

State of Creativity:

# THE FIGHTBACK BEGINS



The creative industry has been bruised by the pandemic, but in all the chaos lies opportunity. Our global survey will show you what needs to change and how.



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“I think challenges of any kind usually lead to big leaps in a lot of fields. Creativity is one of them. Creativity can bloom under the toughest conditions.”

SENIOR BRAND LEADER | HEALTH & BEAUTY

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# Welcome to the State of Creativity



CHARLOTTE WILLIAMS  
VP CONTENT  
LIONS | THE HOME OF CREATIVITY

## A creative re-set

Lions' first global survey went out at the beginning of 2021. Our intention was to check in with the global creative industry. The honesty of the 1,500 responses was illuminating, from the creative director who laments the fact that **“there is no creativity; just production of reassuring content”** to the automotive brand marketer who complains of **“falling into pathetic execution vs true creativity”**.

Along the way, though, there were **hundreds relishing the creative opportunity to contribute to business recovery**. Thanks to everyone for your candour – it was truly appreciated.

## Why post-crisis growth depends on creativity

The pandemic is fundamentally changing what people want and businesses need to evolve to accommodate these new expectations. Old ways of thinking and “sticking to what’s worked in the past” simply won’t do. What was so positive to see is a groundswell of optimism around the role of creativity and an opportunity to rethink the way we work: an opportunity to produce more meaningful, more entertaining and more exciting output. It’s been amazing to see so many inspiring examples of this at the Cannes Lions awards for 2020/21.

## A collective consciousness

We’ve scrutinised thousands of comments submitted by respondents and identified a shared sentiment across the industry. This can best be described as “radical optimism”, “disconnected collaborations” and “a cautiously committed creative appetite”.

The report is based on three inputs:

- A global survey of 1500+ marketers, creatives and media owners at “Head of” level and above
- One-on-one interviews with multiple, global CMOs, creatives and marketing leaders
- Advice from creative leaders and experts featured on LIONS Live





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# THE SENTIMENT TODAY

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“If you think about the point we’re at in time - which some are calling the “great reset” - at this moment in the world there is a responsibility for companies such as ourselves to really help chart a path forward.

We can always say that things are not going to be perfect. But I’ve always maintained that working in this industry is a burden and a privilege.

Now, what are you going to do with that privilege? What truth are you going to tell? How do you help people navigate what’s next?

[We’re] uniquely poised to help with that effort.”



NADJA BELLAN-WHITE  
GLOBAL CHIEF MARKETING OFFICER  
VICE MEDIA GROUP



# 1 Radical Optimism

Given the industry's inherent disposition to problem-solving, we saw a level of comfort from our respondents towards all the current ambiguity. But the levels of confidence and positivity in the comments were unexpected. Despite burnout, remote working and temporary stagnation, the industry's natural inclination towards problem-solving has never been keener.

RECOLOUR YOUR WORLD | LIST GENERAL CONTRACTOR 2017



REICHL UND PARTNER WERBEAGENTUR | AUSTRIA

**“The blank canvas, clean-slate moment in the resetting scenario lends a perfect platform for creativity to contribute in the business recovery... a strategic opportunity to rise up to the occasion.”**

VP MARKETING | ENERGY COMPANY





## 2 Disconnected Collaborations

The crisis seems to have brought the global creative community closer together. Some things are simply bigger than ‘the competition’. There’s no denying, though, that creatives and marketers thrive on human interaction and communication. Remote production shoots and virtual pitches are not the creative community’s preferred way of working, with teams longing for the benefits of face-to-face contact once more. But you told us how you adapted and in the process, honed new skills - be it upskilling in animation and CGI, refined briefing sessions, or improved listening skills.

LO AND BEHOLD | NETSCOUT

2017



PEREIRA & O'DELL | NEW YORK

“There’s a loss of serendipity in the creative process”

CREATIVE | FULL-SERVICE AGENCY

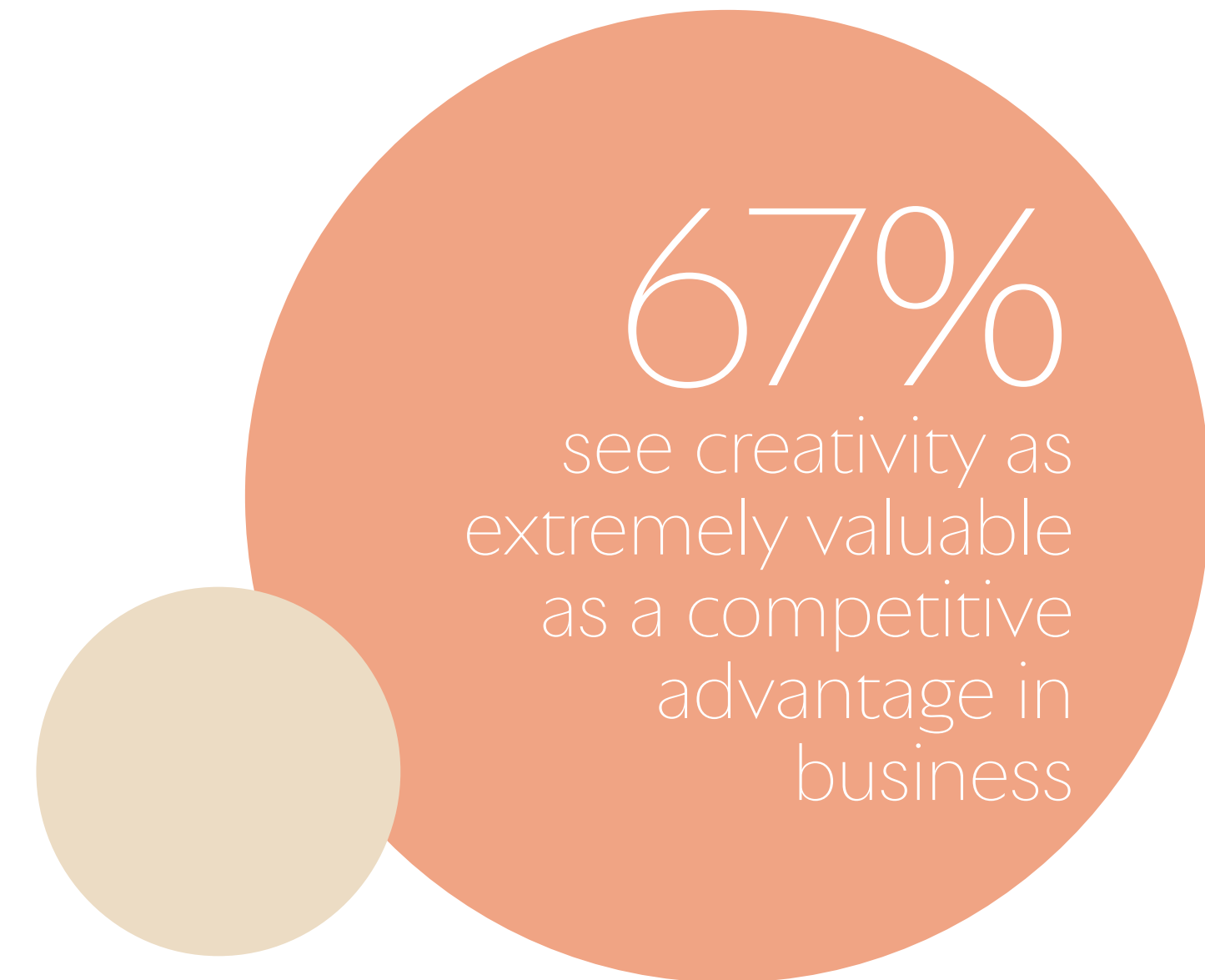




# 3 A cautiously committed creative appetite

Fear and reticence were mentioned in a lot of responses. Agencies frequently lamented a lack of bravery from brand partners and brand partners frequently cited the dread of sounding tone-deaf. But as much as agency partners think brands aren't committed to creativity, the opposite is, in fact, true: **67% see creativity as extremely valuable as a competitive advantage in business.** We also saw strong commitment to creative marketing overall from brands. So why the disconnect? Is it about not having a shared understanding of the true definition and impact of applied creativity? It seems so. It would make sense that the respondents to our survey believe in the power of creativity: its capacity to change minds, behaviour and business prospects. We just all need to get on the same page. As one creative put it:

"There is a perception that 'creativity' and 'effectiveness' are two different entities. When in reality, they are just two sides of the same coin. Work can only be truly effective if it is truly creative".



**“Clients want to do innovative things and ask for something never done before, but they’re not brave enough to do something novel and want examples of how we have done it before... which is contradictory.”**

CREATIVE | FULL-SERVICE AGENCY



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# THE FIVE KEY CHALLENGES FOR 2021

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# The Five key challenges for 2021

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The last 15 months caused huge upheaval within the creative communications industry. Our research set out to identify the most pressing challenges, biggest opportunities and new approaches for creative and marketing leaders.

These are the top five key points:

1

Creativity's worth the fight. And now is the time to hold hands and jump together

2

Committing to creativity. This is the moment to buckle in for the long-haul

3

The campaign to bring back braver creative

4

How do we make killer, collaborative creativity from the (kitchen) table?

5

Designing for digital dexterity



# EXECUTIVE SUMMARY



# 1 — Creativity's worth the fight. And now is the time to hold hands and jump together

Brands say they want big, bold, creative ideas – and agencies are straining at the leash to provide them.

But saying one thing and meaning another is causing confusion. Agencies feel that their clients have limped into 'safe' mode and are obsessed with short-term gains.

The challenge is to find common ground – for brands and agencies to agree on exactly what is desired and how this can be achieved.



Three next steps...

## Steer mutual collaboration through a shared agenda

We need to be explicit about what the goal is, creatives need to be business partners to gain true respect from clients.

“Better creative, better insights” – everyone agrees on the goal, but I’m not sure there is alignment on how to get there. We need faster mutual collaboration and ways to keep it all very real... real to consumers and markets... while trying to breakout and connect our brands to be really helpful to our consumers and customers, some of whom are in “survival’ mode.”

SENIOR BRAND MARKETER | FMCG FOOD & DRINK

## Focus on the value for brands – and for consumers

Work must always be a value-exchange and focused on the outcomes. Again, teams must be clear on what value is and revisit if necessary.

“The whole notion of creative value – of creativity as a self-serving practice for agencies in disregard of what is actually valuable for the brands – must be re-evaluated, reassessed. There is an unedited urgency to apply creativity as a means of healing and overcoming the many challenges faced by markets.”

SENIOR AGENCY LEADER

## Encourage a broadened definition of creativity

There needs to be clearer consensus on what creativity is. It’s not about performance v. brand marketing or ideas v. execution: it is wide-ranging and multi-dimensional.

“Each year I give a lecture to the MBA students at Oxford University about two kinds of creativity in business - innovation and expression. Innovation is about arranging the world in the way your company thinks it should be and Expression is about arranging the world in the way your company feels it should be. Brilliant companies do both.”

PERRY NIGHTINGALE | SVP CREATIVE AI | WPP



# 2

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## Committing to creativity. This is the moment to buckle in for the long-haul

The last two years have seen a partial retreat from creativity, with a focus on short-term results (at a cost). Before committing to wild and wonderful ideas or wider messaging designed to reap future rewards, brands now want assurances.

There needs to be better, more unified ways to define and measure creativity so that brands will commit to it.

Three next steps...

### Defend the soft metrics for creativity as much as the hard metrics

Metrics such as brand health are important and often underestimated. As Hurman and Field showed in their 2020 study **“The Creative Effectiveness Ladder”**, they should be tracked over six months, not just the short-term. Brands need a wide-range of metrics to evaluate successes of campaigns.

“It’s hard to build a brand from banner ads, but they are increasingly used because the C-suite can see instant results, rather than building a brand over time.”

“There is a wide gap for clients in understanding the correlation between marketing effectiveness and brand health - i.e. the value of ‘soft metrics’ is continuing to diminish.”

SENIOR CREATIVE AGENCY LEADERS

### Agree on the objectives and KPIs from the outset

The holy grail of all partnerships. Rule number one. Be clear and don’t rush this stage.

“It’s more about getting the clients to agree to the right KPIs for the work, depending on whether the objective is awareness or engagement/conversion.”

SENIOR AGENCY LEADER

### Recognise that the long-term brand work will have a halo effect on short-term stunts

The Creative Effectiveness Ladder shows long-term brand and sales growth to be the ultimate goal - and work needs to be in the market for six months or more for the best effects.

“We need to prove to clients that short-term spikes are not the goal.”

SENIOR CREATIVE AGENCY LEADER

“If you invest in the long-term value of the brand, that long-term creative idea - you’ll be so much more successful in profit later on, and you’ll be more resilient. This is a conversation that more companies are having. People will turn back to those things they are more familiar with.”

SENIOR BRAND MARKETER | PHARMACEUTICALS

# 3

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## The campaign to bring back braver creative

In times of crisis, creativity famously flourishes. Unfortunately, the creatives work for the brands – and the brands are currently disinclined to deviate from what appear to be safe tactics.

Lost in a sea of sameness, brands risk missing out on a raft of once-in-a-lifetime opportunities.

However, the agencies are committed to upskilling their workforce in pursuit of ground-breaking ideas. Can they convince their clients to take the plunge?



Three next steps...

### Get to the root cause of the problem first to unlock more original ideas

You often have to do some serious self-evaluation and reflection to dig out the most brave ideas that feel authentic to you and to consumers. Trust your gut.

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“We’re using a strong creative problem-solving process for internal and client projects, leading to some groundbreaking developments for both the agency and clients.”

EVENTS SPECIALIST

### See the changes in consumer behaviour as a licence to try new things

Be in lock-step with consumer sentiment and focus on niche moments in time as much as big, long-term trends. There are plenty of opportunities to be had at a precise moment in time.

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“There’s a lot of new techniques, methodologies and approaches to expand our creativity and bring new and exciting ideas, but we need to understand how agencies can open their minds to this world.”

BUSINESS MEDIA OWNER

### In an environment of constant change, take advantage and iterate

Don’t be afraid of experimentation and trying new things. Everyone has a responsibility here. Creative courage is contagious.

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“One significant positive outcome of the pandemic has been agencies’ and clients’ willingness to create, iterate and ideate strategically and creatively in real-time given the rapidity and acceleration of change.”

CREATIVE AGENCY LEADER



# 4

## How do we make killer, collaborative creativity from the (kitchen) table?

Deprived of meaningful human interactions, many creatives are unable to operate at their very best. The serendipitous sparks have been all but extinguished, and you're telling us you're burnt out.

Motivation came up countless times. No-one has a magic bullet in these "unprecedented times".

As leaders, ideas people and problem-solvers, we must rally together, support each other and come up with solutions.



Three next steps...

### Provide access to examples of creative excellence

In times where in-person brainstorming can't take place to spark ideas, establish centres of excellence that inspire creativity.

"We're creating centers of excellence that everyone in our global network can access remotely."

CHIEF STRATEGY OFFICER | CREATIVE AGENCY | UK

### Concentrate on tighter collaboration and training with partners and clients

Find unconventional and fun ways to work with partners if you can. We might be zoomed out but the businesses that will thrive are the ones that find ways to keep the energy up.

"We're ensuring tighter collaboration with production. We're choosing a key production partner and running 95% of the work through them to achieve efficiencies."

HEAD OF CREATIVE | AGENCY | AUSTRALIA

"We've got closer contact to stakeholders through organising more remote work sessions and catch-ups."

STRATEGY DIRECTOR | CREATIVE AGENCY  
NETHERLANDS

### Re-imagine the platforms and technologies in which we build creative ideas

There's a wealth of tools out there to improve real-time communication. It sounds obvious, but make sure you tap into them rather than default to what's easier. There are better ways to work.

"As an art director I need to work in real time with my copywriter, and some of the technologies we use aren't efficient. The pandemic has really put into focus obsolete ways of working. Instead of my writer sending me a doc and me designing everything separately then saving it and sending it back to her for review... we need to re-imagine our platforms."

CREATIVE AGENCY LEADER



# 5

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## Designing for digital dexterity

As Professor Scott Galloway said at Cannes Lions Live last year (quoting Lenin): **“There are decades where nothing happens; and there are weeks where decades happen.”** You can guess where we are right now.

Digital transformation was already a business advantage, but now it’s a business imperative. In the race to keep up though, people are worried about getting lost. It’s as much about culture as it is about technologies and it’s as much about the idea as it is the execution.

There’s an opportunity for the brands who can be truly distinctive.



Three next steps...

### Scrutinise your virtual shelf

Brand leaders explained how they are doubling down on content for their digital shelves on Amazon and other platforms

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“Ecommerce has made us be more effective - we weren’t very organised in our virtual shelf. We have massively increased the amount of A++ content we put on Amazon. We focus on the detail.”

GLOBAL BRAND LEADER | PHARMACEUTICAL

### Do digital-first strategic planning

Quick pivots to produce digital hacks are now evolving into robust digital strategies. The top priorities are structured planning, building out more significant capabilities and more customisable ideas.

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“We’re focused on proposing ideas that can be customised in digital and physical channels”

BRAND ACTIVATION AGENCY LEADER

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“We’re bringing on better data mining and digital analytical capabilities to sharpen the creative solutions”

SENIOR CREATIVE AGENCY LEADER

### Work at a sustainable speed

It’s of paramount importance to figure out what you can hack and automate to allow breathing space for ideas, but creation at a sustainable speed.

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“There’s a faster creative process, more agile, creating in days what used to be weeks”

CREATIVE AGENCY LEADER

Timelines were fast before, now they’re even faster. We are working against not only a time clock, but a pandemic clock that can shift timelines with little to no warning.

CREATIVE AGENCY LEADER



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# 1

Creativity's worth the  
fight. And now is the  
time to hold hands  
and jump together

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Creativity's worth  
the fight. And now  
is the time to hold  
hands and jump  
together

WELCOME HOME | APPLE



GRAND PRIX

TBWA\MEDIA ARTS LAB LOS ANGELES | 2018

At LIONS, we define creativity as “unusual, original and unique thinking, which can be usefully applied and executed”. Creativity is innate, extraordinary and is in every human - but it’s a muscle that requires constant nurturing. The breadth and depth of creativity is constantly changing, enhanced by new developments in data and technology. Creativity can be experience design, innovation, commerce and transformation. It always requires fresh thinking on how it is applied, revisiting the context in which it is best used.

Yet there’s a disconnect between how brand leaders and creative partners regard creativity. Brand leaders told us that they believe in

creativity’s value to drive growth, but creative partners told us that they don’t experience this confidence in creativity from brands.

There’s a need for greater alignment between brands and creative partners on their vision of creativity. There is also a need for creative partners to help brands follow through on their creative ambition, particularly as many long-term strategic brand plans were eclipsed by short-term reactive schemes to ensure sales during the pandemic.





# The insight: A disconnected view on how much brands value creativity

Despite what creative partners might experience in practice, brand leaders overwhelmingly value creativity to drive growth. **67% see creativity as extremely valuable** as a competitive advantage in business. However, only 17% of creative partners believe that brands value creativity to the same extent.

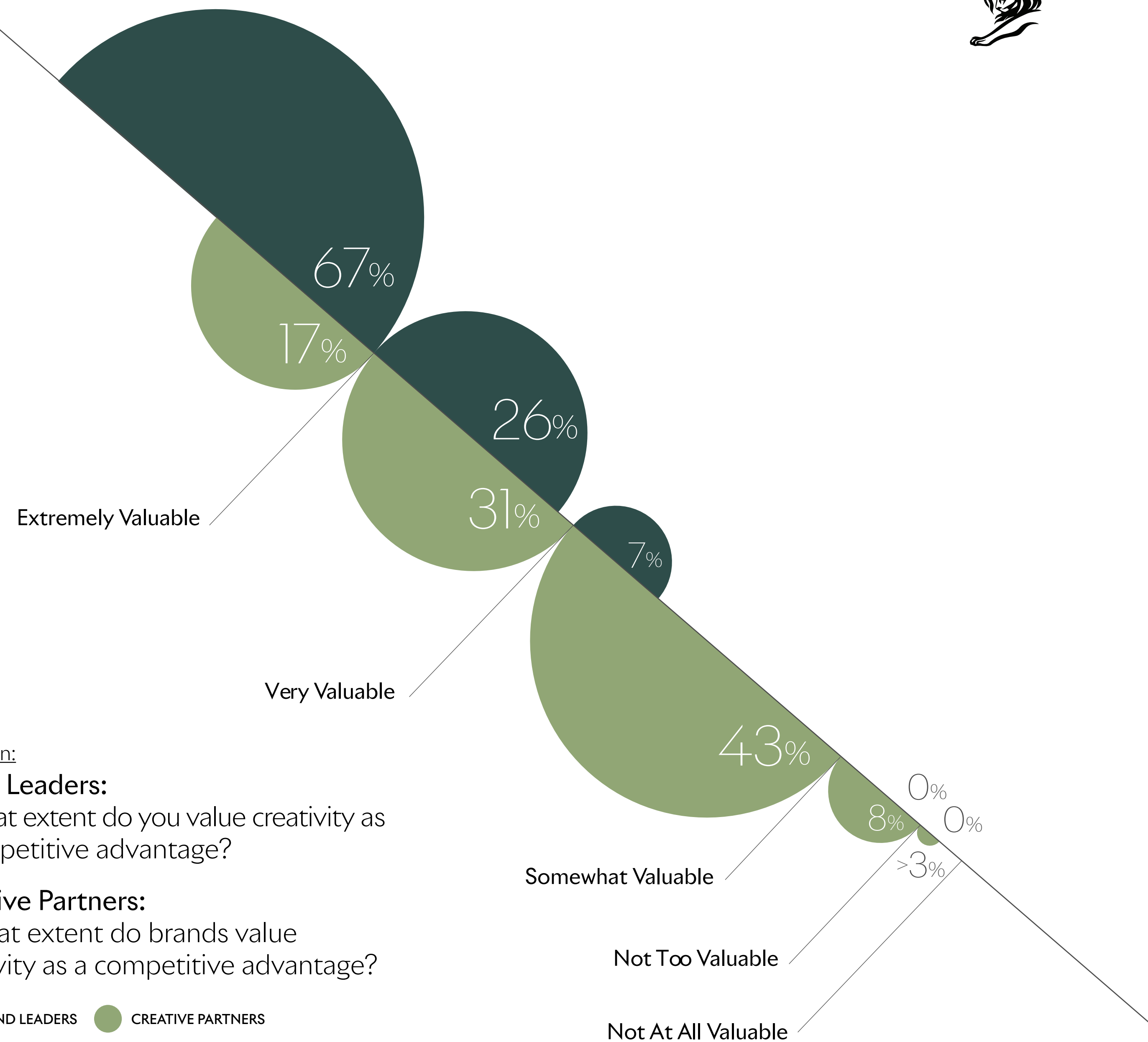
Creativity will always be an expansive term with nuances in interpretation. The pandemic saw brands quickly pivot to reach customers through new channels and **focus their creative efforts on improving experiences**. The majority of marketers (57%)\* prioritised a focus on quality customer experiences to adapt to the economic recession\*. By comparison, **creative partners recount that brand messaging, tone of voice and creative expression often played safe through the same period**.

\*Source: WARC's Marketers Toolkit 2021

Question:  
**Brand Leaders:**  
To what extent do you value creativity as a competitive advantage?

**Creative Partners:**  
To what extent do brands value creativity as a competitive advantage?

● BRAND LEADERS ● CREATIVE PARTNERS





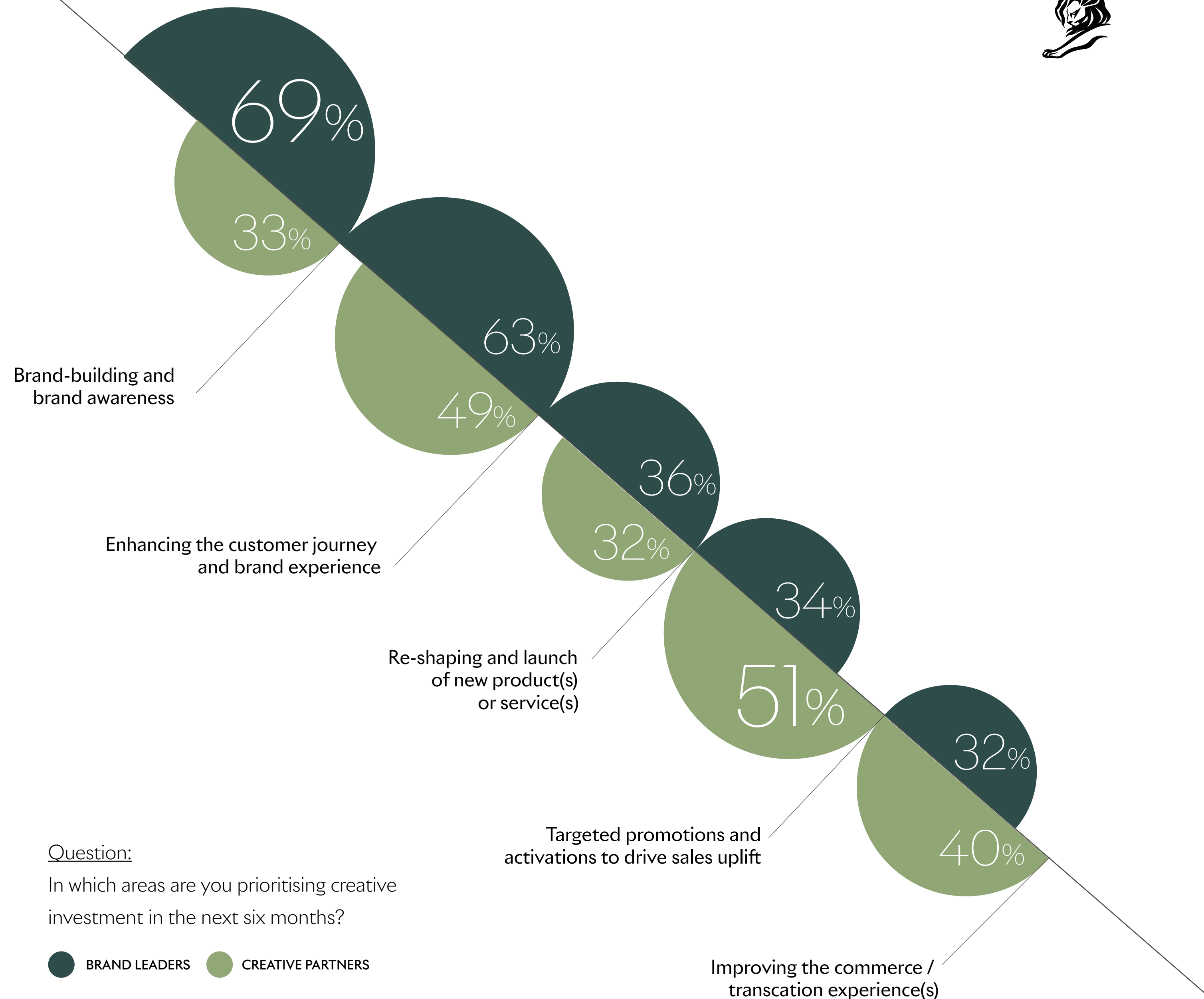


The insight:

# A disconnected view on the priorities for creative investment

Our survey also highlighted the difference between how brands and agencies claim to be spending their creative budgets. Where brands stated they are prioritising creative investment in **brand-building and brand awareness** - work associated with longer-term initiatives - creative partners experience a different practice. More than half of the creative partners surveyed believe brands are fixating on **targeted promotions and activations for sales uplift** - work associated with shorter-term projects.

Reactive behaviour spurred on by sudden changes in spending habits during the pandemic may be the answer to this disconnect. As a senior executive from an FMCG brand explained: "There is often lots of talk of beautiful brand-building with agencies - then the numbers come in. We as clients have to make decisions to change the strategy to account for the need of revenue. Of course, we have an annual brand plan and we have regular reviews - but it ultimately all depends on how sales pan out."





# A year of disconnection will make us **stronger & better**

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We've spent a year in survival mode and whilst it's frequently felt like a drudge, let's not forget how quickly the industry adapted to all the volatility. Plans were ripped up and re-thought, planning quickly moved into action and the whole industry has upskilled in virtual production, the rapid testing of ideas and how to be creative within new parameters.

Speed and agility were mentioned more than 100 times in verbatim comments: it seems that you have even surprised yourselves at just HOW quickly we can refocus and move when you need to. This will lead to a new age of flexibility, dynamism and transparency. It will also strengthen relationships: just think how many new faces you've "met" this year, albeit over a screen. We also have a new empathy and sensitivity towards colleagues, clients and society more generally. That can only be a good thing.

Here's what you said:

"We've shown in the last year that we can be more creative than we ever imagined. Yes you see it in the work...the work that hasn't changed much... because we have had to be creative behind the scenes...we've had to be smart and figure out workarounds so we had a seamless transition to remote work, remote production, fragmented teams."

C-SUITE | FULL-SERVICE AGENCY

"We're building smaller, tighter agile creativity teams"

CHIEF STRATEGY OFFICER | LEO BURNETT

"We are trusting the newer creative structure more and more that teams can still function effectively even when not under the same office roof. At times we deliver faster than before."

CREATIVE DIRECTOR | AGENCY



# Designing for change: The way forward **Creativity in business disruption**

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When we pick apart the reasons why brands and their creative partners are so misaligned in their beliefs about how much businesses value creativity, one aspect is clear. The definition of creativity – and with it, agency capabilities – must broaden.

Two agency founders share their views on how they're agencies are adapting to meet today's creative needs.

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“It’s not just about keeping pace but being ahead of what’s next. And while our core philosophy has remained the same, we’re increasingly asked by clients to take on a more integrated and consultative role. For us, digital has always been the strategy not the tactic. It’s more than just a creative execution in a digital environment – it’s about harnessing consumer data to inform design and engaging experiences that are built around user needs and behaviours.

This is a big focus of our Data, Analytics, Research & Testing (“DART”) and technology practices, which we continue to scale. Some companies tend to think of ‘brand’ in a more singular way; that all you need are brand truths and guidelines, or only a big TV spot in order to connect with consumers. While these are important, they are not the only answer. Today, it’s not just about what your brand stands for but how your brand behaves, and that means considering how a brand’s platform activates across all channels – from communications and services to experiences. Modern brand-building is about building brand experiences.”



**DAN GARDNER**  
CO-FOUNDER AND CEO  
CODE AND THEORY





“With change comes opportunity. So I look at this as a moment of radical opportunity. The opportunity for transformation over the past year has been unlike this industry has ever seen. It’s forced talent to find new homes - some even whole new careers. It’s led to new agency models and ways of working. For Mischief, that means operating at speed with no layers or siloes, focusing on investing in talent and approaching every project from a point of solving problems not selling a solution. This time has also forced marketers to take bigger risks and disrupt with more confidence at a much faster pace. Advertising will never be the same. For the better. The past year is one of the best things to have happened to creativity.”



**GREG HAHN**  
CO-FOUNDER AND CCO  
AT MISCHIEF  
@ NO FIXED ADDRESS





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# 2

Committing to creativity.  
This is the moment  
to buckle in for  
the long-haul

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Committing to creativity. This is the moment to buckle in for the long-haul

NIKE DREAM CRAZY | NIKE



GRAND PRIX

WIEDEN+KENNEDY PORTLAND | 2018

There's nothing like a crisis to reduce everyone to short-term thinking: in fact, it's a natural human response. As one respondent put it, "it's fight, flight, freeze or fixate on immediate results". As uncertainty looms and short-term initiatives dominate the conversation, brand leaders repeatedly proclaim the difficulty in demonstrating creativity's positive impact over the long-term.

At the same time, creative partners highlight the challenges of shifting to project-based work; all at the cost of ongoing partnerships that produce the transformational creativity brands desire. It's an agonisingly familiar refrain.

Despite the feeling that we've heard all this before, it's never been more important to show the ROI on creative endeavours – and be certain of the objectives from the outset. It might be outdated now to cite brand building vs performance marketing as an "either/or" when the reality is that you need both, but as countless studies have shown: when the chips are down, it's time to invest in long-term, brand-building creative.

- So how can brands prove the cumulative impact of creativity?
- And what does it take to commit to creativity for the long haul?



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“A lot of the communication from clients has moved to the more tactical briefs, solving immediate challenges with smaller budgets, so everything right now is much more results-focused than simple awareness or brand-building.”

SENIOR LEADER | DIGITAL AGENCY

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# What's the appetite for creativity?

While brand leaders speak of their business's willingness to invest in creativity, the scrutiny on creativity's ROI has intensified. Almost a third of brand leaders (28%) told us that there is a **more urgent, mounting pressure to prove the effectiveness of creativity**.

Three common challenges were highlighted by those who try to do so: a lack of consistency, too much reliance on conversion data and the difficulty of attributing success to creativity vs other business activities. Digital media has generated numbers in click-throughs and likes, but how can brands quantify the intangible benefits of creativity to stakeholders?

**"The biggest challenge is arriving at a measure of effectiveness that can be common across all media platforms"**

SENIOR LEADER | MEDIA AGENCY

**"It's tricky to measure the varying impact across touchpoints, especially point-of-sale investments"**

SENIOR BRAND MARKETER | FMCG

Question:  
How has your experience of selling in creativity changed as a result of the pandemic?

● BRAND LEADERS ● AGENCIES

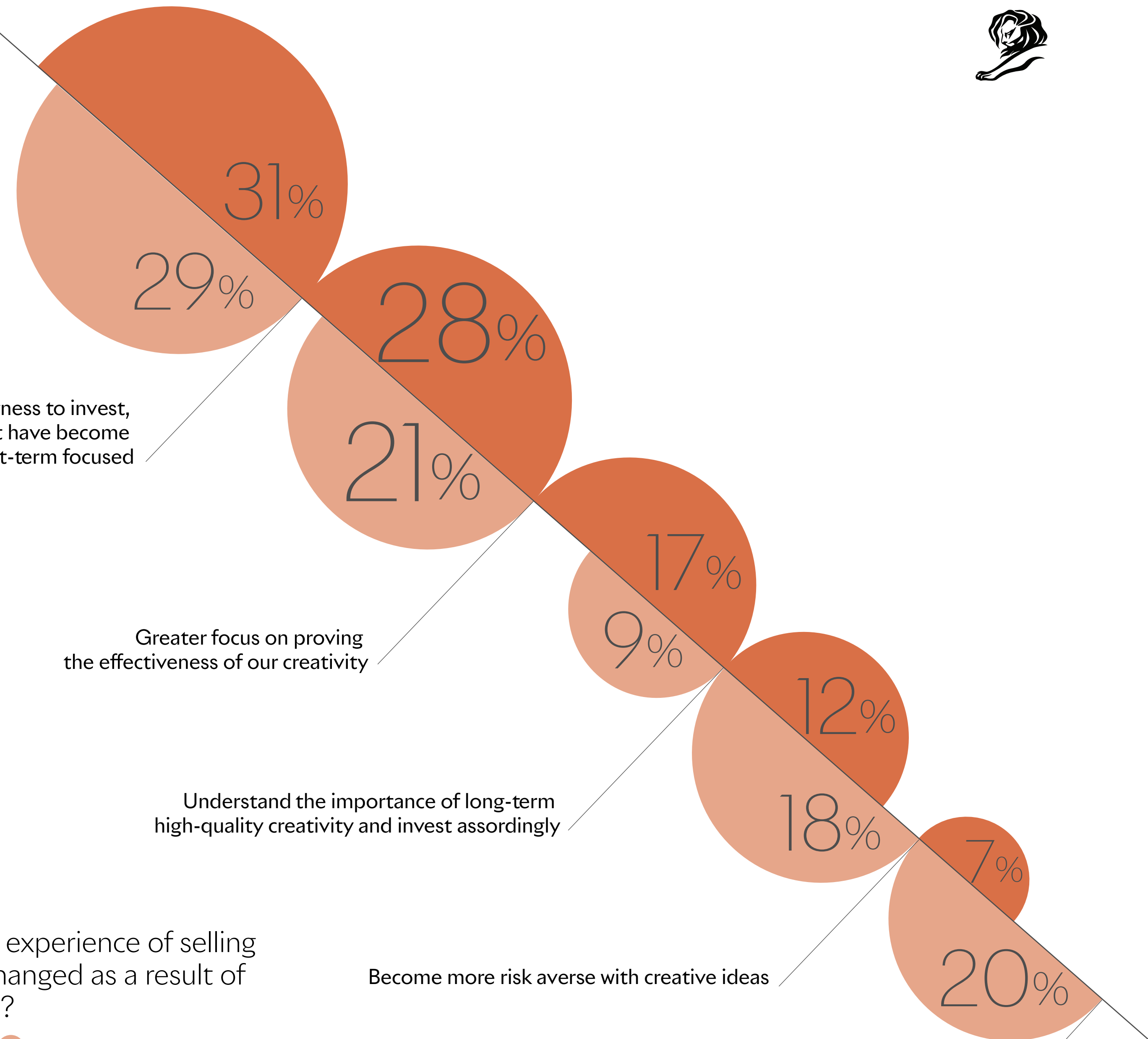
Willingness to invest, but have become more short-term focused

Greater focus on proving the effectiveness of our creativity

Understand the importance of long-term high-quality creativity and invest accordingly

Become more risk averse with creative ideas

Investment in creativity has reduced following the pandemic







# How challenging is it to measure creative efforts?

By far the most cited issue when it comes to creative effectiveness is showing the impact of long-term creativity. 61% of brands told us they find this very or extremely challenging.

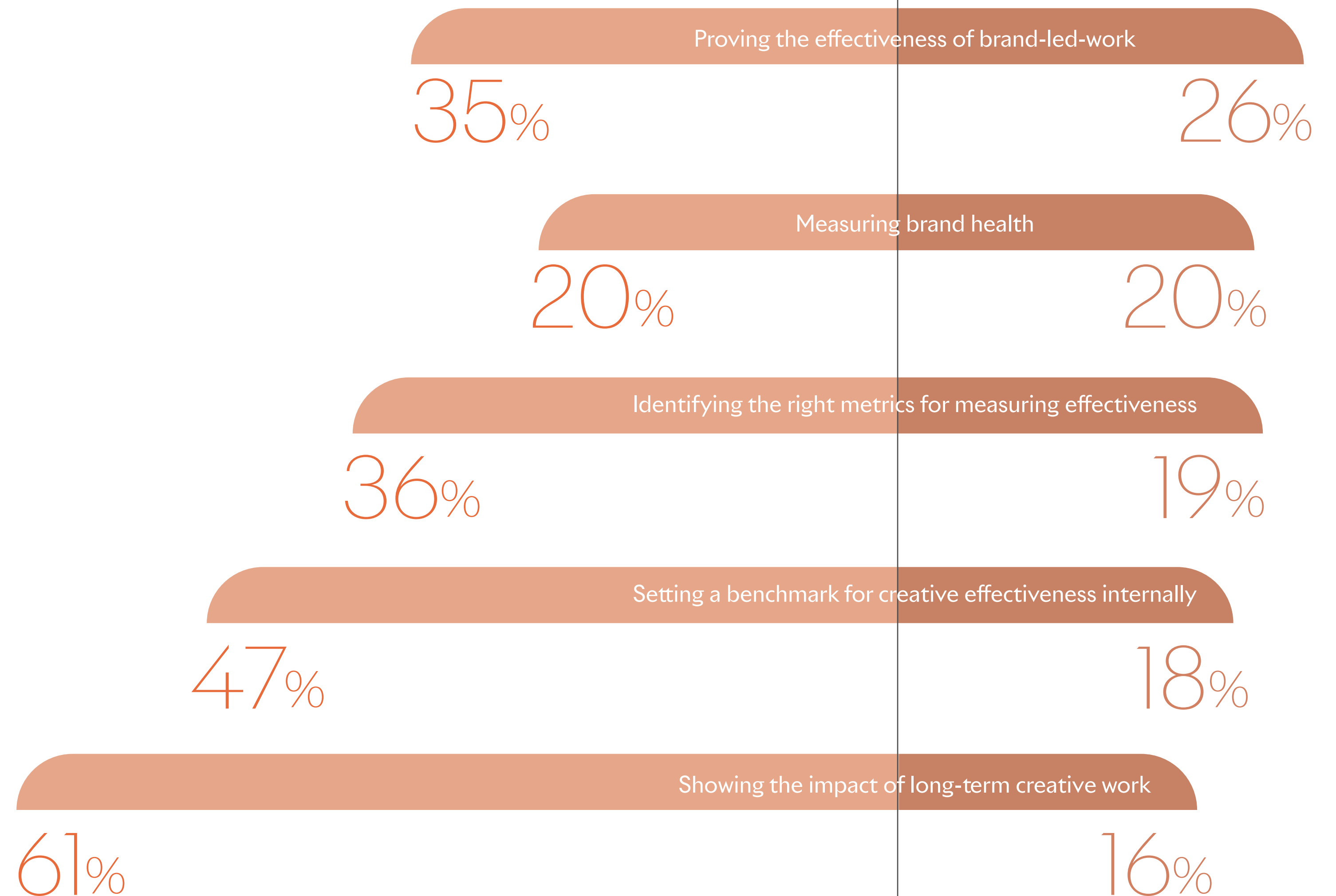
Brand leaders identified key reasons for this challenge:

A lack of standardisation around the concepts and terminology - there is confusion around what we mean by terms such as 'brand health', 'brand affinity', and 'brand engagement'. With the confusion follows a diminishing reliance on these soft metrics.

Short-term tactical ideas can drive hard numbers. However, too much direction is taken from these "instant" results - data from short-term spikes is used to set the next phase of action without allowing a campaign to run its course.

● VERY OF EXTREMELY CHALLENGING ● SOMEWHAT CHALLENGING

N.B This question was for brand leaders only.





# Designing for change: The way forward

## Multiplying effective brand work

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To break the cycle of short-termism and see how an evidence-based approach to brand-building can work, we can take guidance from Global Associate Director, Growth Acceleration for MARS on the company's strategy to multiply effective brand-building.

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“At MARS, we remain highly focused on brand building - one of our core principles is how we create winning stories that let us build brands with purpose. What gives me confidence is our creative process and how it allows us to increase the odds of developing content that sells. We take an evidence-based approach to building brands. Research has shown that if you are measuring and disproportionately investing in ads that perform at a high level then you significantly increase your brand’s growth trajectory.

We set global targets that encourage the business to invest the majority of spend in effective advertising. If you want to build distinctiveness you have to invest in advertising that sells. The challenge with ROI as a leading metric is that it drives the behaviour of maximising efficiency at the expense of investing to grow. You can drive a positive ROI but this doesn’t always mean you are maximising conversion. Measure what is working well, then boost investment in those campaigns.”



**ALEX SCIACCA**  
GLOBAL ASSOCIATE DIRECTOR  
GROWTH ACCELERATION | MARS





# Why your brand matters even more in a digital world

WARC's VP Content David Tiltman explains why we can't be short-sighted with brand-building online

Over the past two years, since Peter Field presented on the WARC stage at Cannes Lions, we have been told repeatedly that there is a crisis in creative effectiveness.

And in the climate of the pandemic, it's getting worse. WARC's data has shown a sharp contraction in brand investment and a swing towards performance marketing. During the economic shock of the past year many marketers understandably focused spend on short-term cash generation. And with the shift to eCommerce, performance is likely to remain king: the biggest winner of the past year, in Western markets, is Amazon, as brands fight to be heard as close to the point of purchase as possible.

It's no wonder marketers are confused. While industry researchers like Les Binet and Peter Field call for a return to brand-building, high-profile pundits such as Scott Galloway declare that the era of 'brand' is over – replaced by a product-focused era in which carefully crafted narratives are swept away by online reviews, and rendered meaningless by the algorithms of almighty platforms.



**DAVID TILTMAN**  
VP CONTENT | WARC





So how can marketers and agencies respond?  
Here are a few key things to consider to make the case for creative brand-building:

- Brand still matters in online commerce – think of brands as keywords. So marketers should be looking at the relationship between brand and search terms in their category. There's a lot of interesting thinking going on around how to use search data – it's worth paying attention.
- Performance works best alongside strong brands – so look for ways to tie the two together. The platforms have already recognised this and are rushing to create 'full funnel' ad formats. There is huge scope for creative thinking with these tools.
- eCommerce is crowded – so what's going to make you stand out? The role of distinctive assets built over time – brand characters, logos, colours, devices – remains key.
- Finally, brand-building has to include non-communications considerations such as CX, delivery and the product experience. Again, there is huge scope to extend creative thinking to these areas.



**DAVID TILTMAN**  
VP CONTENT | WARC



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# 3

The campaign  
to bring back  
braver creative





# The campaign to bring back braver creative

THE WHOPPER DETOUR | BURGER KING



FCB USA | 2019

“The future is unknown – which is the greatest opportunity for creativity.”

AGENCY CONSULTANT

At LIONS, we are in the privileged position of seeing some of the most barrier-crushing, genre-defying, stereotype-shattering work - and it's this kind of stand-out work that wins awards. It's also this kind of work that pushes the creative community to up its game and push harder to do better. At the time you were responding to our State of Creativity survey, it seemed that many of you felt that creativity was in retreat – that the priority for brands was to stick to tried-and-tested methods. You also told us that a focus on digital caused many brands to become a slave to the algorithm. Fear as a theme was common in both brands (who cited a concern of appearing tone-deaf or clichéd) and agency creatives (who didn't hold back in

their frustrations around a lack of client courage).

If the right tone and stories are proving hard to find, a proliferation in new platforms is providing fertile ground for experimentation. Many of you told us how you're trialling new techniques, exploring new platforms and engaging with new technologies. It's been incredible to see the exceptional creativity awarded at the Cannes Lions awards for 2020/21

- So, what can we do collectively to get out of the rut of safe creative?
- How can we convince brands, partners and the board that bravery pays off?



The insight:

Understandably,  
the fear and reticence was a  
by-product of the emergence of  
'cancel culture' – and consumers  
feeling disconnected from their  
typical surroundings

"I wanted to have T-shirts made for several years now that say 'Fear is not a strategy': like you can't have fear define what you do. And I feel like we've been fairly fearless marketers historically. But in this latest context, I do feel that fear is creeping in. Because it almost feels like with 'cancel culture', it's very hard to do anything right.

"I think the best thing we can continually remind ourselves to do is root in authenticity. So make sure that the root of everything we're doing is true."

KATHLEEN HALL  
CHIEF BRAND OFFICER | MICROSOFT

"Agencies have become more cautious, brands too.  
And in a way, that is a reflection of the consumer - who has disconnected from all things related to non-essential consumption and re-focused on the basics."

CREATIVE AGENCY LEADER





The insight:

# Agencies lament brand conservatism - with candid comments on the need for bravery and originality

"I've seen a sea of sameness with two brands launching the same ideas on the same day. Creativity needs inspiration and right now this industry is inside and lacking perspective - on both the client and agency side. A lot of mirroring the consumer is happening and it is not good because life is not good."

DIRECTOR | BRAND AGENCY

"Too many brands adopting the 'Zoom' ad, or ads reflecting the current situation. They lack creativity and distinctiveness. I can't remember a single brand associated with any of them, and I've seen loads. The best ads are not mirrors, but enchanting escapism."

AGENCY SENIOR LEADER  
EDUCATION SECTOR

"We saw a regression to the mean: safe and forgettable creative."

SENIOR AGENCY LEADER | DIGITAL AGENCY





# There's a hunger for change. You shared a burning desire to upskill the workforce and develop category-breaking ideas

More than 80% of you told us it was very or extremely important to upskill your workforce in order to **develop brave or category-breaking ideas**.

This goes hand-in-hand with a need to also upskill the creative workforce on **how to think strategically with creativity**.

To push beyond the mediocre you must first set a benchmark, and that is where our in-depth discussions confirmed how brands, as well as agencies, are providing more forums to debate and discuss what makes for the most original ideas.

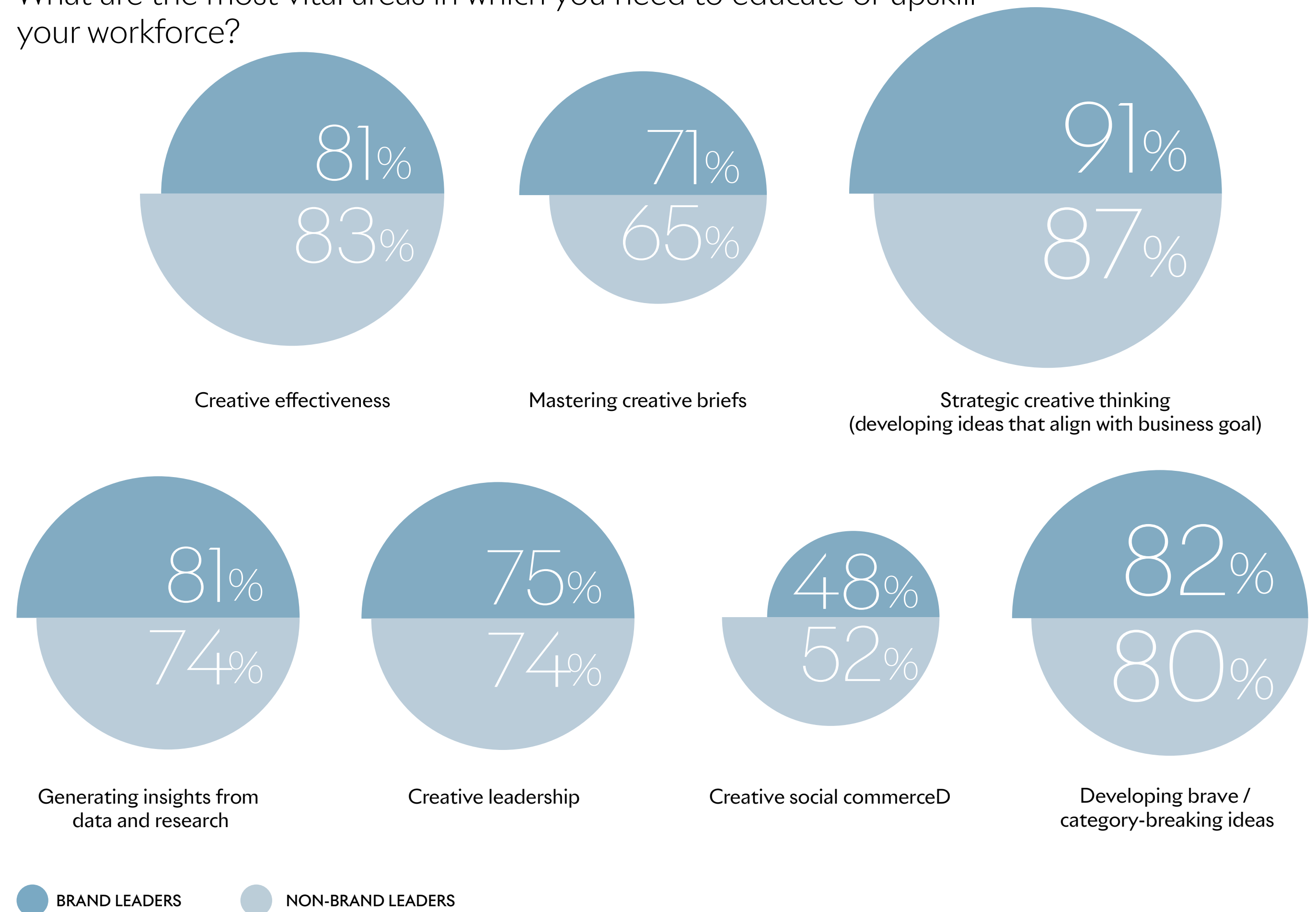
As **Julie Yufe, Head of Expansion Markets Europe, AB InBev** explained

“We’ve developed a creative council. We bring in internal and external people and get the advice of people across the company to help assess the ideas.”

“We have a creative spectrum scale that we rolled out which we use to judge the work. As well as creating more internal dialogue, we have our own creative awards assessed by a panel of external jurors.”

Question:

What are the most vital areas in which you need to educate or upskill your workforce?







# Designing for change: The way forward

## Category-breaking ideas using humour to earn attention

With an understanding that creativity is the only way to break out of the mould of a category and earn attention, Francisco Umana, Senior Global Marketing Director, Dental Appliance Care, GSK Consumer Healthcare – explains how one of their core brands is using humour to connect with consumers and remain distinctive.

“We work on a brand that has some stigma attached to it but that can also be relevant to many more people. So we’re mobilising to reset the brand and be different to attract more of those potential users. Creativity, of course, makes up a big part of this, because in a category where functionally you don’t have huge amounts of difference, connecting with people and serving them better will bring that distinctiveness.

In consumer healthcare this is a huge opportunity and that’s what we need to do. With FCB Inferno, our agency partner, we’re trying a new approach that is more human and incorporates humour; this can bring a lighter touch to a serious topic. However humour is a difficult emotion to tap into with a distinctive voice. That is our creative challenge, as we aim to be charmingly cheeky, but also be empathetic to people.

Our goal in this is to try to be like that friend we all have who says funny things that are true but aren’t harsh. We know from our research that people need this type of message and are more receptive to it than ever before. When you have a good planning team who is able to translate the insight into creativity that connects with the consumer, you can really disrupt the category and stand out.”



**FRANCISCO UMANA**  
SENIOR GLOBAL MARKETING DIRECTOR  
DENTAL APPLIANCE CARE  
GSK CONSUMER HEALTHCARE



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4

Killer,  
collaborative creativity  
from the (kitchen) table





# Killer, collaborative creativity from the (kitchen) table

HOT & SPICY | KFC



OGILVY HONG KONG | 2019

Many of us watched in awe at the beginning of 2020 as innovative companies pivoted strategies and responded at breakneck speed to a new set of circumstances. But as you told us loud and clear, that early ignition is now waning. What at first felt novel rapidly became stagnant. What was at first a new energy (albeit over a screen) quickly became energy-zapping.

Some of the biggest barriers to our creative thinking are the now unavoidable daily mundanities of our lives: kids, dogs and loud neighbours included. For now, the joy of serendipitous connections and spontaneous conversations are on hold. The whole communication dynamic has shifted. As one senior director put it: “Collaboration through screens is making relationships more transactional – within creative departments and agencies, and also

with clients. Overall, people are less curious and more and more are looking for the path of least resistance.”

Mental health and burnout has been a theme in the creative industries for some time. Presenting ideas (only to have them knocked back) is mortifying for many, but even worse over a Google Hangout, where the nuances of empathy are lost. But there are solutions and there are ways to bring back some of that lost spark.

● How can we find new ways to collaborate?

What are some of the practical and  
● inspiring ways that people are flourishing?



# You told us of the realities of collaborating on creativity in the current, virtual working environment

“We’re missing the tactile stimuli - stickies on walls, papers and ideas scattered; the in-person chemistry and momentum of humans in a room together.”

SENIOR CREATIVE AGENCY LEADER

“We’re missing out on the ‘war room’-style creative brainstorm sessions and the bouncing around of ideas. It’s hard to build the same energy and excitement virtually.”

DIGITAL AGENCY LEADER

“Zoom, Google Hangouts or Teams cannot foster discussions necessary to originate or enrich good ideas. Also, the social bonding necessary for a team to optimise its creative output is not possible remotely.”

PLANNING DIRECTOR | COLOMBIA

“There is a lack of accidental inspiration - exposure to ideas by being in a collaborative workplace with other people.”

SENIOR CONSULTANT | AGENCY





# So what's happening with in-housing?

Aside from the shift to a virtual office, there has also been some change to the way brands manage their creative services.

41% of brand leaders identified some in-housing of creative services either on the media or creative side vs 17% looking to outsource. Just over a third (36%) indicated no change.

How does this impact creative collaboration?

This trend falls in step with **creative partners** telling us they are delivering their services to clients through more project-based work with tighter briefs, where speed and efficiency are key.

**“Clients give us more ‘dry briefs’ because their spending has been cut and we mostly work on adaptations or smaller projects.”**

FULL-SERVICE AGENCY LEADER

For brands, there is a focus on in-housing to drive efficiency and upskilling new internal teams on creative excellence, but a recognition of where agency partners can best support.

**“We’re centralising creative process and investment to scale winning ideas faster.”**

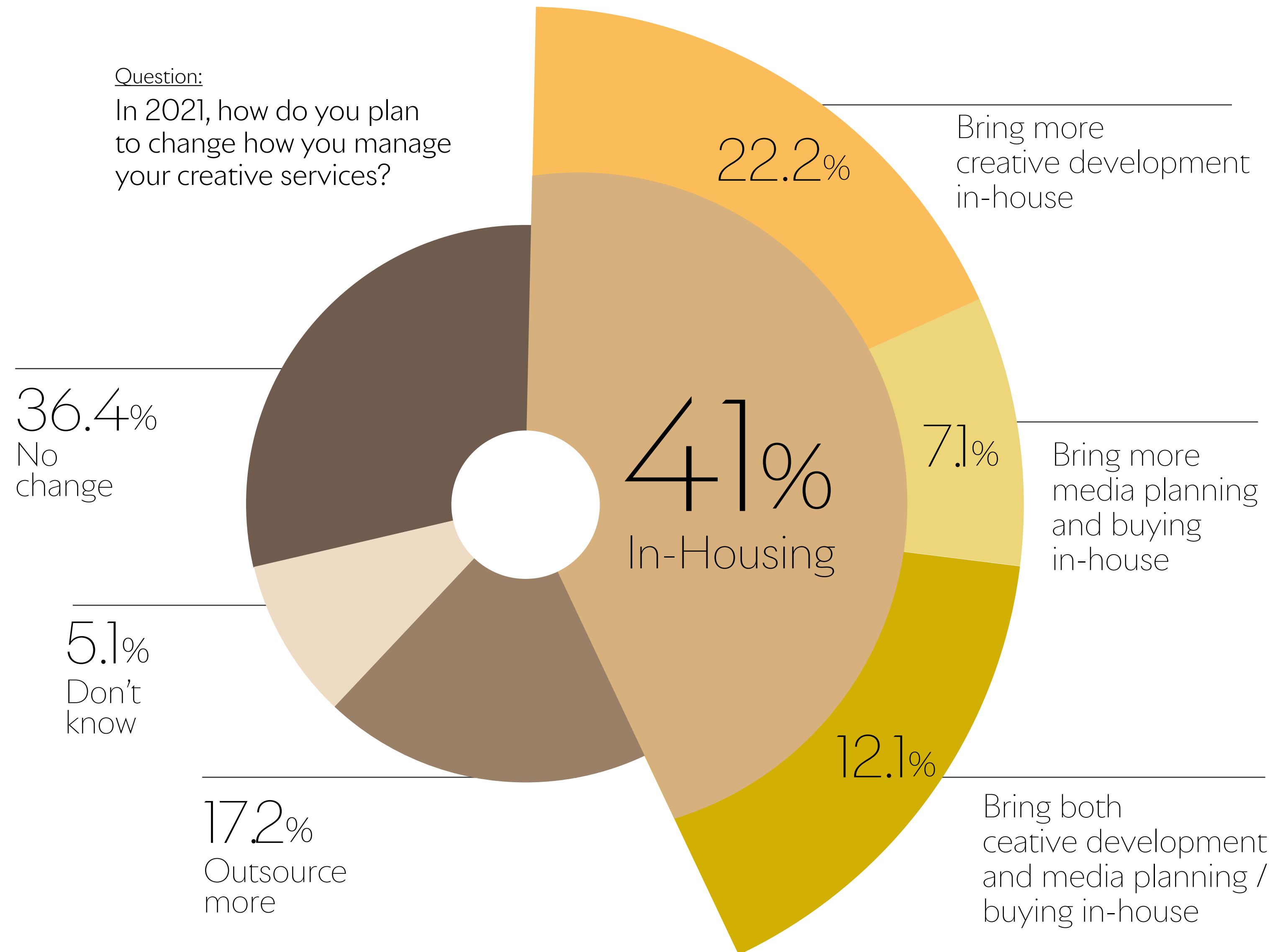
SENIOR BRAND MARKETER | FMCG

**“We’re partnering with agencies to deliver insightful, meaningful creative.”**

SENIOR BRAND LEADER, IT SERVICES & SOFTWARE

Question:

In 2021, how do you plan to change how you manage your creative services?







While senior leaders shared the trials of working in a virtual environment, many also highlighted some **incredible new approaches** that will benefit their workforces well beyond the pandemic

“We’ve used a strong creative problem-solving process for internal and client projects, leading to some groundbreaking developments for both the agency and clients.”

EVENTS SPECIALIST

“We’ve seen brands show a greater awareness of community and the need to think and act responsibly to support these.”

SENIOR  
AGENCY DIRECTOR

“The pandemic has shown how brands can take a small budget and really drive it further with the right creativity.”

MEDIA AGENCY LEADER

“We’ve seen better work across borders. This working style has proven that a team doesn’t have to be in the same country.”

EXECUTIVE  
CREATIVE DIRECTOR

“As we went digital, our creativity got closer to the people outside our bubble.”

SENIOR CREATIVE LEADER  
DIGITAL AGENCY

“We’re reaching out to work with external creative forces much more, and not just individuals but like-minded companies.”

DIGITAL AGENCY LEADER



# Designing for change: The way forward

## A flexible and adaptive creative culture

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Whilst brand leaders and creative partners were vocal about their desire to get back to in-person collaboration, our office space will still likely take a more fluid form in future. Among other aspects, the flexibility that virtual working provides has led to some positive experiences that many may well wish to retain. We asked leaders to share how they are embracing this significant opportunity amid the chaos, and what they're doing to adapt for change.

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“There’s been a lot said about the demerits of remote working. But a lot of people have also found that the absence of noise and shoulder tapping has meant they are suddenly more productive and can concentrate better. So...I am sure the future will be a hybrid model. At home for those times of intense concentration, together in a workspace for times of creative collaboration and idea generation.

The thing that needs to span both these areas – and I think has been understandably diluted in the last year – is feedback. It isn’t as easy to give feedback as fluidly, easily or often virtually, and the lack of physical connection or reading of body language has made it easy for it to fall away. But it’s an essential part of personal growth and new ways of embedding it into our new ways of working is as essential as the collaboration tools themselves.”



**NATASHA CHETIYAWARDANA**  
CO-FOUNDER AND CREATIVE PARTNER  
BOW & ARROW  
PART OF ACCENTURE INTERACTIVE

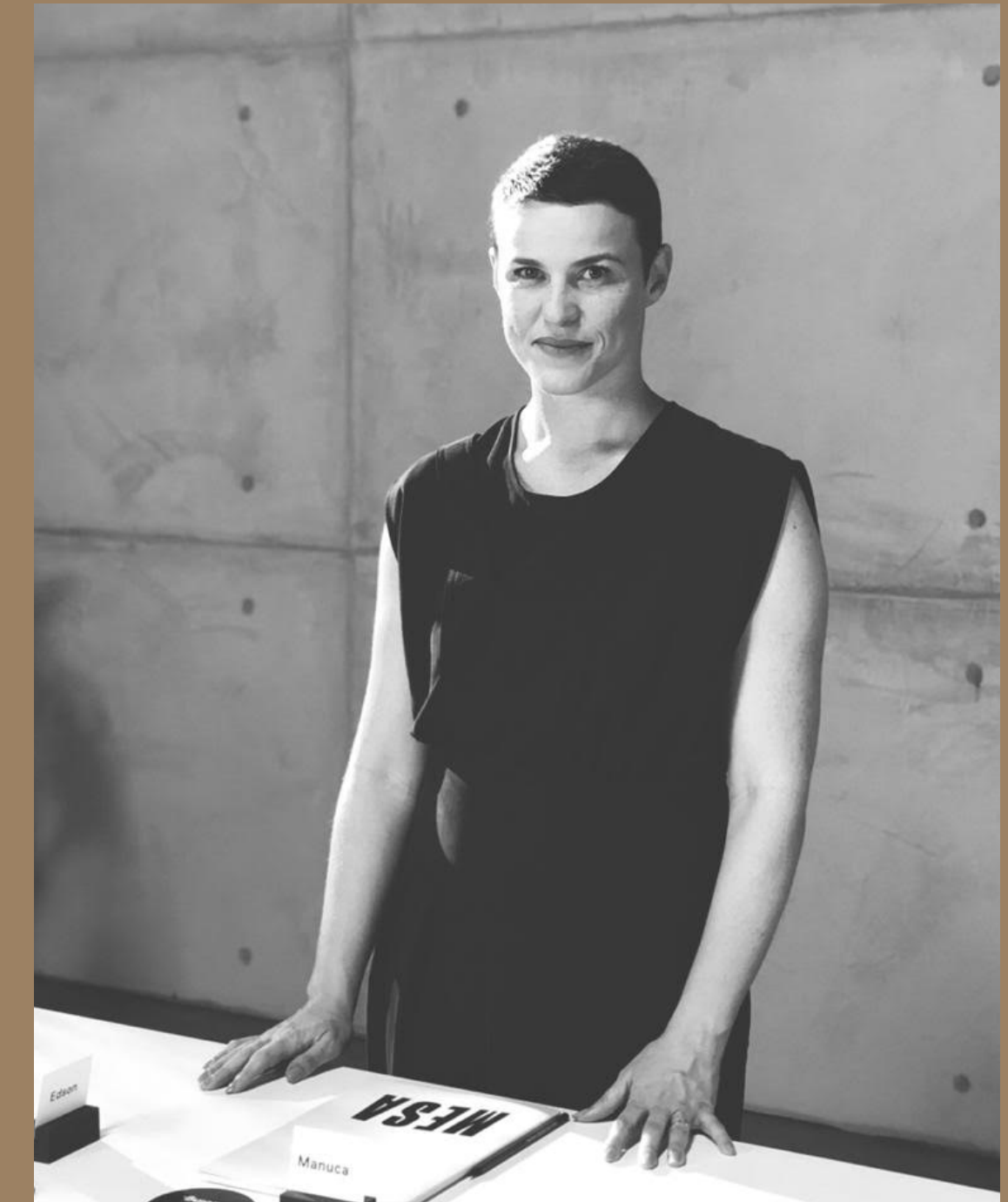




“I used to think that remote meetings could never deliver the same depth of connection that in-real-life meetings do.

Today, I can say with confidence: what truly connects people is having one clear common goal and knowing that every single person in that small universe is as invested, needed and prepared as you are.

It doesn’t matter if this space is one of the most luxurious hotels in the world.”



BARBARA SOALHEIRO  
FOUNDER | MESA



“On the one hand I’m in awe on how fast creativity adapts. From one day to another we switched from taking it for granted working together in an office, to working together over screens from our kitchens and bedrooms. And it worked like crazy. In many ways we are more focused and quite frankly faster finding the solution working this way.

But there is also something more intangible getting lost. The stuff that doesn’t happen on scheduled time, the stuff that comes from hanging out together, kicking stuff around, from not feeling that every minute of a zoom call needs to be filled with someone talking. And sometimes thinking together, ideating together, needs the pauses and the silence in order for ideas or hunches to happen. It’s a bit like playing music, the silence is an instrument too.

That’s the part I miss. The more spontaneous moments, the unscheduled mess. The off-the-grid instances where there are no cameras. They’re different. I think a creative group of people, like the one you find in an agency, crave it, and feed off it. I believe we could all use another hit of this kind of activity at the moment.”



**ANDREAS DAHLQVIST**  
CHIEF CREATIVE OFFICER & CEO  
NORD DDB | STOCKHOLM



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# 5

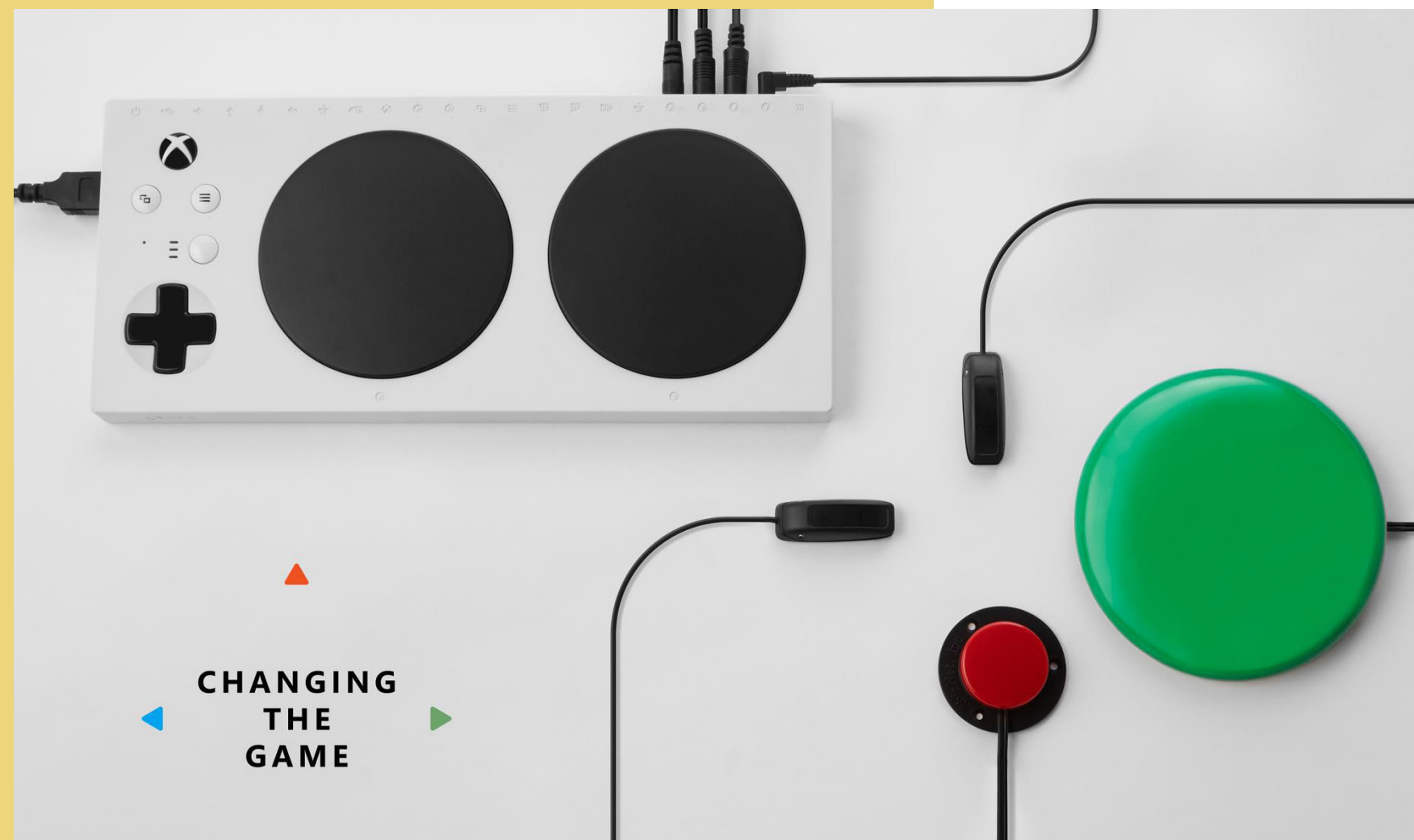
Designing for  
digital  
dexterity





# Designing for digital dexterity

CHANGING THE GAME | MICROSOFT



McCANN USA | 2019

With digital transformation on a bullet-train for most businesses – and expectations for a seamless customer experience as important as ever – there’s a permanent fear of “falling behind”.

Platforms and technologies have seemingly fast-tracked in 2021 - but there’s a need to stop, breathe and take stock of where we are heading. As one Strategy VP put it:  
**“The industry has gotten too comfortable using data and targeting as a crutch, rather than a tool to enable original thinking. A data point isn’t an insight, and never was.”**

But let’s not deny the incredible and exciting possibilities: data-led creative and superior experiences can offer an unrivalled “surprise and delight” factor which can put brands at a competitive advantage.

To rise to the challenge, businesses are experimenting with new tools, technologies and strategies to master the digital world.



# An urgent need to keep up-to-date with changes in consumer habits

With customer buying behaviour in a more unpredictable state, it's no surprise that we want to be better informed about what consumers want and expect.

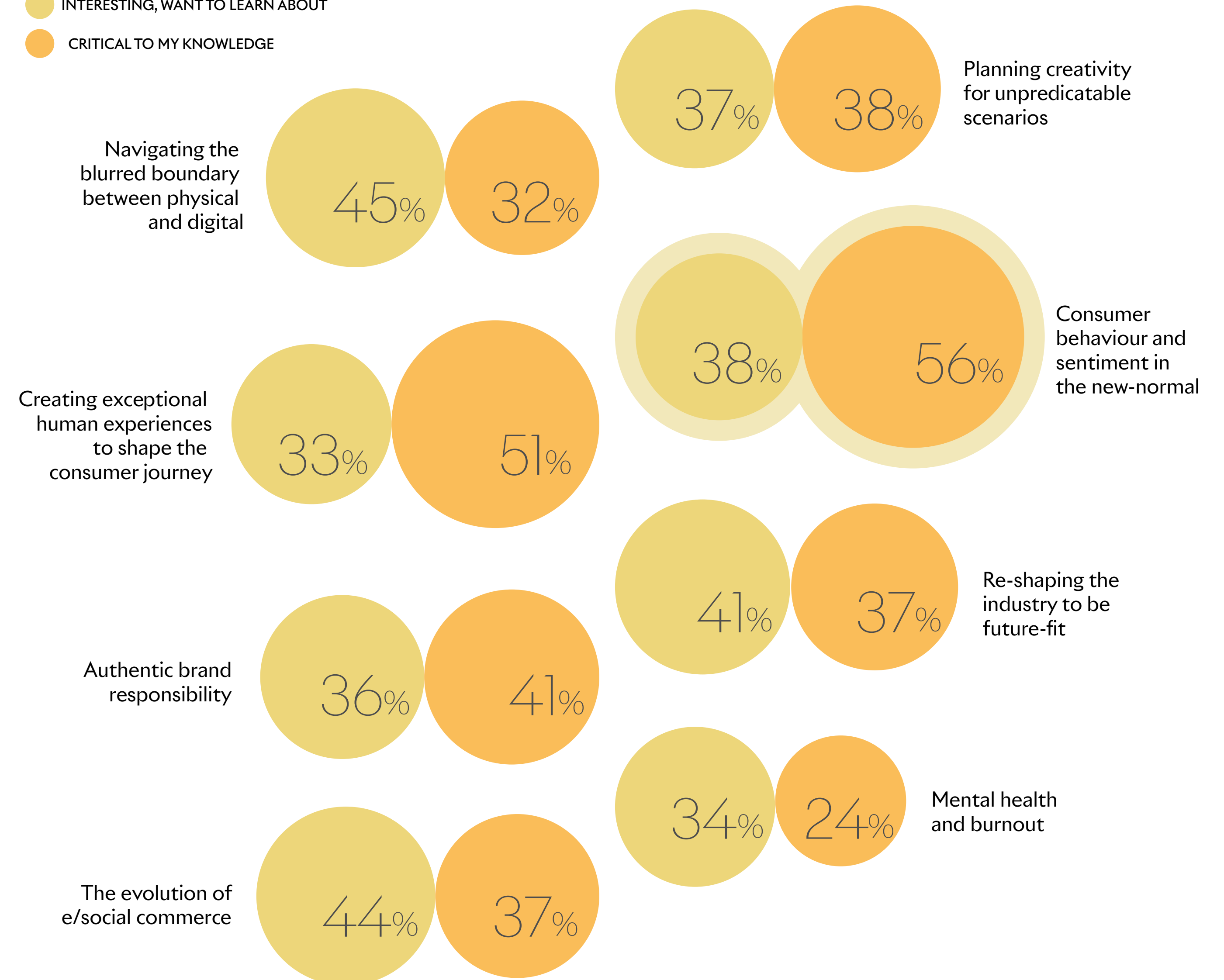
94% of brand leaders said **understanding consumer sentiment and behaviour in the new-normal** is a topic they want to know more about, or is critical to their knowledge.

Keeping track of search and spending habits online, in-store and everywhere in between, is clearly a requirement.

Question:

Which topics are critical to your knowledge?

- INTERESTING, WANT TO LEARN ABOUT
- CRITICAL TO MY KNOWLEDGE





Consumer behaviour will continue to evolve as a result of the pandemic - brands need to show dexterity in the way they evolve their messaging to meet new consumer needs.

“It is essential to understand our audience: how they consume, and what they expect from us. Only those that understand what their consumers need now will survive and succeed.”

SENIOR BRAND MARKETER | FMCG

“Consumer sentiment and mindset is changing so rapidly that creative can feel outdated the same day it’s launched.”

SENIOR BRAND MARKETER  
HEALTHCARE

“We need to ensure we deeply understand how consumers have evolved as a result of the pandemic.”

MEDIA AGENCY LEADER

“We are in a new world of creativity because of the new behaviours created by the pandemic, as well as the economic downturn that affects cross-generations. Knowing how to respond to this will be crucial.”

DIRECTOR | GLOBAL CREATIVE AGENCY





# Dexterity with digital transformation

Poised for further change, brand leaders described how they are elevating customer experience in all areas - digital being the main focus. 52% of brands hold **customer experience** as a top priority for their digital transformation efforts in 2021.

By contrast, 57% of creative partners believe that **eCommerce is the top priority area for digital transformation for brands**.

“We’re rethinking the commerce experience to move from shopping to browsing, and from commerce-first to content-first.”

BRAND LEADER | PACKAGED GOODS

“We’re playing with the constraints of digital and haptic media, shifting boundaries for unique and surprising placement in the consumer acquisition process.”

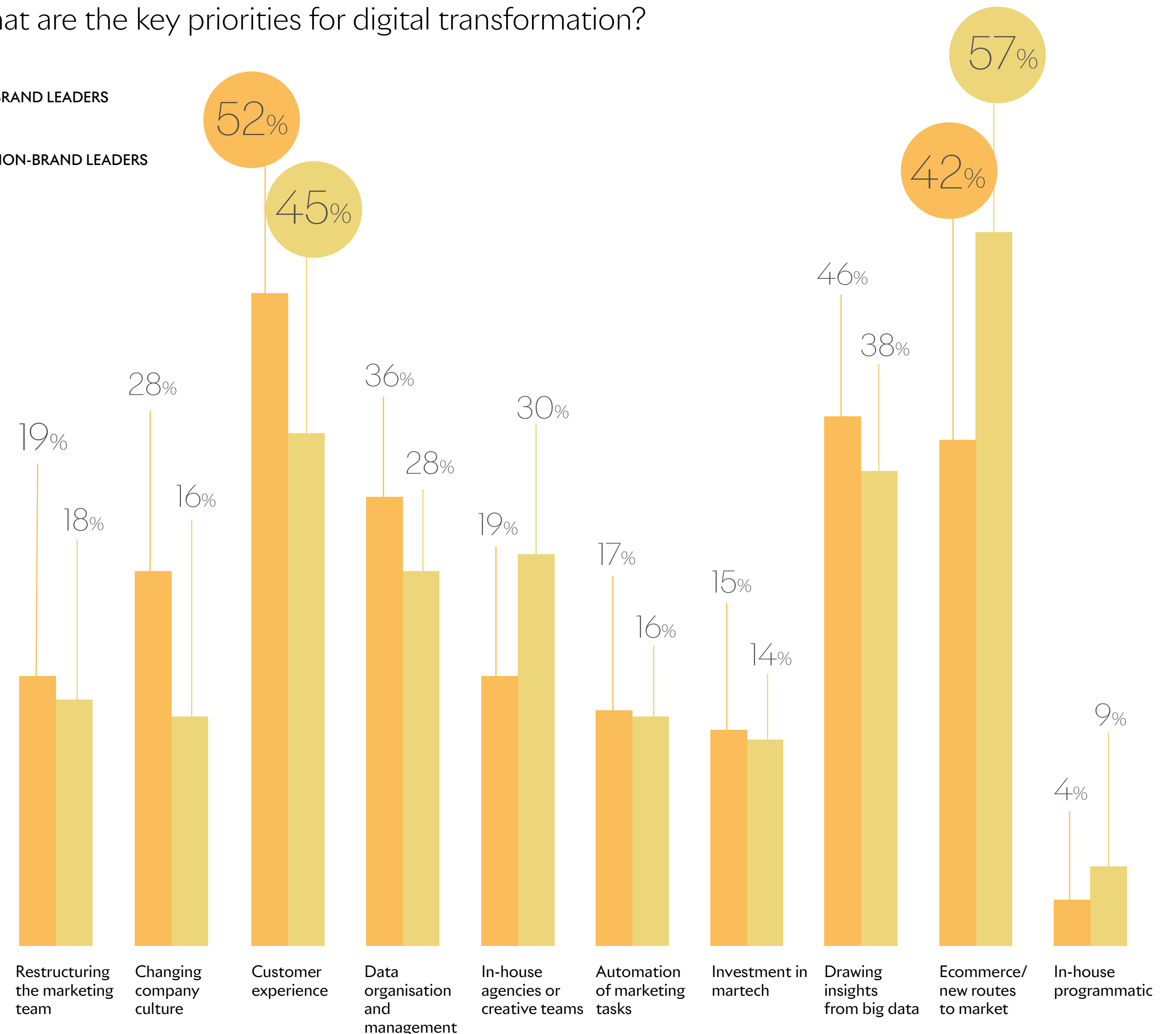
MEDIA AGENCY LEADER

Question:

What are the key priorities for digital transformation?

BRAND LEADERS

NON-BRAND LEADERS





# Data, livestreaming and the rise of 'one-to-one' comms

To support the delivery of exceptional brand experiences, brand leaders are focused on experimenting with tools that improve one-to-one relationships with consumers.

**“We’re trying to push the boundaries of digital interactions.”**

CREATIVE AGENCY LEADER

Top of the priority list is tools to aid personalisation. Almost half (49%) of both brand leaders and creative partners told us they are **experimenting with personalisation**. For brands, **chatbots and messenger apps** are also playing a big role (45% are experimenting with these tools).

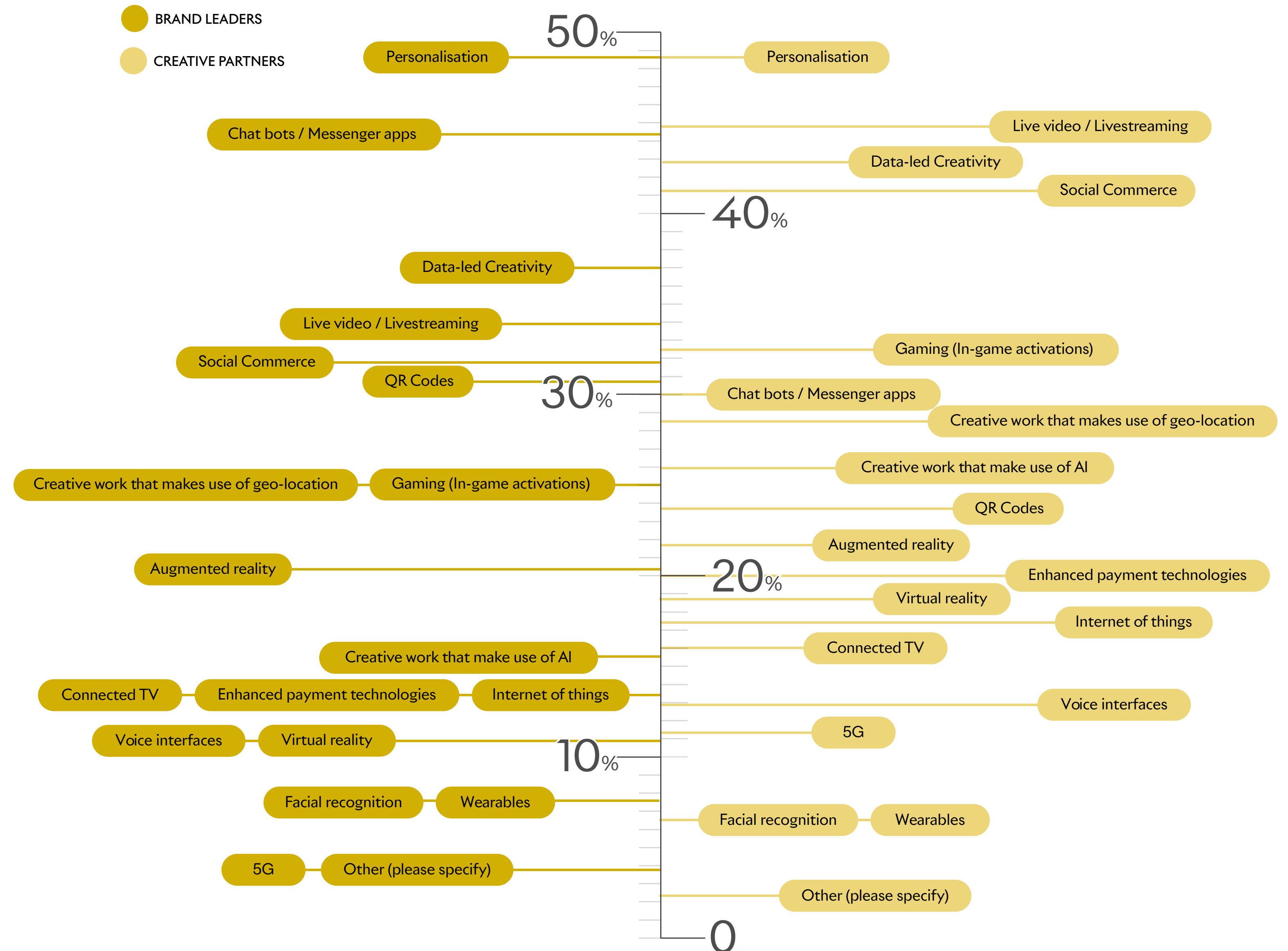
For their part, creative partners see greater experimentation using **data-led creativity and livestreaming**. However, there is a resounding call to ensure brands don’t over-index on algorithms and tech to drive engagement.

**“It’s a time to reconnect emotional intelligence with the power of AI to design new and powerful insights. Creativity by itself can’t reach the hearts and minds of customers. We need to build new ways to avoid too much algorithm-based decision-making.”**

SENIOR LEADER | MEDIA BUSINESS

Question:

Which of these creative tools are you experimenting with most?



# Designing for change: The way forward

## Agility and scale with eCommerce

In her LIONS Live CMOs in the Spotlight interview, L'Oréal's Former Chief Digital Officer, Lubomira Rochet, discussed the effort involved to build out the company's eCommerce capabilities quickly and at-scale across the group.

“The first thing is to strategise your growth by channel, by brand, by country so that you can really scale your strategy on eCommerce. The second thing is really to build the capabilities. We have recruited more than 2,000 eCommerce specialists in the group, and those guys are operating the 27% back-end of the business.

“We've upskilled more than 50,000 people out of the 80,000 employees of L'Oréal, and by doing so, we digitised the company – we didn't create a silo that was digital on the side.”



**LUBOMIRA ROCHET**  
FORMER CHIEF DIGITAL OFFICER | L'ORÉAL



# Designing for Change: A Reset

It's unrealistic to think we'll go back to where we were 15 months ago. It's been tough - personally and professionally. At times it's felt we've been on a high-speed train that we can't get off, but it's also been a game-changer for the creative industries. For years, we've heard from you that the industry has been too slow to adapt and resistant to change. If anything will force this - and lead us into new fertile territory - it's this recent period in history.

## A renewed emphasis on creative problem-solving

Creativity comes in many forms but it really comes into its own when there's a challenge. Consumer sentiment has changed, we're in a state of emergency and social justice issues have reached a tipping point. And it's these critical issues that require the collective brainpower and firepower of this community.

**"It's an amazing time to be a creative person. We need many, many more creative solutions in every aspect of life"**

SPECIALIST HEALTHCARE CREATIVE

## Unlocking new creative opportunity everywhere

As LIONS knows and WARC reiterates in this report, brand-building must include non-communications considerations such as CX delivery and the product experience. When you think about it, this is vast and the opportunities are endless for the ambitious.

## The democratisation of creativity & a new set of diverse creators

Rather than seeing this as a threat, we need to embrace the new makers and creators in our midst. It's an exciting time for creators and creatives and the collaborations we will see will be electrifying.

**"The creative process needs to change to enable agility, cross fertilisation, collaboration"**

FOUNDER AND CCO  
DESIGN AGENCY



## Greater empathy and respect for others

Systemic inequity has long been a theme in the creative industries, but we were heartened to see many accounts of progress and increased empathy towards others in the last few months. You spoke of new Diversity, Equity & Inclusion Creative Review Committees, more transparency in leadership and a new appreciation of colleagues' and clients' home duties. Even though we've been so far apart, we seem to know and understand each other so much better.

## An industry on the precipice of change

Yes, we need better alignment between all of us on the definitions and expectations of creativity. We need to be better at explaining the value of creativity and demonstrating its benefits. But the good news is that there's a unanimous consensus that it works. So let's get to work.



## Driving progress through creativity

At LIONS we have over 65 years of evidence that creative excellence moves people, business and society forward. Cannes Lions: The International Festival of Creativity has been championing creative excellence since 1954 with the goal of providing a global destination and the definitive benchmark for creativity that drives progress.

LIONS | The Home of Creativity is the destination for anyone who believes in the power of creative possibility and wants to aim higher and push forward. Our purpose is to drive progress through creativity and provide those in the business of creativity with all they need for their journey to creative excellence, at whatever stage they are at and wherever they are: insight and inspiration, encouragement and connection, milestones and magic.

## Our manifesto

Creativity is extraordinary.  
It can come from anywhere and exists in everyone.  
It can take any shape, some of which you would never expect.  
Like all of us, it's a work in progress.  
When I choose creativity I take the harder path, the unfinished search in the pursuit of the exceptional. A sprint forward when there is no finish line. Creativity has the power to transform people, build business and shape society in a way that nothing else can. It walks with me every step of the way, through all life's stages and diversions. It's insight and inspiration, encouragement and connection, milestones and magic.  
Because of creativity I stay restless, aim higher, and push forward.

LIONS | The Home of Creativity  
[lionscreativity.com](https://lionscreativity.com)

## Our services include

### COMMUNITY

Our community experiences are the definitive place for the global creative community to come together to collaborate, partner & celebrate creativity that drives progress.

- MEMBERSHIP
- EVENTS
- PARTNERSHIPS

### LEARN

Our learning programmes - aimed at individuals - and advisory services - aimed at organisations - accelerate excellence by building creative capabilities, leadership and processes through the best experts and work in the world.

- LEARNING
- ADVISORY

### BENCHMARK

Our awards - including Cannes Lions' - are the undisputed benchmark for creative excellence and effectiveness, enabling those in the business of creativity to understand best practice and gain the confidence to aim higher by seeing what's creatively possible.

- ADWARDS
- INTELLIGENCE

Our new membership programme unites the global creative community in their mission to drive progress through creativity every day of the year. For 67 years, our community have left Cannes Lions feeling like they've had a masterclass in creativity surrounded by the most interesting people in the world. LIONS membership is that. For everyone. All year round.

Get in touch at [membership@lionscreativity.com](mailto:membership@lionscreativity.com) to learn more or visit [lionscreativity.com/membership](https://lionscreativity.com/membership)

## Clients include

