KANTAR | shɘqual

REPRESENTING REAL PEOPLE IN ADS

How to develop progressive, genuine and authentic advertising with a strong commercial impact

Women's Health
VICTORIA

Kantar and Women's Health Victoria acknowledges the traditional custodians of the lands and waters across Victoria and pays our respects to their Elders past and present.

We recognise that sovereignty was never ceded and that we are beneficiaries of stolen land and dispossession, which began over 200 years ago and continues today.

A note from the shEqual team at Women's Health Victoria

Advertising and communications possess remarkable influence in shaping our perceptions and behaviours within society. At Women's Health Victoria, we are dedicated to advancing gender equality by improving the representation of women in advertising and public spaces.

To establish an evidence base for this cause, we engaged Kantar, the world's leading data, insights, and consulting company, to conduct research on the impact and effectiveness of progressive gender portrayals in Australian advertising. Our findings confirm that positive, authentic, and diverse representations of women not only enhance campaign effectiveness but also yield a higher return on investment.

I invite you to join shEqual in reshaping society for the better. Let's create an inclusive world where everyone thrives and advertising reflects authenticity, genuineness, and equality.

Lauren Zappa, Manager Gender Equality and Capacity Building, Women's Health Victoria

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SECTION ONE:

BACKGROUND

'Seeing is Believing' is a national framework developed by Women's Health Victoria's shEqual project and is Australia's first strategic framework to champion gender equality in advertising[1]. This project represents the first coordinated effort in Australia to promote gender equality and address the drivers of violence against women in the advertising setting.

The framework recognises the immense power of advertising to influence our beliefs, values, attitudes, and behaviours. It recognises the significant role advertising plays in shaping and reinforcing our ideas about what it means to identify as a woman or a man, and how traditional gender roles are valued in our society.

Advertising not only reflects but also influences and forms cultural stories. Therefore, casting and character portrayal in advertising plays an important role in shaping gender and identity perceptions. Stereotyped advertising can perpetuate a toxic culture and an unsafe world for women and children[2].

Project Ambition

The goal of the research was to provide brands and marketers with inspiration and a springboard from which to embark on a journey of cultural revolution, starting with the progressive and realistic portrayal of Australian people.

Methodology

The main body of research in this report was formulated from Kantar's LINK Database, a combination of over 2,500 ads tested across a variety of industries; categories; and clients. Kantar combined the Unstereotype Alliance Measures (UA-UM) with the Association of National Advertisers (ANA), leading the #SeeHer initiative and Gender Equality Measure (GEM); to identify ads that are positively contributing to breaking stereotypes and perpetuating positive gender images.

Kantar selected Australian ads that were tested via Kantar LINK between 2017-2022, which performed strongly against two dimensions: 1) a high UA-UM score; 2) a high Brand Power and Short Term Sales Likelihood. Brand Power is Kantar's metric of measuring the strength of consumers' predisposition toward a brand[2]; and Short Term Sales Likelihood is a metric for assessing how likely a piece of creative content will be in boosting sales[3].

Therefore, the ads selected and analysed had to be both culturally and commercially influential. From there, a qualitative content analysis was utilised to analyse cues, codes, and symbols on the different ways gender was performed, portrayed, and depicted within the ads, using the Unstereotype Alliance's 3P's framework of Presence, Personality and Perspective (discussed in detail in Section 2 of the report). The content analysis delved into depictions across themes such as gender roles, the portrayals of beauty, idealisation of male/female archetypes, shame, etc. – which were then decoded and contextualised with secondary research and further qualitative insights.

To understand the effect of positive portrayals on brand health and commercial success, Kantar identified three examples of brands that demonstrated unstereotyping efforts, and compared this against quantitative, primary commercial data from Kantar's client base, brand trackers, and brand projects. While the exact metrics from these brand health studies were kept confidential, their results were indicative of the outcome of the campaigns and consequent business results.

2   Kyriakidi, M, 'What Is Brand Equity?', Kantar, 2021. https://www.kantar.com/inspiration/brands/what-is-brand-equity.

3   Kantar, 'Link Solutions', 2020, https://marketplacesupport.kantar.com/support/solutions/articles/77000290115-link-solutions-how-do-i-interpret-my-results-#:~:text=Short%20Term%20Sales%20Likelihood%20(STSL,i.e.%20financial%20services)%20TV%20ads.

1   shEqual, 'Seeing is Believing', Women's Health Victoria, November 2020. https://shequal.com.au/2020/11/16/seeing-is-believing-paves-the-way-for-transforming-australian-advertising/.

SECTION TWO:

PORTRAYALS IN ADVERTISING

Australia and Beyond

In contextualising the landscape of progressive advertising in Australia, Kantar first sought to understand where Australia is in the journey of representing people in a progressive and unstereotyped way, through the lens of UA-UM metrics.

The Unstereotype Alliance has measured over 14,000+ ads across 70 countries, 3,300+ brands, and 251 categories[4]. In doing so, they have obtained norms from 46 countries:

According to their findings (2021), UM performance is strengthening across the global advertising landscape. On average, the positive portrayal of women (measured by the average percentile of Female UM globally), has increased incrementally over the past 5 years. Similarly, the portrayal of men in advertising has followed the same trajectory, with Male UM scores growing by approximately 23% since 2019.

They've also identified that certain countries have engaged positive portrayals of men and women in their advertising better than others. Figure 2.1.2 indicates how some countries around the world rank in terms of their Female/Male UM scores[5]. Notably, India and Kenya lead the way for positive portrayals of women, with Female UM scores (T2B%*) sitting at 97% and 94% respectively.

Based on these findings, Australian advertising has a long way to go in terms of catching up to the rest of the world in its progressive portrayals of gender.

Figure 2.1.1. Unstereotype Alliance Global Norms Database

Norms currently available in 46 countries

Argentina	**India**	Poland
Australia	Indonesia	Portugal
Belgium	Ireland	Romania
Brazil	Italy	Russa
Canada	**Japan**	Saudia Arabia
Chile	**Kenya**	Serbia
China	Korea	Slovakia
Colombia	Malaysia	**South Africa**
Czech Republic	**Mexico**	Spain
Denmark	Netherlands	Switzerland
Ecuador	New Zealand	Thailand
France	Nigeria	**Turkey**
Germany	Pakistan	**UK**
Greece	Peru	USA
Hungary	Philippines	Vietnam

Bold - Current National UNW Chapters

Figure 2.1.2. UM Score (Top 2 Box %) - Female & Male by Country

Elevate and Inspire: Content Analysis of Progressive Australian Advertising

Of those 2,500 ads reviewed, 59 were identified as effective in delivering both high commercial impact and high male and female UM scores. Across these quantitively progressive ads, Kantar found that 86% of ads incorporated Presence – where the diversity of the people around us was visually reflected within the creatives. However, only 42% of creatives delivered on Personality, and 46% on Perspective. This indicates that while Australian advertising was demonstrating a definite 'tick' for displaying (mainly cultural and ethnic) diversity, there is still progress to be made concerning the relevance, depth, and meaningfulness of their inclusion, as well as allowing for minority or non-hegemonic perspectives, views and stories to be heard.

Presence   86%

Featured people of diverse backgrounds, women over 40, depicted a realistic portrayal of Australian society and its members, etc.

Personality   42%

Had more than just a diversity tickbox

Perspective   46%

Had non-hegemonic point of view and perspective, prominent female POV, etc.

Presence in Australian Advertising

Presence is about ensuring that advertising depicts a vast range of human identity – reflecting the rich reality of human culture and society that we live in.

Some facets of Presence include:

1. Featuring the inclusion of men and women equally – as well as people of different identities, e.g., trans men and women, and non-binary people
2. The portrayal of different races and ethnicities
3. People of different ages
4. People with accessibility issues and needs

The simple inclusion and representation of these diverse beings can be thought of as the first step in progressive portrayals – recognising that being seen and included can be impactful too.

People with diverse skin colours and ethnicities are represented in ads, although it is highly dependent on region. According to Kantar's *The Power of Inclusive Portrayal in Advertising* report (2021)[6], 19% of ads globally depict people from different ethnic origins, and 25% depict a diversity of skin colour. Honing in on North America, diversity of skin colour is reflected more widely, but only a third of ads feature people from different ethnic origins. Portrayals of this facet are even weaker in Europe.

In Australia, the figure is combined – but even so, representation is less prominent than in all the regions – where only 12% of all ads showcased either characters of different ethnic origins or a diversity of skin colours.
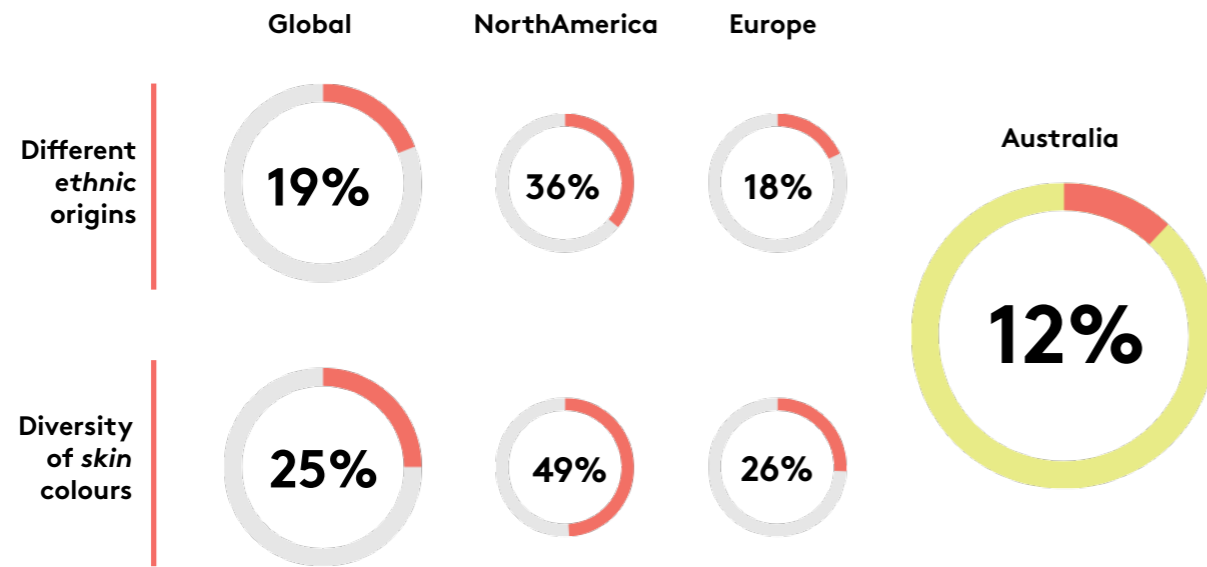
6　　Kantar, The Power of Inclusive Portrayal In Advertising, 2021.

Global   **NorthAmerica**   **Europe**

Different *ethnic* **origins**

Global **19%**   NorthAmerica **36%**   Europe **18%**

Australia

12%

Diversity of *skin* **colours**

Global **25%**   NorthAmerica **49%**   Europe **26%**

Figure 2.3.1. Ethnic and Racial Diversity in Advertising
(Kantar LINK Database (Global) January 2019 – March 2021)

> " *Despite the figures of diverse representation being so low, Australian consumers have a demand and appetite for it: showing a diversity of skin colour and ethnic origin is seen as a driver of enjoyment[7].*

Drivers of Enjoyment in Australia

Legend: Presence, Perspective, Personality

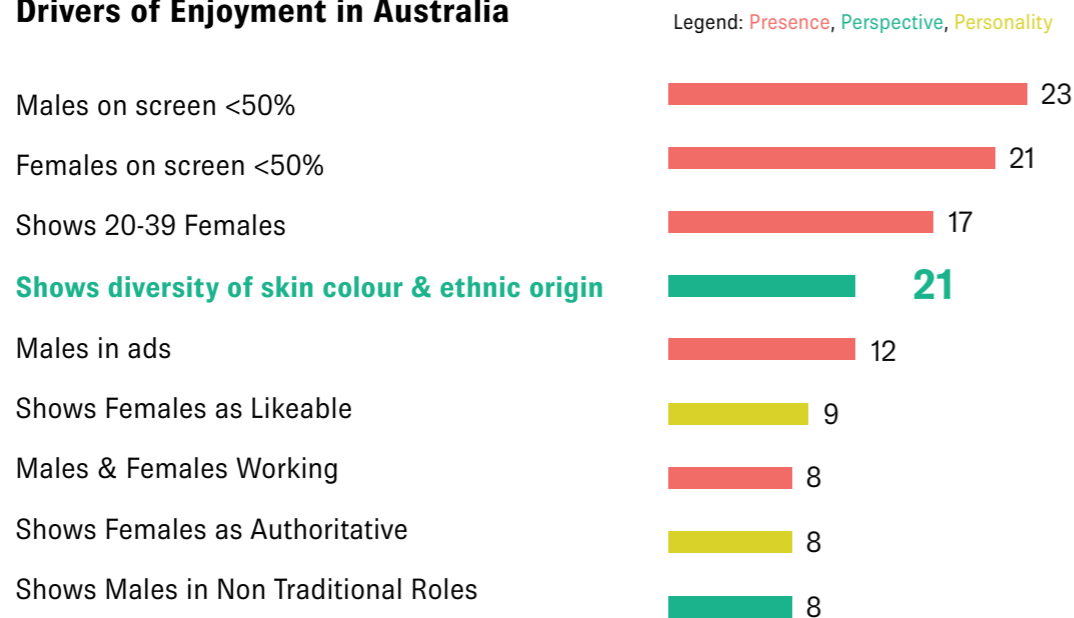| Driver	Value
Males on screen <50%	23
Females on screen <50%	21
Shows 20-39 Females	17
Shows diversity of skin colour & ethnic origin	**21**
Males in ads	12
Shows Females as Likeable	9
Males & Females Working	8
Shows Females as Authoritative	8
Shows Males in Non Traditional Roles	8

Figure 2.3.2. Drivers of Enjoyment in Australia (Based On Data From 2019 Onwards)

Note: Only Drivers where there is a significant difference between the top and bottom quartile on Enjoyment are shown.

At this point in time, the portrayal and inclusion of people from diverse ethnic and cultural backgrounds are commonplace and considered a hygiene factor within Australian advertising. Brands like eBay in their 'There's A Person For Every Gift' and KitchenAid's 'Built To Take It All On' ads ensure to feature characters of a variety of skin colours and ethnic origins, creating that material level of connection and representation with consumers that reflect the diverse reality and social environment.

Presence could also be the depiction of characters in non-traditional roles, or when men and women are portrayed equally. KitchenAid's 'Built To Take It All On' campaign represents both men and women in the kitchen, in the role of preparing food, home-making, and hosting friends and family – a setting that is traditionally depicted amongst women in a particular way (see, the nurturing mother; the traditional homemaker[8]). OMO's 'Dirt is Good' features a father and son doing household laundry, reflecting the changing, modern norms around men's and women's roles and expectations within the home.

Presence and representation extend beyond skin colour and ethnicity to identities: a growing proportion of people identify as LGBTQIA++, while only 1% of ads overtly show gay/lesbian characters globally[9].

Only 1% of ads overtly show gay or lesbian people

5% of the worlds population identified as LGBTQIA++

$3.9 trillion is the buying power held by this group

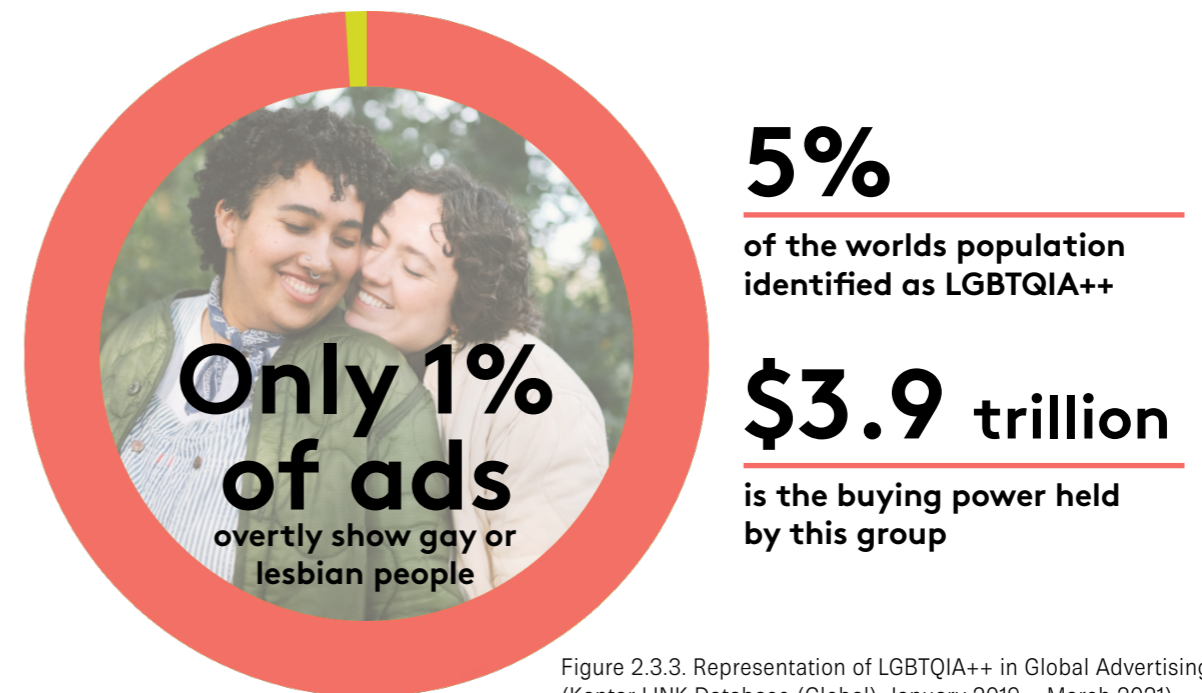Figure 2.3.3. Representation of LGBTQIA++ in Global Advertising
(Kantar LINK Database (Global) January 2019 – March 2021)

7   Unstereotype Alliance, Annual Review, 2021.

8   shEqual, Gender Stereotypes in Advertising, Women's Health Victoria, 2021, https://shequal.com.au/app/uploads/2022/04/Female-Stereotypes-in-Advertising-Guide.pdf

9   Kantar, The Power of Inclusive Portrayal In Advertising, 2021.

In 2019, Telstra's 'Time for A Chat' ad was pivotal in making a meaningful demonstration of their brand ethos of connecting people in critical life moments, built around a storyline that creates empathy and celebration of emotional vulnerability in men, and different sexual orientations and identities - particularly in a culture that is still very much rooted in traditional notions of masculinity. At the same time, well-executed representation need not be overt, as seen in Mitsubishi's 'Live Outlandish' and QV's 'Feel QV', where the inclusion of non-heteronormative characters and family structures was interwoven subtly as simply part of the story, normalising the growing diversity within society.
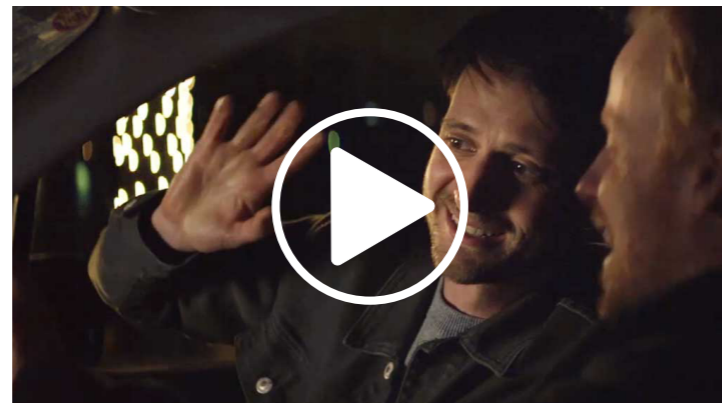
Telstra - Time for a Chat

Mitsubishi - Live Outlandish

QV - Feel QV

Representation also extends to different age groups. shEqual's *Gender Stereotypes in Advertising* (2021)[10] guide identified that women above the age of 50 are notably underrepresented in advertising , which is consistent with global findings, where the majority of people cast in advertising are within the 20-39 age bracket, and only 6% of those aged 65+ are represented[11]. Yet, this older age group represents over $8.7 trillion in buying power, a figure that is expected to grow to $15 trillion by 2030[12].

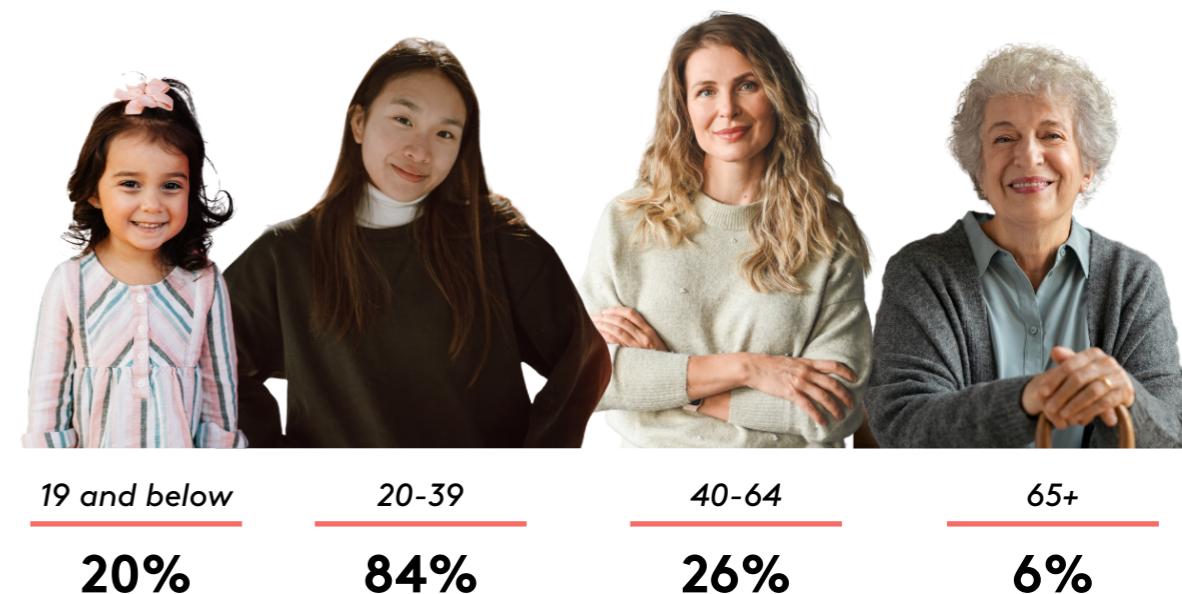| 19 and below	20-39	40-64	65+
20%	**84%**	**26%**	**6%**

Figure 2.3.4. Global Representation by Age Group (Kantar LINK Database (Global) January 2019 – March 2021)

In Australia, 32% of ads that were identified in this study of high cultural & commercial relevance and success featured the presence of women aged 55+. Suncorp's 'The Suncorp Spirit' campaign champions the stories of real-life customer support team members, who went out of their way to support the Townsville people during the floods in 2019. In choosing a storytelling format like this, real people and real women are made the heroes of the creatives, and inherently portray a genuine depiction of reality. Tourism New Zealand ads, like 'Best Kept Secret', create a sense of authenticity by casting everyday New Zealanders across a variety of ages, ethnicities, and backgrounds – from the very young to very old – to connect to broad audiences.

10   shEqual, Gender Stereotypes in Advertising, Women's Health Victoria, 2021, https://shequal.com.au/app/uploads/2022/04/Female-Stereotypes-in-Advertising-Guide.pdf

11, 12   Kantar, The Power of Inclusive Portrayal in Advertising, 2021.

This idea of authenticity and realism extends to the presence and portrayal of diverse body types, to reflect the real nature of human bodies and figures on screen. Health and wellness brands like Blackmores 'Good Health Changes Everything' and Centrum's 'Live Colourful' boldly, meaningfully, and consistently depicted diverse characters engaging in a range of physical activities. Both executions featured women with a variety of body shapes and sizes participating in activities like dancing, hula-hooping, and rollerblading, which accomplished two things. Firstly, representation helps to break down the barriers and perceptions that participation in these kinds of activities is limited to only a certain type of person or body type. Secondly, depicting them in positive ways creates positive associations and meanings to the way different sized bodies are portrayed.

Framing has a key role in positive, progressive portrayal, and has a significant impact on the way certain depictions are received by consumers, which is discussed in further detail in Section 4 – unpacking the challenges and barriers of progressive portrayal.

Presence appears to be the base point of progression: there is power and impact in seeing diversity represented on screen, and the difference visual inclusion can make. Presence can create acceptance, normalisation, and be the spark that ignites change. However, presence alone is not enough to shift the dial – characters need to be given interesting roles, storylines, narratives, and scripts, so that their inclusion is not purely performative in fulfilling a diversity tick box.

Suncorp - The Suncorp Spirit

Tourism New Zealand - Best Kept Secret
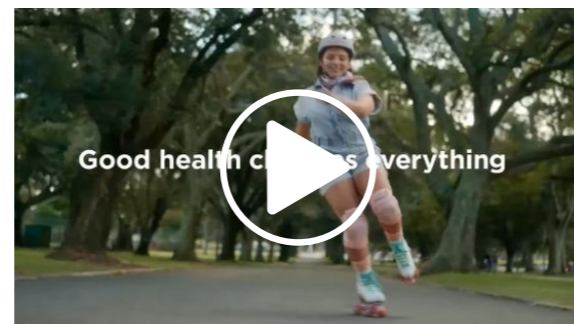
Blackmores - Good Health Changes Everything

Centrum - Live Colourful

Personality in Australian Advertising

Personality is the next layer of meaning that is infused in the depiction of gender – but it is not a simple concept. Personality goes slightly deeper than mere presence, and encompasses a number of variables:

1. The context and setting of their presence
2. The nature of casting – from costume to body type to what the character depicts in culture
3. The conversation between or around the characters
4. The archetype or stereotype that the persona symbolises or perpetuates

There is a shift in the way men and women are presented in non-traditional roles, particularly amongst women:
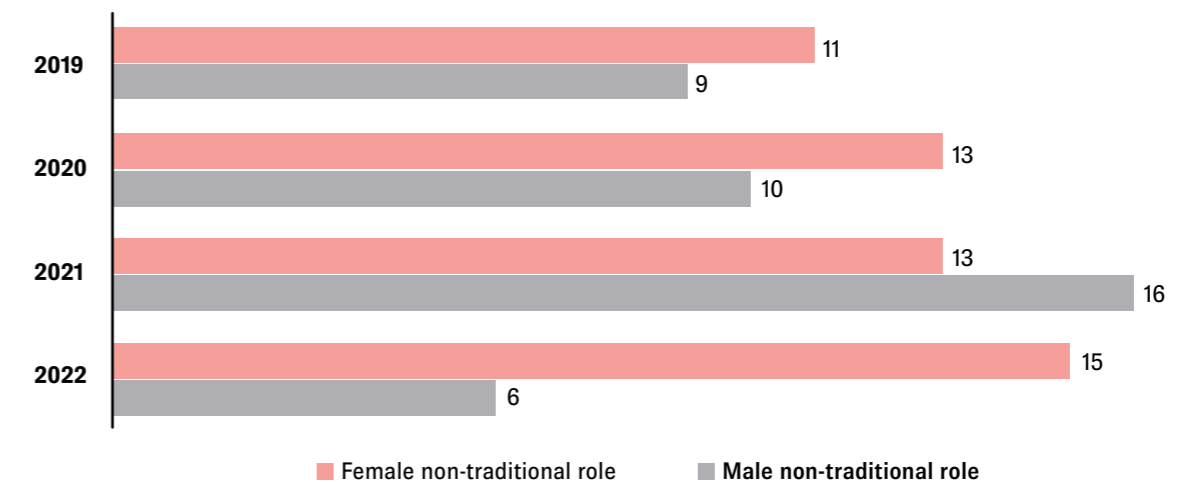

Figure 2.4.1. Ads That Featured Characters in a Non-Traditional Role (%) - Australia H1 2021
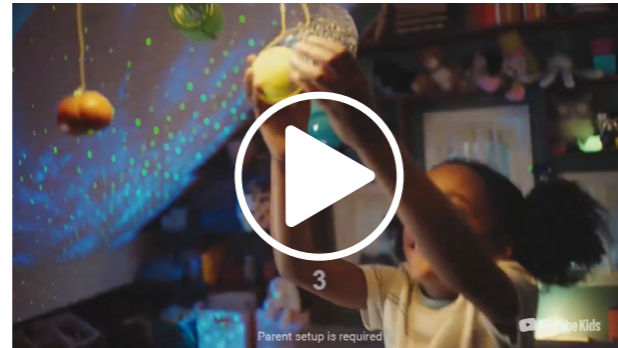
In 2022, 15% of ads in Australia have featured females in non-traditional roles – a figure that's grown by 36% since 2019[13].

13   Kantar LINK Database, 2019 – 2022.

Four key facets of demonstrating Personality were seen in YouTube Kids, Cetaphil's 'Skin Loves You' and Google's 'Helping You Help Others'.

In YouTube Kids, the set design, script, and narrative promote and normalise the involvement and ability of young girls to take part in areas like science, technology, engineering and maths. This showcases the diversity of interests of girls beyond just playhouses and dolls, and subverting the 'Passive Little Girl' stereotype[14]. Progression here is achieved through the context and setting of their presence.

Through the context and visuals (the background graphics depicting skis and a marathon jersey), Cetaphil's 'Skin Loves You' portrays a woman that is active, sporty, and a positive female role model, whose skill and accomplishment demonstrates more than just 'a pretty face'[15]. Finally, Google's 'Helping You Help Others' ad, built on the concept of helpfulness, embodies the final aspect of a character's interactions and engagements with others, where the main character in the ad is portrayed as culturally connected, community-minded, curious, and independent. Adventurous, fun, cheeky, and helpful - the woman is depicted as a whole, rich, interesting character through costume, set design, and scripting, bringing the character to life rather than just a passive figure.

Youtube Kids

Cetaphil - Skin Loves You

Google - Helping You Help Them

14, 15   shEqual, Gender Stereotypes in Advertising, Women's Health Victoria, 2021, https://shequal.com.au/app/uploads/2022/04/Female-Stereotypes-in-Advertising-Guide.pdf

> *For the over 50s, personality is about replacing the stereotypical 'Magical Grandmother' with the emerging 'Marvellous Mavens'*

For the over 50s, personality is about replacing the stereotypical 'Magical Grandmother'[16] with the emerging 'Marvellous Mavens': older women cast as spontaneous, empowered, autonomous, prominent characters championing their own full lives. APIA's 'Home Insurance Options - Kay Cottee' ad heroes Kay Cottee - an Australian sailor who was the first woman to sail non-stop, unassisted, and alone around the world in 189 days. The ad is an inspiring representation of a remarkable older woman, while TattsLotto's 'There's No Nicer Feeling' features an uplifting narrative of a Marvellous Maven re-discovering music. Plus, because under-representation of older generations applies to both men and women – NIB's 'Health First for All' breaking the codes of traditional hobbies and pastimes for the older generation has been included.

Thus, Personality helps to add dimension and richness to the portrayals of people and gender, and enables their presence to be meaningful, communicating positive messages about their place in society.

APIA - Kay Cottee

Tattslotto - There's No nicer Feeling

NIB - Health First For All

16   shEqual, Gender Stereotypes in Advertising, Women's Health Victoria, 2021, https://shequal.com.au/app/uploads/2022/04/Female-Stereotypes-in-Advertising-Guide.pdf

Perspective in Australian Advertising

The final 'P' of progression is Perspective, which is grounded in practice and integrity, and fortifying efforts of progress beyond tokenism or performance. Perspective is holistic and practical in nature, as it involves not just the creation and design of characters and the subject matter, but also the integrity of the ads' creators themselves. Perspective refers to:

1. Whose stories and voices are being told?
2. How are they told? How are their perspectives amplified?
3. Are they the dominant narratives within a society?
4. Are diverse perspectives being represented behind-the-scenes as well – are women; women of colour; people from diverse backgrounds and orientations included in decision-making roles, are stories relevant and authentic to those experiencing them?

In the Australian context, powerful and effective storytelling from diverse perspectives is achievable, facilitated through the dominant codes of an egalitarian, mate-ship culture, where (in theory) every voice has the ability to be heard. This is seen reflected in the drivers of enjoyment for Australian advertising – where men shown in non-traditional roles, and women shown as authoritative, are perceived to be conducive to enjoyment[17].

This is demonstrated in Google's 'Helping You Help Them - Aussie Rules' execution - the ground-breaking, moving story told from the perspective of an immigrant family as they try to assimilate into Australian culture, using footy as the mode of cultural connection and socialisation. The resonance this ad had amongst Australian audiences represents the appetite for progressive portrayals in advertising, not only in the presence of characters of different cultural and ethnic backgrounds and skin colours, but also how their stories are told in reflection of their realities and lives within Australia. In the development and creation of more of these stories, there is an opportunity to make significant impact on the progressive portrayal of men, as well as women, through changing the narrative around traditional gender roles.

*Google - Helping You Help Them
Aussie Rules*

Other brilliant examples of what Perspective looks like in Australia from this study are Westpac's 'Separation' (a warm and heartfelt depiction of a single mum and her son – the struggles, the anxiety and stress on relations - told through the lens of a 'different' family) and Google x Baker Boy's 'Helping You Help Them' (inspired and directed by Baker Boy's own personal experiences with 'shame job', a concept unique to Indigenous Australian culture, told in native Yolngu Matha[18]) - ads that champion unheard voices and stories from the perspective of a non-hegemonic Anglo-Australian view.

There's power in representation, and seeing different but relatable characters, voices, languages on screen – and having stories told through their perspective - delivers human essence and truth to creative advertising. This builds empathy, connection, engagement, and drives ad and brand memorability. Creative storytelling, commercial success, and social impact can all be achieved dualistically, illustrating the need for progressive advertising in Australia.

Westpac - Separation

*Google x Baker Boy - Helping You
Help Them*

17　　　Unstereotype Alliance, Annual Review, 2021.

18　　　Green, Ricki, 'Google Celebrates the Power of Inspirational Relationships in New Campaign Via 72andSunny', Campaign Brief, 2022, https://campaignbrief.com/google-celebrates-the-power-of-inspirational-relationships-in-new-campaign-via-72andsunny/.

SECTION THREE:

BUILDING A
BUSINESS CASE

In Australia, data shows that more positive portrayals of both men and women contributes to higher brand equity and have a stronger influence on short-term sales likelihood.

+17
Short Term Sales Likelihood

+32
Long Term Equity

Positive Male UM

+15
Short Term Sales Likelihood

+29
Long Term Equity

Positive Female UM

UM (Unstereotype Metric) is Unstereotype Alliance's measure of how well a piece of advertising presents a progressive or regressive image of the female and/or male character(s).

Figure 3.0.1. Impact of Positive Male & Female UM on Brand Equity & Short-Term Sales Likelihood (Kantar Link database (Global) January 2019 – March 2021)

This is consistent with global findings, where just showing under-represented groups has no impact on the ads' ability to build brand equity or increase short-term sales – but showing under-represented groups in a positive way does (+45 on Long Term Equity; and +23 on Short Term Sales Likelihood)[19]. In other words, showing under-represented groups has no drawbacks or losses – there is nothing to lose when inclusiveness is done right. To validate this, Kantar put forth three case studies that are examples of the best-performing brands in terms of impact and return on investment (ROI), to show how progressive gender representation is not a hindrance, but rather the pathway to advertising effectiveness and brand success.

Progression Through Realism: Modibodi

Progression through realism is about being true to reality, solving for real problems, and not shying away from portraying humans as they truly are.

Modibodi - Lifechanging Apparel

Progression through realism is about being true to reality, solving for real problems, and not shying away from portraying humans as they truly are.

Periods have been a long-standing subject of stigma and taboo. In the past few years, there have been women-powered brands like Tom Organics, Thinx and Ovira tackle this head-on, changing the way brands talk about feminine personal care, periods, and the female body and experience.

Modibodi is another great example of this – founded in 2011, Australian personal-care brand Modibodi champions reusable period-wear, as well as other products for 'people with all kinds of leaky bodies'.

Driven by founder Kristy Chong's own struggles with post-partum bladder and period leaks, there was a clear need and opportunity to address the under-represented spaces in women's health and wellness, in a way that also aimed to normalise periods; improve education around it; and tackle other social issues like women's participation in sport.

In 2020, Modibodi launched their 'The New Way To Period' campaign, which pushed the boundaries of period product advertising due to the portrayal of menstrual blood (as opposed to the blue dye used in traditional advertising up until then), and the ad was subsequently banned. After much push-back, this decision was reversed. But the ad itself was revolutionary, and the brand has continued to break taboos around other topics like masturbation and incontinence.

Their latest ad campaign, 'Lifechanging Apparel', features women from a variety of backgrounds, body types, and identities – again, centring around the concept of real bodies and real experiences, speaking directly to the lives and sentiments of their target consumers.

Modibodi's advertising campaigns embody progressive advertising by mirroring the raw, un-airbrushed realities of the human condition – how people look, feel, behave, and think. It's realness in the female experience, embracing the sometimes ugly and uncomfortable truths that define this creative revolution. In doing so, they've managed to connect with their audience in a way that truly resonates.

Modibodi - The New Way To Period

The Commercial Impact

When Modibodi first launched in the market, the brand was an aggressive challenger to 'traditional' feminine products on the market (i.e., pads and tampons). At that stage, only 4% of women in Australia were using 'non-traditional' period products[20]. Over the past several years, the category was forced to keep up with the disruption of challenger brands like Modibodi, with 17% of consumers in 2021 reported having using non-traditional products[21], and key players like Libra and UBK launching their own line of reusable period underwear – and hitting the mainstream.

This translates to improvements in their long-term brand equity measures of Meaning, Difference and Salience – where the brand's Meaningfulness metrics (which measures how well the brand is perceived to meets consumers' needs, and a measurement of brand love/affinity) have jumped by 17 points in 2021[22], and built greater difference for the brand in being unique and a trendsetter compared to the year prior.

Their 2020 campaign may have been seen as bold and contentious at the time, but it's clearly paid off in the long run, rebounding the brand to positive growth in brand power over the years.
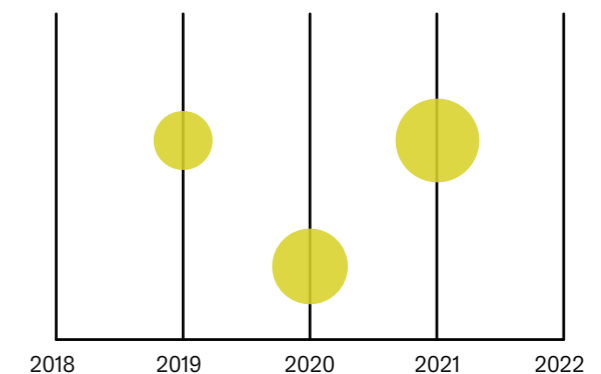

Figure 3.1.1. Modibodi's Brand Equity 2019-2021

A take away from Modibodi is that even though bodily representation impedes enjoyment in Australia, when contextualised meaningfully to reflect human truths in a real and honest way within the category, it can be appealing and effective.

20, 21 ,22   Kantar Brand Health Tracking Data, 2021.

Progression Through Cultural Integrity: Airbnb

Progression through cultural integrity is about being truthful, genuine, and authentic to the subtle realities, nuances, and complexities of cultural differences – depicting and sharing their stories as they are, as opposed to trying to mould them to fit a certain societal expectation or ideal.
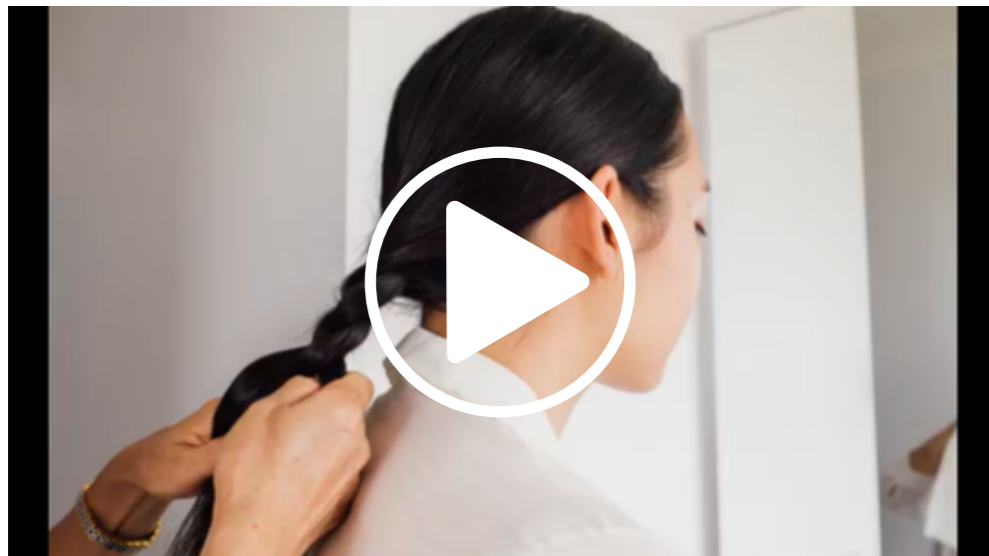
Airbnb - Sweet Child O'Mine

Progression through cultural integrity is about being truthful, genuine, and authentic to the subtle realities, nuances, and complexities of cultural differences – depicting and sharing their stories as they are, as opposed to trying to mould them to fit a certain societal expectation or ideal.

In 2020, Airbnb was among one of many companies who were hit hardest by the pandemic. New bookings on the platform were, unsurprisingly, dramatically down – the company witnessed an 85% drop in bookings during the height of it all[23].

The brand's solution to this was to prioritise brand-building over performance marketing, which focuses on investing in long-term brand equity vs short-term sales[24]. One of the ways this was achieved was through their brand campaign, 'Made Possible by Hosts'. The global ad campaign consisted of a series of videos using real photographs from guests staying in Airbnb's around the world, from a beach house in Victoria, Australia; to an olive grove-lined stone house in Parma, Italy. The ads tap into a subtle, quiet tenderness of real humans, and real relationships, and are both set against, and named after, nostalgic soundtracks like 'Sweet Child O'Mine' and 'Forever Young'.

Their <u>'Sweet Child O'Mine'</u> execution spotlights the story of photographer, Anne, who along with her family took a trip down to Peterborough, VIC, to take respite and reconnect after a challenging year[25]. The power of the ad comes from the subtle accuracy of portraying, devising, and telling the story of an Asian-Australian family in its true, unrevised, un-refurbished format. It does not shy away from the cultural realities and nuances of being Asian – such as the symbolism of the mother braiding her daughter's hair (a cultural code that signals ingrained rituals) - but it wasn't the key defining feature of the ad either. The cultural inclusion and representation of their casting and storytelling wasn't overt or overdone racial stereotypes, but rather cultural nuances that are reflective of many Asian-Australians, without brushing over either fact. The ad perfectly demonstrates integrity and authenticity to the cultural realities of their characters, narratives, and portrayals, and that in turn delivers the most cultural, commercial, and creative effectiveness.

23   Kyriakidi, M, 'Modern marketing dilemmas - Where does performance marketing meet brand building?', 2022, https://www.kantar.com/inspiration/brands/modern-marketing-dilemmas-where-does-performance-marketing-meet-brand-building.

24   Kyriakidi, M, 'Modern marketing dilemmas - Where does performance marketing meet brand building?', 2022, https://www.kantar.com/inspiration/brands/modern-marketing-dilemmas-where-does-performance-marketing-meet-brand-building.

25   Airbnb, 'See What's Made Possible When It's Made Possible By Hosts', 2021, https://news.airbnb.com/en-au/see-whats-possible-when-its-made-possible-by-hosts/.

The Commercial Impact

In 2021, Airbnb reported its strongest ever fourth quarter results – which Airbnb's CFO attributes to their commitment and dedication to brand building, and delivering impactful, considered creative efforts[26]. In markets like the US and France, the campaign delivered a significant increase in traffic of +20%, well ahead of non-campaign countries[27].

In France, the brand's Power score jumped +44 points in 2 years, and almost doubled in the US in the same time frame[28]. Plus, Airbnb as a brand positions itself strongly by building and achieving Difference in both its unique product offering, and in their brand and marketing comms.

Airbnb demonstrates that this purpose-driven strategy not only delivers short-term marketing impact, but ultimately contributes to on-going brand love and trust among consumers, paving the way for continued success.
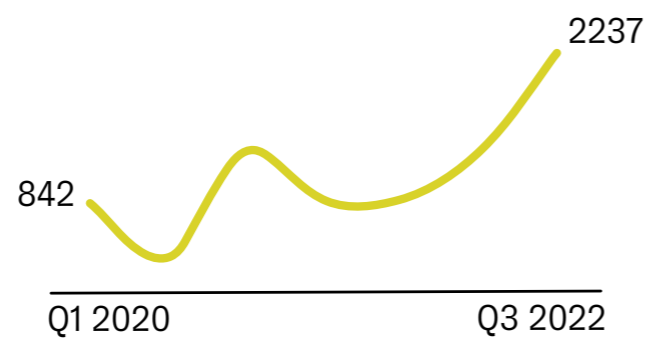
Airbnb Global Revenue ($M)
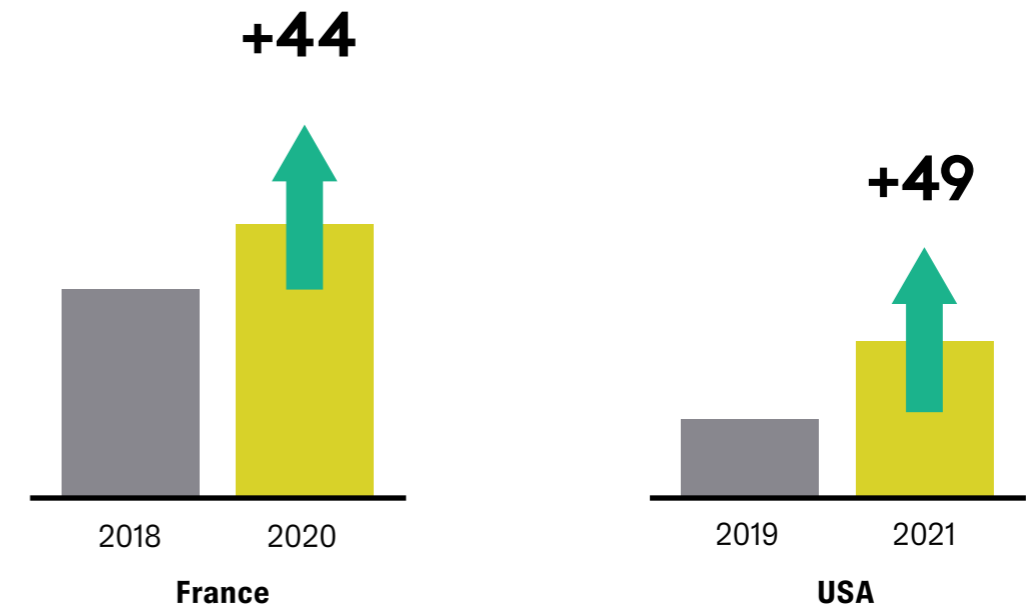

Figure 3.2.1. Airbnb's Global Revenue (2021)

+44

+49

Figure 3.2.2. Airbnb Brand Power Index (Kantar Brand Z Data 2022)

Average equity profile

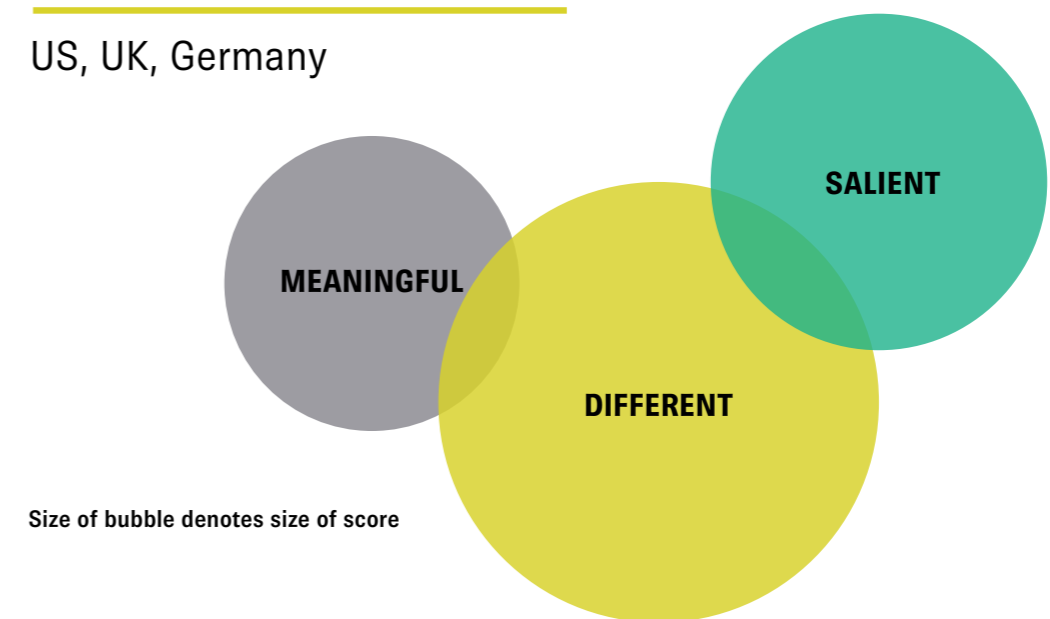US, UK, Germany

Size of bubble denotes size of score

Figure 3.2.3. Airbnb Average Equity Profile (Kantar Brand Z Data 2022)

26, 27   Kyriakidi, M, 'Modern marketing dilemmas - Where does performance marketing meet brand building?', Kantar, 2022, https://www.kantar.com/inspiration/brands/modern-marketing-dilemmas-where-does-performance-marketing-meet-brand-building.

Progression Through Real People: Suncorp

Progression through real people is about showing true events, true heroes and integrating them into the larger discourse of the brand and the community. It makes for great storytelling and celebrates the enduring spirit of the Aussie.

Suncorp - The Suncorp Spirit

Progression through real people is about showing true events, true heroes and integrating them into the larger discourse of the brand and the community. It makes for great storytelling and celebrates the enduring spirit of the Aussie.

Suncorp is a brand that has traditionally been attributed to values such as liveliness, energy, and joy - essentially 'sunny' Suncorp. In recent years, the brand sought to reposition itself more towards nurturance, thoughtfulness, and warmth, as an embodiment of the brand's 100-year heritage of being there for customers in moments that matter the most[29]. 'The Suncorp Spirit' campaign platform utilises stories of real people and real customers, and the start of Suncorp leaning back into the heritage of the brand and its emotional connection to consumers.

Through the story of Barbara and other Suncorp team members, the campaign embodied Suncorp's commitment to being there for customers, especially when they needed it most. It brought to life the brand's dedication and commitment, told in a genuine and moving way, which later contributed a positive uplift to brand health in Q2 of 2020[30]. More importantly, this style of advertising had greater positive impact on the brand's long-term brand positioning, compared to the previous style of 'Sunny' ads that favoured short-term cut-through and impact [31].

Staying true to the brand platform, Suncorp also released 'The Drive' – a heart-warming story following a young girl's aspirations to play netball - shared by her family. The story was inspired by real-life netball player Lara Dunkley, whose parents travelled over 2000km a week driving her to and from training and games[32]. Again, the campaign leans on the moving stories of real people and enriches Suncorp's values and positioning further. The ad drove significant campaign uplift across spontaneous awareness and brand consideration (to a significantly higher degree compared to AU/NZ media impact norms)[33].

Suncorp - The Drive

29   Wilkinson, Z, 'Suncorp reveals brand platform 'That's the Suncorp Spirit'', 2020, https://mumbrella.com.au/suncorp-reveals-brand-platform-thats-the-suncorp-spirit-620501.

30   Kantar Brand Health Tracking Data, 2020

31   Kantar Brand Health Tracking Data, 2020.

32   B&T Magazine, 'Suncorp releases new netball campaign, The Drive, via Leo Burnett', 2021, https://www.bandt.com.au/suncorp-releases-new-netball-campaign-the-drive-via-leo-burnett/

33   Kantar Brand Health Tracking Data, 2020.

SECTION FOUR:

PRACTICAL EXECUTION TIPS

Traditional gender roles have been defined in Australia through ingrained dominant cultural codes, which have run through the thread of society for many decades. These codes, while forming the glue that brings us together, can also manifest in ways that perpetuate stereotypes and contribute to a toxic 'mateship' culture, especially against women. As cultures evolve and new codes emerge, advertisers and marketers need to be at the forefront of creating/reflecting change by portraying the people of Australia in a way that is true to reality and is authentic - that is progress.

Not only is this in the interest of building a better society; but brands who do this, and do this well, achieve greater brand impact, memorability, and have a stronger and more sustainable business.

Recommendations Around Strategy Development – 3 Pathways to Progressive Portrayal

The journey towards accomplishing better representation is paved by three key steps for marketers when it comes to advertising. Kantar have enumerated them as 3 Pathways to Progressive Portrayal:

1. Progression through realism

Australian audiences want to see their reality reflected back to them – real people, real bodies, real experiences and perspectives. Infusing truth and honesty to create emotional connection is key for brand growth

2. Progression through cultural integrity

Portraying people of different ethnic origins, skin colours and backgrounds is has to be authentic and genuine to the situation, narrative, and story told. In other words: fit-for-purpose diversity, rather than simply for the sake of it

3. Progression through real people

Champion real stories of real people that demonstrate the connection, strength, resilience and power of the human (and Aussie) spirit

Recommendations Around Execution in Communication Development

INVOLVE
Inclusive cultures breed inclusive practices

Ensure diversity around the table during ideation and creation

Encourage free thinking and challenging the status quo

IDENTIFY
Pick the segments you wish to represent in the campaign

Keep the casting as inclusive as possible

INFUSE
Inclusive storytelling and scripts lead to progressive and powerful representation

INTERGRATE
Make the characters own the story and not just be part of the fixtures on the set

INCLUDE
Create inclusive ripples

Keep expanding the ambit of representation to the fringes

Involve

Is a 2-stage process that starts before the shoot and then continues till the deployment of the content.

Before the shoot:

- ❑ Gather insights into the views of the audience and society as a whole
- ❑ Understand the target market – what resonates with them? What does inclusion mean to them?
- ❑ Understand the people being represented for authentic portrayal

After the shoot:

- ❑ Confirm that you've achieved the inclusion that you intended
- ❑ Check that you've achieved progressive presence
- ❑ Double check for inadvertent stereotypes

And always, ensure you have a diverse team and/or that you solicit diverse views.

Identify

People don't have to look like someone or share all their experiences to engage with them. The key is empathy - powerful stories, told well, resonate whoever plays the main character.

Using under-represented groups won't hold your advertising back – doing it well adds to the power. Diversity represents a much broader canvas than just issue-based campaigns.

Infuse & Intergrate

Australian advertising is characterised by the use of human stories to elevate and integrate the product proposition into a singular narrative. In a nutshell, they feature the human insight at the heart of the execution, as opposed to the product. This gives advertisers in Australia a unique opportunity to create stories that not just sell the brand idea but at the same time have the potential to integrate diverse perspectives.

Include

Create inclusive ripples consistently. This is a never-ending job and hence there is a need to keep expanding the ambit of representation to the fringes.

The important thing to acknowledge is that there are steps in the right direction. While there is still space to grow, we mustn't take our foot off the pedal. Little by little, over consistent and ongoing dedication and commitment, we must continue the drive towards more progressive advertising within Australia.

Together, we can make advertising more **meaningful**

KANTAR | shEqual

Kantar is the world's leading evidence-base insights and consulting company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets. By combining the deep expertise of our people, our data resources and benchmarks, our innovative analytics and technology, we help our clients understand people and inspire growth.

shEqual, a project by Women's Health Victoria, is the first coordinated effort in Australia to promote gender equality and address the drivers of violence against women in the advertising setting. At shEqual, it's our mission to raise industry and public awareness, reinforce positive behaviours, and empower people to take action in shaping how women are represented in the stories we tell and consume.

Women's Health
VICTORIA

VICTORIA
State
Government
Australia