MEDIACOM

OUR 5 TRENDS
**FROM CANNES LIONS
2019**

_A week of inspiration

We're just back from the **66th** Cannes Lions Festival of Creativity, where we were inspired by some of the smartest thinkers in the industry and beyond.

Complementing the main festival programming, we returned to our home at the historic Martinez Hotel to host an exclusive programme of intimate fireside chats and panel sessions.

These sessions were designed to add depth to the major themes discussed on the main stages and reveal intriguing **new perspectives** from key industry players.

One of the highlights of our programme was our daily Cocktails and Curation sessions where we discussed our favourite campaigns of the week.

In this report, we identify the **top trends** that emerged, highlight the work that demonstrates their power, and share insights that will impact our industry in the months and years to come.

We hope you find our thoughts interesting and useful.

OUR 5 TRENDS
FROM CANNES LIONS 2019
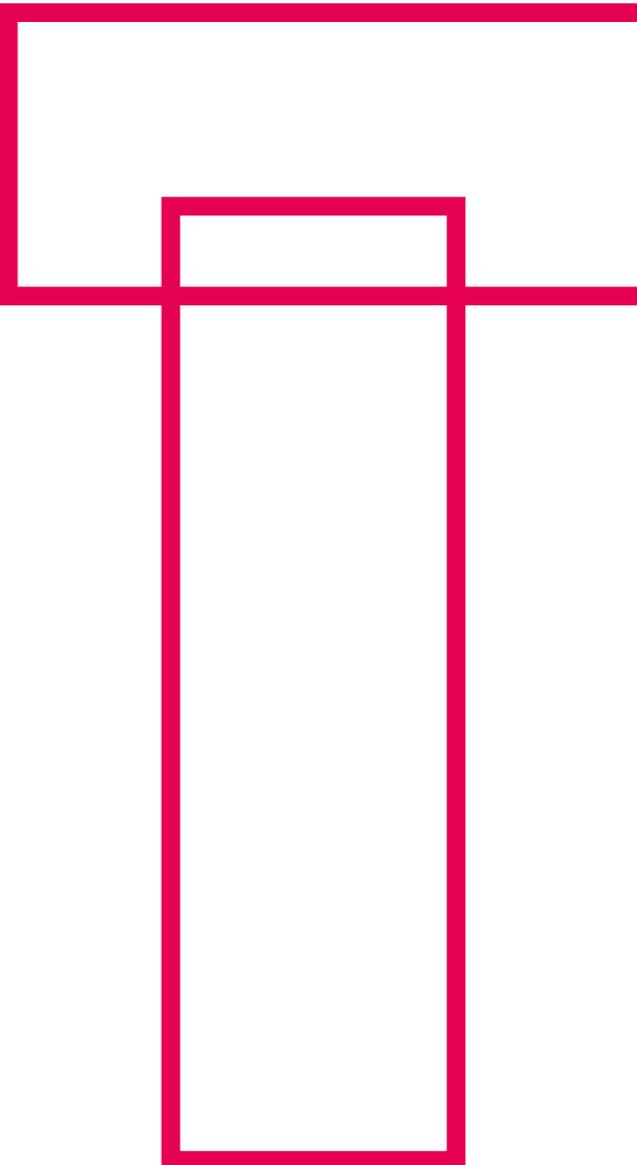
_We're entering a golden age of audio (and multisensory experiences)

Innovation is always hot at Cannes. Every year we talk about new technology, new devices, and new ways of reaching people. This year, that conversation focused on the importance of **multisensory** experiences. In a world saturated with connected devices and screens, the power of **touch, smell, and sound** can cut through the clutter.

Consumer backlash against the visual is all too understandable. According to ZDNet, 13% of Millennials now spend more than 12 hours a day on their phones; they're experiencing serious screen fatigue. As a result, audio platforms are experiencing rapid growth – whether through digital streaming, podcasts, broadcast radio, or the availability of new listening devices – and consumer listening is at an all-time high at an average of 17 hours weekly (source: iHeartMedia).

To help brands reach these engaged consumers, iHeartMedia and WPP launched Project Listen at Cannes, an initiative designed to enhance insights from, planning for, and creative capabilities in audio. The iHeartMedia/WPP partnership aims to help brands use audio more effectively to reach their customers in ways that are more personal.

One brand that has invested in developing its sonic identity is Visa. It spent the last year developing its multisensory brand – a 'signature sound', an animation and a 'haptic' (i.e. a vibration). Visa's new sound is not just for comms – it's a 'working sound', which signifies a transaction has occurred (like in a contactless payment).

The sound is already built into one million points of sale in 25 countries, and Visa is tracking awareness. Seeing a Visa logo at a merchant increases trust and makes a sale more likely, and the idea is that the sound will deliver the same reassurance. Mastercard is also investing in this space.

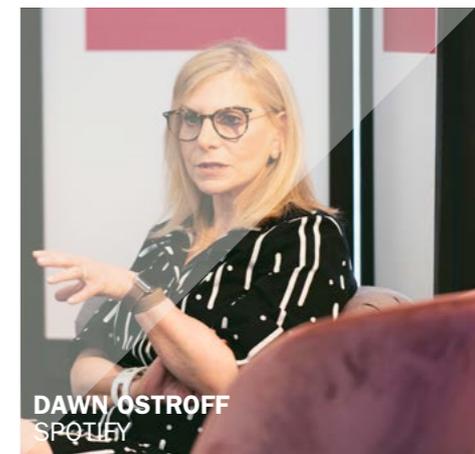## 1 in 3
PEOPLE IN THE US LISTEN TO A PODCAST AT LEAST ONCE A MONTH

Source: Spotify

"**People are so engaged in audio content that they will stay for the advertising.**"

DAWN OSTROFF
CHIEF CONTENT OFFICER, SPOTIFY

DAWN OSTROFF
SPOTIFY

MULTISENSORY EXPERIENCES

Media owners and tech providers are looking for ways to help brands improve the quality of their multisensory experiences. Google's 'Creatability', for instance, which won the Design Lions Grand Prix, explores how creative tools – drawing, music, and more – can be made more accessible for people with disabilities thanks to the web and AI technology. It allows creators who can't hear to make music, while those who can't see are empowered to draw.

There were several other standout sense-powered campaigns at Cannes:

'Scent by Glade' tapped into the power of smell. Teaming up with Walmart, Glade invented a new medium to let people sample its fragrance products without leaving the couch: the world's first fragrance-filled packing pillows. When people received their orders and popped the packing bags in the box, they released a free sample of Glade's new spring fragrance. Consumers could buy instantly via a simple scan of the bag and a tap of their phone.

'Extra Reminder' sought to address changing shopping habits, which were hitting gum sales, through sound. Extra partnered with BP to give people a reminder to buy. Extra Reminder is a cash register integration that alerts customers when they purchase a product that will give them bad breath. The standard 'beep' of the scanner is replaced by a buzzer sound if they purchase products like cheese, chips, pies, coffee and cigarettes.

'Infection Alert System' fused data with multisensory experiences. Lifebuoy, India's largest soap brand used sound to tackle India's infant mortality rate, which is 13% higher than the global average. The trouble is, in rural communities, low literacy rates and media penetration mean people are not aware of the importance of hand-washing. To change this, Lifebuoy crunched government data to predict outbreaks in rural areas. When an outbreak looked likely it triggered an automated call to people's mobiles reminding them to wash their hands.

> [Brands need to] reinvent advertising and engage people in a way that is useful and entertaining to a point where they look forward to the next engagement with the brand."
> **MARC PRITCHARD**
> CHIEF BRAND OFFICER, P&G

> You have to build the brand. Performance marketing alone can't do that."
> **KELLYN SMITH KENNY**
> CMO, HILTON

_Creativity + Data = Growth

Data is **everywhere**. Every time we click online, turn on our phone, or make a transaction, we leave a data footprint. But while brands are getting better at using this data, they are also recognising that it is **useless** without the **right creative approach**.

Data provides the context and information we need to make an informed decision, but creativity – the human response to how we can apply this data in the real world – is what makes campaigns cut through.

As Meghan Farren, Chief Marketing Officer at KFC UK & Ireland, recognised, data is "only useful if you can match it with understanding to turn it into something useful for the consumer". Speaking at The Economist Group's Wake Up panel, Suzanne Kounkel, Chief Marketing Officer at Deloitte US, agreed, stressing that there is too much value placed on data alone. The trick is "knowing what the data is telling you but not letting the data be something you hide behind," she said.

The stats prove that the most effective campaigns balance data-driven ideas with creative ideas. Speaking in the Palais, Cannes Lions VP of Partnerships Myriam Coupard explained that their records show McDonald's creatively-awarded work had 54% higher ROI than non-awarded. Moreover, she pointed out that all Cannes Advertisers of the Year have outperformed the stock market. What's more, WARC Analysis shows that, while the biggest ROI multipliers are market and brand size (ROI x18), creativity is the second biggest (ROI x 12) and easier to shift.

But there's a caveat. As the IPA's Peter Field unveiled in 'The Crisis in Creative Effectiveness', while short-term creative campaigns may generate buzz and win awards, they usually have little or no effect on business results. Instead, long-term creative ideas – like Snickers' on-going 'You're not you when you're hungry' campaign, for example – that are more proven to have genuine impact.

> **We are moving into a whole new phase of interfaces that will be invisible and controlled by sensors.**
>
> **DAN KAUFMAN**
> HEAD OF ADVANCED TECHNOLOGY AND PRODUCTS (ATAP), GOOGLE

STANDOUT CREATIVE EFFECTIVENESS CAMPAIGNS

Burger King's 'Whopper Detour' is one stunt that did generate sales, however. It drove 1.5 million downloads of Burger King's app (becoming the most downloaded app on the App Store) by letting fans unlock a 1-cent Whopper – but only if they went to a McDonald's location. The story generated buzz in the press and generated 3.5 billion earned media impressions and a 37-to-1 ROI, according to the chain.

Volkswagen Netherlands's 'Snelweg Sprookjes' (Road Tales) campaign demonstrated a particularly creative use of location data. To make children's car journeys more entertaining, Volkswagen created a location-based app that tells personalised stories based on what kids can see out of the window. The app detects ordinary objects such as tunnels, windmills, pass overs, gas stations, and electricity poles and transforms them in real-time into story elements. For example, a tunnel turns into a rocket.

Nike's 'Air Max Graffiti Store' campaign – winner of the Media Lions Grand Prix – found new ways to fuse tech with creative. The brand tapped into Brazil's graffiti culture. It located popular spray-painted characters in the city and asked the artists to spray-paint Nike Air Max shoes onto their feet. Nike app users could win the shoes by visiting the graffiti; a GPS signal from the user's phone confirmed they were at the right location and the campaign led to a 32% increase in sales.

↘ **BURGER KING**
WHOPPER DETOUR

↘ **VOLKSWAGEN**
SNELWEG SPROOKIES

AI ADVANCES

Advances in Artificial Intelligence are giving brands more opportunities to make more sense of their data and apply it in creative ways. For 'Monty's Wicket Warnings', for example, Foxtel collaborated with Google to create an automated cricket AI that predicts when and how wickets would fall in live games, in real time. The model was integrated into the Fox Sports app for the traditional Boxing Day Test, and Foxtel achieved a double-digit increase in weekly sales growth in the week that followed.

In recent years, consumers have become used to interacting with devices using their voices, usually through a series of specific prompts ("Alexa, play a song…"). But soon, these experiences will become more and more like interacting with real human beings. Speech recognition by AI has already hit 95% accuracy

(that's greater than human accuracy levels) and is still improving.

'Digital humans' (think devices with a face on a screen or more humanised bots) represent a step towards AI developing a reward system similar to the ones we have in our brains, and a future where people can have non-verbal communication with AIs (i.e. by changing their facial expressions). These 'digital humans' have in-built virtual dopamine/oxytocin systems, so when the bot recognises the way you're responding to the things they're saying (through the camera), they learn and adapt to the things you say and do.

One brand already experimenting with AI is P&G; it's SK-II brand has already worked with Soul Machines to create Yumi, a digital human skin-care expert. The skincare

market is complex and confusing to consumers, but Yumi offers a friendly face, giving customers back control.

Another stand-out example of AI in action is National Geographic's 'Bravo Tango', a voice assistant that provides mental health guidance for war veterans struggling to reintegrate into society. From the privacy of their own home, veterans could use the app to find calm in the moment and practice techniques designed to minimise the negative impact of stressful situations or emotions. Bravo Tango replicates the conversation you might have with a human but without the potential embarrassment of opening up to a real person.

FOXTEL
WICKET WARNINGS

SK-II
YUMI
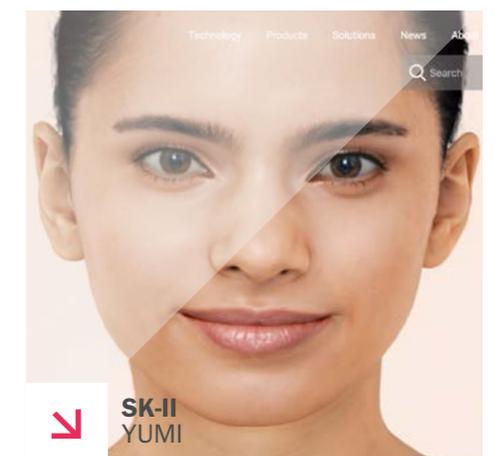
ETHICAL ISSUES

As brands collect more and more data, consumers are demanding more reassurance on the ethics of their approach. In particular, there is concern that source data biases can have an impact in terms of diversity and inclusion.

At Cannes, some campaigns showed that data could be used responsibly, while also creating a positive global impact. Travel company Black & Abroad's 'Go Back to Africa' campaign used social data for good. Every minute, someone posts "go back to Africa" on social media. Putting a positive and uplifting spin on this negative and disparaging narrative, the company blacked out the hate-fuelled Twitter posts and reframed them against words and images showing the beauty and diversity of all African countries.

In a similar vein, with 'The E.V.A Initiative', Volvo used data to affect positive change. After sifting through decades of data, Volvo found that women are more likely than men to suffer injuries from a crash, in part, because auto companies only use male crash-test dummies to test their cars. This has hindered how manufacturers design safety features. Highlighting this gender bias, Volvo released its data to the public, hoping automakers would use it to inform the design of their vehicles. So far, it's clocked up more than 11,000 downloads.

CHRISTINA LU
ALIBABA GROUP

CAROLINE WILKINSON
MOBKOI

"We have very strict internal processes to ensure that we protect consumer and business data privacy."

CHRISTINA LU
GENERAL MANAGER, UNI MARKETING CENTER, ALIBABA GROUP

"You have to admire the way [Volvo] shared data with all and didn't protect it."

CAROLINE WILKINSON
VICE PRESIDENT EMEA CLIENT PARTNERSHIPS AT MOBKOI

_Human connections are the most powerful

The 'rediscovery' of creativity represents a marked shift away from the obsession with **data for data's sake**. The smartest brands know they are not just talking to faceless 'consumers'. As Sublime COO Andrew Buckman explained in the MediaCom Suite, "people can **identify** and go on a journey in adverts that use **real people**".

There's a lot to be said for being real. As Tim Leake of RPA noted in his session 'Ugly Sells', while brands often obsess about delivering the perfect piece of polished creative, what they forget is that people often respond better to messages that are just honest – even if they're 'ugly'.

Stephane Henrich, Director of US Marketing at short-form mobile video app TikTok, supports the notion that authenticity trumps aesthetics. "People have been in a perfect, manufactured world for a while, where they have to live up to expectations and ideals," he said. "Now it's about real life. Real people."

DEATH OF THE INSTAGRAM AESTHETIC

In the last few years, platforms such as Instagram have enabled real people to present more polished versions of themselves but in 2019, we've reached saturation point. As The Atlantic claimed in its 2019 article, 'The Instagram Aesthetic is Over', people are rejecting perfection. It has become unauthentic and fake and people are developing an aversion to ads that look like ads.

In fact, the internet as a whole thrives on ugly things; memes, GIFs, fan art, a lot of online design generally – is ugly. As Leake noted, many people (and influencers) are returning to the kind of punk DIY aesthetic of the late 1970s… and the bravest brands will follow suit.

Some brands are already responding to this trend. Sony PlayStation, for example, launched a Giphy account, populated by a selection of YouTubers, to encourage gamers to share their standout gaming moments in online conversations.

> "We need to stop using the word consumer. They're people. That they consume our product doesn't define them. People don't go out for a Smirnoff evening. They go out to have a good time."
>
> **SYL SALLER**
> DIAGEO CMO

> "Campaigns that take an emotional approach have better results than a direct sales campaign."
>
> **REBECCA WARING**
> VP INSIGHTS AND BRAND STRATEGY, UNRULY

GREAT EXAMPLES OF CAMPAIGNS THAT CELEBRATE REAL PEOPLE

'Project Body Hair' a real, honest message. For nearly 100 years hair removal has been marketed to women by brands that would have us believe that women have no body hair. But #bodypositivity has women demanding more realistic portrayals of femininity. So, Billie bravely released an ad showing women – normal, human women – shaving actual hair. Project Body Hair, which has over 22m views, has ignited an industry-wide trend.

'Viva la vulva' for feminine hygiene brand Libresse challenged the taboos of femininity with a lip sync music video like no other. A plethora of diverse vulvas, from a conch shell to origami, sing the track 'Take Yo Praise' by Camille Yarbrough, and every line brings women's previously hidden genitalia to life.

Tommy Hilfiger's 'Adaptive' fashion line celebrates the power within real people – of all abilities. The clothing features magnetic closures, adjustable hems, one-handed zippers, and velcro fastenings. For its AW18 collection, Tommy Hilfiger debuted a moving one-minute video campaign aimed at celebrating strength in disability.

↘ **BILLIE**
PROJECT BODY HAIR

↘ **LIBRESSE**
VIVA LA VULVA

> **Brands don't change culture. Culture changes brands.”**

DEBBIE MILLAN
DESIGN MATTERS PODCAST

> **Attitudes are best changed through positive experiences.”**

CRAIG SPENCE
CHIEF MARKETING AND COMMUNICATIONS OFFICER,
THE INTERNATIONAL PARALYMPIC COMMITTEE
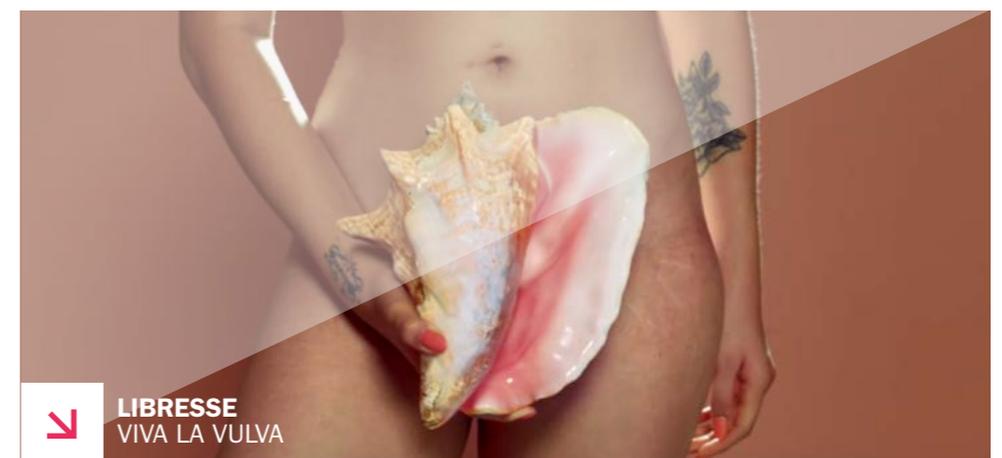
_Brands are becoming activists… with mixed results

In recent years, we've heard a lot about the **importance of purpose**. But in 2019, brands are being encouraged to take real action, and for good reason.

According to Unilever CEO Alan Jope, 91% of millennials would switch brands for one which champions a cause. What's more, 64% of global consumers say they choose brands because of their stand on social issues.

Jope recognised, "purpose is one of the most exciting opportunities I've seen for this industry in my 35 years of marketing. Done properly, done responsibly, it will help us restore trust in our industry, unlock greater creativity in our work and grow the brands we love."

But there's one problem: many brands aren't delivering on their promises to do good. Jope continued to say that the purpose category is being "polluted" by brands that fail to take real action. He argued that "woke-washing" is undermining credibility.

"**Businesses and brands have a great effect on culture and sustainability, so we have a responsibility to act in a way that is good for the economy.**"

MARC PRITCHARD
CHIEF BRAND OFFICER, P&G

"**Purpose isn't just about interesting ads that have a point of view.**"

JULIA GOLDIN
GLOBAL CHIEF MARKETING OFFICER, LEGO

9/10
PEOPLE SAY THEY EXPECT MORE FROM COMPANIES AND FEEL BETTER ABOUT BRANDS WHEN THEY SEE BRAND PURPOSE WORK

Source: P&G

78%
OF EXECS BELIEVE THEIR BUSINESSES ARE FAILING TO DELIVER ON SOCIAL PURPOSE PLEDGES

Source: The Economist

THE CHALLENGES OF BRAND PURPOSE

Even when brands have the right intentions they can get it wrong. In 2019, for example, Pinterest came under fire for banning anti-abortion group Live Action. Was this censorship? Not according to Pinterest CMO Andréa Mallard. Speaking to The Economist, she argued that the issue was more around spreading misinformation, as Pinterest is focused on "content being true".

Hotel chain Marriott also ran into trouble in 2018, when its site in China was shut down after listing Hong Kong and Taiwan as separate countries rather than territories. The company's International Global Marketing Officer, Karin Timpone, explained that "it was a typo" but

taught the company an important lesson. "Things travel around on social media without necessarily the same sort of completeness that you might see in a longer form article about it," she said.

To get brand purpose right, brands must be committed to their cause and be brave enough to take a stand – even if that sometimes means addressing sensitive topics. Maithreyi Jagannathan, Associate Marketing Director, Healthcare at P&G demonstrated how this commitment can often lead to great work.

She cited the company's famous '#TouchOfCare' campaign for Vicks in India as the perfect example. The ad, which featured a transgender (or 'hijras') Indian mother, was lauded in

India and beyond. A second wave of the campaign picked up four metals at Cannes Lions 2019 – the highest for a single campaign from India.

That second campaign is important; for brand purpose to really make a difference, brands must make a long-term commitment to purpose-based activity. One-off campaigns are often interpreted as ingenuine or 'greenwashing'.

↘ **VICKS**
#TOUCHOFCARE

BRILLIANT BRAND PURPOSE EXAMPLES

Nike's 'Dream Crazy' – winner of the Outdoor and Entertainment for Sport Grand Prix – challenged discrimination head-on. When NFL quarterback Colin Kaepernick sparked controversy in 2016 by kneeling during the national anthem, few people recognised his voice. But Nike gave him a platform with a brave, simple campaign tagged with the copy "Believe in something. Even if it means sacrificing everything". The controversial ad created a cultural movement.

For 'Blank Newspaper' – winner of the Print and Publishing Grand Prix – Lebanese newspaper An-Nahar risked sales to pursue a greater good when it published a completely blank edition as a response to the political gridlock that left the country without a working government for several months. The idea was that if the politicians aren't working, why should anyone else? The newspaper's editor encouraged people to write their own headlines and send them to politicians, over social media. 'The Blank Edition' became the newspaper's best-selling issue ever.

'The Tampon Book: A tax against discrimination' was driven by a similar desire to force change. In Germany, feminine hygiene products are considered luxury goods and levied with a 19% tax – more than caviar and oil paintings. To circumvent this tax rate, The Female Company packaged 15 organic tampons inside a 46-page book, which was taxed at the lower 7% rate. The first printing of the book sold out in a day, and the second in a week. The government is now considering reclassifying the tax rate on hygiene products.

Ikea's 'ThisAbles' project saw the company design a new line of product adaptors to make its furniture and goods accessible to those with disabilities. Winner of the Grand Prix winner for Health and Wellness, products included sofa-elevating legs for easier ascending, lamp button enlargements, and easy-grip handles for closets – all available instore or printable at home with a 3D printer.

THE FEMALE COMPANY
THE TAMPON BOOK

IKEA
THISABLES

" We as a company are just one element of sustainability, we all need to work to a collective purpose."

BERTA DE PABLOS-BARBIER
CHIEF GROWTH OFFICER, MARS

_The industry is getting its house in order

This year, brands became **more vocal** in their efforts to **change the industry** itself for the better.

Transparency and brand safety were obvious topics for debate. P&G's Chief Brand Officer, Marc Pritchard, a long-term campaigner for both, was once again vociferous in his demands. P&G's 'Transparency 1.0' drive has been focused on getting Facebook and Google to accept MRC accredited third-party verification on viewability, audience reach and anti-fraud measures.

While there is (still) a long way to go, Pritchard accepted that the 'digital duopoly' are trying to address the issues. "It's difficult because these are huge platforms with billions of people on them. But look, I give them credit for putting their best foot forward," he said.

However, control over content quality and "civility on editorial comments" as well as cross-platform measurement, must be "the next frontier" added Pritchard. Michael Kassan, CEO of MediaLink, echoed these sentiments. "Brand safety is critical for every brand. No one wants to see your ad suggesting people buy next to a jihadist video," he said.

Pritchard isn't the only one looking to clean up the industry. Unveiled in Cannes, 16 of the world's biggest advertisers, including Diageo, Unilever, BP, adidas and Mars, together with all the major holding companies have formed an alliance to address the spread of harmful and misleading content online.

Dubbed the Global Alliance for Responsible Media, the cross-industry working group is being spearheaded by the World Federation of Advertisers and will see agencies, media companies, platforms and brands come together to "rapidly improve" digital safety. "When I talk to our clients, they're really concerned about the platforms on which their messages are received. They want to be in brand-safe platforms," said WPP CEO Mark Read.

" **To create change we must be the change ourselves and not be a bystander."**

SUE UNERMAN
CHIEF TRANSFORMATION OFFICER, MEDIACOM UK

66%
OF WOMEN SWITCH OFF IF THEY ARE PORTRAYED IN A STEREOTYPICAL WAY

Source: Kantar

85%
OF PEOPLE SAY THAT ADVERTISERS NEED TO KEEP UP WITH REAL LIFE

Source: Kantar

OVERCOMING STEREOTYPING IN ADVERTISING

Beyond brand purpose, diversity and the unconscious gender and racial bias that still exists in advertising was also on the agenda. Speaking in the Palais, Mars' Chief Category Officer Berta De Pablos identified gender imbalances in the company's own advertising – notably that men outnumbered women by 3:2. Machine-learning tools analysed more than 200 Mars global television adverts across its various brands, and while representation was "better than the industry baseline", there were still imbalances.

Elsewhere, Grey ECD Leo Savage identified another demographic unconsciously discriminated against: the over 50s. According to Grey's research, in the UK, over 50s account for 79% of the nation's disposable income – but agencies don't receive many briefs that include over 50s.

To help overcome such challenges, Diageo CMO Syl Saller explained her company has introduced a global framework, which allows it to test ads for stereotyping. She also noted the importance of working together: "As individual companies, there is very little we can do, but together we can have a massive shift of society. That's why we joined with other companies and shared our framework with them – the collective work is the most important."

> "We are at a turning point in our industry… We are the least trusted profession… this week is the beginning of the turnaround."

ALINE SANTOS
GLOBAL MARKETING AND CHIEF DIVERSITY & INCLUSION OFFICER, UNILEVER

> "It is not enough to know the laws of marketing. You need to know how to act on them."

PROFESSOR NICOLE HARTNETT
EHRENBERG-BASS INSTITUTE

45%
INCREASE IN PURCHASE INTENT WHEN WOMEN ARE PORTRAYED POSITIVELY

Source: Kantar

ADDRESSING THE IMBALANCES IN ADVERTISING

Unconscious biases are contributing to unequal opportunities in the workplace, too. Verizon CMO Diego Scotti revealed some damning statistics: "We've just finished a study – and we all have a bigger retention problem than we think, women are twice as likely as men to leave their company in the next year. For people of colour, they are more likely to leave the industry in five years."

Perhaps one way to change these statistics is to change the entry points into the industry. For Pinterest CMO Andréa Mallard, the traditional university pathway is outdated.

"Why do we require an advanced degree when what really matters is what you learn on the job?" she asked. In her mind, this is having an adverse effect on diversity.

As a reminder that the benefits of diversity extend beyond tokenism, EY's John Rudaizky pointed out that "there's both a moral imperative and a business one. And the business one is twofold; you need different skills and you need to reflect your customers."

It will be interesting to see how brands try to change in this area in the year ahead.

"We have a responsibility as marketers to combat fake news."
KARI KING
RVP, MIDWEST SALES, TEADS

"It's a paradox most people don't believe the content they read on Facebook but still continue reading it."
GEOFF RAMSEY
CHIEF CONTENT OFFICER & CO-FOUNDER, EMARKETER

12%
FEMALES IN CREATIVE LEADERSHIP POSITIONS IN THE UK

Source: Diageo

"We need to measure the gender pay gap quicker, so it's reflected in the results and we can respond faster."
MARK READ
CEO, WPP

_Key takeaways for brands

Even if you didn't make it to Cannes, there are still ways to take advantage of the insights and lessons from this year's event.

1. Think beyond visuals

Today's consumers are increasingly looking beyond screens. So, how can your brand reach them via their other senses? Work with your agency partners to determine how audio and multisensory experiences can form part of your communications system.

2. Find the creative angle in your data

Work with your creative strategists to unpack your consumer data. What trends stand out? How can you respond to them in your messaging?

3. Find a cause you believe in… and stick to it

Chances are, you've already thought about which causes your brand can support. But is there a common storytelling thread across your campaigns? If not, consider how you can weave your message into your long-term strategy.

4. Benchmark for diversity

Audit your own ads and try to spot any unconscious biases or stereotypes. How can you eradicate them from your next campaigns?

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Thank you

MEDIACOM