing in new Abnormal Survey, Asia Pacific, 144 respondents, 13 countries, 11+ industries, Aug 2020

Qn13: Has COVID-19 changed the way you measure KPIs?

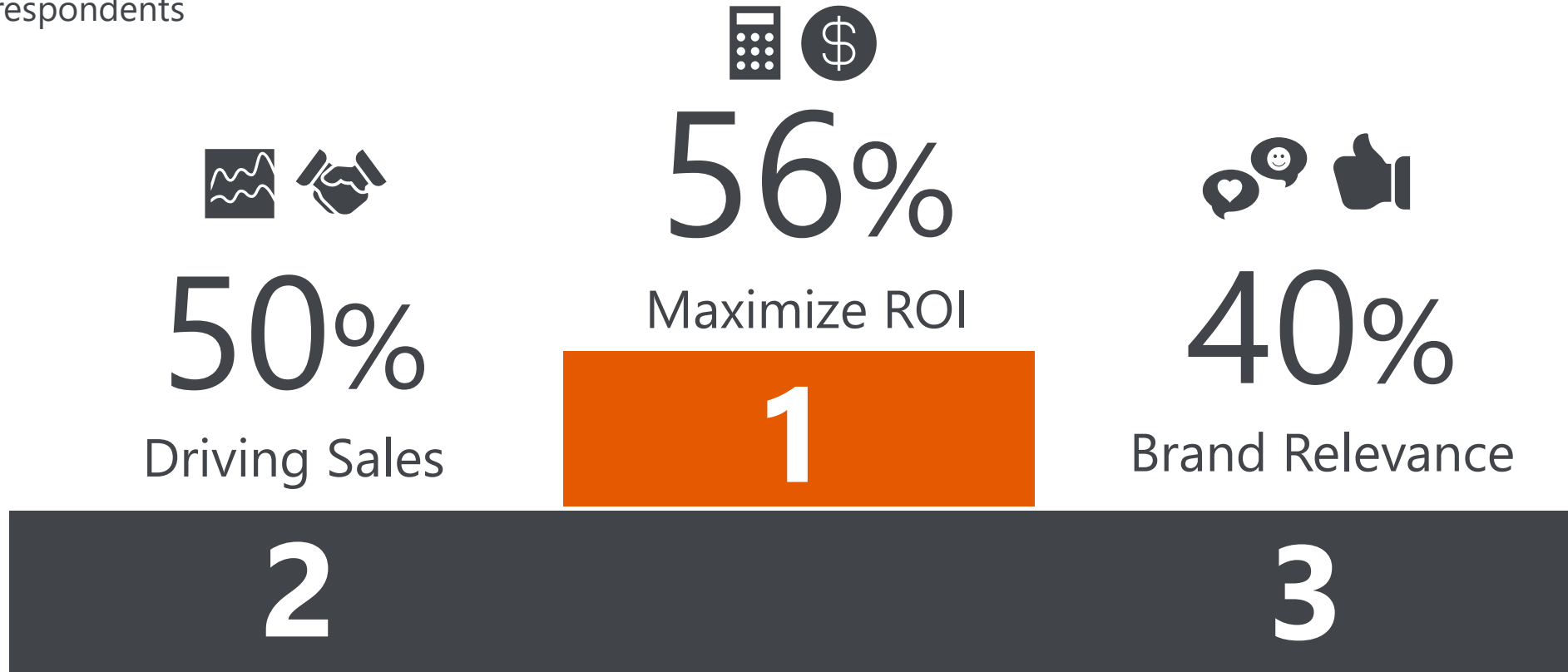
Qn15: In what ways has COVID-19 changed the way you measure KPIs? Tick all that apply

What has changed for Brand and Marketing Leaders:



#4. Maximizing ROI is top of mind as a topic

% of respondents



Source: GfK Branding and Marketing in new Abnormal Survey, Asia Pacific, 144 respondents, 13 countries, 11+ industries, Aug 2020
Qn9: What are the most important topics for you right now as a marketer? Choose your top 3.

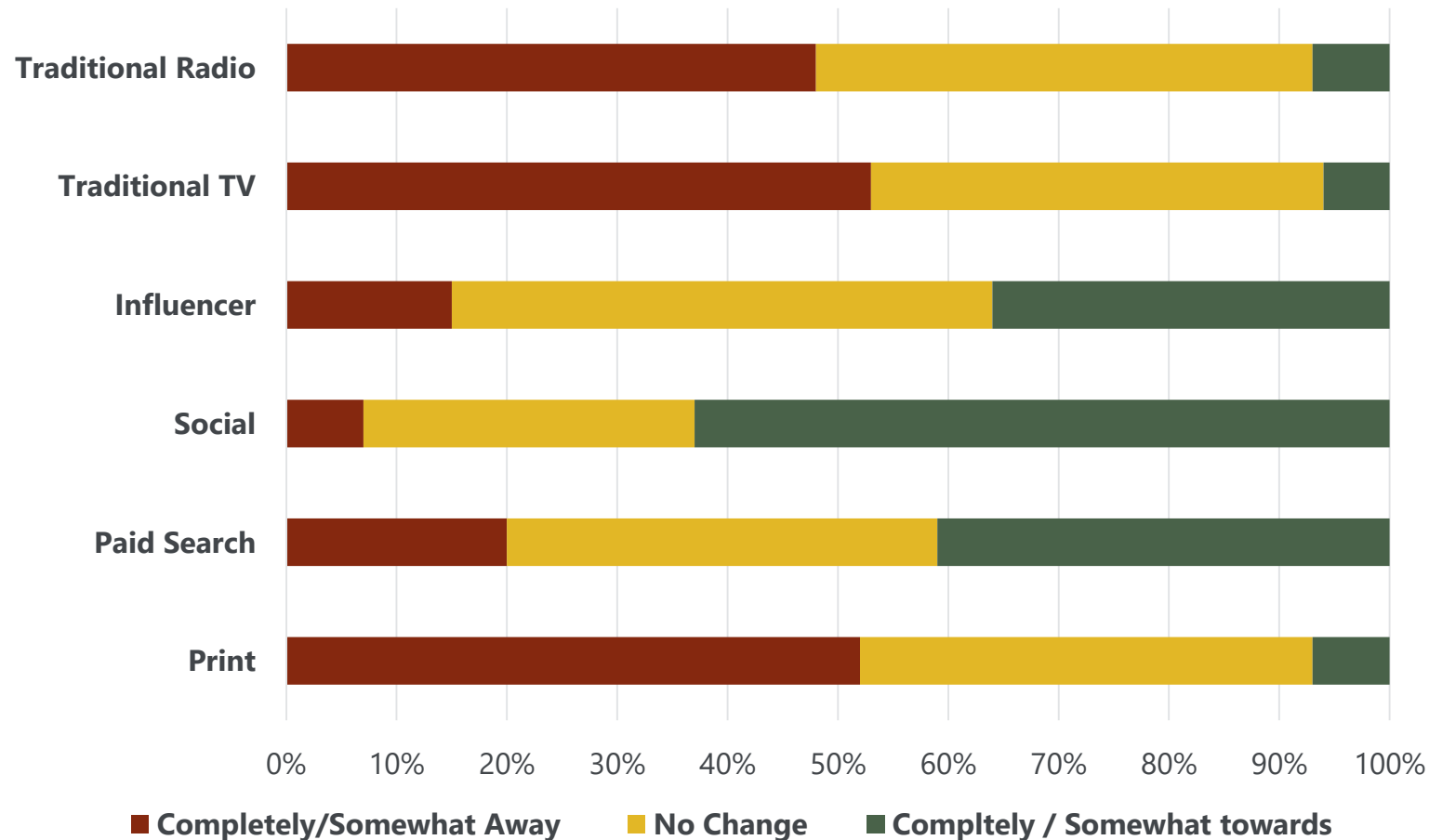
Live Poll 2:

Where are you shifting your advertising budgets towards to?

What has changed for Brand and Marketing Leaders:



#5. More targeted in ad budget shifts: social, influencers and paid search



- Traditional mediums starting to feel the pinch
- Nearly all industries shifting towards **social media & influencer marketing**
- Healthcare, FMCG, Travel and Financial Services** “most reactionary” in budget shifts

Source: GfK Branding and Marketing in new Abnormal Survey, Asia Pacific, 144 respondents, 13 countries, 11+ industries, Aug 2020
Qn17: Have your advertising budgets shifted towards/away from the following methods/platforms?

What we've seen so far... priorities and challenges faced by brand and marketing leaders...



Having looked at their pain points and actions...
let's now look at how they are looking to measure these actions

Measuring MROI :

Only half measure all campaigns

% of respondents



55%

Maximize ROI

*One of Top 3 Priorities



Nearly 1 of 2 brand marketers (49%) across Asia **measure all** marketing campaigns

Source: GfK Branding and Marketing in new Abnormal Survey, Asia Pacific, 144 respondents, 13 countries, 11+ industries, Aug 2020

Qn5: How often do you measure marketing effectiveness?

Qn9: What are the most important topics for you right now as a marketer? Choose your top 3.

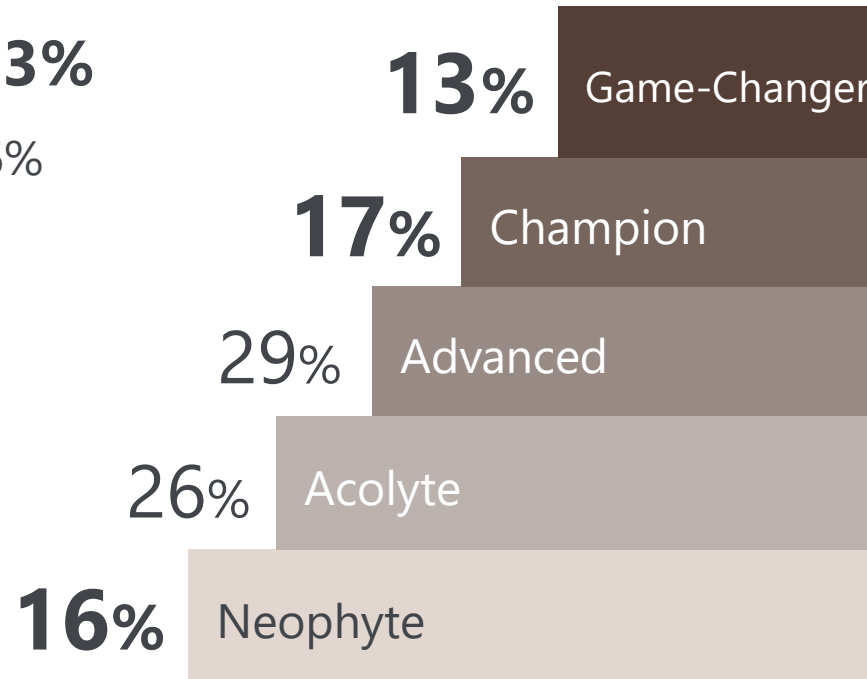
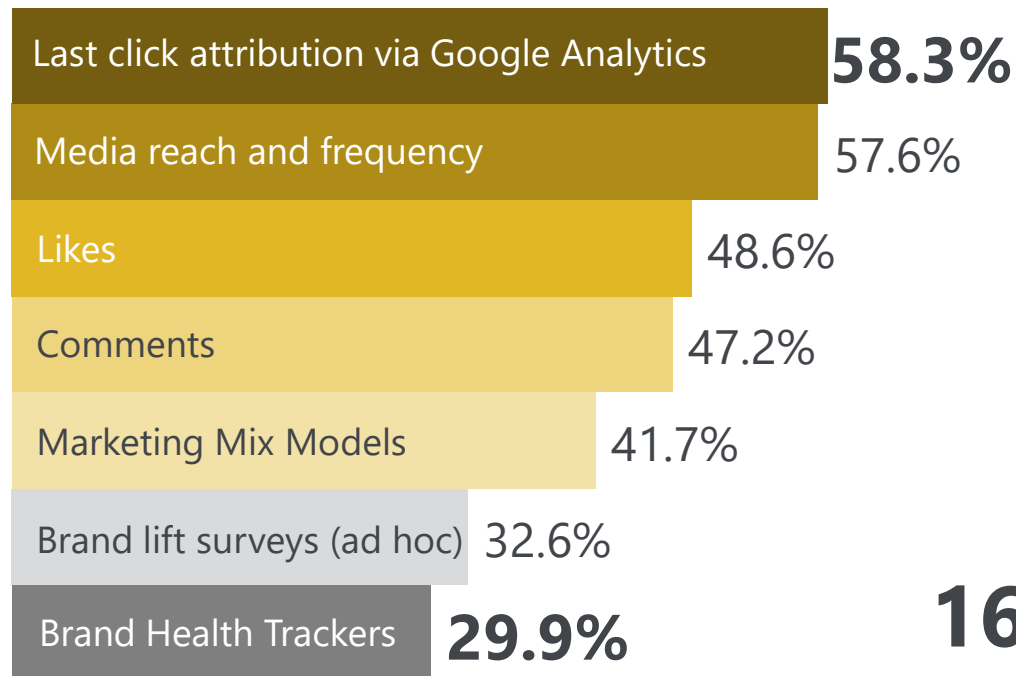
Measuring MROI



Measurement Methods and Maturity

% of respondents

Less than 1/3 (30%) indicated their organization as **"Game-Changer / Champion"**



Pervasive culture of marketing effectiveness. All business decisions are data driven. Industry leading practices and thought leader

Selectively measures, diagnose and optimize marketing performance

Just started or not using it to influence decisions

Source: GfK Branding and Marketing in new Abnormal Survey, Asia Pacific, 144 respondents, 11+ industries, 13 countries, Aug 2020
Qn6. What method(s) do you currently use to measure marketing effectiveness? Tick all that apply.
Qn7. How would you best describe your organization when it comes to measuring marketing effectiveness?

What are brand and marketing leaders saying?



Problems about measuring MROI in their organizations



Lack of **advance technologies** to measure better way of marketing effectiveness.

Challenges - **no direct & proper methodology** to measure marketing campaign performance. Due to budget constraints, we have **difficulty developing the right model for performance measurements** on marketing campaigns

Yes, We need to now get **more granular** and get **more touchpoints** evaluated too

I think there's one area we're struggling is when it comes to some **brand marketers, they request for the KPI talking about conversions...**

Couldn't provide a **holistic view** of overall marketing effectiveness

digital campaign effectiveness is **difficult to measure**

Data, **Digital not easy to check.**
And **methodology is evolving** as fast

With the new normal, budgets are shrinking. And with that, scale of campaigns are smaller. And with **Brand Lift surveys, and NPS surveys, you need a big base to get a large enough sample size.**

Source: GfK Branding and Marketing in new Abnormal Survey, Asia Pacific, 144 respondents, 13 countries, 11+ industries, Aug 2020
Qn8. Do you see any problems with the way that marketing effectiveness in your organization is currently measured?



Clear gap exists in MROI measurement:

What, How and Level of Sophistication

% of respondents

55%  



Maximize ROI

*One of Top 3 Priorities

90%



Driving Sales

*One of Top 3 Priorities



Less than 1/3 are using Multi-Touch Attribution



Less than half are using Marketing Mix Models



*~6% are using likes, shares and media reach.

Source: GfK Branding and Marketing in new Abnormal Survey, Asia Pacific, 144 respondents, 13 countries, 11+ industries, Aug 2020
 Qn6: What method(s) do you currently use to measure marketing effectiveness? Tick all that apply.
 Qn9: What are the most important topics for you right now as a marketer? Choose your top 3.

More than ever, brand and marketing leaders need insights to make swift and informed decisions with confidence for the business.



1

Measuring the right thing in the right way

2

Data-driven and analytical approach guides optimal decisions and investments to maximize ROI and brand value

3

Digital transformation as an increasing KPI:
Holistic approach to marketing measurement with the right internal metrics, methods and insights



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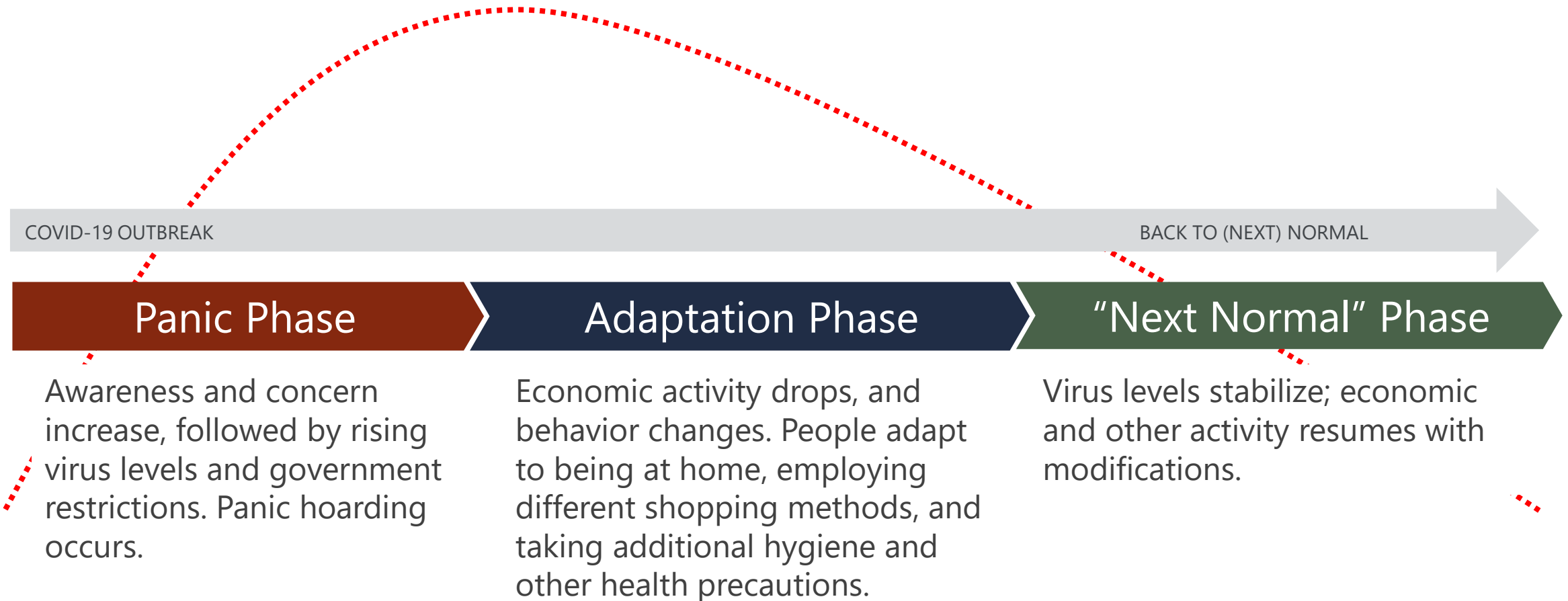
Looking ahead



The Crisis Curve



People – and societies – experience three phases during major crises such as the COVID-19 pandemic

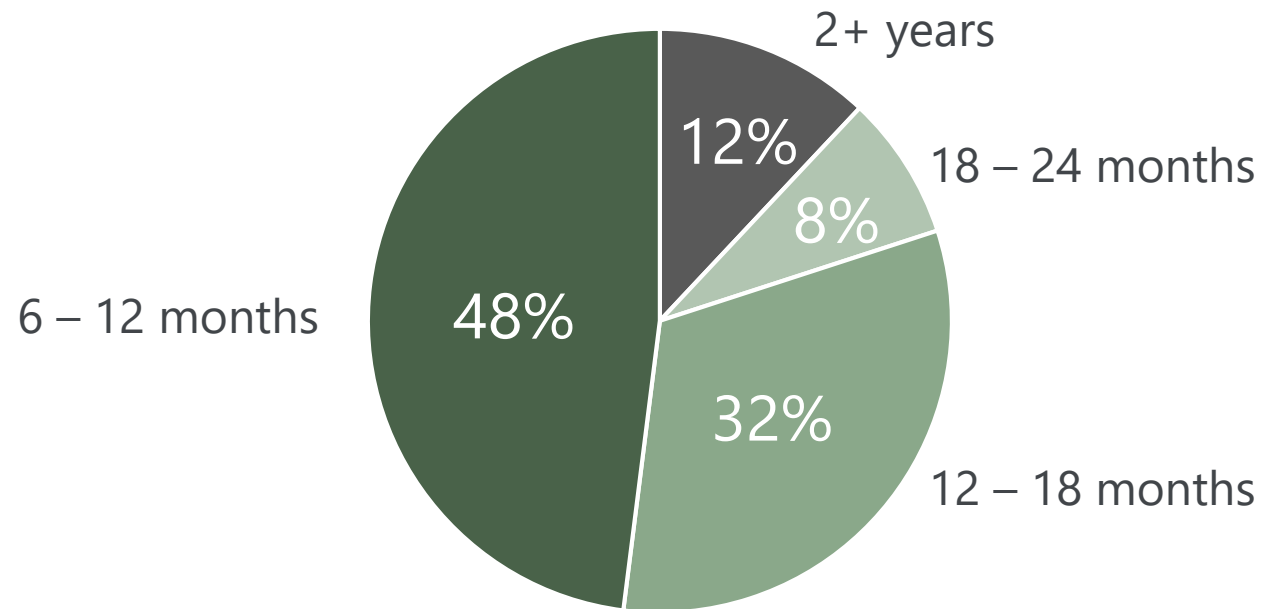


Looking ahead: Consumer demand



Nearly half surveyed are optimistic of recovery within 6 – 12 months

% of respondents



Source: GfK Branding and Marketing in new Abnormal Survey, Asia Pacific, 144 respondents, 13 countries, 11+ industries, Aug 2020
Qn6. How long do you think the impact of COVID-19 on consumer demand in your business will last?

Looking ahead: actions in next 6 months



Knowing the consumer and how to engage them is top of mind

% of respondents



Source: GfK Branding and Marketing in new Abnormal Survey, Asia Pacific, 144 respondents, 13 countries, 11+ industries, Aug 2020
Qn19: What actions do you plan to take in the next 6 months?



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Closing Thoughts



Key Takeaways



Post-Covid Challenges



New ways to engage consumers in new normalcy



Doing "same or more with less"



Digital transformation pressures

Decisions

1. What marketing programs and tactics should we **invest more / less** to meet business demands?
2. What is the **potential ROI** from our marketing investments?
3. Do we have the **data to demonstrate** marketing effectiveness and sales impact?

Top of Mind



Maximize ROI



Driving Sales



Brand Relevance

Are brand and marketing leaders prepared for this new abnormal?
Can they swiftly pivot their marketing plans to make an impact?

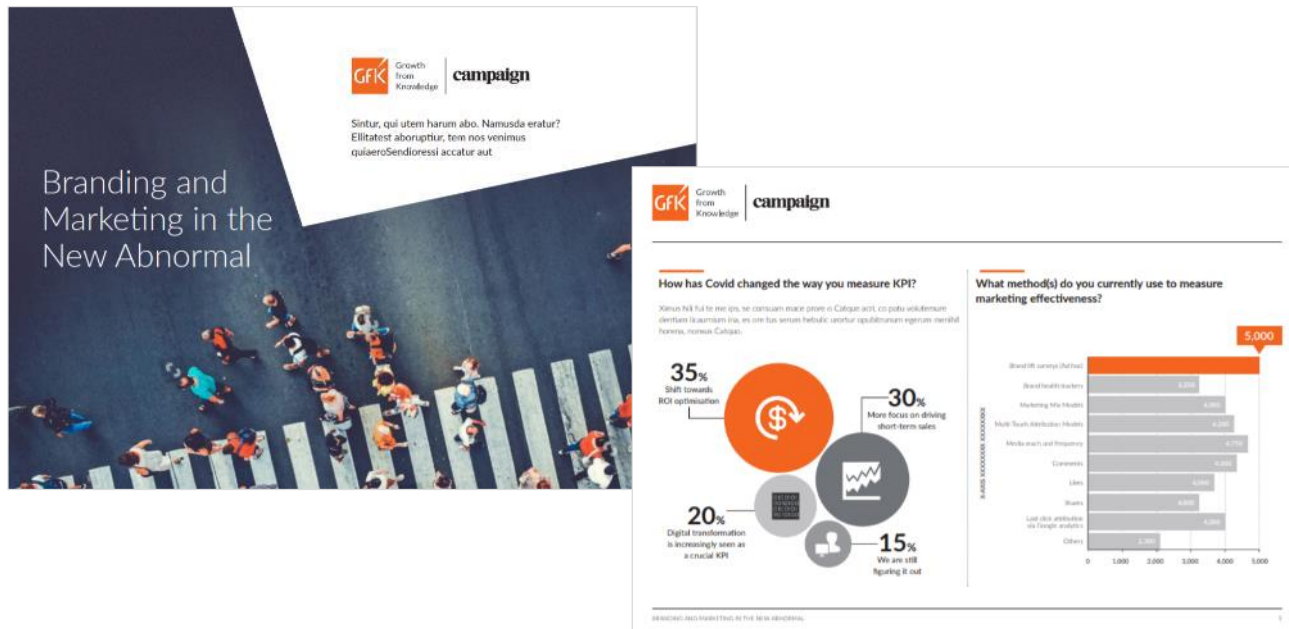
Full Report Launch: 19 Oct 2020

Knowledge to shape **your brand and business**

campaign



- All webinar attendees will receive the full report
- For more insights, visit **GfK.com** or follow us on LinkedIn



Learn how you can grow your brand and business with actionable insights, simply email apac@gfk.com



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Thank You

