

Emerging brands

Developing markets can teach us how to engage with brands in 'brand play' as an antidote to western brand-weariness

By Guy Murphy, *JWT*

I'm sure many planners have recently wished they were working in a time gone by. A time when consumers were easier to understand (and influence), the media marketplace was simpler, there were fewer markets to consider and clients were more willing to give agencies power over the breadth of their brand activities. No doubt there is complexity now that our forefathers didn't face but, as Jeremy Bullmore so eloquently points out, it wasn't as if people 'back then' would simply go out and buy a product on a charming advertisement's say-so. We are in danger of fearing the situation we think we're in, leaving us peering myopically through our nostalgia-tinted spectacles.

I want to take a step back and look at a serious, but largely unseen, threat to brands. As planners, our role is to imagine new futures for brands. I will argue that these futures shouldn't be imagined from within the fear of growing complexity and potential for error, but with a view to building brands that excite people. To do this, we should look to planning across the globe, and start to actively embrace elements of the developing markets' culture of brand-building. There is an outlook that can help to liberate us, and is a reason for optimism. Brands need to be original and different; let's look for originality and difference in a world of 'brand play'.

I want to start by introducing a long-term challenge for brands and the role of planners. Millward Brown's global BrandZ survey gauges brand enthusiasm by asking, for each of the 10,000 brands it looks at, whether it is a brand that people would like to spend time with. With that data, you can amalgamate results for

all the brands for any individual country and create the *Time Metric*, a score of how much time people from each country want to spend with brands (see Figure 1).

You can see that the scores vary wildly, but you'll also notice that there is a pattern. The countries that are brand enthusiastic tend to be from the developing world; the countries that are the least keen tend to be from the developed world. This suggests there is a life-cycle for brands. The longer consumers have lived with brands, the less likely they are to still love them. Perhaps people become tired of them, perhaps more interesting things emerge, and perhaps they begin to object to the notion of brands. But in places where brands are a relatively new idea, they are still novel, exciting, thrilling things.

LOOMING PROBLEM

If this is true, and it continues, then we are facing a big problem in the future. Eventually, people fall out of love with brands. Not only will western consumers' enthusiasm drain away completely, but we will see the consumers from the developing markets follow suit. All these scores are heading towards zero, at which point nobody wants to spend time with brands anywhere.

What's more, this threat has been accelerated in the clutches of the global recession. In response to a perceived heightened search for value by the consumer, more brands have resorted to value-led messages. JWT's Anxiety Index research has dubbed this 'the genericising of brands'. If the recession is a 'reset button', which could change consumer behaviour for the long term, it looks like marketing is leading consumers down the path of a hunt

for value, rather than looking to create brands that people want to spend time with. Figure 2 shows the result of grouping brand behaviour across the globe into six different categories, from value-led messaging, to nostalgia, to optimism. It shows that, in the depths of recession, value-led messaging has been by far the most common behaviour.

Planning has a job to do. We must labour against genericism as we continue to fear the consumer hunt for 'value.' More importantly, we must look to create enough difference and fun in our brands to reverse the slide in developed markets and avoid a slide in developing markets, to a world in which no-one has any time for brands.

The current dominant marketing view is largely determining our approach to brands. This is a view that sees consumers nowadays as hugely sophisticated, marketing-savvy people. They are disloyal to brands, they are cynical about brands and are empowered to take revenge on brands and companies that disappoint or deceive. Consumers are difficult, mutinous people who will all jump on Facebook or Twitter if we get it wrong. In one of the key speeches at the MRS Conference in 2004, this sentiment was clearly expressed: "Cynical consumers are increasingly shrewd and articulate instinctive brand managers. Their message is, by and large, simple: be more direct, be more honest, be more transparent, do less and do it well."

This results in a marketing culture centred on ensuring that brands don't get things wrong. With more data and analytics coming from digital communication, we're going to have yet more ability to measure, track and tweak. But at the same time, there are growing layers of approval procedures, and longer timelines for getting anything done. It's a logical, linear and, dare I say it, sometimes joyless method of building brands. Stephen King's description in *Advertising: Art and Science* still rings true: "What you're supposed to do is get a lot of little bits, pat each one into shape and chuck them all into the hopper. Then, if all the bits are all right, they will work through the

and wisdom

FIGURE 1

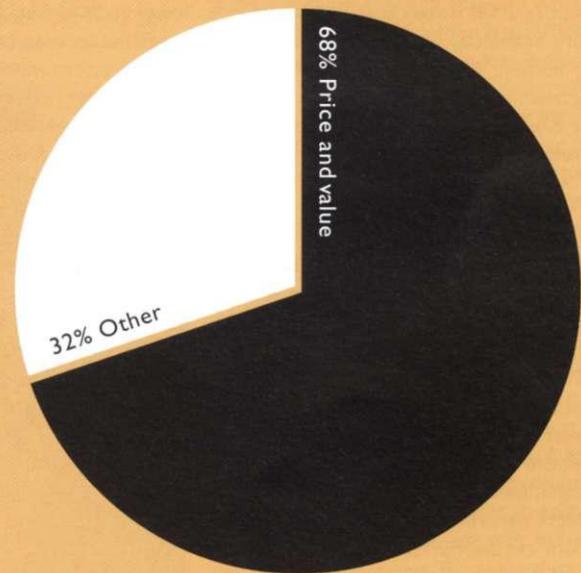
JWT Time Metric Scores (Index by country)



Source: Millward Brown BrandZ, 2008

FIGURE 2

Price and value messaging compared to other approaches (December 2008 to May 2009)



Source: JWT Anxiety Index (www.anxietyindex.com)

system step-by-step and you will come up with The Ideal Brand."

This is the view that marketing has developed in the west (particularly the US and UK) and, as witnessed by the *UNCTAD Creative Economy Report 2008*, is being exported to the developing markets. This current approach seems unlikely to help us avoid the genericising of brands. We should resist the temptation to extend a wholly analytical view of brand building, concentrating on the periphery and minutiae, while fewer and fewer want to spend time with the brand itself. Planning must look to break from the pull of the dominant marketing view if we are to reinvigorate the increasingly unenthusiastic consumer, and defend brand enthusiasm in those who still have it.

Why is it that we seem stuck in the hunt for the perfect hopper ingredients, rather than

looking for a way to create enthusiasm for our brands? No doubt risk comes into the equation. The dominant view carries with it a language - of 'link' testing, of innovation funnels, of segmentation - that seems to disarm concerns about risk and appease corporate cultures that see marketing as an expense, rather than an investment. When the average tenure of a CMO is little more than two years, resorting to this must feel a good bet.

WESTERN VIEW

But maybe the observation that the dominant marketing view is currently a western export is a more fundamental issue. Why are we adopting the marketing view from parts of the world where people have fallen out of love with brands, rather than looking to the parts

of the world where people still love brands?

Consumers in developing markets are not cynical and brand-weary. They are full of hope for the future, with a great determination to succeed and flourish. This leads to a different process of doing marketing, epitomised by Unilever chief marketing officer Simon Gift's comparison, in an address to the Marketing Society, between marketing in western Europe and what he experienced in Latin America: "[Marketing in Latin America shows] a belief in the power of brands; an almost childlike optimism in what marketers can achieve with them with a little courage, imagination and when unencumbered with cynicism or self-imposed limitations."

It may well be that this approach is even aided by breathtakingly smaller spends on research in the developing markets (Figure 3).

In broader business, too, the ethos of exploration and play is embodied in an enviable level of entrepreneurialism and innovation in developing markets. The World Patent Report 2008 shows that Korea and China were in the top five countries in the world for number of patent filings, and that the efficiency of innovation (measured by patent filings per R&D dollar spent) far surpasses that of developed markets.

TIME TO PLAY

In short, marketing and innovation in developing markets is more likely to engage in what I would call 'Brand Play'. This idea sees the brands that we work with as tactile, engaging and fun. They are things we love to play with and spend time with - not only as consumers, but also as the people who help to build them. I believe this outlook should form part of planning in its broadest sense: influencing the products we create, our workplaces and those of our clients, our view of consumers, and our retail spaces. From Havaianas and Band-Aid designs by Alexandre Herchcovitch in Brazil, to last year's Cannes silver-winning commercial for Happydent in India, there are many examples of liberated, engaging and fun work across developing markets. I'm not saying brand play is limited to these markets. But it is fostered and encouraged, and this is something planning across the globe can learn from as it tackles the threat to brands.

Brand play must start with background knowledge, but then can liberate us to leap boldly to a trial solution. This solution should be pioneering, interruptive and creative. The rest of the endeavour sets out to shape and challenge that solution, feeding back findings to strengthen and reinvent the idea. This means that planning should, more than ever, look to actively create and experiment, rather than be stuck in thought.

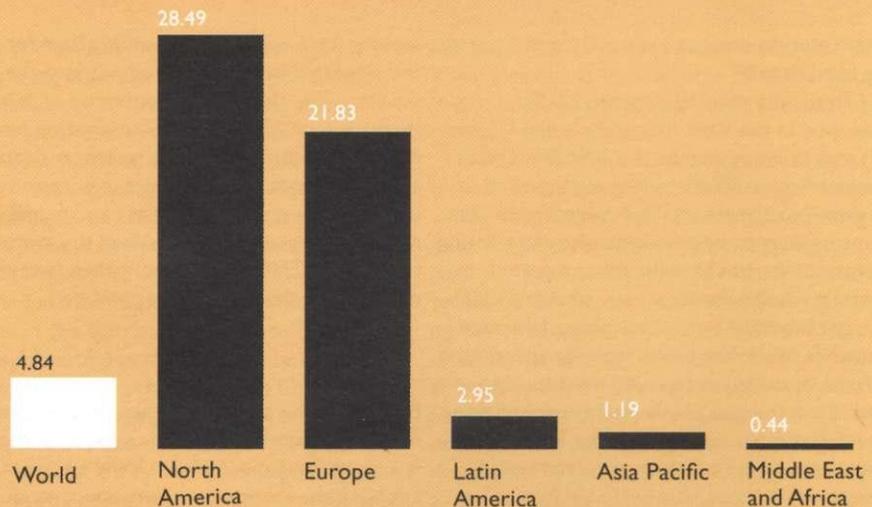
Planning across the world should take a look to developing markets for palliative care for brands. If developed markets are trying to

resuscitate brands with ever-more complex methodology and forensic examination of the elements of marketing, developing markets are nurturing and feeding their brands with optimism and innovation. It is telling that eastern medicine focuses on prevention and balance, while western medicine focuses on cure and intervention. Let's reverse the trend of communications services exports by importing brand play from the very markets in which optimism, and brand enthusiasm, is still strong. I recommend Richard E Nesbitt's *The Geography of Thought* for insight on the difference between eastern and western modes of thinking; you can decide for yourself if you think this difference is present within marketing.

I wanted to bring brand play to life, so we've built a 'Brand Toy-maker' at JWT. If anyone wants to come have a play, let me know.

FIGURE 3

Market research revenues per head of population (\$) 2008



Source: ESOMAR Global Market Research Report 2009 and UN population data