

**MCN** **MEDIABRANDS**

Accelerating digital  
marketing  
transformation for  
CPGs



in collaboration with





## Harnessing disruption to build sustainable long-term growth

Shadi Kandil / [CEO MCN MEDIABRANDS MENA](#)

No doubt, this year has been trying. It has shaken-up the structural foundations of every organization and every industry. It has tested the viability and relevance of the value chains and re-arranged the consumer journeys in many ways unbeknownst to many.

Yet, as we solve the jigsaw puzzle of consumer habits and the net gains in digital adoption (tools and channels), we know that this disruption is not recent and has been steadily expanding over the past 5 years.

In fact, many marketers have been speaking about the coming reckoning, about how consumer journeys have already been transformed from linear transactions to multi-moment experiences, about how the prevalence of data is paving the way to more accountable marketing investments.

In this context, Digital Marketing Transformation (DMT) has always been on the radar as a precursor to the next stage of development. It was never a question of 'if' but a question of 'when'.

In a post COVID world, the 'when' became imminent. The actions taken by leaders today and over the next 6 months will greatly contribute to success or failure in the future.

It is from this vantage point that we put this piece of work in front of you. Transformations require depth of knowledge and unique expertise across a wide cross-section of areas. And while transformations are necessary, we know it is daunting and fraught with untold risks that might produce the opposite outcomes. That's why our team at Reprise partnered with Google MENA, developing mastery in leading digital marketing transformation projects. Their work includes auditing current maturity states then developing and implementing a comprehensive transformation plan built on the principles of the BCG framework for digital maturity and inspired by successful case studies and best practice from around the globe.

This document is also about demonstrating the viability of DMT. Our agencies UM, Initiative and Magna, together with some of the most successful global brands, paired-up with experts from Google to bring this work to life. Throughout this document, you will come across case studies that embraced the spirit of DMT and delivered concrete positive business outcomes, setting these brands on a growth trajectory that can hardly be reversed or challenged.

In all, we're putting forward the sum total of experiences and knowledge gained to drive successful digital transformation programs. As with all things disruptive, this will always be in a constant state of 'work-in-progress'. We will continue to update, iterate and incorporate more learning that will benefit our clients and partners. We look forward to actively participating with you in setting your organization on the path to sustainable growth.

# Google has partnered with BCG to understand the impact of data use on organizational success



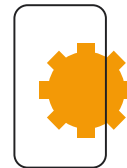
Experts interviewed

**+40**



Brands surveyed

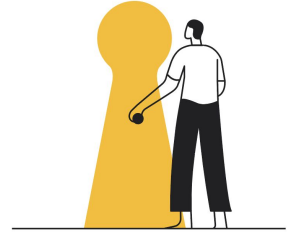
**200**



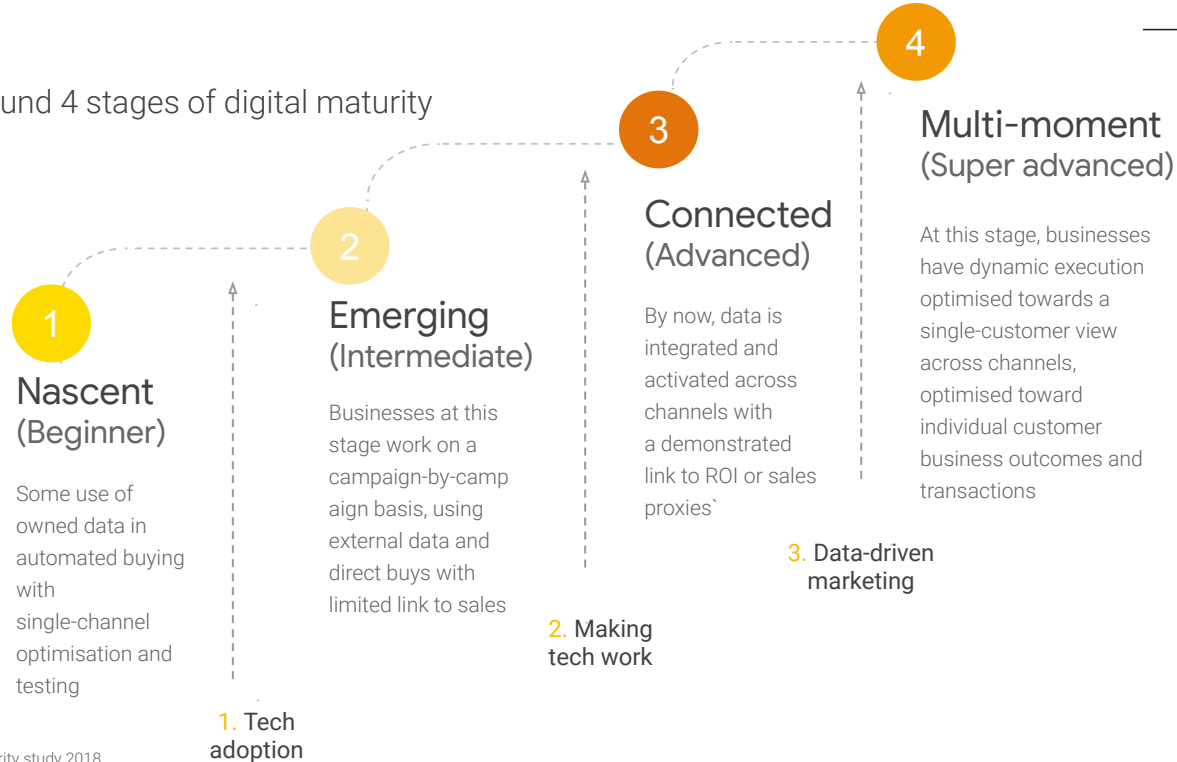
Statistical test-controls  
conducted

**16**

# Resulting in a framework that allows us to judge digital maturity

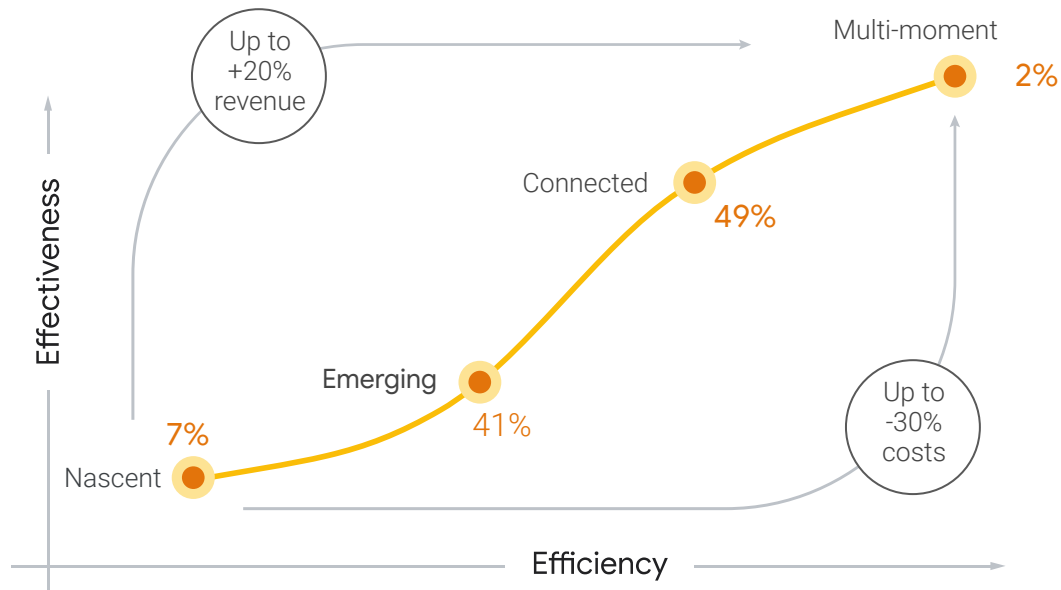


In our research, we've found 4 stages of digital maturity



# With clear upsides for revenue based on performance

Digital Maturity had a **strong correlation to Revenue and Efficiency Metrics**



Source: [BCG-Google Data-Driven Marketing assessment 2017](#) (full report [here](#)), [The Dividends of Digital Marketing Maturity 2019](#). Assessment of 40+ companies across 8 industries and 5 European countries.

# We've broken down digital maturity into 6 core dimensions

**6 core digital maturity dimensions** to win Digital Marketing Transformation



## Audience

Organise data to identify, understand and influence the most valuable audiences throughout the sales funnel



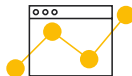
## Assets and ads

Deliver attention-driving, intuitive experiences across digital touchpoints



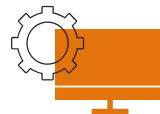
## Access

Reach and deliver across all inventory types and channels



## Attribution

Accurately measure and value customer touchpoints



## Automation

Optimise marketing operations to drive profitability and growth

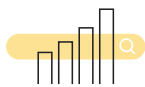


## Organisation

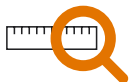
Improve decision-making and results by working collaboratively across teams and with specialised partners

MCN MEDIABRANDS & Google MENA have distilled their CPG expertise in the form of this playbook, to help CPG advertisers unpack digital marketing transformation

# We started with outlining the challenges of the CPG landscape in MENA (and even globally)



## Data



## Creative



## Measurement

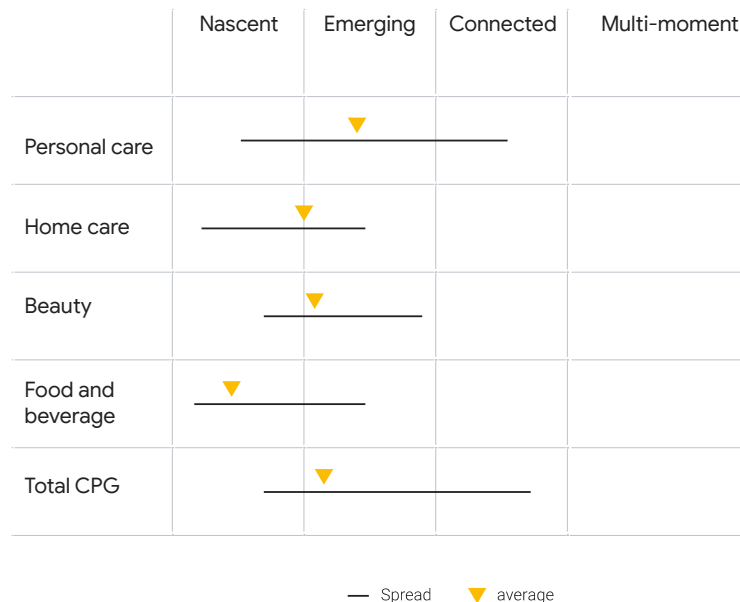
- How do I **understand my consumers better** via data-driven insights given my point of sale blindspot?
- How do I **build a full data strategy** to collect, analyze and activate my audiences with limited 1st party data availability?
- How do I **disrupt the traditional paradigm of building creative assets** and bring together my media and creative partners?
- How do I **build made for digital user-first assets** that deliver impact and are relevant to my consumer audience?
- How do I **extend my communication journey** across the consumer path to purchase up to the point of sale and beyond?
- How do I **leverage digital for better visibility across my consumer journey** and understand the impact of media at every touchpoint?
- How do I **move the needle on e-commerce** and re-invent the way I sell my products to consumers?



# We've also benchmarked where MENA CPGs stand when it comes to digital maturity

**The CPG universe is not transforming at the same pace.** We're seeing a wide gap between the frontrunners, typically disruptive, digital native brands and laggards, mostly legacy CPG brands. The positive result is that **MENA CPG brands lie mostly within the Emerging stage**, but there is definite room **for most brands to grow, especially F&B.**

MENA CPG sub-sectors benchmarked against maturity



# Within the maturity dimensions, Assets & Attribution have the biggest room to grow

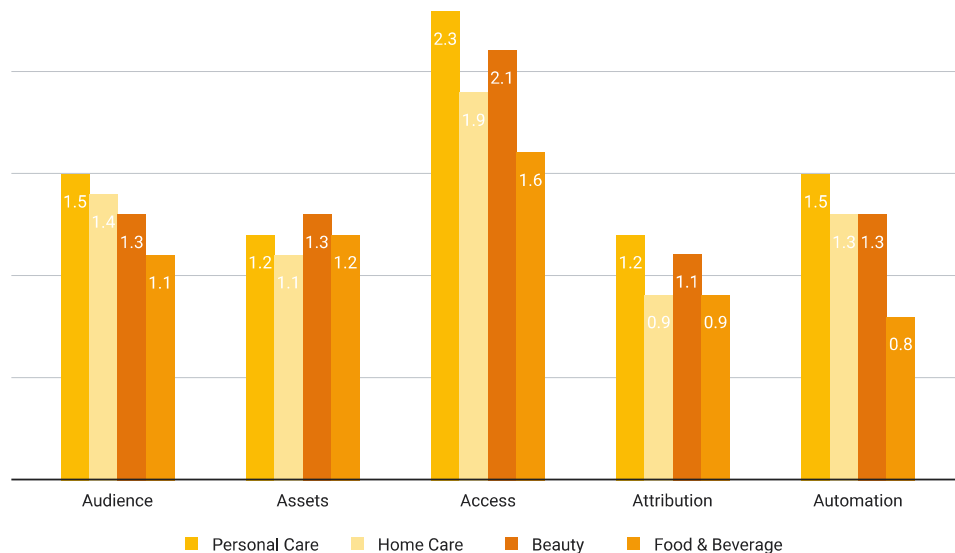
Digging further into the CPG subcategories, we identify specific buckets of opportunity.

**Attribution is the weakest pillar across the board**, a clear issue for CPG brands which sometimes have no visibility on the end consumer purchase.

Personal Care and Home Care categories have the **opportunity to bolster transformation around Assets**, particularly by embracing personalization at scale, which consumers start to expect.

Beauty and F&B categories on the other hand have their **work cut out on understanding their audiences** and segmenting them with further precision.

Average Maturity Scores by sub-sector



This playbook is designed to help you progress on every marketing dimension, accelerating your digital marketing maturity



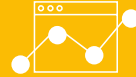
Audience



Assets and ads



Access



Attribution



Automation



# I. Audience

# Executive Summary

1

- With the proliferation of data, CPGs should **pursue a consumer profiling strategy based on personas** not demographics

2

- Contrary to popular belief, **CPGs have access to data**, and need to evolve to 1st party data centricity

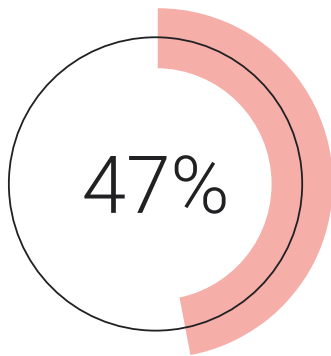
3

- **Targeting needs to pivot to high value audiences**, and that does not mean compromising reach or efficiency

# The consumer journey in MENA has been disrupted with the rise of digital

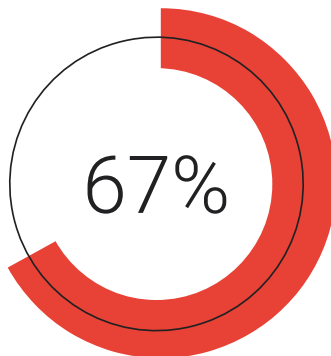
MENA Consumers are

Always Connected



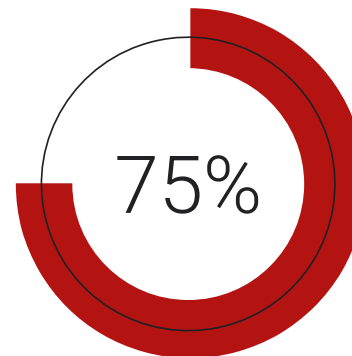
Use over 5 separate devices to watch video content

Always Shopping



Check e-commerce when in store

Always Unique



Expect advertising to be relevant and personalised

The MENA consumer is now hyper connected, highly individualistic, and always-on. This opens up many possibilities to do more and better

# This connectivity generates data, shifting CPG profiles from a simple “age & gender” to full personas

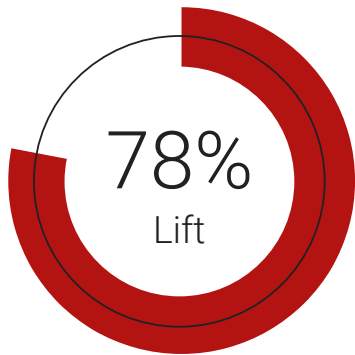
**The connected consumers are more than age and gender.** They are more than just a “target”. They are expecting advertisers to know them better and speak to them accordingly.



# CPGs in MENA are already experiencing this shift in consumer profiling first-hand

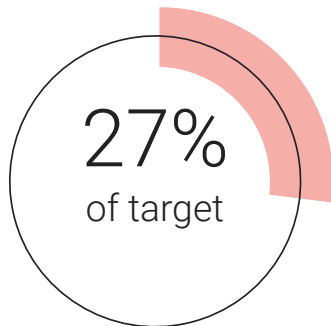
New Audiences uncovered for MCN MEDIABRANDS Clients

Candy & Gum



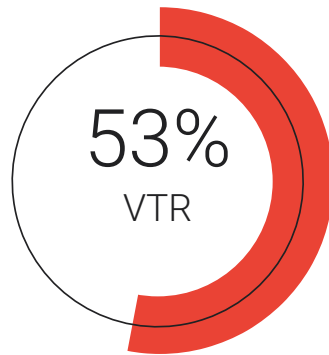
A candy and gum brand discovered **strong engagement from a younger, female audience** in addition to its traditionally male target

Frozen Foods



A frozen foods brand focused on a core audience of the experienced mom, but increasingly **a young male audience became receptive to its ready made value added range**

Oral care



An oral care brand discovered that **not only foodies but also travel buffs were among its most engaged audiences** within the fresh go-getters young male and female target



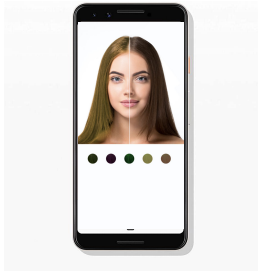
# The starting point of this shift is data; contrary to popular belief, CPGs have access to a lot of it

Site / App Interactions	Media Interactions	CRM	Publisher Data*	E-commerce / Brick & Mortar Retailer Data*	Audience Data Aggregators*	Contextual Data Aggregators*
Cookie-based data: Audiences collected through website visits	Cookie-based data: Audiences collected through media activations (views, clicks, engagements, etc.)	Personal Identifier information (PII): Audience data collected through CRM, Sign up forms, In-store activities.	Publishers' audiences, usually segmented based on the content consumed	POS and retailer data that can be used to enhance targeting and profiling based on actual purchase data	Aggregators purchase data at a large scale from publishers. Good for demographic, behavioral and contextual targeting	Aggregators who make contextual data like weather, events, TV schedules and more available to you for targeting
<b>"Owned"</b> 1st party data			<b>"Earned"</b> 2nd party data		<b>"Bought"</b> 3rd party data	

# A CPG's 1st party data should be at the heart of any audience strategy

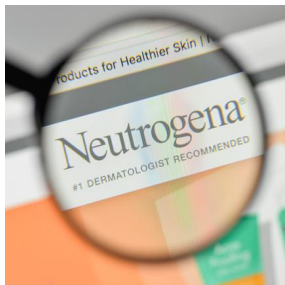
With the changes in the privacy and tech landscape, **brands increasingly have to become 1st party data centric**. A solid data strategy will boost a brand's commerce capabilities with speed and efficiency. What are some of the methods CPGs can use to collect 1<sup>st</sup> party data?

## Microsites/Apps



AI micro-sites and apps now allows users to test virtually make-up, diagnose skin condition, etc.

## D2C channels



Many brands are now testing subscription and direct to consumer models

## Offline capture



Gift samples, surveys, and offline activations are becoming another source of building 1st party data stores

## You are the custodian of your data

With new data regulation rolling out, you need to address some key data privacy questions

### Ownership

- What data do I own?
- Who has access to my data?

### Compliance

- Do I have the right T&Cs in place?
- How is the data processed and used?

### Security

- Where is my data stored?
- Is the data at risk of being exposed?

### Visibility

- What roles in my organization have a data hat? Is there a function overseeing all of this?

# Output is only as good as your data

The quality of your data determines **quality of insights and decisions it drives.**



## Age

How fresh is the data?

- 1 Data is not refreshed
- 10 Data is refreshed instantly



## Source

How reliable is the data source?

- 1 The data is a guess
- 10 The data is factual information



## Scale

How much of the data exists?

- 1 There is hardly any data
- 10 Enough to analyse and target



## Cost

How much does it cost to access?

- 1 Very expensive!
- 10 Free



## Accessibility

How easy is it to access this data?

- 1 Needs several integrations to gain access
- 10 Data is already available



## Goal Multiplier

How related is it to business objective?

- 1 Data is not relevant at all to my objective
- 10 Data is highly relevant to my objective

# Then, combine your data sets to segment audiences along factors that drive their purchases

## Identify your data sources

- What data sources can I look at to evaluate performance (hint: if you have any of the data sources mentioned in slide 20, you can)
- How can I use the data available to identify and prioritize my high value audiences? Those will drive growth

## Segment your data to uncover audiences

- Segment audiences along the lines which differentiate their purchase decisions
- In the CPG category, consumers with different demographics or interests would go for the same product, simply because they are seeking the same benefit

## Build your high value audiences

- Looking at performance, build audiences (from all your data sources) that will bring value to your brand
- Ensure your audiences are addressable online through the variety of signals available

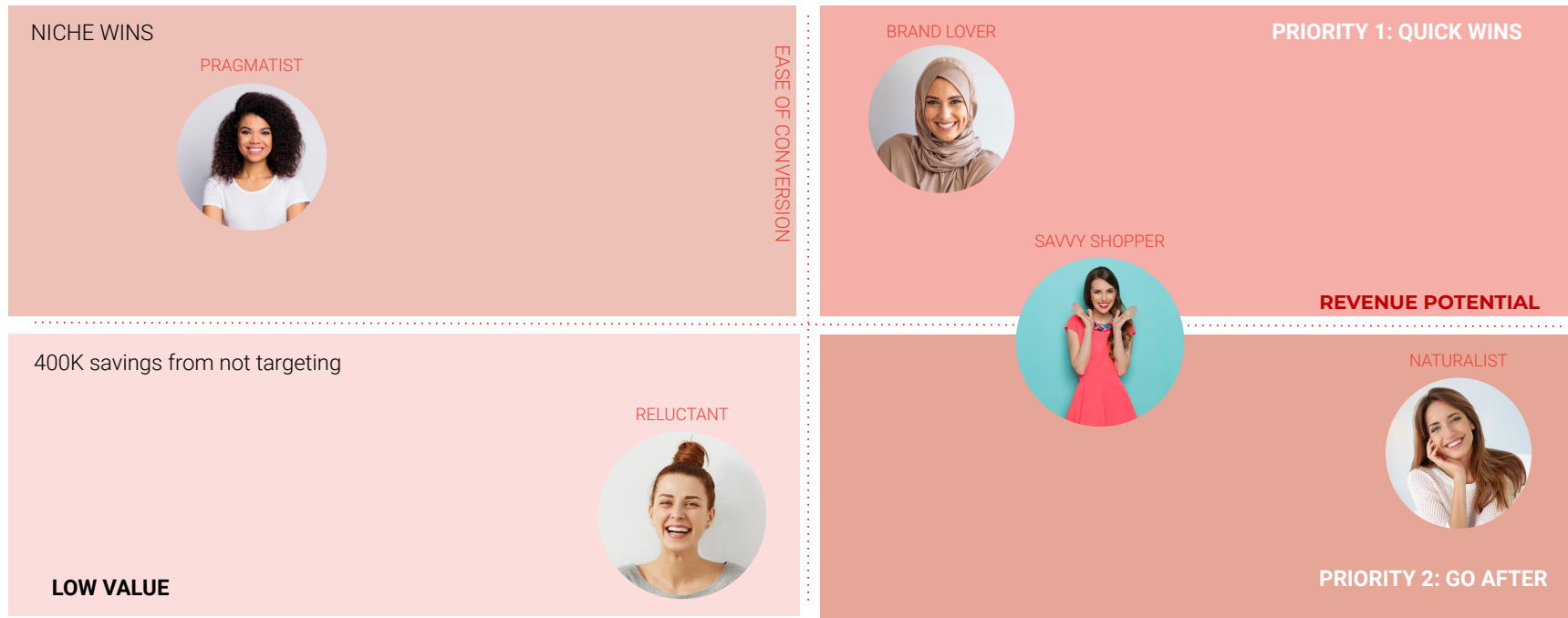


# Rank your audience segments to prioritize focus

**Audiences are ranked based on two dimensions, first their revenue potential, a function of their size and purchase habits.** Then, their ease of conversion, a factor of their affinity to the brand. Audiences that are too small or too difficult to convert should not be targeted for better efficiency.

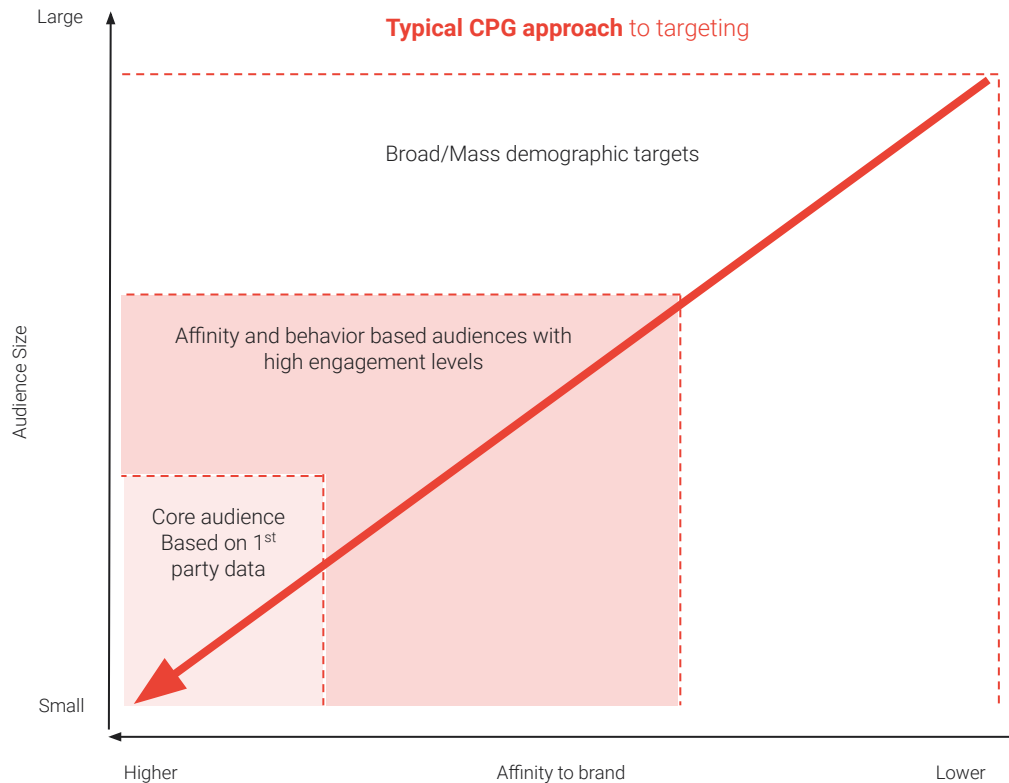
Example of MCN MEDIABRANDS High Value Audience Segmentation\*

75% OF TOTAL POP



# Historically, due to data restrictions, CPGs had to follow a mass approach to targeting

**The traditional CPG approach is to go broad,** mass reach is a term familiar to us all. In many cases CPG advertisers go across a full demo or multiple ones as a way to promote their products

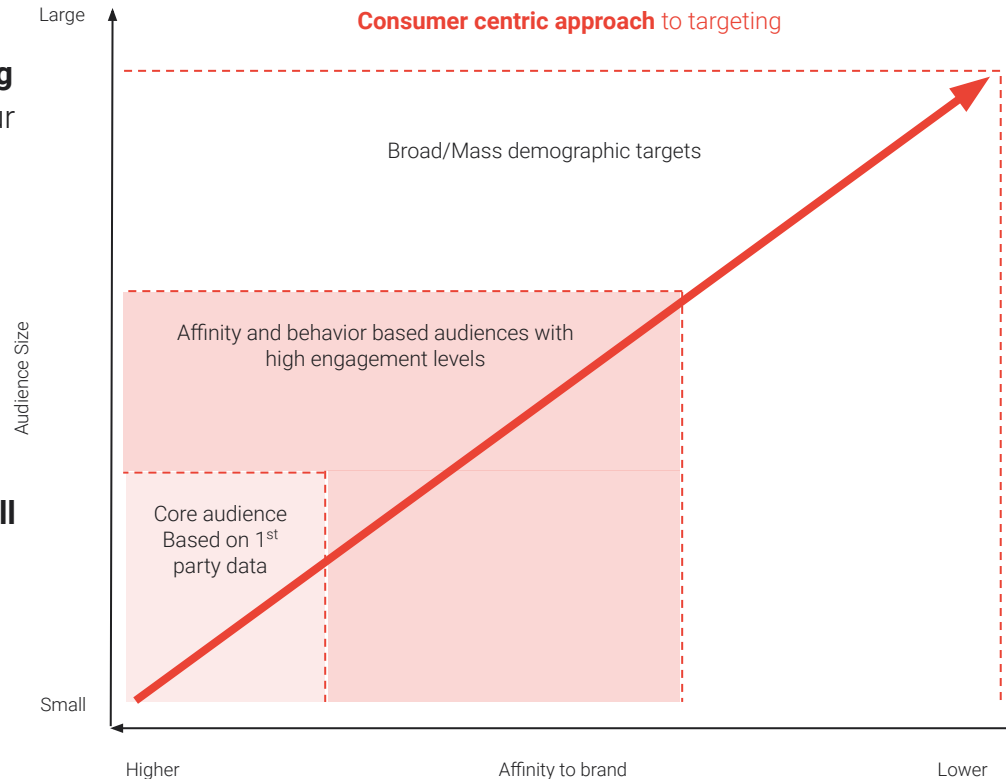


# Flip the targeting game on its head by focusing on high value audiences first

**Our point of view is to begin by targeting our most relevant first**, as they will be our lowest hanging fruit.

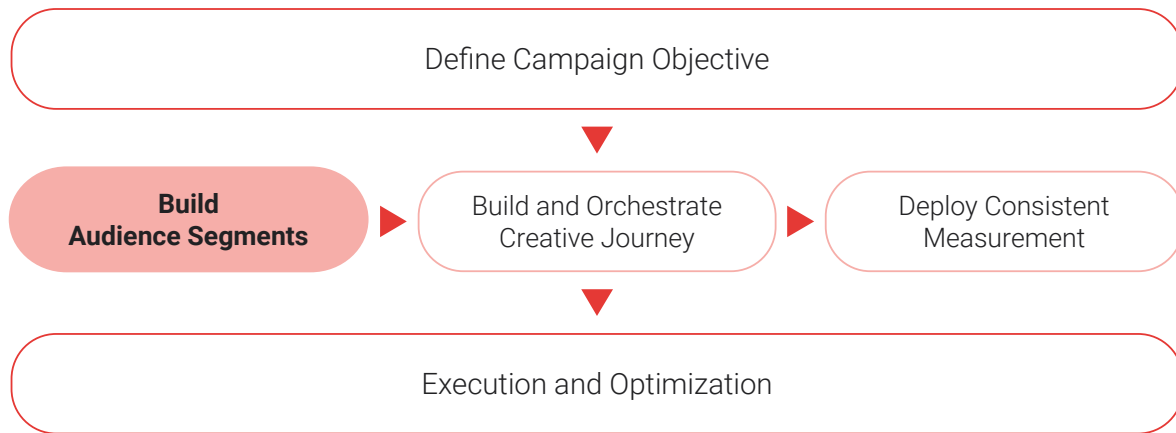
After ensuring we've reached them enough with the right frequency, we can then gradually broaden our target to a more mass approach.

**This approach maintains our reach, but improves effectiveness, because we will have higher conversion potential.**



# This audience approach then becomes critical to informing the creative strategy

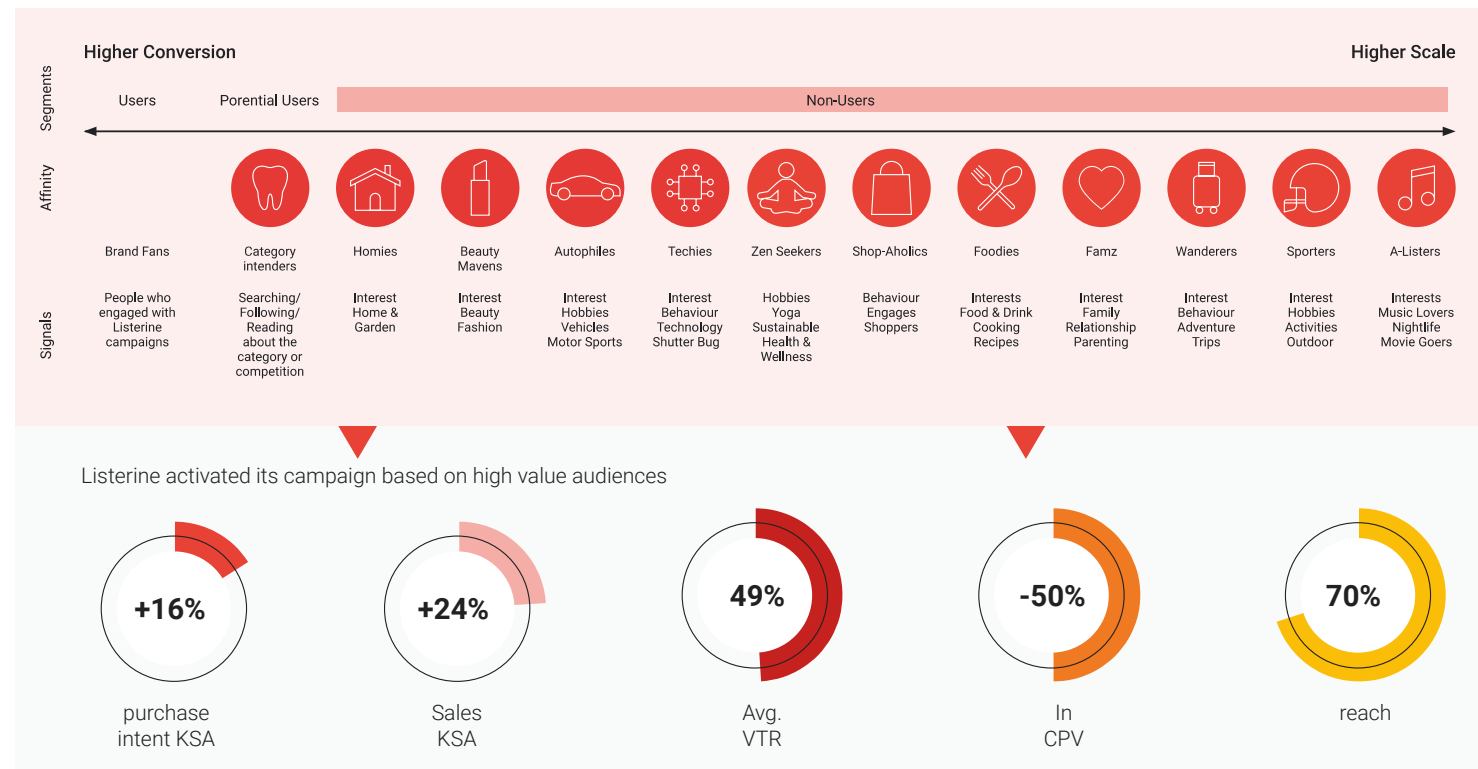
Your **audience strategy** needs to be built and used to **help feed your creative strategy**





# Listerine experimented with targeting HVAs first, the results were clear

Listerine used 1st party data to determine its high value audiences



[Check out the official case study!](#)

# So where do you start?

Below is a list of best practices to consider for you to grow your Audience maturity

	Nascent	Emerging	Connected	Multi-moment
<b>Data strategy</b>	<ul style="list-style-type: none"> <li>You mainly use of 3rd party data. No/limited use of 1st party cookie data. No/limited linking of customer data</li> </ul>	<ul style="list-style-type: none"> <li>You use a mix of 1st and 3rd party data targeting</li> </ul>	<ul style="list-style-type: none"> <li>You use a range of online &amp; offline data linked to target audiences</li> </ul>	<ul style="list-style-type: none"> <li>You have a holistic customer view</li> <li>You have a full funnel strategy</li> </ul>
<b>1st party data control and management</b>	<ul style="list-style-type: none"> <li>You have no collection of 1P data</li> <li>1P data hosted in separate tools of partners (e.g. agencies)</li> </ul>	<ul style="list-style-type: none"> <li>1P is consciously collected and owned in buying tools and used for remarketing</li> <li>Consent data is collected</li> </ul>	<ul style="list-style-type: none"> <li>Your 1P is leveraged across channels</li> <li>You are integrating offline data (e.g. CRM, POS)</li> </ul>	<ul style="list-style-type: none"> <li>You have a fully integrated Customer Data Platform (formerly DMP)</li> <li>You actively manage of consent data across platforms (keep it fresh)</li> </ul>
<b>Audience definition</b>	<ul style="list-style-type: none"> <li>You use a single broad audience segment</li> </ul>	<ul style="list-style-type: none"> <li>Your audiences are defined largely by demographics</li> </ul>	<ul style="list-style-type: none"> <li>You leverage e-Retailer Data to fuel your audiences</li> </ul>	<ul style="list-style-type: none"> <li>You have fully linked online and offline data</li> </ul>
<b>Display targeting techniques</b>	<ul style="list-style-type: none"> <li>You use basic upper funnel targeting techniques (e.g. demo, affinity)</li> </ul>	<ul style="list-style-type: none"> <li>You use upper and lower funnel techniques (e.g. remarketing)</li> </ul>	<ul style="list-style-type: none"> <li>You use upper, lower and mid funnel (e.g. similar audiences, adaptive audiences, in-market)</li> </ul>	<ul style="list-style-type: none"> <li>You segment and target using advanced analytics / machine learning</li> </ul>
<b>Search targeting techniques</b>	<ul style="list-style-type: none"> <li>You use simple keyword targeting</li> </ul>	<ul style="list-style-type: none"> <li>You use sequential data and storytelling builds</li> </ul>	<ul style="list-style-type: none"> <li>You use remarketing lists</li> </ul>	<ul style="list-style-type: none"> <li>You link to Analytics to targets based on search + onsite behaviour</li> </ul>
<b>Cross channel platform usage</b>	<ul style="list-style-type: none"> <li>Your targeting is siloed by channel (e.g. display, search, social, email, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>You use cross channel targeting techniques online (e.g. search-to-display)</li> </ul>	<ul style="list-style-type: none"> <li>You use GA360 audience segmentation and GA&gt;DV360 advanced audience retargeting</li> </ul>	<ul style="list-style-type: none"> <li>You use BigQuery/Ads Data Hub for holistic cloud measurement + activation where possible</li> </ul>



## II. Assets and Ads

# Executive Summary

CPG creatives need to evolve to find a place in the era of the connected consumer. Marketers can do this via:

1

- Creatives that deliver impact built around **user first insights** and leveraging a **made for digital storyline**

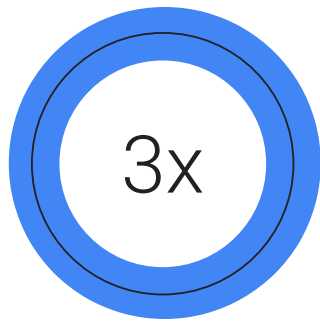
2

- **Personalization**, which when used appropriately can improve performance by increasing relevance

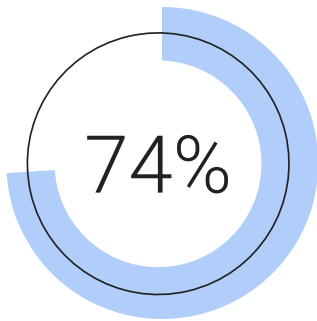
3

- **Content strategies built to accompany consumers** across their complex path-to-purchase

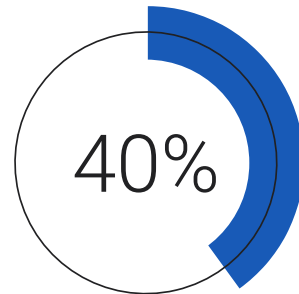
# Consumers today are empowered and impatient, with high expectations on their digital experiences



more attention is paid to  
"ads that were relevant to  
me" vs. average.(1)



of consumers get frustrated  
when they get exposed to ads  
that have nothing to do with  
their interests (2)



Increase in brand favorability  
for contextually relevant ad (3)

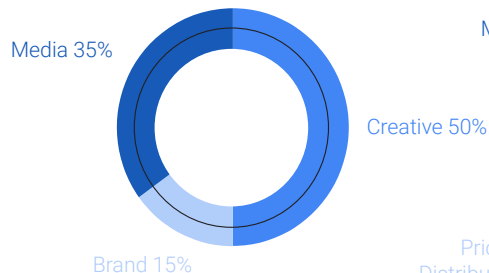
Source:

- (1) Google/Ipsos, Video Mobile Diary, US, 2017, n of 4,381 (saw ads occasions).
- (2) UM Wave X, 2019.
- (3) MCN MEDIABRANDS, ZEFR (2016). The Power of Relevance: Content, Context and Emotions

# Which explains the key role the creative plays in generating sales from advertising

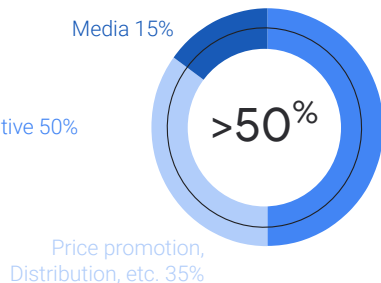
**GOOD CREATIVE** is good for business.

## Nielsen Catalina SOLUTIONS



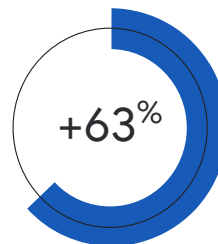
Contribution to sales

## comscore



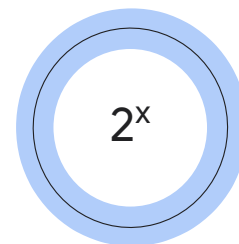
Ad quality impact on sales

## IPG MEDIA LAB



Increase purchase intent for contextual creative

## Harvard Business Review



Increase in ROI for effective creative

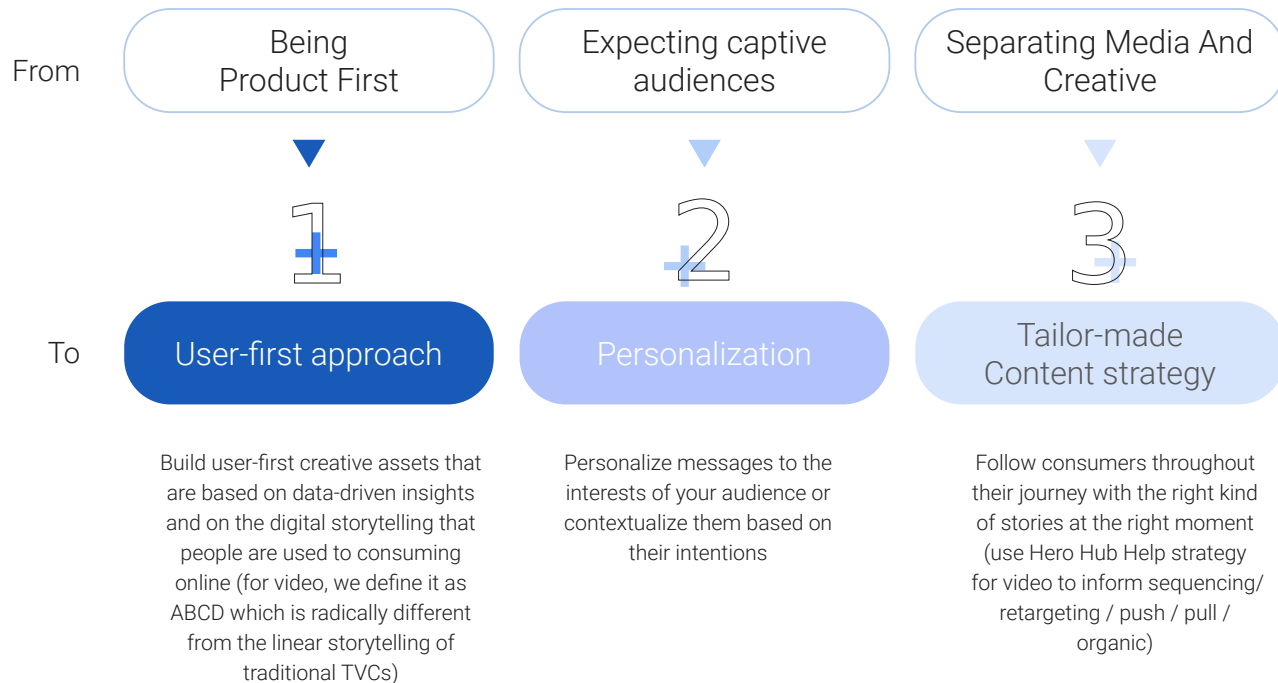
<sup>1</sup>comScore ARS Global Validation Summary, [comScore](#), October 2010

<sup>2</sup>The Power of Relevance: Content, Context and Emotions; [IPG + ZEFR](#), March 2016

<sup>3</sup>Creativity in Advertising: When It Works and When It Doesn't, [Harvard Business Review](#), June 2013

<sup>4</sup>Nielsen Catalina Solutions. Nearly 500 campaigns across all media platforms, Period 2016-Q1 2017

# CPG creative assets should evolve dynamically, benefitting from the HVAs to maximize their impact and ROI



# Creatives must always be built around very strong user insights, which data can unlock

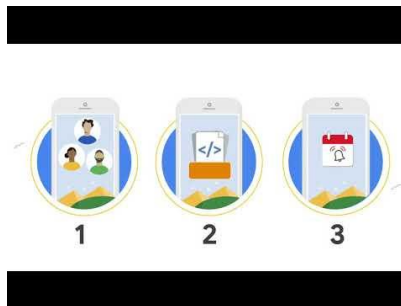
Below are some great MENA examples of successful user first creatives

Maybelline  
Makyaj w Banat



Winner of the 2019 Lantern Award, Makyaj w Banat captures **vlogging and Ramadan trends** fully to create a full series and engage users

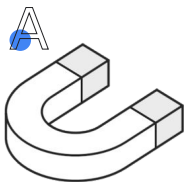
Listerine  
Personalization



Listerine wanted to be hyper-personalized to their consumers. They decided to take their main message, and create 106 custom copies to push relevance to the next level

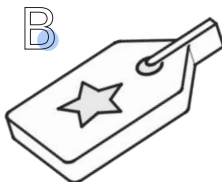


# Executed around a made-for-digital storyline



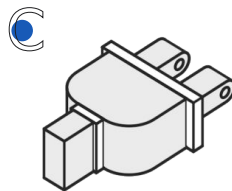
## Attract

In the first 5 seconds, make sure to start with a story that hook consumers' attention and draws them in, to avoid them skipping the ad (surprise, tighter framing and fast editing pace are proved best practices).



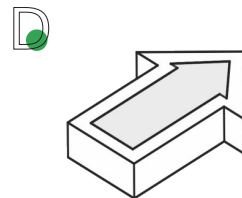
## Brand

Integrate the brand very naturally into the stories, the earlier the better: if not in the first 5 seconds, it is mandatory to integrate the brand in the story in the next 5-7 seconds (natural integration works better than packshots and audio mention is also a best practice).



## Connect

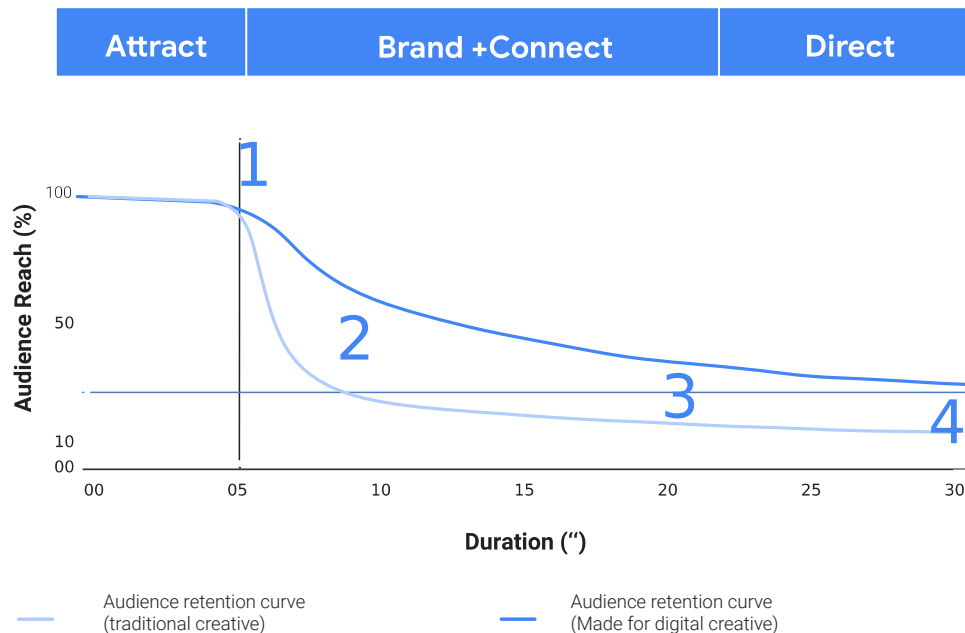
Make your story relatable by integrating the functional and emotional aspect of your brand. Especially if they solve a tension point for the users (positive emotions drive better engagement as does using human stories we can relate to).



## Direct

Provide clear calls to action to direct viewers who decided to watch your content until the end on what to do next (be transparent, express clearly what you expect them to do, offer actionable options)

# With this, you can deliver truly user-first experiences, leading to stronger audience retention



1. After the first seconds more people decide to continue watching the video as they have been quickly **ATTRACTED (A)** by a relevant story.
2. The **BRAND (B)** has appeared within 10 seconds and the core Brand message has been delivered in the first 15" seconds.
3. The informations about the product/service are grounded in an emotional **CONNECTION (C)**, the tension points are addressed.
4. At the end of the ad there is a sizable audience of engaged viewers that are ready to take a **DIRECT (D)** action and can be retargeted.

# Attention-selective consumers respond better to personal creatives

Combining a strong creative insight and platform with a precise segmentation of high value audiences means your creatives can become more relevant by being addressable to specific audiences. **Addressable content is customized around variations in the person, interest, moment or any combination of the three.**

## Addressable Content

### Person

Who are they, how do they interact with your brand/category?

e.g: Site visitors, campaign engagers, category intenders...

### Interest

What are they into?

e.g: Travel affinity, searching for herbal remedies, surfing beauty website

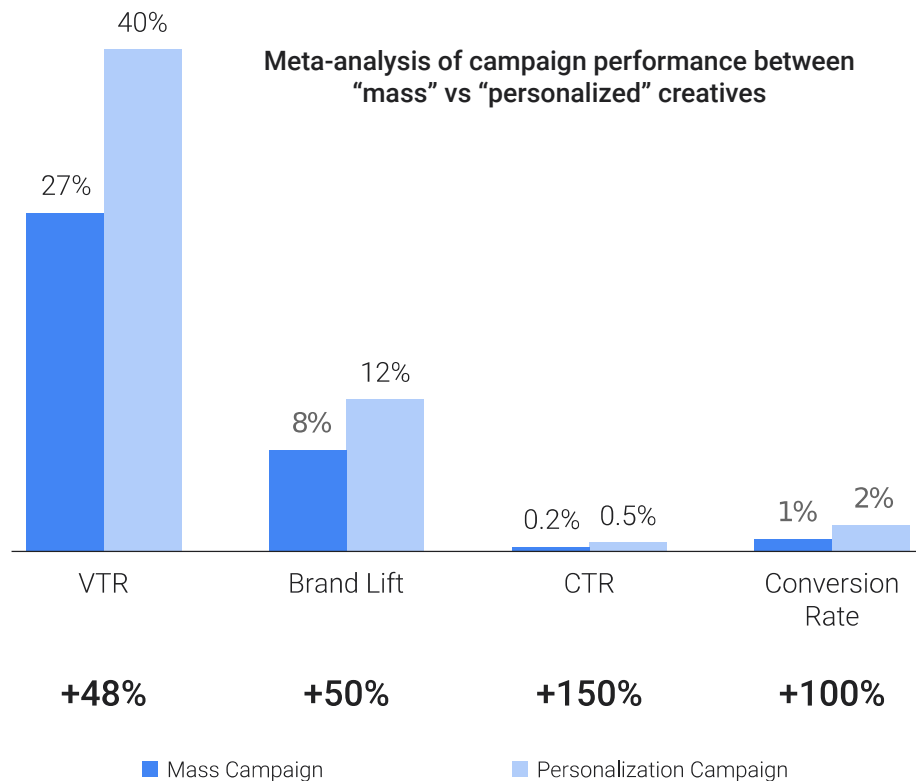
### Moment

External factors in real-time

e.g: Location, weather, big cultural events, device type etc...

# And we know that personalization works

Contextual 'Moment' personalization is shown to be particularly effective, driving a 63% increase in purchase intent.



# Elvive Arabia Uses Data to Inform Multiple, Personalized Creatives

## Examples of Video Personalisation

Serum Focus w/ Serum Pack Shot



Ingredient Focus w/ Rose Frame Added



Product Effectiveness Focus (5x)



DIY w/ Custom Copy Around Home Recipes



## Goals

- Communicate L'Oreal's Total Repair 5 value proposition
- Pursue L'Oreal's precision agenda by building around data-driven marketing & insights

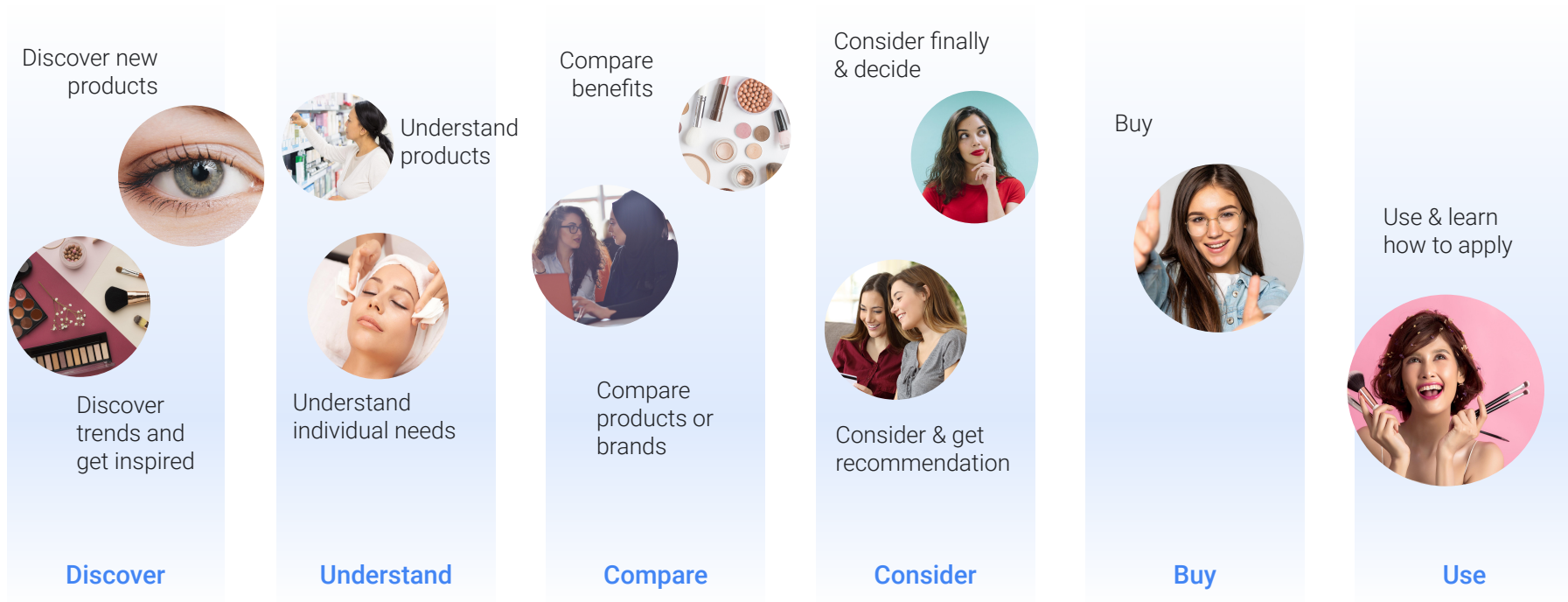
## Approach

- Utilise 1st & 3rd party data across web and social to build 8 core profiles of the "Elvive consumer"
- Create custom experiences with personalized creatives for each segment (30 YouTube videos & 2,000 dynamic display banners)

## Results

- Launched programmatically w/ personalized videos & DDC
- 53% increase in VTR
- 34% lift in brand awareness
- 43% rise in CTR on banners

# Finally, brands have the opportunity to influence consumers across their complex path to purchase



\*Source : KANTAR Connected Beauty Study 2019 - Study on the Path to Purchase in 4 personal care categories : Hair Care, Make up, Skin Care, Fragrances  
Base: all product buyers, females n=1528, males n=992.

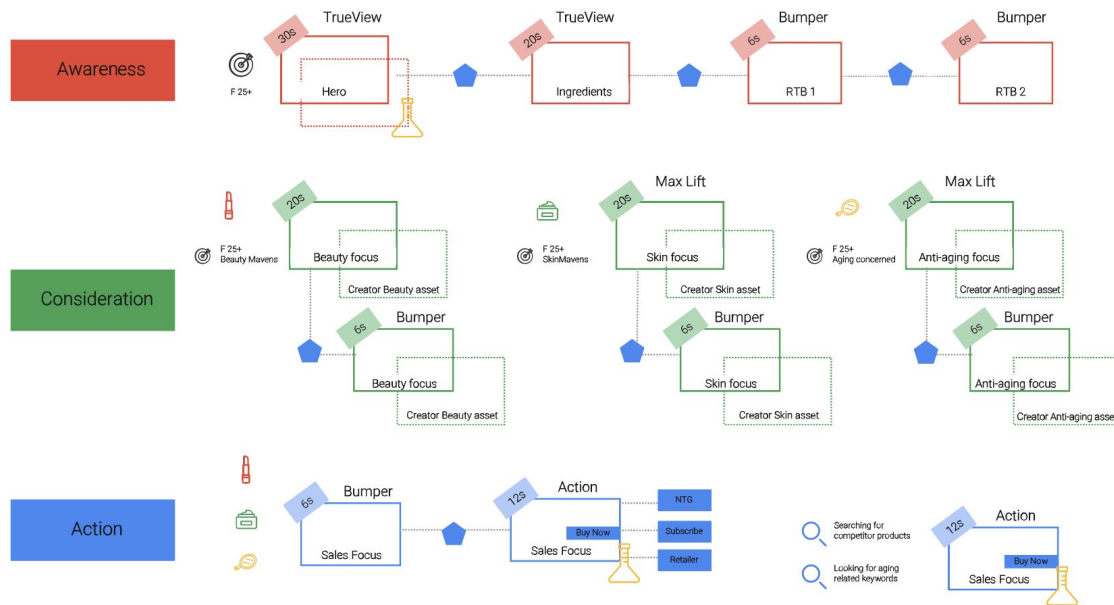
# By orchestrating a full content strategy of formats and messages

CPG brands are moving consumers down the funnel by using a variety of **formats** that help deliver the right message at the right moment for the right audience.

Enrich your content strategy by **addressing these thought starters**:

- What are your marketing **objectives**
- What **audiences** are you targeting?
- What does **success** look like?

Sample Content Strategy plan



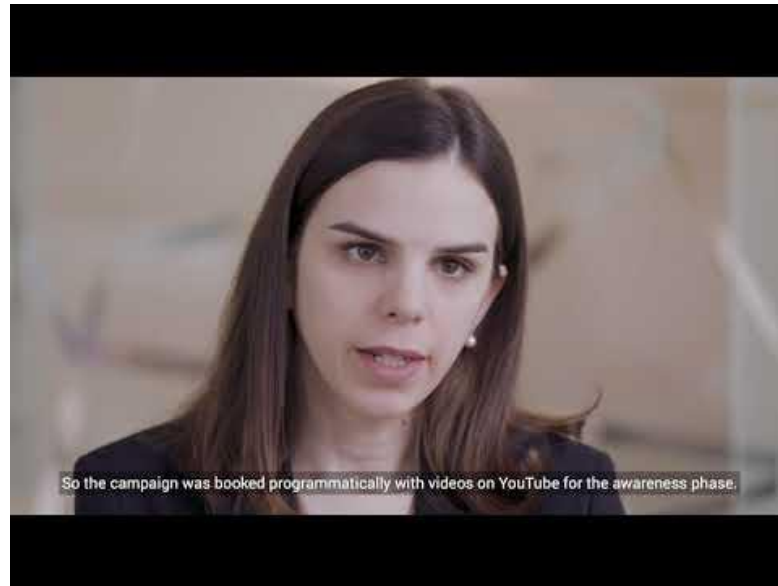
## Case Study:

Leading brands created great media orchestrations to push users across the funnel

Maybelline Case Study



L'Oreal Paris Case Study





# So where do you start?

Below is a list of best practices to consider for you to grow your Assets and Ads maturity

	Nascent	Emerging	Connected	Multi-moment
<b>Display development: formats</b>	<ul style="list-style-type: none"> <li>You use the same message served to all in many channels</li> </ul>	<ul style="list-style-type: none"> <li>You use multiple creatives including digital specific display</li> </ul>	<ul style="list-style-type: none"> <li>You use digital specific mobile, video, and dynamic display creatives</li> </ul>	<ul style="list-style-type: none"> <li>You use creatives available for all formats: Native formats and high impact formats; mweb, app, video, display</li> </ul>
<b>1st party data control and management</b>	<ul style="list-style-type: none"> <li>You have no or very little media and creative team collaboration</li> </ul>	<ul style="list-style-type: none"> <li>You have some formalised media and creative collaboration, use of siloed tools</li> </ul>	<ul style="list-style-type: none"> <li>Your media and creative teams work in conjunction with shared project management tools</li> </ul>	<ul style="list-style-type: none"> <li>Your media and creative teams work hand in hand from planning to execution to achieve common goal through collaborative Creative Management Platform (CMP)</li> </ul>
<b>Audience definition</b>	<ul style="list-style-type: none"> <li>You use the same message served to all in many channels</li> </ul>	<ul style="list-style-type: none"> <li>You create varied messages for brand vs performance depending on objective, with creative decisioning - messages tailored by segment in some channels</li> </ul>	<ul style="list-style-type: none"> <li>You use dynamic creatives leveraging some A/B auto optimisation</li> <li>Your messages are tailored by segment in most channels</li> </ul>	<ul style="list-style-type: none"> <li>You use dynamic creatives incorporating audience and environmental signals</li> <li>You use personalised messaging for customers</li> </ul>
<b>Display targeting techniques</b>	<ul style="list-style-type: none"> <li>You are not leveraging ad server for creative hosting</li> </ul>	<ul style="list-style-type: none"> <li>You are leveraging an ad server for creative hosting</li> </ul>	<ul style="list-style-type: none"> <li>You use full consolidation of ad serving / hosting</li> </ul>	<ul style="list-style-type: none"> <li>You use full consolidation of ad serving / hosting with connected asset strategy powering dynamic creatives</li> </ul>
<b>Search targeting techniques</b>	<ul style="list-style-type: none"> <li>N/A</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>	<ul style="list-style-type: none"> <li>You test ad copies in search ads</li> </ul>	<ul style="list-style-type: none"> <li>You test and optimize ad copy in search ads</li> </ul>
<b>Cross channel platform usage</b>	<ul style="list-style-type: none"> <li>You have no or very little media and creative team collaboration</li> </ul>	<ul style="list-style-type: none"> <li>You use multiple creatives including digital specific display</li> </ul>	<ul style="list-style-type: none"> <li>You use digital specific mobile, video, and dynamic display creatives</li> </ul>	<ul style="list-style-type: none"> <li>You use creatives available for all formats: Native formats and high impact formats; mweb, app, video, display</li> </ul>



### III. Access

# Executive Summary

With the fragmentation of the media landscape, reach has become a bigger challenge, especially for CPGs that focus on sizeable audiences. Technology plays in addressing this challenge:

1

- By **accounting for viewability** in media metrics in a standardized way

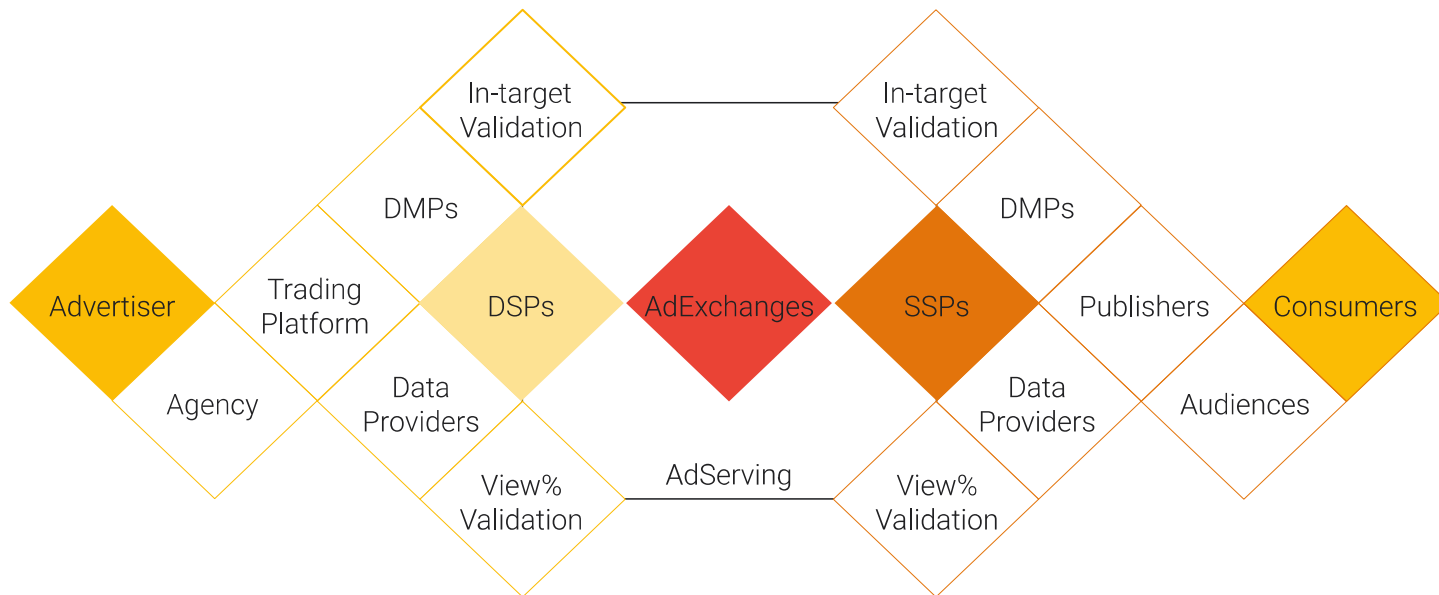
2

- By exploring the **nuance between brand suitable and brand safe**

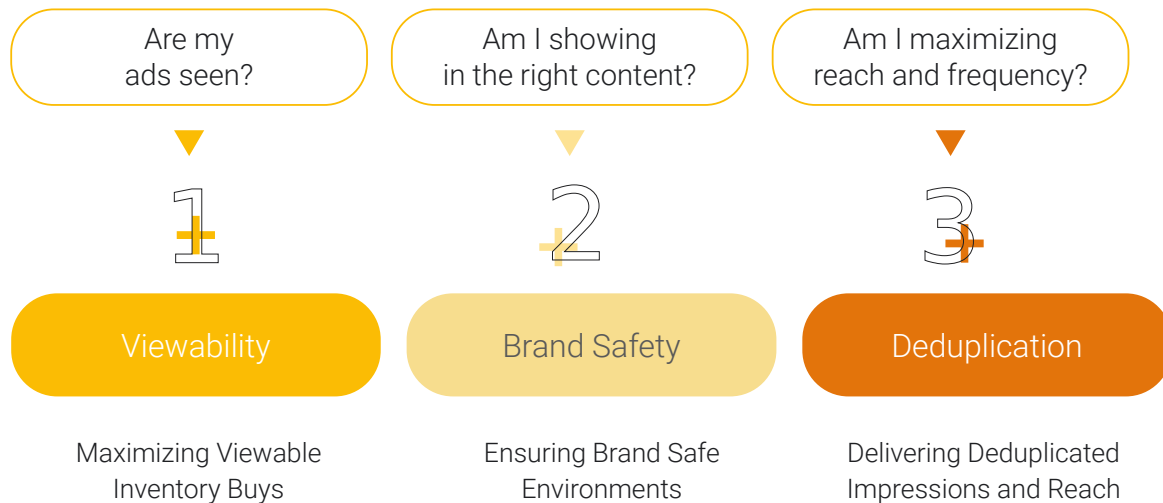
3

- By **minimizing media overlap wastage** through deduplicated reach

# Reaching consumers has become a complex pathway, a challenge further amplified for reach driven CPGs



# Technology plays a role in addressing this challenge and maximizing CPG digital investments



# Viewability is still a challenge to tackle today, and CPGs need to look closer at their activities

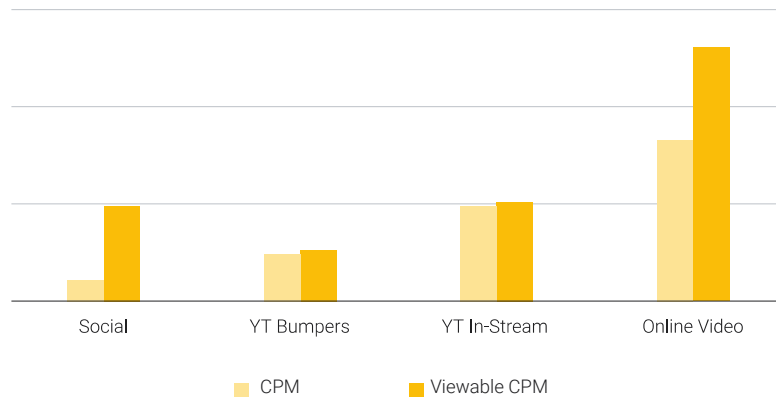
Viewability has been a hot topic in the industry. **Historically, we've looked at CPM as a key benchmark** of what our media performance looked like.

Now, **we are able to layer in a more intelligent layer of information, which addresses the "is my ad on screen" question.**

Though a great addition, this generates further questions, such as :

- How do we **define viewability**? Many providers define viewability differently
- How do I **standardize viewability measurement** across my buying?
- **What technology do I use** to track and ensure this?
- Beyond this, where does **audibility** sit? Did people have a chance to **hear your message**?

Viewability measurement pushes us to reconsider our performance



\*Please note that "social" is a collection of formats, vs how YouTube and Online Video are presented

\*\*Online video buys in MENA today skew towards private deals, which might impact results

# Brand suitability, the next evolution of safety for CPGs

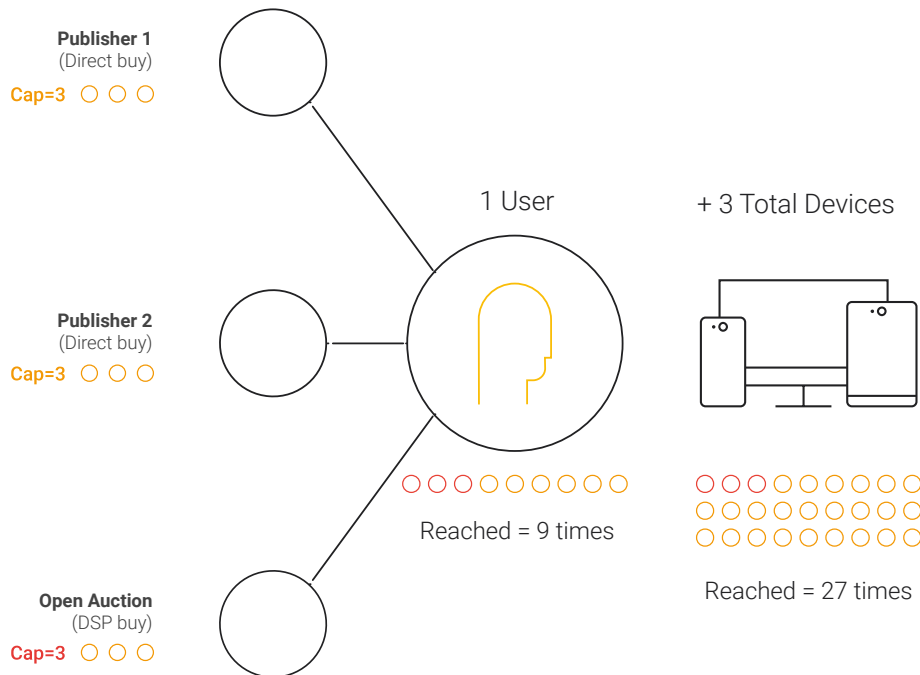
**For CPGs with low risk tolerance, brand safety is a high stakes balancing act** which is necessary to prevent possible negative associations and damage to brand reputation from being visible alongside harmful or undesirable content online.

**But being overprotective of where ads appear has drawbacks related to limited inventory and reach.** New technology allows agencies to identify environments beyond the strict block lists which could still be suitable to each brand's values.

Brand Unsafe	Brand Safe	Brand Suitable
Content which is: <ul style="list-style-type: none"><li>• Illegal</li><li>• Abusive</li><li>• Adult</li><li>• Fake</li></ul>	<ul style="list-style-type: none"><li>• Bloated block lists</li><li>• Limited inventory</li><li>• On- target</li><li>• 3<sup>rd</sup> party ad verification Partner led 2<sup>nd</sup> party data</li><li>• Verified 3<sup>rd</sup> party data</li></ul>	<ul style="list-style-type: none"><li>• Webpage level context</li><li>• Sentiment analysis</li><li>• Contextual suitability</li><li>• Pre-bid</li><li>• Post-bid validation</li></ul>

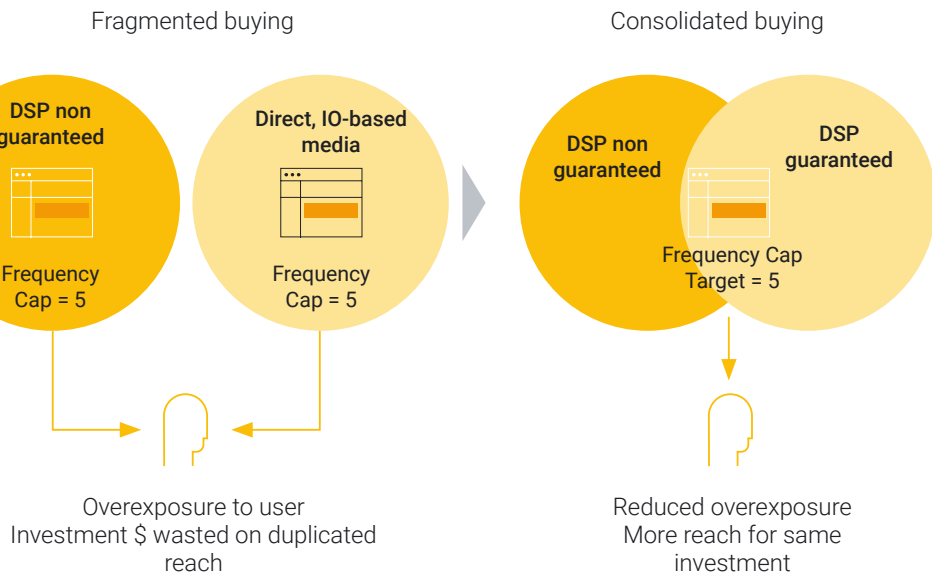
# Fragmented cross platform activations across partners duplicates reach and overwhelms consumers

## Traditional Approach to Media Buying





# Media consolidation allows for deduplication in buying, helping advertisers optimize their spend



## Consolidation delivers results

We ran a study with BCG to understand the impact of consolidating guaranteed buys. The results?

### Reach

- **10% more frequency control** on average
- **Up to 24% of media budgets being wasted** could have been used to reach new users

### Frequency Control

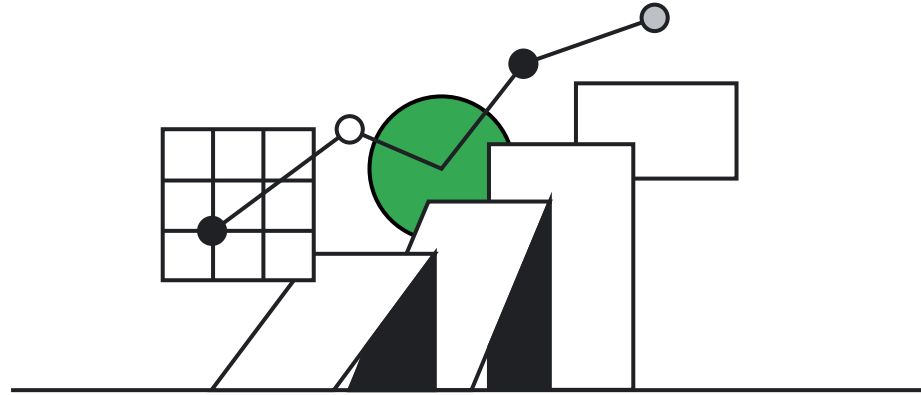
- **11% more reach** on average
- **39% of media being wasted**

Read the full study [here](#)

# So where do you start?

Below is a list of best practices to consider for you to grow your Access maturity

	Nascent	Emerging	Connected	Multi-moment
<b>Diverse mix: New inventory and channel/format diversification</b>	<ul style="list-style-type: none"> <li>You mostly use display</li> </ul>	<ul style="list-style-type: none"> <li>You use display and some mobile (mWeb) and video (instream)</li> <li>You have an audience strategy within channel/format</li> </ul>	<ul style="list-style-type: none"> <li>You use display, mobile, instream video, mApp and native</li> <li>You start to apply audience and targeting across some channels/formats</li> </ul>	<ul style="list-style-type: none"> <li>You use all formats and channels, leveraging a comprehensive audience strategy</li> </ul>
<b>Flexible access: Deal execution</b>	<ul style="list-style-type: none"> <li>You mostly use direct reservation, some network buys</li> </ul>	<ul style="list-style-type: none"> <li>You leverage a DSP to buy open auction</li> </ul>	<ul style="list-style-type: none"> <li>You leverage a DSP to buy open auction and some PD</li> <li>You are starting to apply audience to some PD</li> </ul>	<ul style="list-style-type: none"> <li>All open auction and non-open auction running via DSP</li> </ul>
<b>Quality: Invest in quality and trustworthy inventory</b>	<ul style="list-style-type: none"> <li>NA - mostly reservation</li> </ul>	<ul style="list-style-type: none"> <li>You use minimal monitoring of fraud and ads.txt compliance</li> </ul>	<ul style="list-style-type: none"> <li>You are actively monitoring fraud and optimising buys</li> </ul>	<ul style="list-style-type: none"> <li>You are actively engaged with publishers on fraud prevention.</li> </ul>
<b>Access in a brand safe way: ability to apply brand controls</b>	<ul style="list-style-type: none"> <li>You have limited quality settings to manage brand safety</li> </ul>	<ul style="list-style-type: none"> <li>You are leveraging DSP brand controls in a limited way pre-bid (mostly post bid measurement): usage of (sensitive) category blocking and viewability</li> </ul>	<ul style="list-style-type: none"> <li>You are leveraging both ad server and DSP controls prebid: Custom filters, Geo tracking, view of brand suitability for each campaign, usage of 3P solutions</li> </ul>	<ul style="list-style-type: none"> <li>You have sophisticated usage of category targeting/blocking across all channels with actionability on insights</li> </ul>



## IV. Attribution

# Executive Summary

Even though the space is highly fragmented, CPG marketers' objectives are still the same:

1

- **Media Effectiveness:** Make sure to drill down media results to an audience and a consumer stage level

2

- **Creative Effectiveness:** Utilize a variety of free and real-time tools to optimize campaigns in-flight

3

- **Sales Impact:** Kick-start a long term project on measurement to bridge marketing and sales

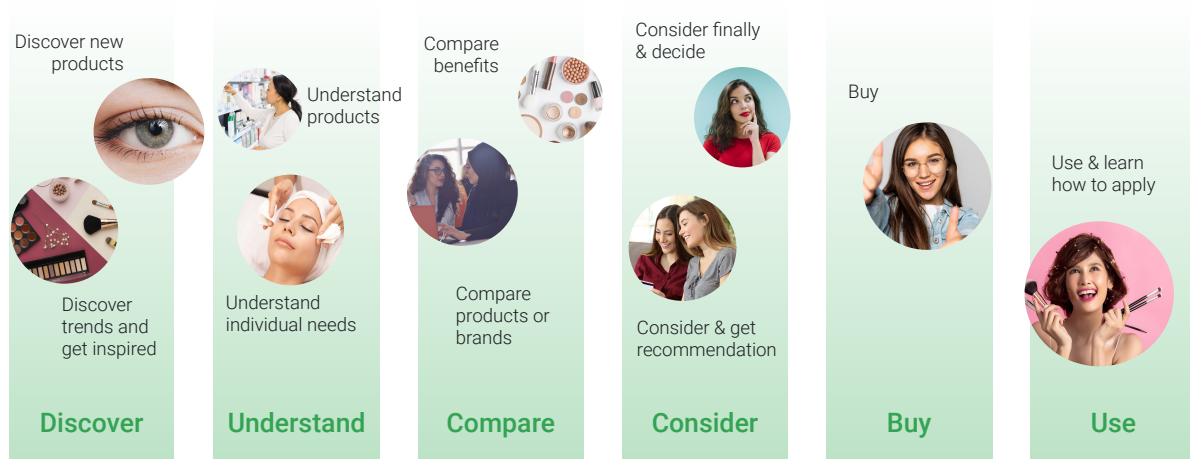
# Given the fragmented nature of today's consumer journeys, attribution is becoming more complex for CPG companies

People are involved in their purchase  
(example for Personal care)

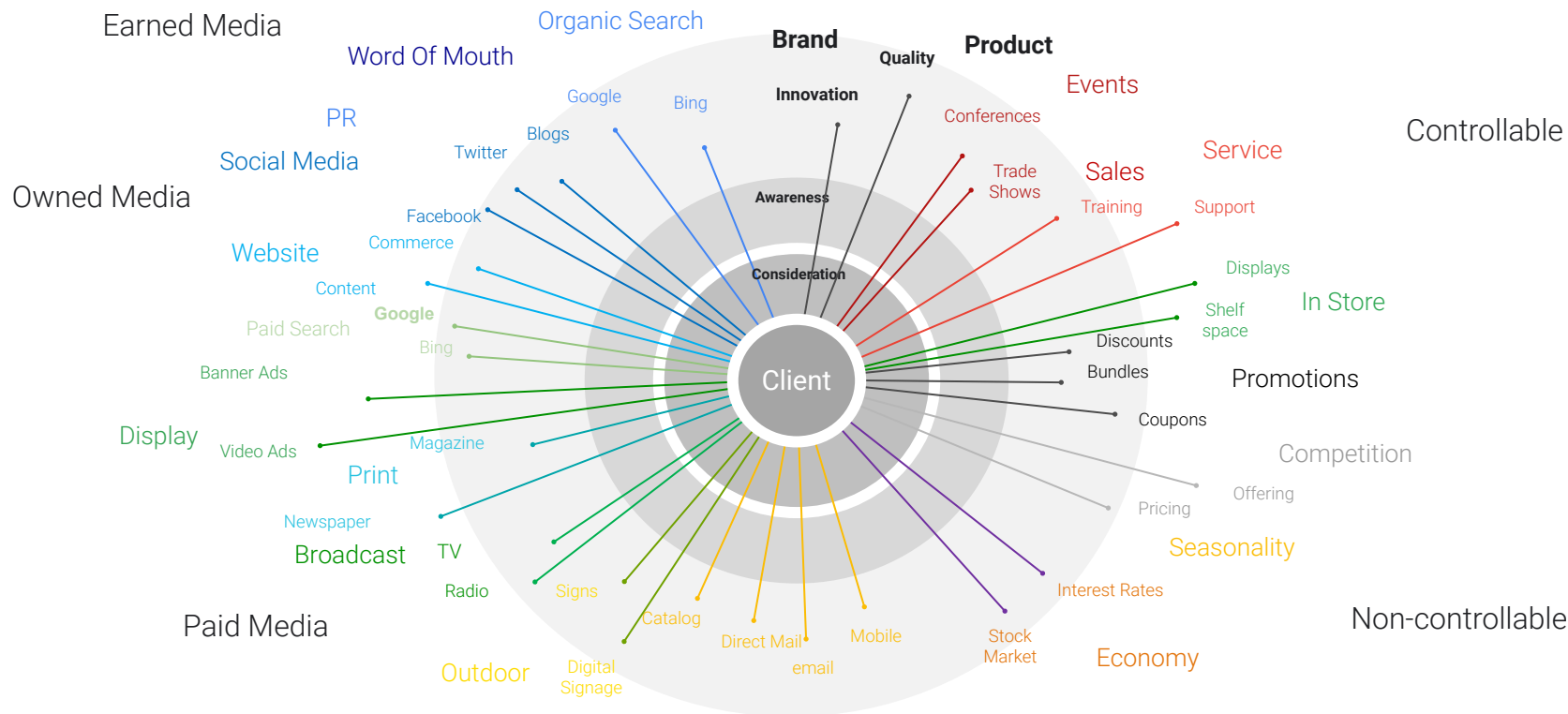


80%\* of male and female in KSA are searching both Online & Offline for trends and personal care product info before they purchase.

The path to purchase went from 4 simple stages (Consider, Evaluate, Purchase, Experience) to the six stages below



# This is further amplified by the explosion of touchpoints to reach consumers



\*Source : KANTAR Connected Beauty Study 2019 - Study on the Path to Purchase in 4 personal care categories : Hair Care, Make up, Skin Care, Fragrances  
Base: all product buyers, females n=1528, males n=992.

# Ultimately, what matters has not changed; marketers still want to build brands and generate sales

1

## Media Effectiveness

- Audience Verification
- Viewability
- Reach / Frequency
- Duplicated Reach
- Ad Views
- View-Thru Rates
- Completion Rates
- Retention Rate
- Site Visits
- Social Actions

2

## Creative Effectiveness

- Ad Recall
- Brand Perception:
  - Awareness
  - Consideration
  - Favorability
- Brand Interest (Search lift)

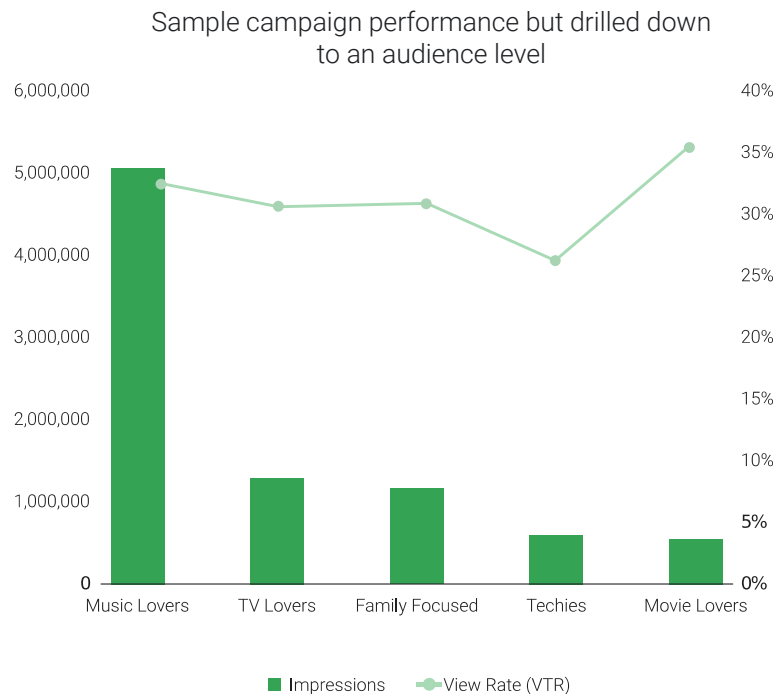
3

## Sales Impact

- Purchase Intent
- Sales
- Purchase
- Behaviors
- Profitability
- Loyalty

To measure achievement on these two objectives, it is important to **ask the right questions and put in place a robust framework** for key performance indicators along these 3 dimensions:

# Media effectiveness should be drilled down from the campaign level to the audience level



Especially in-campaign it's crucial to **monitor the performance of different audience segments** and their responses to your assets.

Comparing different metrics in real-time on live dashboards can help you **invest behind the most effective audiences** and improve your performance.



# And finally, for media, we need to consider a full conversation with users with the appropriate KPIs at every stage of the funnel

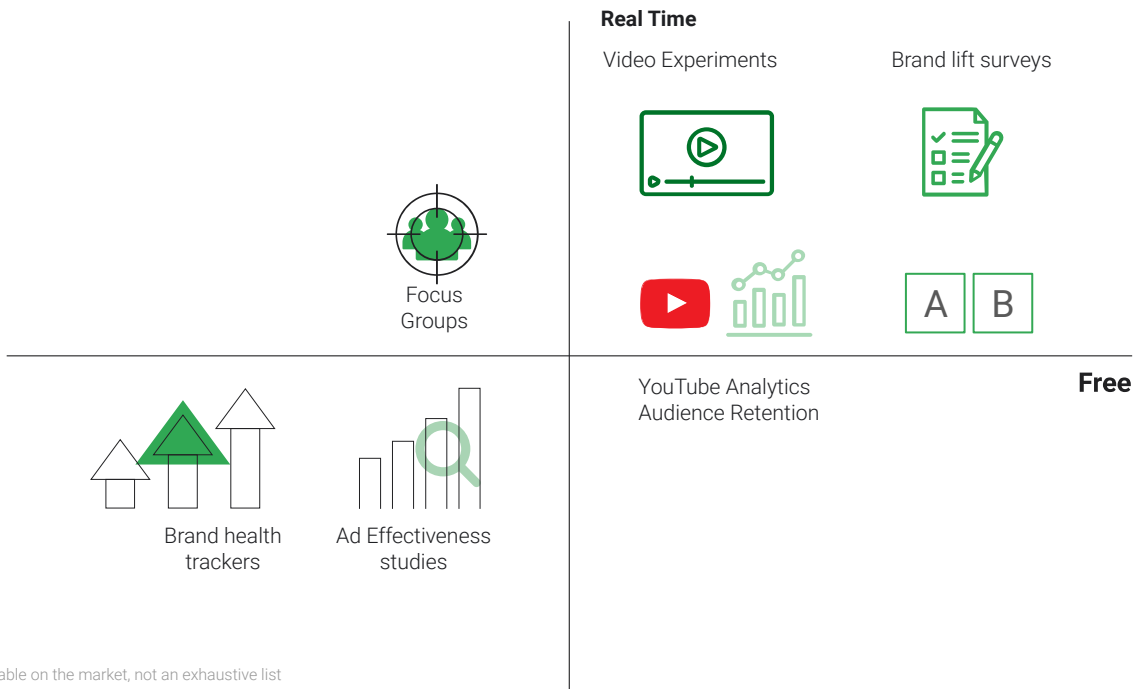
	Marketing Objectives	Media Goals	Metrics
Discover	Brand awareness Product awareness Reach Ad recall	Impressions (CPM) Maximize Awareness	Unique reach & frequency Ad recall lift Brand awareness lift Impressions
Understand			
Compare	Improve consideration Retention & loyalty Increase purchase intent	Views (CPV) Maximize Lift <sup>4</sup> (Cost-per-lifted-user)	Views / View-through-rate Consideration lift Favorability lift Purchase intent lift Clicks / CPC
Consider			
Buy	Sales online Leads Other conversions Cross-sell & up-sell	Action (CPA) Maximize Conversions	Online conversions Website actions and leads Brand interest lift App installs
Use			

Often times, CPG **marketers may not adjust their measurement strategy to the appropriate consumer journey stage** the campaign is for.

**An “awareness” creative should not be judged on lower funnel metrics.**

**Lower funnel activations are not built to deliver reach and frequency, etc.**

# On creative effectiveness, advertisers have a variety of tools at their disposal to assess their content and its impact



\*Example of tools available on the market, not an exhaustive list

# On brand lift studies\*, some of the pitfalls for CPG brands is selecting the most appropriate dimension to assess

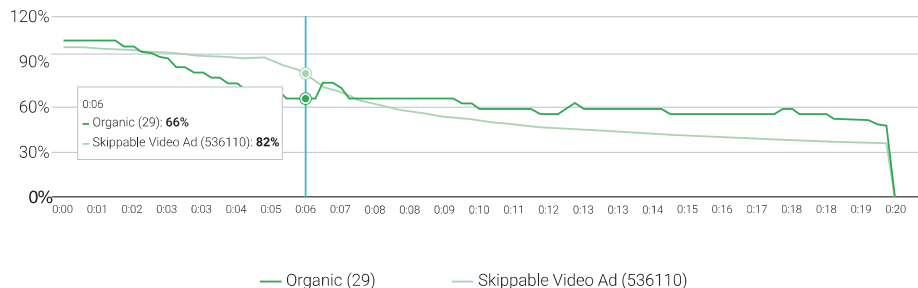
Always make sure to correlate the objective of the campaign to the right BLS metric

Marketing objective	Metric(s) to measure in BLS		Answers the question of
<b>Awareness</b>	Ad Recall	Brand awareness	<ul style="list-style-type: none"> <li>• Do people recall watching my video ads?</li> <li>• Are my target consumers more aware of my brand after seeing my video ads?</li> </ul>
<b>Consideration</b>	Consideration	Brand interest (search lift)	<ul style="list-style-type: none"> <li>• Did my video ads move people to consider my brand or product?</li> <li>• Are people more interested in my brand/product? Did my ads increase organic search activity for my brand/product?</li> </ul>
<b>Affinity</b>	Favorability		<ul style="list-style-type: none"> <li>• Are consumers more favorable to my brand after viewing my ads?</li> </ul>
<b>Purchase</b>	Purchase intent	Brand interest	<ul style="list-style-type: none"> <li>• Are consumers intending to purchase my product after seeing my ads?</li> </ul>

Also, when deciding on the objective, do you have the right creative for it? An upper-funnel awareness creative will probably not improve lower funnel metrics like purchase intent or consideration

# Audience retention is also a valuable tool helping you optimize the performance of your storyline

Tools like YouTube allow you to **understand your audience retention as the story progresses**

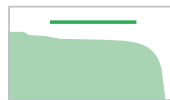


In the above example, we can see that from your total audience:

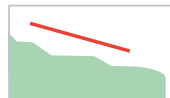
- 82% kept watching after the 5th sec
- 36% watched until the end

**Why is it important?** This allows you to **understand whether your content resonates with your audience and how you can optimize it for better results**

Your **retention curve is an excellent quality indicator of your story** and can inform future executions



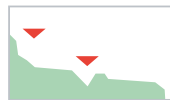
Flatness means viewers are watching your video from start to finish.



Gradual declines mean viewers are losing interest over time.



Bumps mean viewers are rewatching or sharing those parts of your video.



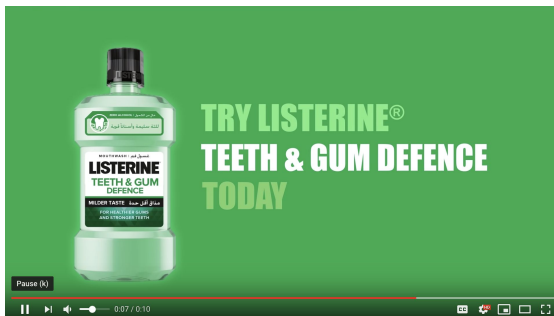
Dips mean viewers are skipping over those parts of your video.



A sudden drop means viewers are leaving your video at that specific part.

# Finally, A/B testing and video experiments allow you to explore hypotheses in real-time

1. Run creative A/B tests to understand which assets have the most impact on your audience



- Listerine wanted to see the creative impact of a regular TVC versus customized ads
- They ran a generic TVC alongside four customized versions of their Listerine video ad, based on audience insights
- The results? The customized versions produced a 38% higher VTR

2. Run video experiments to explore the impact of even more triggers on performance

- Video Experiments is a powerful testing tool that allows advertisers to assess which creative, targeting, or bidding strategies is most effective on YouTube
- Learn What Works: Reduce reliance on “gut” feeling and instead use data-backed guidance to understand what performs best on YouTube
- Fine-tune your strategies: Leverage insights to improve performance and convert non-working dollars into working media based on brand campaign and creative objectives

# For CPGs specifically, the long term play will be investing in measurement that links the journey all the way up to purchase

Some solutions exist, but others need to be established fully

<p>1</p> <p><b>Indirect sales Offline:</b></p> <p>95% of the sales but low growth</p>	<p>2</p> <p><b>Indirect sales Online:</b></p> <p>growing fast but via retailers (not data and client ownership for CPG companies)</p>
<p>4</p> <p><b>Direct sales Offline:</b></p> <p>only few brands in the CPG industry selling directly to clients</p>	<p>3</p> <p><b>Direct Sales Online:</b></p> <p>Growing but lack of focus from CPGs and only few brands selling directly to clients</p>

1 + 2 **A-**Traditionally, impact of Media activities on indirect sales, whether online or offline, can be measured with **Media Mix Modeling** studies.  
**Pros** : can attribute a value to each media channel, can be granular if the data that feeds the model is detailed enough  
**Cons** : expensive, time consuming, and complex. Not linked to a specific campaign.

**B- Mixed Matched Panels** analysis or geographic experiments can allow much faster tests and be linked to specific campaigns.  
**Pros** : campaign based, faster results, simpler to implement  
**Cons** : cost. Requires a high selling volume to be possible

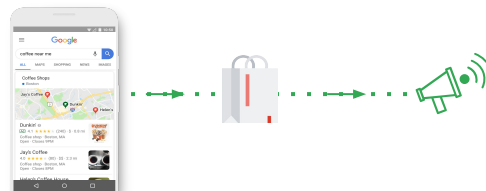
2 When selling online through retailers, CPG brands need to link their media activities back to traffic they send to retailer sites. This requires a **data sharing agreement** and **technical capabilities to pass on the conversion data**, when in place, CPG players can optimize towards sales.

# For CPGs specifically, the long term play will be investing in measurement that links the journey all the way up to purchase

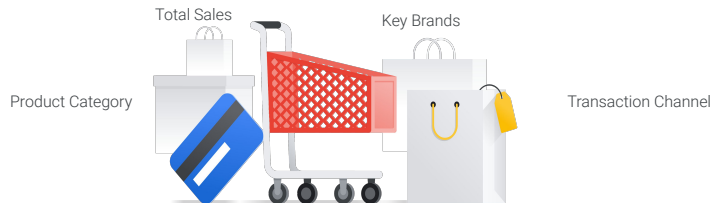
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- 4 **Stores visits:** When users click on your ads and then visit your store, we attribute those store visits back to the ad, through Geometry mapping and wi-fi scanning



- 4 **Stores Sales Direct:** Store Sales Direct helps you understand what kinds of sales result from your online campaigns by sending transaction records data through Google Ads



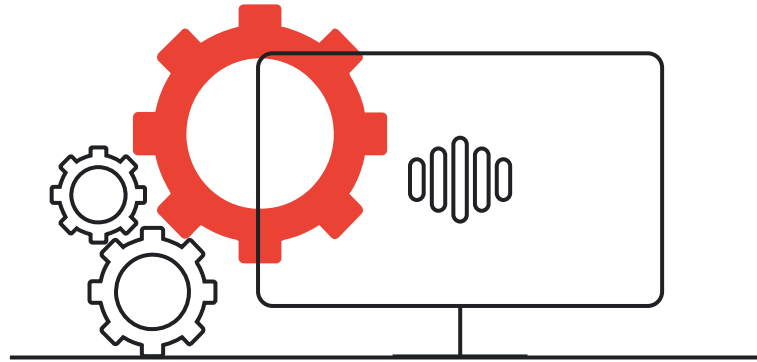
\*standard (and extensive) attribution features would apply here

# So where do you start?

**Below is a list of best practices** to consider for you to grow your Attribution maturity

	Nascent	Emerging	Connected	Multi-moment
Measurement ecosystem	<ul style="list-style-type: none"> <li>You do limited performance analysis; based mainly on last click models</li> <li>There is no online-offline tracking solution in place</li> </ul>	<ul style="list-style-type: none"> <li>You use last Click attribution for mix optimisation post-campaign, Offline econometrics or ROPO to estimate impact of digital</li> <li>You use proxy-conversions to estimate the role of media on sales</li> </ul>	<ul style="list-style-type: none"> <li>You leverage cross-channel analysis that includes all online touch points across devices</li> <li>You optimize and act based on estimated offline revenue (SV x CVR x AOV) or through store sales direct</li> </ul>	<ul style="list-style-type: none"> <li>You have a completely set up measurement ecosystem across channels and devices, to measure online and offline ROI (incl. attribution, MMMs, brand tracking)</li> </ul>
KPI setting and optimisation	<ul style="list-style-type: none"> <li>Digital media KPIs are not linked to business outcomes (e.g. vCPM, vCPCV, CPC), possibly due to lack of conversion tracking</li> </ul>	<ul style="list-style-type: none"> <li>You have conversion KPIs set-up across channels (e.g. CPA)</li> </ul>	<ul style="list-style-type: none"> <li>You use performance KPIs across channels linked to revenue and/or profitability (e.g. omni ROAS)</li> </ul>	<ul style="list-style-type: none"> <li>Your performance KPIs are linked to lifetime customer value used for in-flight mix optimisation</li> </ul>
Testing and feedback mechanisms	<ul style="list-style-type: none"> <li>Limited test and learn ability</li> <li>Campaign effectiveness feeds into annual planning</li> <li>Org still working in siloed approach</li> </ul>	<ul style="list-style-type: none"> <li>You use A/B testing</li> <li>Campaign effectiveness feeds into next campaign</li> <li>Org opened up siloes to one team</li> </ul>	<ul style="list-style-type: none"> <li>You have always-on A/B testing</li> <li>Effectiveness feeds into activity whilst in-flight</li> <li>Your Online-Offline teams speak 1 common language</li> </ul>	<ul style="list-style-type: none"> <li>You have always-on multivariate testing</li> <li>Effectiveness feeds into real time actions across channels</li> </ul>





## V. Automation

# Executive Summary

With the explosion of data, CPG brands need to harness the power of automation:

1

- **Reveal consumer insights and trendspot** upcoming changes

2

- **Scale personalization** by harnessing creative automation

3

- Leverage machine learning to **optimize media performance**

4

- **Conduct sophisticated measurement** exercises using cloud solutions

# The abundance of data requires brands to leverage automation for faster, smarter decision making

Brands can leverage automation to

## Develop Insights

Use automation to data-crunch at scale helping you:

- Understand **user sentiments**
- **Profile** them into personas
- Develop a strong understanding of their **wants and needs**

## Execute Media

Use automation to accelerate media execution, either through:

- **Scaling implementations** through automated means
- **Producing creatives** at scale via automation

## Optimize Performance

Use automation to **improve performance**, leveraging inherent features to improve results with bidding, budget, inventory, audience changes and more

## Report And Measure

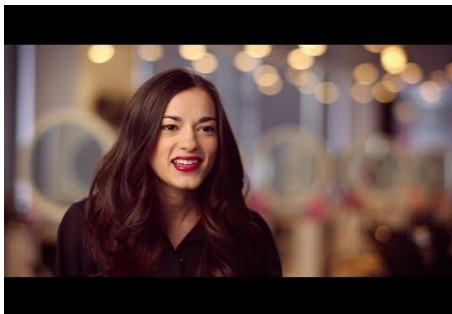
Use automation to improve reporting and measuring, by:

- **Automating standardized reporting** to focus more on insights and learnings
- Leveraging advanced cloud features to **import data and run custom experiments**

Media Lifecycle

# Automation allows you to data-crunch and trendspot at scale

Trendspotting patterns for CPG brands to gather competitive advantage



Automate processing and activating strategic data sets



Key examples of trendspotting benefits for CPG brands

- **Fleeting long term trends:** Identify opportunities using intent data such as search and social listening
- **Demand prediction:** Identifying trends to manage optimum levels of inventory to boost operational efficiency
- **Optimum product portfolio mix:** This will be determined from the first point of identifying demand

Case Study: L'Oreal Paris uses search insights to build product

Key benefits for CPG brands for effective data crunching

- **Audience intelligence:** Analysing shopper attributes & insights (covered under the audience section)
- **Data collection** from retailers
- **Price setting** including determining optimum product mix to war gaming simulations

Case Study: Zyrtec uses real-time feeds to improve assistance

# CPGs have embraced automation of messaging and bidding to deliver personalized experiences

Aveeno uses automation at scale to produce personalized content



**Automation can be complex. Make sure to**

- **Have clear roles & responsibilities:** Between client, media and creative/content agency. This includes a clear **Governance** framework
- **Map audiences to the consumer journey & A/B Test:** This will determine what type of CTA would work best i.e. is the intent high or is the user simply browsing for options
- **Collect data:** Ensure data implementation is done correctly to ensure accuracy when segmenting and analyzing
- **Review historical data:** Algorithms require a base of data points to gather learnings from to optimize campaign further. Automation is therefore suited to larger organizations

Click for full Director Mix personalization case studies [Link](#)

# Automation creates confidence, trust and better results when you learn to let go

Creative rotation

1

Auto select creative evenly or on the basis of price, clicks, goals, time spent, or custom metrics

Inventory buying

2

Set conditions and rules to inform the system to buy only matching inventory

Budget optimization

3

Allocate budgets based on specific budget and pricing criterias, eliminating the need for constant monitoring

Trigger ie, weather, sports, tv

4

Establish triggers to inform advertising activities. Overlapping behavioural traits to timings of ads is a good example

Audience management

5

Automate audience addressability on the basis of pre set criterias

# Cloud applications allow you to connect data sets for more powerful use cases

## Data Collection

### Traditional Data

Brand Perception & Survey Data



Ad Monitoring & Survey Data

### Digital Data

Aggregated Campaign Performance & Programmatic Data



Aggregated Social campaign Data



### Transactional Data

#### 1<sup>st</sup> Party Data Sources



CRM, Sales Data

#### 2<sup>nd</sup> Party Data Sources



Retail e-Commerce data

## Single Source of Insight

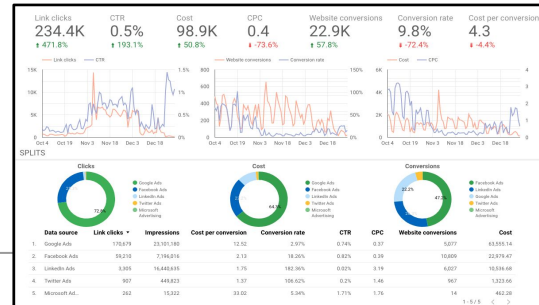
Pretrained Models

Trained Models

Transform  
Analyze

## Democratized Analytics

Visualize



Activating

Ads Platforms

Email Platforms

Content Optimization

Commerce Platforms

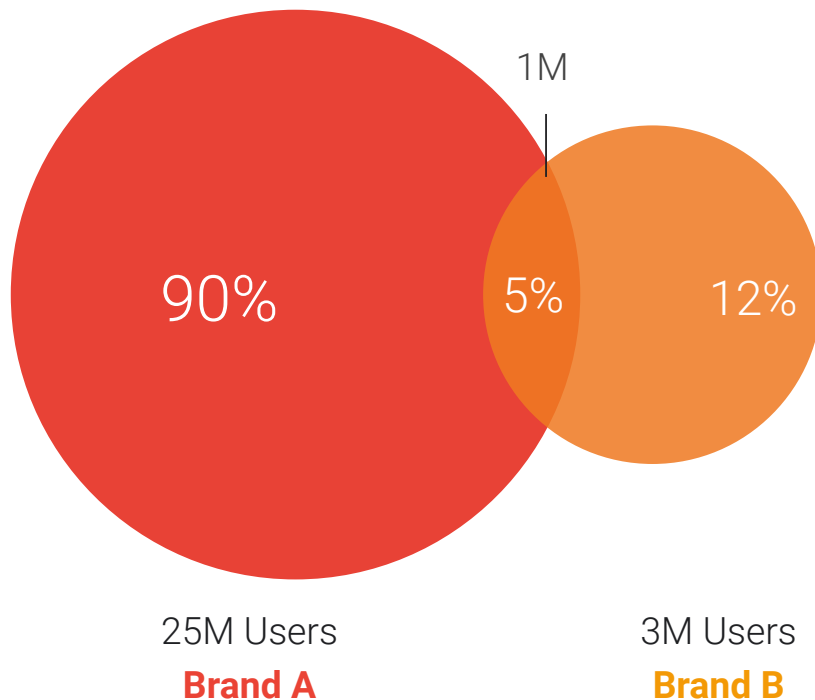
CRM Platforms

Social Platforms

Aggregated Actionable Insights

# With this, we are able to create advanced measurement activities on product portfolios

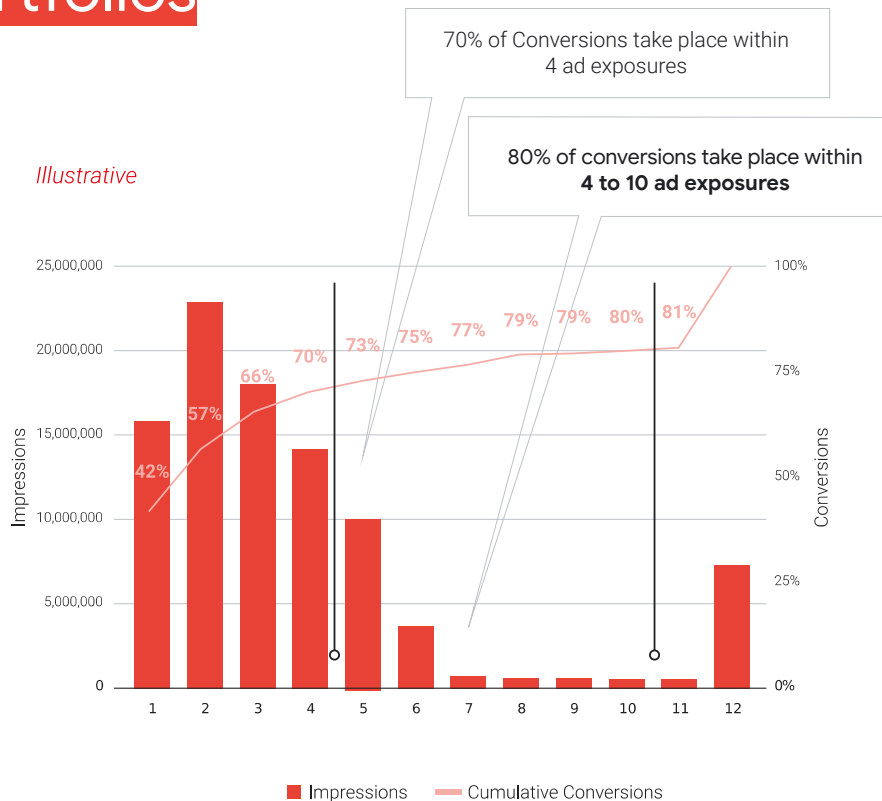
Example: **Do users who watch Brand A content also purchase Brand B?**





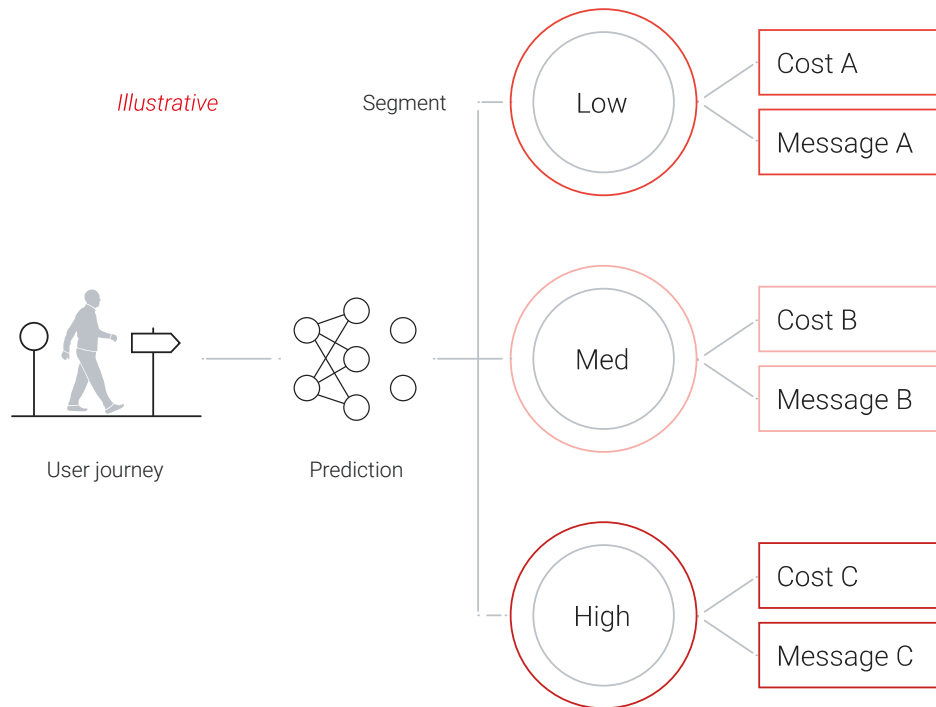
# With this, we are able to create advanced measurement activities on product portfolios

Example: **How many times does a user need to see an ad to download a coupon?**



# With this, we are able to create advanced measurement activities on product portfolios

Example: **What it is the likelihood of a new user to become a “converter” based on my current data sets?**



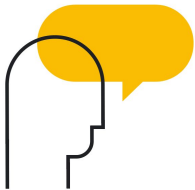
# So where do you start?

Below is a list of best practices to consider for you to grow your Automation maturity

	Nascent	Emerging	Connected	Multi-moment
<b>Full stack efficiency and integration</b>	<ul style="list-style-type: none"> <li>No linking amongst adtech</li> </ul>	<ul style="list-style-type: none"> <li>Ad server+bid management used, adserver for reporting</li> </ul>	<ul style="list-style-type: none"> <li>Transition to analytics as source of truth linked to ad server and bid management</li> </ul>	<ul style="list-style-type: none"> <li>Full ad tech platform and marketing suite, linking throughout</li> </ul>
<b>Automated campaign planning</b>	<ul style="list-style-type: none"> <li>Mostly direct buys, little use of data for planning</li> </ul>	<ul style="list-style-type: none"> <li>Transition to some programmatic, seeking consolidation for planning</li> </ul>	<ul style="list-style-type: none"> <li>Programmatic + x-channel planning with optimisation</li> </ul>	<ul style="list-style-type: none"> <li>Full-funnel planning across channel programmatically. Data and insights linked to planning</li> </ul>
<b>Bid automation in search</b>	<ul style="list-style-type: none"> <li>Manual bids with AW strategies</li> </ul>	<ul style="list-style-type: none"> <li>Rules to adjust bids more freq</li> </ul>	<ul style="list-style-type: none"> <li>Bid modifiers, RLSA, training DDA to use in bidding in future</li> </ul>	<ul style="list-style-type: none"> <li>POS, Perf, ROAS, bidding to DDA model with rules</li> </ul>
<b>Bid automation in Display &amp; Video 360</b>	<ul style="list-style-type: none"> <li>Little programmatic with manual fixed bids</li> </ul>	<ul style="list-style-type: none"> <li>More programmatic optimised within channel, manual bids optimised with multipliers</li> </ul>	<ul style="list-style-type: none"> <li>Optimised bidding with automated bid tactics</li> </ul>	<ul style="list-style-type: none"> <li>Full autobidding with DDA in bids and budgets, custom bidding</li> </ul>
<b>Enterprise dev solutions for campaign setup and development</b>	<ul style="list-style-type: none"> <li>No scaled solutions to manage campaigns - all within UI</li> </ul>	<ul style="list-style-type: none"> <li>Leveraging adtech API for ad server campaign setup</li> </ul>	<ul style="list-style-type: none"> <li>Some use of structured data files/API for bid management</li> </ul>	<ul style="list-style-type: none"> <li>Full use of data files and API for setup and maintenance</li> </ul>



Closing



## The 6th dimension, people

Rayan Karaky / Head of Platforms and Partnerships,  
Google MENA

Embracing digital transformation and digital maturity have become obsessions of organizations worldwide as consumers turn to the online world to meet their needs. The challenge, however, seems to consistently be: where to start? Is this about investing in digital channels? Building infrastructures? Digitizing processes and streamlining approaches across teams? One key insight I take from this playbook is the variety of scenarios when it comes to transformation. No one got everything right (yet), and that's the beauty of this challenge: There is no right or wrong way - as long as we have the courage to start doing what is needed.

We have always known that transformation is not easy; give me a blank sheet of paper and I will immediately draw for you the ideal scenario of how I want my audience journey to look, my data infrastructure to be built and my teams organized for this new data - driven world. There's nothing easier than starting fresh, but that's not a luxury everyone can afford. What needs to change first is our mindset.

For transformation to land effectively, we need to abandon organizational rivers of thinking. This playbook may guide you to improve audience utilization, but it won't tell you how your organization should look, how to manage mindset changes or what legacy practices need to be completely overhauled - if not thrown out the window. During my years working with customers, I have seen many companies attempt to transform and make the typical mistake of starting with acquiring technology and then putting all the focus on integrating systems. They didn't fail because of a lack of investment or talent. They failed due to a highly charged political environment, a monopoly on ideation within teams, or - even worse - a lack of unifying company objectives. **We must remember that technology is barely a facilitator. Humans are the catalyst and that tech doesn't solve problems - humans do.**

The other common mistake I see time and time again is the nature of relationships with partners. Often when agencies or system integrators are hired, it is with a narrow scope that focuses on the lowest price against a service, typically - media planning and buying. The fast-paced disruption of the marketing world with technology makes many of these arrangements obsolete within their first few months. **I believe partners should be evaluated exactly like your consumers: based on lifetime value.** Agencies who are business partners should have the same KPIs that you share with your teams. As long as this is not addressed, shopping around will continue and the longevity of transformation will be threatened.

In closing, this playbook will continue to evolve as a way to stay on top of the changing landscape in our industry, so we can learn from each other and continue mutually growing our businesses.

# Contributors

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Thank You

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