



WHY BEING  
DIFFERENT STILL  
MAKES A DIFFERENCE

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## Foreword

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There has certainly never been a more exciting time to be involved in the art/science of brand building. In an increasingly borderless world, the opportunities to present brands to new consumers is virtually limitless, as are the array of new and emerging tools at the marketer's disposal. But, therein lies the rub.

Today, marketers' efforts to built long term brand equity has become an incredibly complex journey to navigate. A quick scan of the trade press quickly reveals the careful balancing act marketers need to master in order to satisfy their many stakeholders.

They face ever-increasing pressure to show the ROI of their work. The need to show results quickly is further amplified in the digital age where everything is measurable in real time and with delectable detail, making it tempting to use short-term online metrics as primary performance measures, but this has dangerous implications for long-term success. This tension between short and long-term gains is explored in great detail and clarity by Les Binet and Peter Field in their paper *'The Long and the Short of it'*.

But technology is also disrupting the supply chain, introducing new pressure on marketing budgets.

Reporting on ad performance recently, Jonathan Allan of Channel 4 highlighted the growing pressure that retailers place on marketers to spend budget on discounting rather than advertising.

Further complexity is added by the current debate taking place in marketing around the merits of two very different approaches to brand building. One argues that having brand purpose is the ideal route to growth; another suggests that it's all about driving penetration by being salient.

Magnetic tapped into the expertise of Millward Brown and their wealth of data within the WPP group to gain a deeper understanding into what is required for brands to achieve sales success today.

The findings provide great insight into the role that channel selection plays in this process, and Magnetic were fascinated to learn that magazines' particular sweet spot is being the most potent driver of brand differentiation, a key requirement for supercharging brand growth. We trust you too will find plenty of food for thought in this report.

**Marius Cloete, Magnetic**



Magnetic tapped into the expertise of Millward Brown and their wealth of data sourced from thousands of brand equity projects and a multitude of R&D studies to help us understand how brand perceptions translate into sales success.

In particular we investigated brand growth through the prism of Millward Brown's Meaningfully Different framework. Their framework shows that successful brands share five key characteristics:

- Consumers feel an **affinity** for them
- Consumers think they will **meet their needs**
- They are seen as **unique**
- They are **dynamic** and *set category trends*
- They are **top-of-mind** to consumers

These characteristics were then further distilled into three dimensions; salience (top of mind), meaningful (affinity & meets needs) and difference (seen as unique and dynamic).

Our work with Millward Brown has confirmed that saliency is undeniably important and that brands can achieve growth with a strong focus on salience. However, the work also shows that brands that are meaningfully different are much more likely to enjoy repeat purchase by consumers and more likely to maintain a price premium over their competitors.

More importantly, brands that have high meaningful difference achieve twice the growth rates enjoyed by brands that rely on saliency alone. This would suggest that brand differentiation should be a planning KPI alongside salience for brands to grow.

We further explored the role of different channels in creating meaningfully different brands using the five key metrics that feed into the Millward Brown Meaningfully Different framework and found that:

- Audio visual channels play an important role in driving salience
- Big visual media like cinema and OOH play a key role in achieving affinity (brand love)

- Informative media like newspapers and TV help consumers understand whether a product meets their needs
- Targeted media like cinema and magazines help consumers understand what makes a product unique
- Specialist channels like magazines and radio help brands achieve dynamism (sets the trends)

The study showed that magazines' particular sweet spot is as a key driver of the differentiation required to supercharge growth, but magazines also uniquely featured in the top three channels across all dimensions.

When these dimensions are combined into a single metric which shows the ability of different channels to deliver meaningfully different impact (MDI), magazines not only deliver the highest level of MDI overall, but does so most cost efficiently. The implication is that magazines are an essential media choice for brands that want to improve their brand equity, and ensure long term sales success.







## The context for growing brands today

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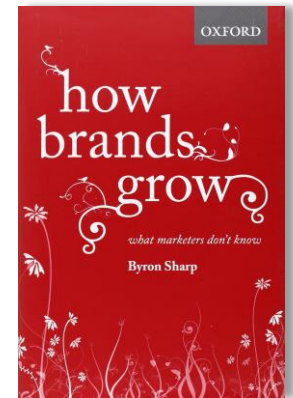
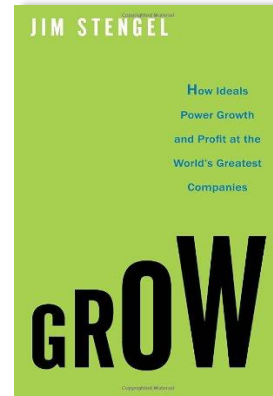
This is a time of unparalleled change in how brands connect with users and consumers. It is a cliché that media channels are fragmenting, but no less true for that. Simultaneously, established models of marketing influence are being challenged and contested. At the centre of the debate are highly respected brand gurus with opposing views.

Jim Stengel, former global CMO of P&G, argues that brands need a higher ideal to grow. In his book 'Grow' he argues passionately that brand purpose or 'brand ideals' provide the best route to corporate growth and that cognitive science suggests that heuristics and instinctive responses are far more powerful drivers of decisions than we ever thought.

Work by Byron Sharp and the Ehrenberg-Bass institute suggests that brand loyalty, differentiation and segmentation are wasted efforts and that high growth brands rely on physical and mental availability, distinctive brand assets and an always-on advertising strategy which builds saliency by continuously reaching

all potential buyers in a particular product category all the time.

While still widely debated, such ideas have led some to question the value of traditional ideas such as a brand USP – or whether what people think and feel about brands matters at all.



*Why being different still makes a difference, May 2016*



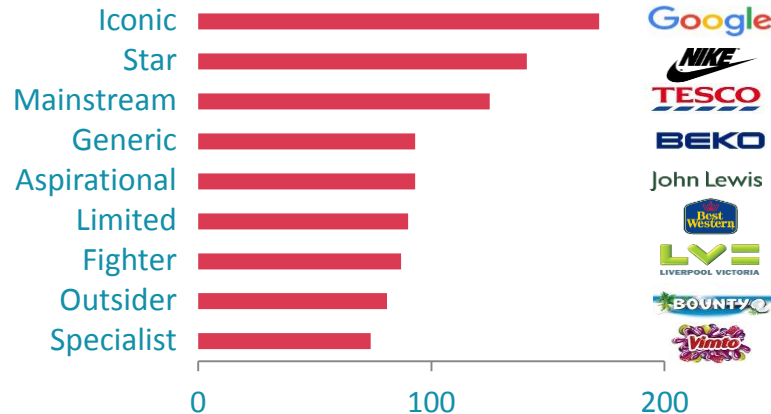
# Salience is undeniably important

Millward Brown’s work confirmed without a doubt that salience – or how easily a brand comes to mind when prompted by a relevant need – is undeniably important. All brand equity models include it in some form in their metrics, and media has a clear role to play in generating salience for brands.

world, and uses Millward Brown’s brand equity framework (more on this later).

One output is a \*classification of brands into different types, depending on their success and challenges. Here we can see that the most successful brands – the Iconics, the Stars, and the big, Mainstream brands – all over-index on salience. Coming to mind easily when prompted by a relevant need is a key attribute of strong brands.

The importance of saliency for big brands is clearly illustrated by data from the WPP BRANDZ Database. This is the largest study of brand equity in the



\*For further information on classification of brands please see appendix 1

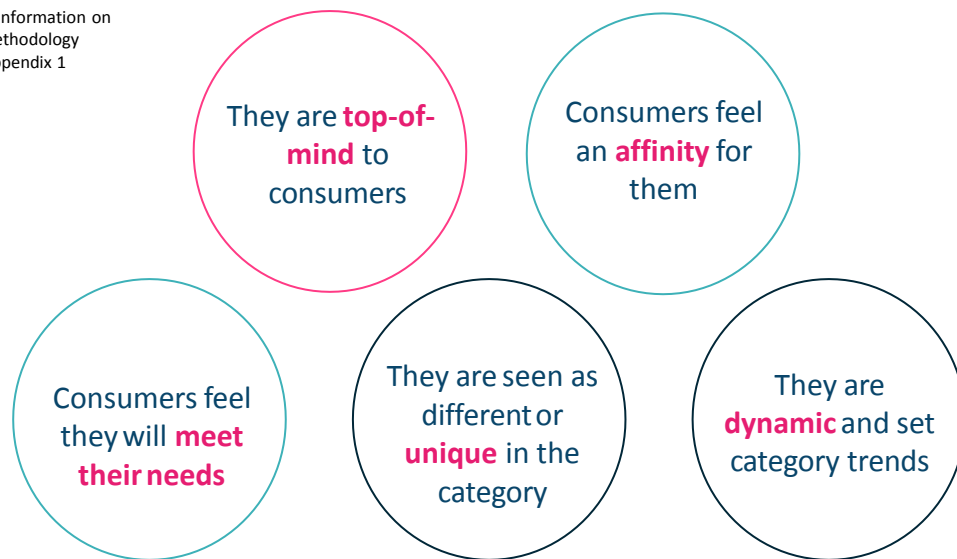


## But salience alone is not enough

In order to fully understand all the levers that influence a brand's sales success in the market, Millward Brown developed the \*Meaningfully Different framework. The work found that that successful brands all share five key characteristics:

1. They are **top-of-mind** to consumers
2. Consumers feel an **affinity** for them
3. Consumers think they will **meet their needs**
4. They are seen as **unique** in the category
5. They are **dynamic** and set category trends

\*For further information on notes and methodology please see appendix 1



# Brands need to be meaningfully different to succeed

Using factor analysis, Millward Brown further distilled the five characteristics of successful brands into three dimensions:

**Salient:** A dimension dominated by *top-of-mind* awareness; indicates the mental availability of the brand or how quickly it comes to mind.

**Meaningful:** A dimension dominated by *affinity* and *meets needs*; indicates the extent to which brands build an emotional connection and are seen to

deliver against functional needs.

**Different:** A dimension dominated by *uniqueness* and *dynamism*; the extent to which brands are seen to offer something that others don't or their ability to lead the way in being a trendsetter.

These three qualities, in varying combinations, are present in brands that sell the most, command the highest price premium and generate the most value share growth the following year.



Dominated by top-of-mind awareness



Dominated by affinity and meets needs



Dominated by uniqueness and dynamism





## Being meaningfully different supercharges growth

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The analysis by Millward Brown clearly illustrates that those brands that focus on being meaningfully different enjoyed supercharged growth rates in comparison to brands that rely on saliency alone.

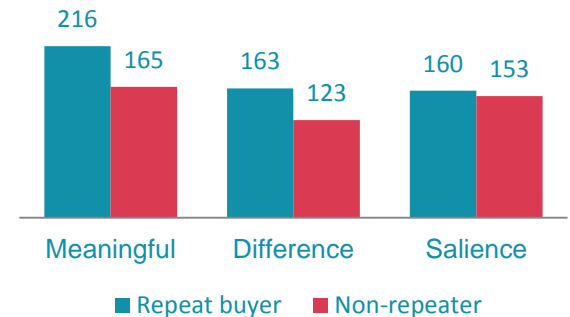
Brands with high meaningful difference are more likely to benefit from repeat purchase and can command higher prices. More importantly price elasticity is reduced even where consumers are price rather than brand driven in their choices.

This brand new analysis is based on work Millward Brown has done in conjunction with Kantar Worldpanel. Worldpanel tracked the actual purchasing of personal care brands, by almost 400 consumers, via their panel for 18 months, and in the middle of that period, assessed perceptions of the brands using the Meaningfully Different framework.

Firstly Millward Brown looked at repeat purchase – those who bought the tracked brands in both the first and second half of the tracked period, vs those that only bought in the first half, prior to the attitudinal read.

The bar chart below shows the average performance of brands on the three broad dimensions in the model, split by repeat and non-repeat buyers. (The average brand would score 100, all brands included in the analysis scores above this level as only buyers were tracked during the period of investigation)

However, those who were repeat buyers perceived the brands to be much more meaningful and different. There was no difference in saliency. Being meaningfully different then, clearly engenders higher repeat purchase rates.



The second element the analysis focussed on was the relationship between salience and the price consumers are willing to pay for a product. While the relationship between brand salience and brand size is undisputed, when we look at other key business outcomes, like a brand's ability to charge a premium, the link disappears.

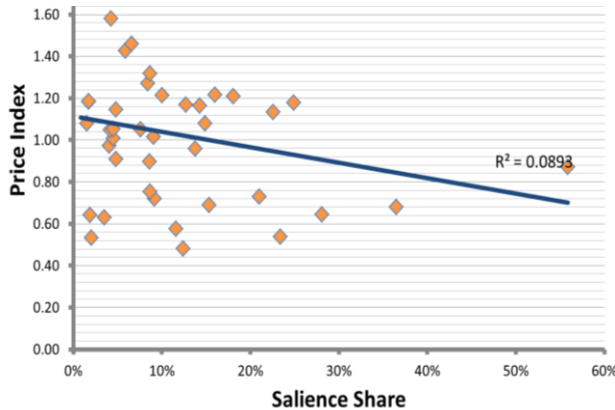
This is again data from a series of studies conducted by Millward Brown and Kantar Worldpanel, comparing the average price paid for

the 42 FMCG brands, relative to the category average (1.00) with the salience of the those brands. Clearly, having a salient brand does not guarantee that you can charge a premium for it, as shown below.

In contrast however, having a brand which is meaningfully different does make it more likely to charge a premium. The graph on the right shows the average price paid for FMCG products by 800 consumers, which has been split into 3 groups

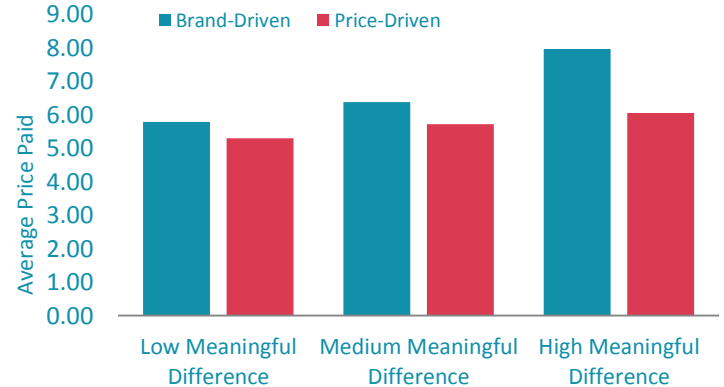
based on their perceptions of the brands purchased.

There is a clear tendency for people to pay more - relative to the category average - for meaningfully different brands. That is particularly true of people who identify themselves as brand driven - but still also true, albeit less strongly, among people who identify themselves as primarily price driven (bars in red). If your brand is commoditised, it is perhaps unsurprising that people won't pay extra for it.



*Left: There is no correlation between salience and price premium*

*Right: Both price and brand driven consumers will pay more for a brand with high meaningful difference*



# Meaningfully different brands achieve twice the growth

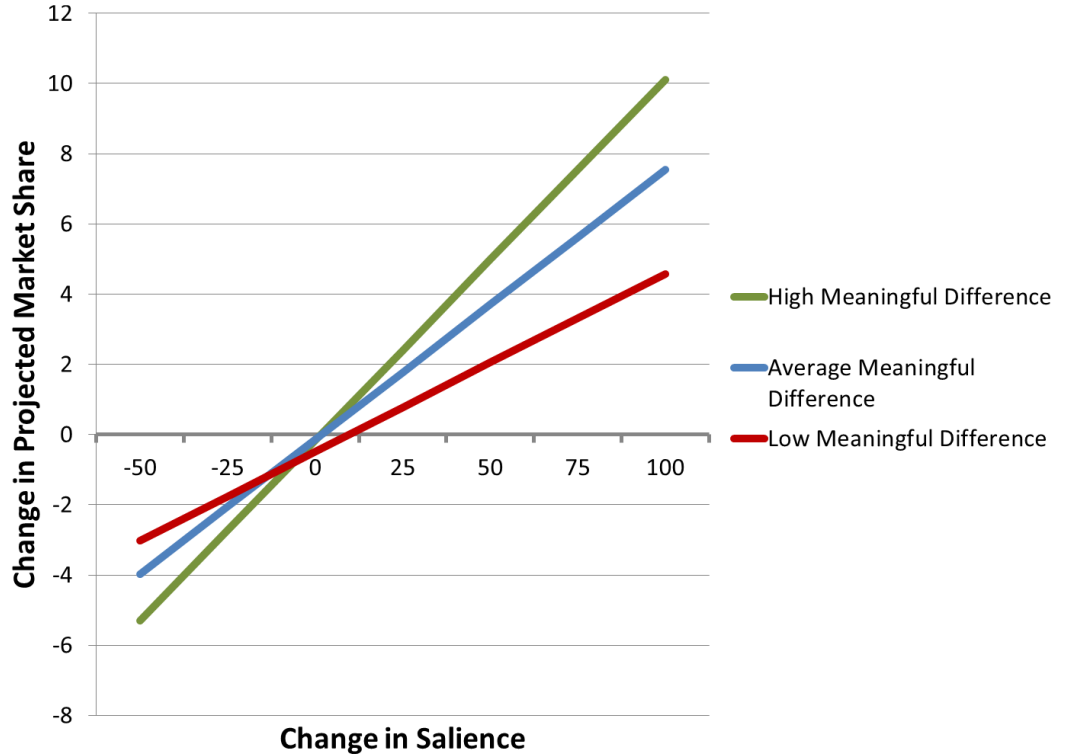
The most important finding from the analysis, however was that brands with high levels of meaningful difference have the potential to grow twice as much as brands with low levels of meaningful difference.

This new analysis was based on a comparison of data for 2,301 brands measured in BRANDZ over a five year time frame.

The lines indicate the average relationship between change in salience, and change in market share over that five year period, split by three different groups. The blue line shows the relationship for brands which are 'average' on meaningful difference. These brands grow as salience grows, as we would expect.

We see this also among brands that aren't very different or meaningful (red)- with a 100% growth in salience being associated with a four point growth in share on average.

However, brands which are strong on meaningful difference grow twice as much, with the same increase in salience bringing with it a 10 point share change.



Overall, the evidence suggests brands need to have *meaning* if they are to have a strong foundation; be seen as *different* if they are to have a competitive edge, and to be *salient* if they are to leverage those brand perceptions effectively.

Saliency, then, is a critical goal – but creating a perception that brands are meaningfully different is also vital to brand success.

If the challenge for brands is not just about generating saliency, how can we help build the other attributes? Which media are useful levers to generate these other critical perceptions?

To help with this question, Millward Brown analysed data from 88 Cross Media studies in the UK, and looked at the average impact per person achieved by exposure different channels, against the five key brand perceptions we described earlier.

The Cross Media methodology models out the effect of likely media exposure in different channels, to identify the amount of brand equity attributable to campaign exposure in each media. The analysis averaged the effects attributable to different media and to exclude average reach differences, impact was measured per person reached by each campaign.



Foundation



Competitive edge



Growth lever



# SALIENT

the extent to which a brand is known by the consumer and how quickly it comes to mind, often referred to as top-of-mind awareness

## Audio visual channels and magazines drive salience

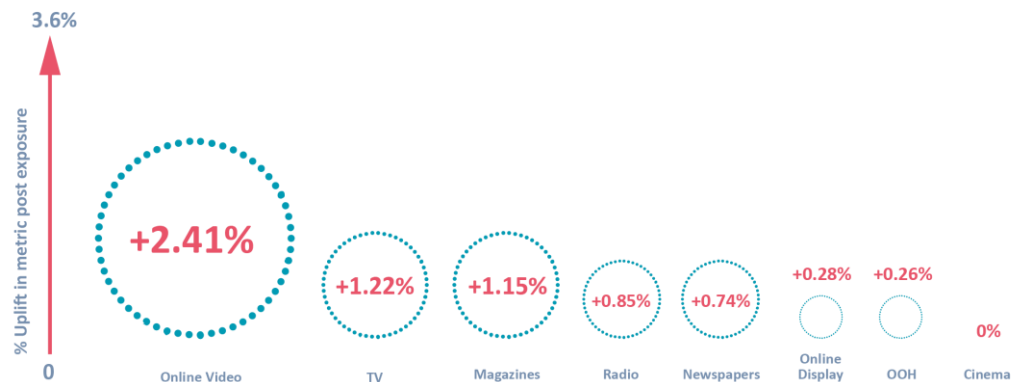
13

Saliency relies on the ability of channels to engage the consumer to such an extent that it stimulates long-term memory encoding. Channels that excel at presenting narrative do well in driving salience.

**TV** – Creative quality plays huge part in TV's performance as TV ads are the most researched prior to going live. As a result you could argue they have the best chance of doing well.

**Online video** – online video is more lean forward than traditional video channels. Users of YouTube or Broadcaster VOD for example are sat waiting for content to start, meaning they are a captive audience. More so than is the case with linear TV. This is certainly more true for premium channels.

**Magazines** – with its targeted and contextual nature, reaching a receptive and attentive audience with a relevant message in magazines is easily achieved. Large impactful formats such as gate-folds, full page and double page spreads are designed to grab attention.



*This graph shows the % uplift each channel delivers to 'salience' in the average campaign*



Why being different still makes a difference, May 2016





# MEANINGFUL

having a real importance or value to consumers that delivers against their functional and emotional needs

## Big visual impact media achieve 'brand affinity'

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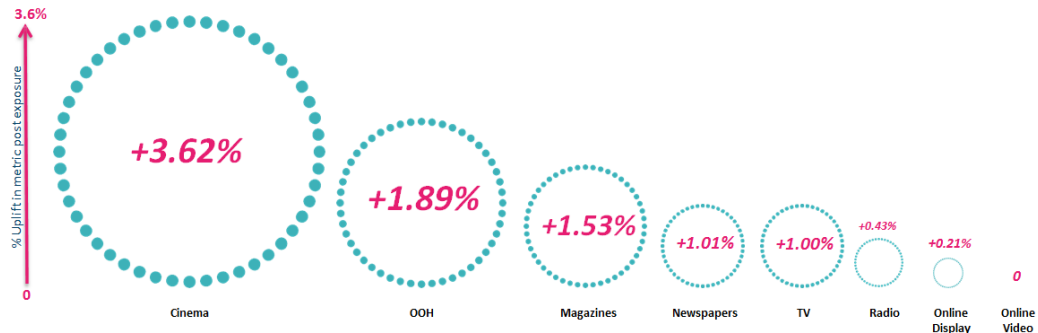
To achieve affinity (or brand love), brands need to be likeable and relatable and have a general appeal that is also quite public and capable of achieving social approval. We are visual creatures and tend to like what is visually impactful.

**Cinema** – offering well targeted audiences, high quality experiences and positive emotions associated with consuming cinema are some of the reasons why cinema is able to deliver so much in terms of brand love.

**OOH** – ads are often used tactically to communicate

a new price or product offer. This value exchange could help improve brand love as consumers feel that the brand is giving them something back or a good deal.

**Magazines** – ads are presented to a relevant audience, in relevant brands at the right time. Trust and belonging could also play a part here, if someone you know and trust (your favourite magazine) tells you about a brilliant product, by association you may be more likely to agree it is a brand for you/brand you love even before you've tried it yourself.



*This graph shows the % uplift each channel delivers to 'brand affinity' in the average campaign*



Why being different still makes a difference, May 2016



# MEANINGFUL

having a real importance or value to consumers that delivers against their functional and emotional needs

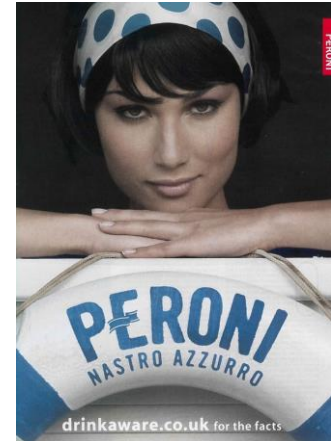
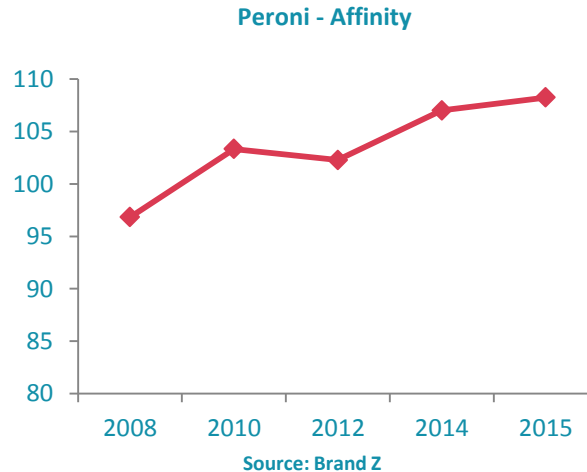
## Peroni achieves affinity by dialling up heritage

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Many brands' growth stories are driven by increases in affinity – Peroni being a good example. Over the last few years, it has grown from being a niche player to a much more meaningful and powerful brand asset.

This has been driven by increases in brand affinity, which has moved from well below average to above average over that time, and has been generated by

clever exploitation of the brand's Italian heritage. By playing on associations of Italian style, and deploying media across relevant channels such as OOH and magazines, the brand moved from a shallow set of associations, often with Pizza Express, to a much broader and more appealing brand with meaning, with resulting benefits in brand share.



*Why being different still makes a difference, May 2016*



# MEANINGFUL

having a real importance or value to consumers that delivers against their functional and emotional needs

## Informative media conveys that a brand meets needs 16

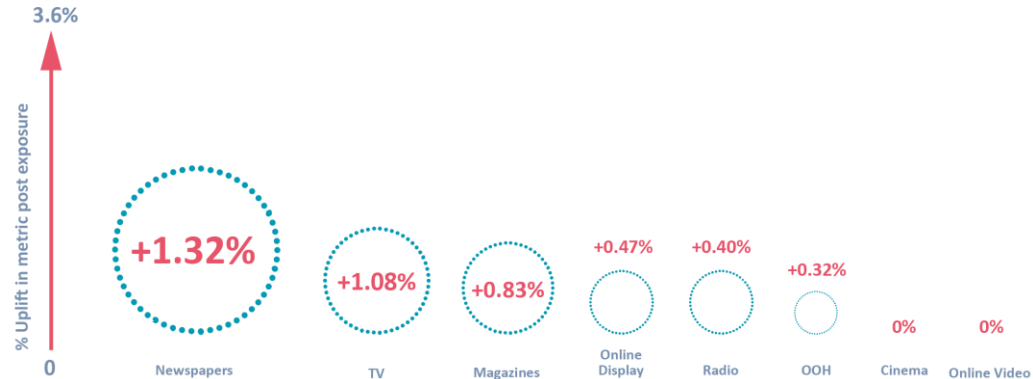
To relay whether a brand meets your needs requires space or time to explain detailed product and service attributes, so this brand value is better served by media where long copy or detailed messages can be conveyed.

with emotional/engaging messaging. The power of video allows the advertisers to quickly demonstrate how a product can meet their needs better than others. Dyson is a prime example of a brand that uses TV this way.

**Newspapers** – provide a platform in which the audience is primed and receptive towards detailed information making it one of the best placed platforms to share functional information.

**Magazines** – provides similar benefits to newspapers, but potentially provides a better context for doing so given the highly targeted nature of content and audiences.

**TV** – provides a platform to reach a large audience



*This graph shows the % uplift each channel delivers to 'meets needs' in the average campaign*



Why being different still makes a difference, May 2016



# MEANINGFUL

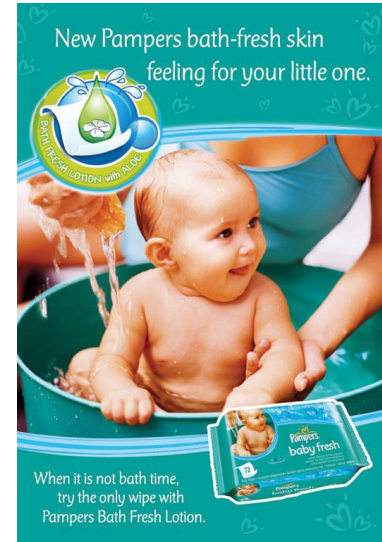
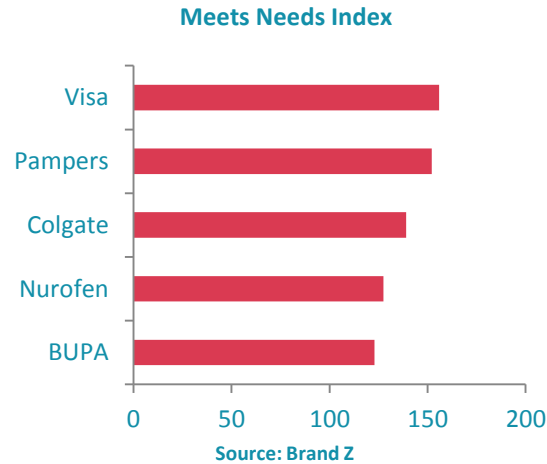
having a real importance or value to consumers that delivers against their functional and emotional needs

## Finance and health brands drive success by meeting functional needs

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Unsurprisingly, many healthcare and finance brands tend to have their brand foundation in functional performance. While emotional associations have a clear role to play in amplifying fundamental product strength, many such brands would be meaningless without strong functional benefits.

Hence, brands like Pampers, Colgate, Neurofen and BUPA all over-index on perceptions that they meet needs, as do many strong finance brands such as Visa. Many brands have used informative media to reinforce this positioning as part of their campaigns.



Why being different still makes a difference, May 2016





# DIFFERENT

to achieve a level of separation from other brands in the category due to sense of uniqueness or dynamism

## Targeted, premium channels contribute to uniqueness 18

A sense of uniqueness is best achieved by channels which are targeted in their nature so the product or service feels like something that is aimed at you, however uniqueness also needs to feel special and premium.

**Cinema** – it could be said that brands advertising on the big screen can benefit from the ‘cinema effect’. Brands often run their TV copy in cinema, but achieve a different level of impact, as is observed in this chart. Appearing in cinema makes brands seem different purely by advertising on this platform. Cinema offers a captive audience and a

clutter free and engaging environment.

**Magazines** – magazines are highly targeted in nature and self-selecting, they offer a diverse canvas with strong creative values, this contributes to a context which is adept at achieving difference for brands. The information and detail provided in magazine ads might give brands more space to express their difference. For example mascara brands advertising 8x longer lashes etc. This messaging reaching a relevant audience, often with editorial and reviews proving or disproving the product could be amplifying its effectiveness.



*This graph shows the % uplift each channel delivers to 'uniqueness' in the average campaign*



Why being different still makes a difference, May 2016





# DIFFERENT

to achieve a level of separation from other brands in the category due to sense of uniqueness or dynamism

## Jägermeister leverages its unique creative

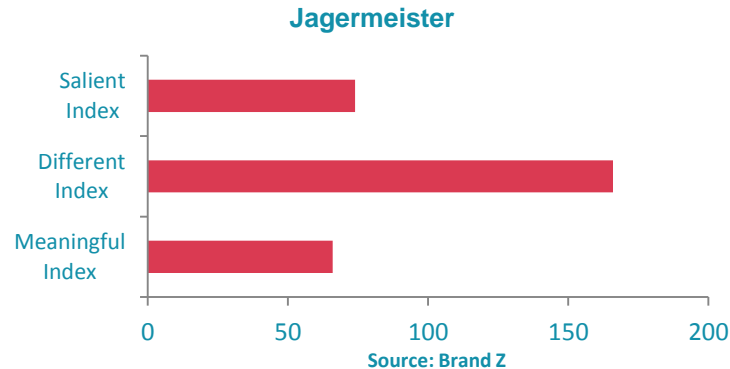
19

Uniqueness is critical to many brands and making optimal use of the creative canvas that magazines provides is a central pillar to this.

Similarly Aldi's success story is well documented but its price and quality narrative has generated a real sense of uniqueness in the marketplace over the last five years.

Jägermeister has grown to be one of the UK's largest spirits brands, based on a unique product and format that has been well exploited in media. A recent print campaign leveraged the brand's three pillars of heritage, process and ingredients to create unique wood cuts which formed the basis of the campaign's creative, by creating a woodcut that illustrated the unique mix of ingredients.

Again, marketing has built on the offer differential, combining TV and other media effectively to shape brand perceptions in a more positive way.



Why being different still makes a difference, May 2016



# DIFFERENT

to achieve a level of separation from other brands in the category due to sense of uniqueness or dynamism

## Specialist channels achieve dynamism

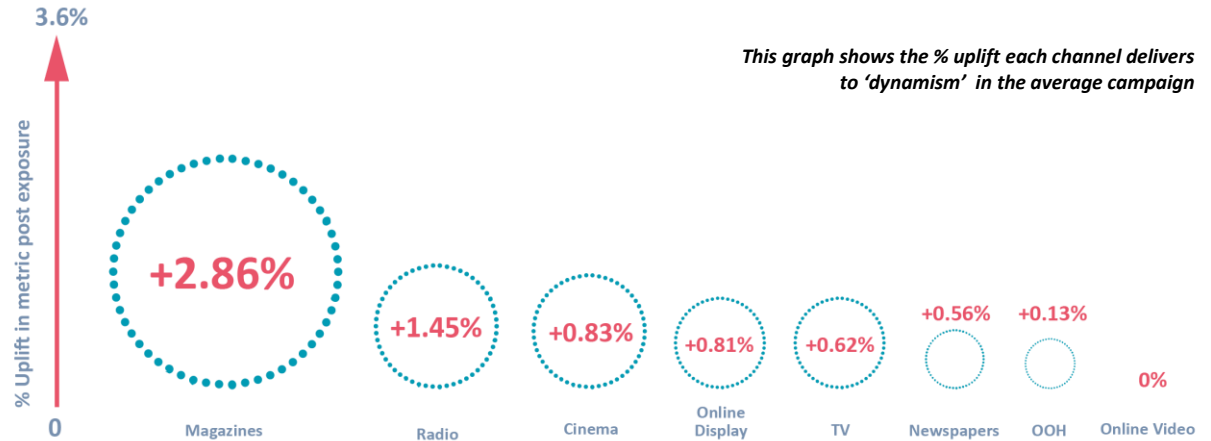
20

Channels which act as showcase to contemporary culture or feed specialist interests tend to be seen as dynamic (a trend setter).

might be underlying factors it could also be down to the new news factor. Although its easy to associate magazines with health and beauty this equally applies to any topic area from technology, to sport, motoring and food.

**Magazines** - editors and writers offer unrivalled expertise and specialist knowledge about their sectors so people trust their point of view. They not only curate and drive conversations in special interest communities, but are at the forefront of driving emerging trends. While belonging and trust

**Radio** - although one may not associate radio with dynamism, it's content which updates and refreshes to reflect the latest trends in both music and news and talk radio certainly fits the bill.



Why being different still makes a difference, May 2016



# DIFFERENT

to achieve a level of separation from other brands in the category due to sense of uniqueness or dynamism

## Audi showcases dynamism through engineering leadership

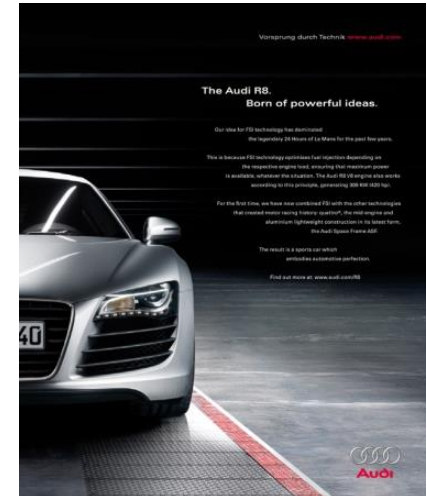
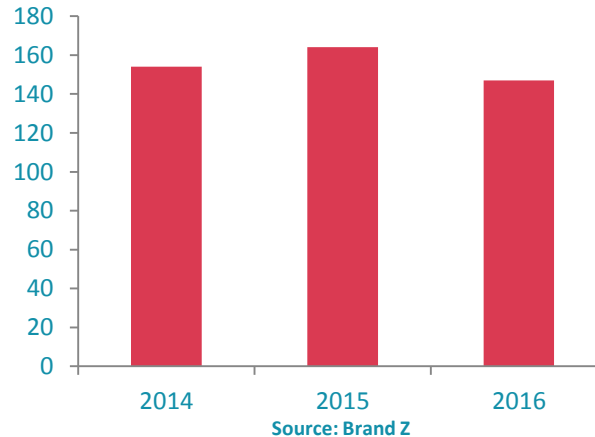
21

Projecting a sense of leadership is of course critical for many brands, especially in markets which thrive on innovation. Premium car brands such as Audi (but also BMW and Mercedes) have built a rich heritage of differentiation and leadership through engineering innovation.

depend on perceptions of difference and leadership. While success is intimately linked to range and each year's trends, consistent amplification of difference in media has been critical to maximise brand performance. In the case of Levi's the brand has accelerated perceived leadership over recent years, among mainstream male fashion brands.

Similarly, many fashion brands such as Levi's,

Audi - Difference index



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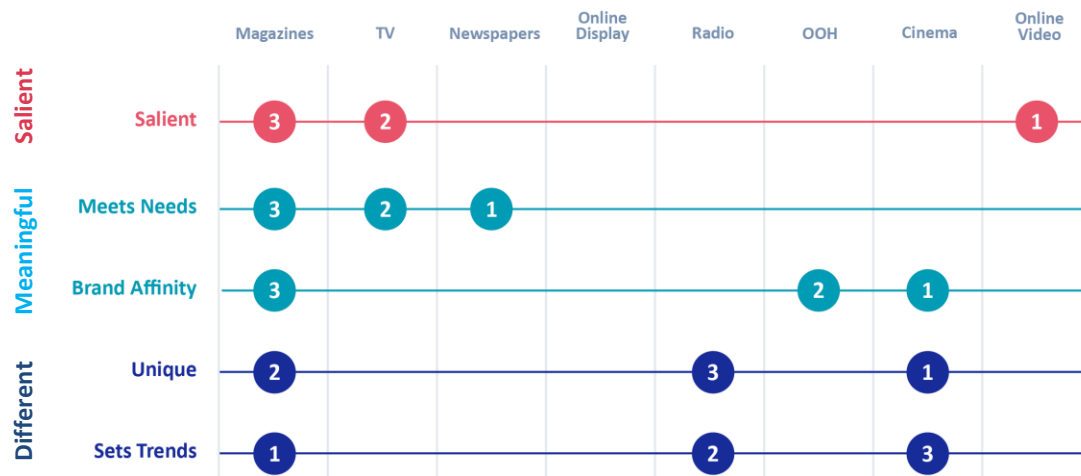
## Magazines uniquely influence all five key metrics

22

As we have seen in this report different media play a key role in driving each of the five key metrics within the Meaningfully Different framework. When we look at the roll of the top three channels in influencing each of these metrics an interesting

picture starts emerging for magazines. Magazines uniquely rank in the top three channels to influence all five metrics, but its particular strength is in driving differentiation, or the key attributes that helps brands set themselves apart from competitors.

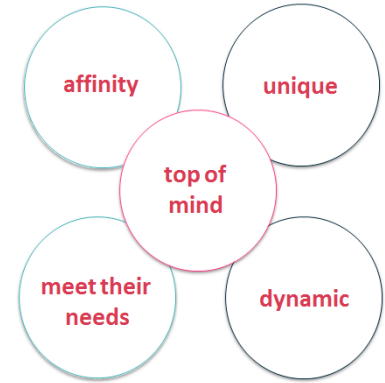
Media ranking by metric (top 3 shown)



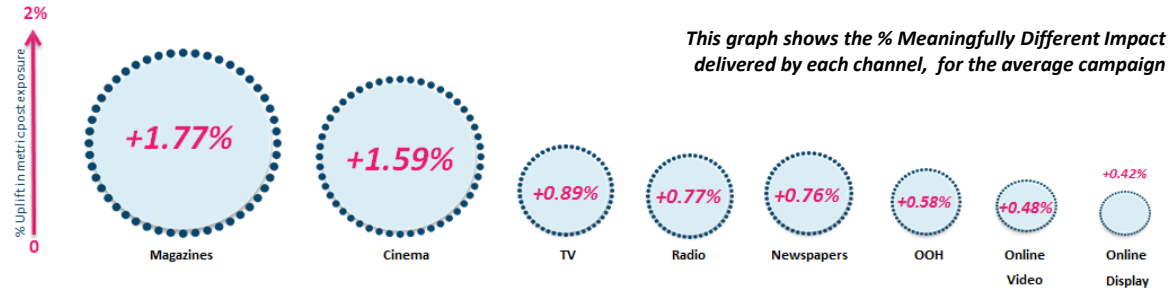


# Magazines uniquely influence all five key metrics

In order to understand and express the value that different channels provide across all five of the key metrics in an easily understandable way, Magnetic worked with Millward Brown to develop a single metric which represents the contribution different channels make in delivering against all five characteristic that feeds into the Meaningfully Different framework.



This metric; Meaningfully Different Impact (MDI) shows that magazines, followed by cinema and TV provide the highest level of MDI per person reached.



*This graph shows the % Meaningfully Different Impact delivered by each channel, for the average campaign*





# Cost efficiency with which channels deliver Meaningfully Different Impact

Finally we wanted to understand the cost efficiency with which channels deliver MDI.

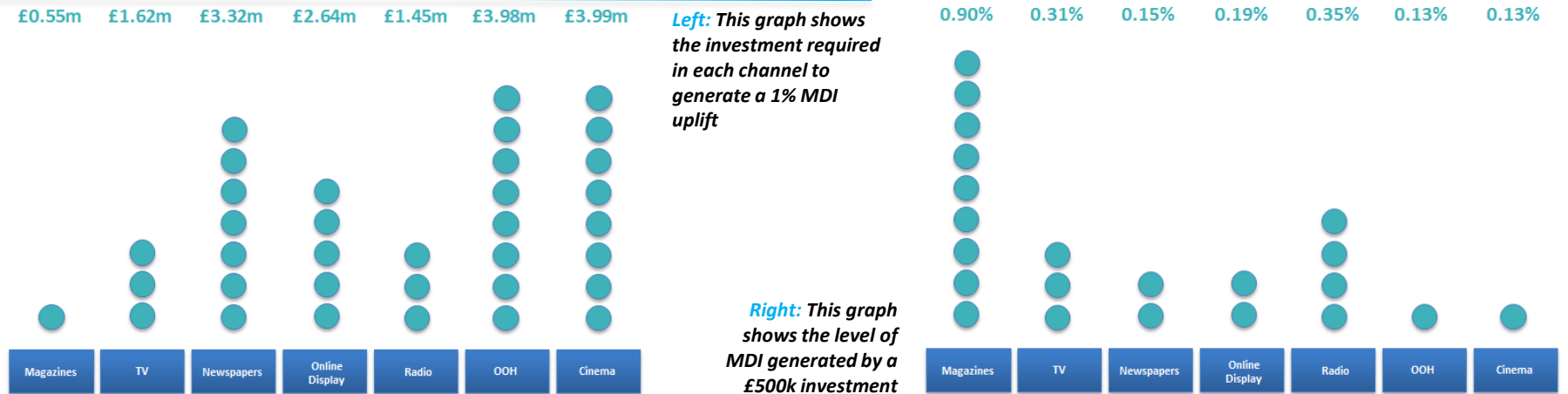
Previously we've only looked at measures on an impact per person basis (the impact of each channel on those exposed to the campaign), but here we included reach for each channel to ensure that the figures reflected the overall MDI each channel

made at campaign level. We then compared this to the average media investment in each channel across the campaigns studied.

In the first instance we calculated the cost of generating 1% of MDI contribution. This showed that magazines had the lowest overall cost of

£550,000 to generate 1% of MDI. Looking at this from a cost efficiency point of view we calculated the MDI uplift each channel would provide at a fixed investment level of £500k.

For this investment, magazines delivered a 0.9% MDI uplift, 3x higher than nearest alternatives.



Our work with Millward Brown has shown that saliency is undeniable important in growing brands, but in order to maximise growth, brands need to do more than get noticed; they need to be meaningfully different.

Brands that achieve a high level of meaningful difference enjoy many benefits. They are more likely to engender the customer loyalty required for repeat purchase, and they can achieve a higher price premium for their products, even amongst those consumers that are price rather than brand driven in their purchase choices.

These factors combine to supercharge growth for brands, and the analysis shows that brands with high meaningful difference can achieve growth rates twice as high in comparison to brands with low meaningful difference and which place a stronger focus on saliency.

The findings would suggest that creating meaningful difference is a KPI which should given equal weighting to salience.

In order to achieve meaningful difference brands have a host of channels available which can help stimulate different areas within the Meaningful Different framework. The evidence would suggest that a planning approach which is overly reliant on any given channel is bound to perform poorly, and in order to stimulate optimal levels of meaningful difference, planning needs to tap into a well balanced mix of media, which are best able to meet the objectives of the campaign.

Although magazines perform well across all metrics, the particular sweet spot for magazines is its ability to drive differentiation. This ability allow brands the opportunity to achieve a level of separation from other brands in the category due to a sense of uniqueness and dynamism, making magazines an essential part of the schedule for any campaign seeking to build brand equity and drive sales growth.

[Click on any of the logos below to see examples of how magazines help brands achieve meaningful difference:](#)



**WANT TO KNOW MORE?**

E-MAIL: [hello@magnetic.media](mailto:hello@magnetic.media)



## Meaningful Different Framework

The Meaningfully Different Framework was developed based on an analysis of Millward Brown's historical brand data, academic review, and a unique R&D program. It has since been validated across thousands of studies worldwide.

The R&D program included a study across five countries (U.S., UK, France, India and Mexico), covering 12 categories – over 400 brands and more than 8,000 consumers. Furthermore, it was the first study to put together the following three elements on such a scale:

1. Implicit measures of the fast, automatic, emotional, instinctive and subconscious thought process and heuristics, such as intuitive emotion – system 1.
2. Survey-based measures of brand associations and equity – a combination of systems 1 and 2.
3. Actual purchase data recorded through SMS diary and shopper panel – behaviour. It's only by holding all three of these pieces of information for the same individual respondent that they have been able to understand how intuitive brand responses (or system 1 thinking) influence reflective thought about the brands (system 2) and how these ultimately combine to explain purchase behaviour.

To read full paper about the Meaningfully Different Framework, click [here](#)

## Channel Analysis

In order to assess the contribution that different channels make within the context of the Meaningfully Different framework, we analysed 88 FMCG campaigns from the Millward Brown CrossMedia database. (see following page for more information on Cross Media)

Each channel's performance was measured against the 5 key MDF metrics on an impact per person basis. Sample sizes for each channel are as follows:

TV n=83, Newspapers n=32, Online Display n=68, Radio n=29, OOH n=59, Cinema n=28, Online Video n=9, Magazines n=22.

Cost efficiency calculations included reach of each channel, to ensure cost data reflected the contribution each channel made at campaign level. As the total number of campaigns in which online video was measured in less than 10 campaigns, the base was too small to include the channel in the final cost analysis.

CrossMedia is Millward Brown's best in class solution that is designed to evaluate how paid media impact key brand metrics such as awareness, recommendation and consideration. CrossMedia covers a multitude of channels, from press channels, to outdoor, to AV and online channels.

CrossMedia is devised to disentangle the results of multimedia campaigns and to understand the role each channel is playing in driving each of these brand metrics - through modeling, Millward Brown quantify the

campaign contribution and tease out which channels are responsible.

The robust methodology utilises the best available measures of exposure to media, takes great care to address any possible biases in the models and controls for misattribution.

CrossMedia helps marketers evaluate how their multi-channel campaign performs in terms of exposure, effectiveness and efficiency, isolating the impact of individual channels on their brand.

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