



HEINEKEN CREATIVE COUNCILS STATE OF THE NATION REPORTS

INTRODUCTION

Between October 2021 and August 2022, 11 Creative Councils were held across all four Heineken regions: three in Europe, three in AMEE, two in APAC and three in the Americas. Over the course of 33 hours of discussion and debate, campaigns from a total of 49 internal brands were reviewed. The results of the pre-voting, alongside key takeouts from across all four regions, are included on the following pages. Overall, the Americas emerged as the likely leader amongst the regions, followed by Europe, then APAC, then AMEE.

The Creative Councils were very well received across all four regions, with marketing leaders requesting that the sessions become staples of the marketing culture at Heineken. A number of additional Creative Council sessions were subsequently arranged: one in Europe (an overview session for the whole marketing community) and two in AMEE (one for the whole marketing community and one for the Nigerian market). All of the Creative Council sessions were long (three hours each), but feedback suggests that senior marketers relished the opportunity to discuss creativity candidly within a supportive professional environment.

When it came to the quality of output from Heineken brands, the level of creativity overall was respectable, punctuated with flashes of world-class innovation and creative inspiration. The majority of brands have clear and well considered brand fundamentals; many campaigns are built upon robust human insights; production values are generally, although not universally, high; and there are a number of examples of Heineken brands deliberately and effectively breaking with the narrow conventions of the category.

However, too frequently the campaigns being presented to the Creative Councils were fundamentally conservative and 'safe' in their ideas and executions. Campaigns were frequently video-led and confined to traditional media, rather than involving big ideas that fully explored the creative potential of touchpoints across all 14 Must Win Battles. Genuinely social-first campaigns were absent, and the only truly world-class brand activation presented to the Councils was the Heineken Shutter Ads campaign – a campaign that, tellingly, was rejected by a significant number of European markets. A not insubstantial minority of brands fell into the 'Cliché' bracket through their relative lack of insight, their use of 'stock-shot-esque' imagery, and their general willingness to conform to, rather than challenge, what is expected from beer brands. However, it should be said that, due to the retrospective nature of the Creative Councils, some of the work shown was historic and therefore may not reflect the current creative ambitions and capabilities of Heineken brand teams.

A critical issue facing Heineken at the moment is that AB InBev is not only the largest and wealthiest player in the market, but is also a company that has made a long-term commitment to building and sharpening its creative capabilities. This, of course, culminated in AB InBev being awarded the title of Creative Marketer of the Year at Cannes in 2022. In the round, Heineken brands are currently not demonstrating the consistent creative ambition, bravery, and executional flair that have become hallmarks of AB InBev brands over recent years.

HEINEKEN CREATIVE COUNCILS STATE OF THE NATION REPORT – EUROPE

OVERVIEW

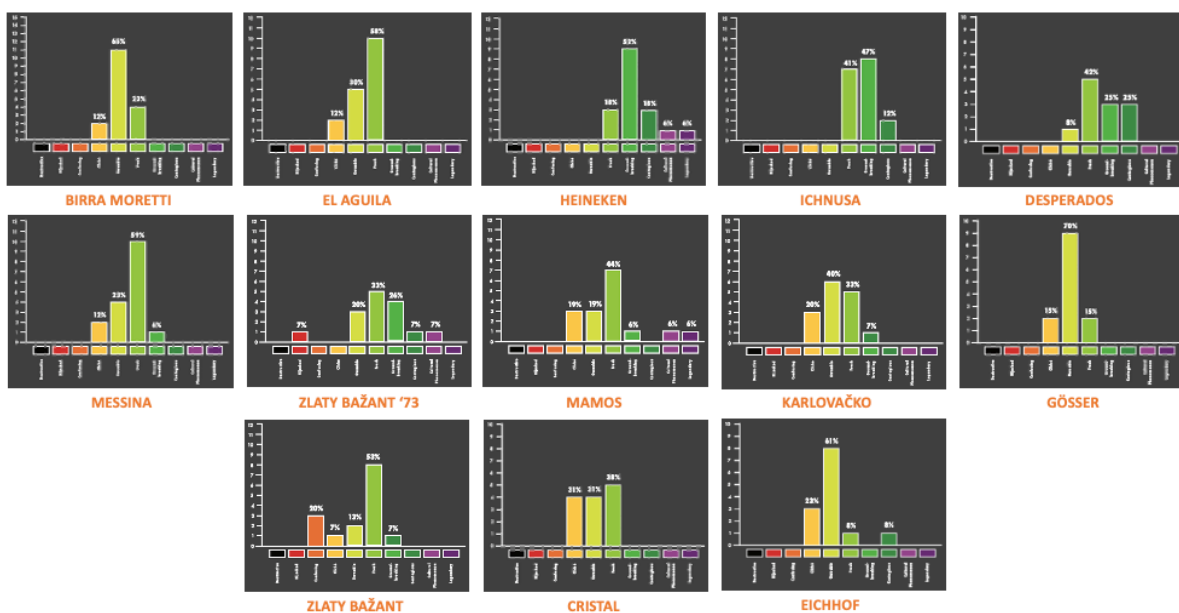
In Q4 2021, three European Creative Council sessions were held: **G6 Creative Council** (28th October), **G10 Creative Council** (15th November), and **G7 Creative Council** (18th November).

Work was reviewed from the following internal brands: **Heineken, Birra Moretti, Desperados, El Aguila, Ichnusa, Messina, Zlaty Bažant, Zlaty Bažant '73, Mamos, Karlovačko, Gösser, Cristal and Eichhof.**

The featured work for each of the Creative Council sessions can be accessed via the password-protected links below (username - 'guest', password - 'welcome').

- **G6:** <https://heiway.sharepoint.com/:f:/s/CREATIVECOUNCILEUROPEG6/EjuaI9JUK9REmE-RU73EzEkB7hvA2fjF-oqg97Cbssof3g?e=eyf0IP>
- **G10:** <https://g10.heinekencreativecouncil.com/>
- **G7:** <https://g7.heinekencreativecouncil.com/>

Pre-voting results for each of the brands are captured in the charts below.



OVERALL CREATIVE 'STATE OF THE NATION' IN THE EUROPEAN REGION

The region displays high marketing competence across the portfolio of brands. Brand strategies are distinct and well articulated, production values are strong, and there is impressive brand consistency across touchpoints. However, the use of truly innovative creativity to drive fame and disrupt category conventions appears rare and sporadic. The majority of the brand communications are well thought through, very polished, but often quite conservative.

STAND-OUT BRAND CAMPAIGNS

Ichnusa, *Il Nostro Orgoglio*: This was a brand that emphatically stood out across the European Creative Councils for its refusal to conform to the conventions and executional codes of the beer category. Across multiple touchpoints, but particularly in the video assets, the brand evoked the

rawness and visceral power of Sardinia. The campaign was full of swagger, character, and substance. It successfully stood out and resonated at a deep emotional level.

Heineken, *Shutter Ads*: This was the highest performing internal campaign across all three Creative Council sessions. Despite being a global campaign, it had significant take up across a number of key European markets. Over half of the participants voted it ‘Groundbreaking’, with the campaign also garnering votes for ‘Contagious’, ‘Cultural Phenomenon’ and ‘Legendary’. This is an example of the brand tackling a real-world issue through the application of lateral thinking and creative flair. As well as making a profound philanthropic contribution during the pandemic, the campaign successfully generated considerable PR and buzz for the brand by adopting a heightened role in culture.

AREAS OF STRENGTH

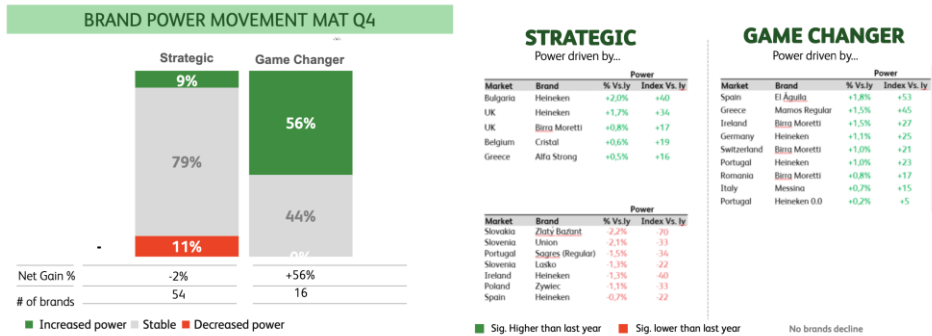
- Brands tend to display strong brand fundamentals and robust brand strategies. It is clear what they represent – they are distinctive in their markets and are consistent across touchpoints. These strong fundamentals are typically coupled with high production values and robust quality cues.
- Several brands are looking beyond internal, product-based attributes and are engaging with big, emotional, resonant issues. These included **Mamos** (the Greek “brain drain”) and **Heineken** (*We’ll Meet Again* and COVID-19 lockdowns).
- There are clearly teams across Europe that are willing to push the creative envelope and to embrace discomfort. A number of campaigns were willing to deliberately disrupt category norms (**Ichnusa**, **Desperados**) or to incorporate brave, surreal elements (**Zlaty Bažant**), leading to the brands standing out and getting noticed. As Bill Bernbach said, “If people don’t notice your advertising, everything else is academic”.

AREAS OF OPPORTUNITY

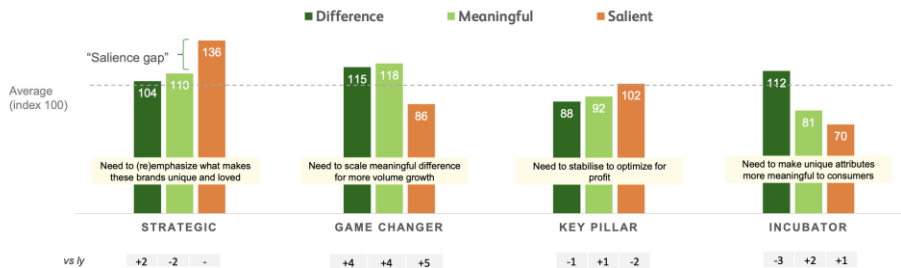
- There seems to be a general conservatism amongst brand teams when it comes to touchpoints and media selection. Brand teams have previously been advised to channel 10% of budget into experimentation, but experimental campaigns now comprise just 1% of output. Campaigns are frequently video-led, and core creative ideas seem to be developed specifically for TV advertising – they can often feel safe, overly pragmatic, and lacking in innovation. Whilst these video-led campaigns have an important role in brand communications (TV, for instance, remains a crucial brand-building platform), it is necessary for Heineken teams to take bolder decisions if they are going to generate disproportionate fame for their brands: developing big, creative ideas that are not necessarily video-first, and applying world-class creativity to the full spectrum of touchpoints across the 14 Must Win Battles.
- Campaigns, whilst being polished and professional, can sometimes fail to register above the ‘Ownable’ level. There is often an apparent reticence to challenge category norms in a confident and emphatic way. Despite having clear, rigorous strategies behind them, the final creative executions can feel a bit tepid – gentle and potentially forgettable. Occasionally, brand communications run the risk of looking and feeling like brand manifesto films, rather than sharp and exciting communications. Having a powerful strategy is a means to an end (world-class creative output) rather than an end in itself. Ultimately, consumers don’t see our strategy documents: they see the creative work that results from that work.
- *Shutter Ads* was an outstanding, award-winning campaign for Heineken. However, only a few markets decided to run with the campaign. How can outstanding creative ideas be identified earlier and how can teams be incentivised to adopt more unconventional ideas that have significant upside fame-driving potential?

Brand Power analysis:

Brand Power growth in Europe is led by strong growth of Game Changers



Game changers offer a strong foundation for further growth through growing salience Opportunity to grow meaningful differentiation for strategic brands



We see an impressive growth in Brand Power of Local Brand Game Changers

BRAND POWER INDEX		GAME CHANGER- HNK LOCAL BRANDS						
Brand	AVERAGE (INDEX 100)	DIFFERENT INDEX		MEANINGFUL INDEX		SALIENT INDEX		
		INDEX	VS. LY	INDEX	VS. LY	INDEX	VS. LY	
Mamos (Greece)	162	+45	116	+17	141	+19	97	+3
Gösser (Hungary)	134	+8	116	+7	125	-	93	+8
Messina (Italy)	94	+15	118	+3	109	+8	78	+2
El Águila (Spain)	81	+53	93	+12	82	+2	76	-
Zlatý Bazant (Czech Republic)	36	+2	82	-	82	+2	68	+2

Legend: ■ Sig. Higher than last year

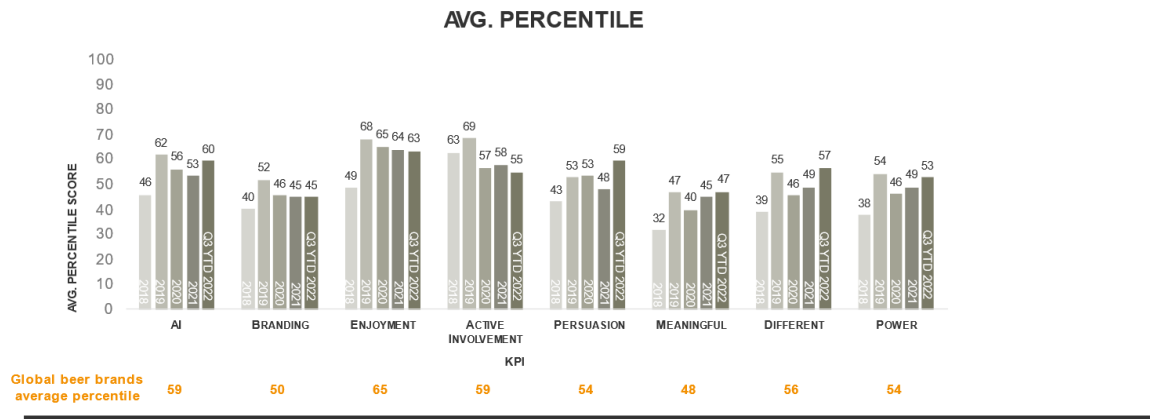
AMBITION2025



Pre-testing results:

TV – all brands, Total Europe: Positive growth in Persuasion and Power, but ads in Europe require refinement on Branding

X: KPI || Y: YEAR [2018, 2019, 2020, 2021, Q3 YTD 2022]



KANTAR

Base sizes by year: 105, 89, 135, 108, 100

6

Countries included: Belgium, Bosnia and Herzegovina, Bulgaria, Czech Republic, France, Germany, Greece, Hungary, Ireland, Italy, Netherlands, Poland, Portugal, Romania, Russia, Slovakia, Spain, United Kingdom

HEINEKEN CREATIVE COUNCILS STATE OF THE NATION REPORT – AMEE

OVERVIEW

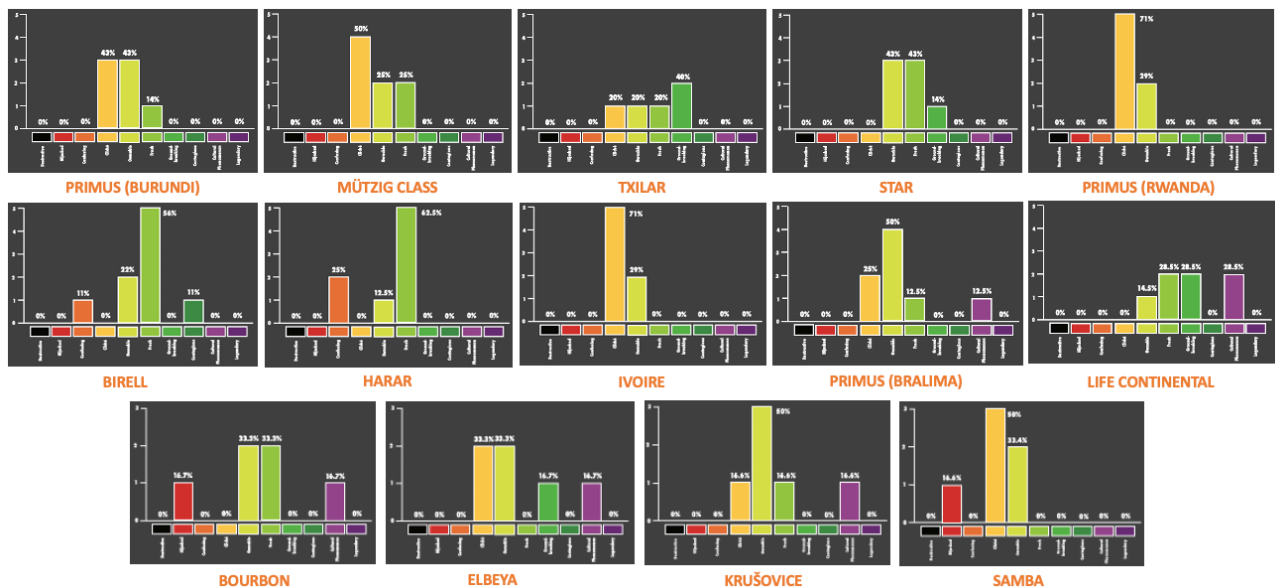
In Q2/Q3 2022, three AMEE Creative Council sessions were held: on 14th June (**Burundi, Mozambique, Rwanda, Brasseries Du Congo, Sierra Leone**), on 15th June (**Egypt, Ivory Coast, Bralima, Nigeria, Ethiopia**), and on 1st July (**Réunion, Tunisia, Russia, Algeria**).

Work was reviewed from the following internal brands: **Primus** (Burundi, Rwanda, Bralima), **Txilar**, **Mützig Class**, **Star**, **Birrel**, **Ivoire**, **Life Continental**, **Harar**, **Bourbon**, **Elbeya**, **Krušovice**, and **Samba**.

The featured work for each of the Creative Council sessions can be accessed via the password-protected links below (username - 'guest', password - 'welcome').

- 14th June group: <https://amee-june14.heinekencreativecouncil.com/>
- 15th June group: <https://amee-june15.heinekencreativecouncil.com/>
- 1st July group: <https://amee-july1.heinekencreativecouncil.com/>

Pre-voting results for each of the brands are captured in the charts below.



OVERALL CREATIVE 'STATE OF THE NATION' IN THE AMEE REGION

Like a large number of the markets from the APAC Creative Councils, the AMEE markets represented in the 2022 Creative Councils were frequently less creatively mature than other markets in which Heineken maintains a presence – this impacts the general creative standards and the quality of available agency expertise. In addition, many of the AMEE markets are either 'semi-dark' or 'dark'. Certain campaigns from the region showcased good strategic insights (**Star**, **Birrel**), the leveraging of interesting touchpoints (**Primus Rwanda**), and robust storytelling (**Life Continental**). Often these examples of strong creative work were achieved through inter-market synergies. However, a significant number of the campaigns felt quite safe, conventional and generic for the category, and demonstrated a substandard level of creativity. There is a risk that these brands, whether through failing to evoke their core DNA in an ownable way or by adopting rational and product-focused messaging strategies, fail to carve out distinctive and engaging spaces in their markets. However, it should be noted how well the Creative Council initiative was received in general, and how much enthusiasm and engagement was exhibited by the marketing leaders taking part.

STAND-OUT BRAND CAMPAIGNS

Life Continental, Turu Ugo Lota: This was the highest performing campaign from across the three AMEE Creative Council sessions. The campaign demonstrated strong fundamentals: a robust strategic underpinning, clear narrative focus, and high production values. However, what particularly impressed the Creative Council was the emotional power of the storytelling and its proud focus on Igbo culture and heritage – it displayed substance, authenticity and impact across touchpoints. The campaign touchpoints were not limited to the traditional and expected - the campaign was spearheaded by an original music track ('Egedege'), which has gained impressive traction across TikTok and other digital channels. The campaign evokes the brand essence of progress, without losing touch with a rich cultural heritage.

Bourbon, Kartier En Lér: Réunion Island imposes strict restrictions on what beer brands can show in their advertising, and where they can communicate with audiences. The Bourbon campaign showcased outstanding product design (some of the very best design work from across all of the Heineken Creative Councils worldwide), and served as an example of how hard packaging can work for a brand. The neighbourhood-themed designs were engaging, charming, and clearly evoked the diversity at the heart of the brand (brand essence: "celebrate the Creole melting pot"). The brand has the potential to bring people even closer to the campaign, by incentivising the collection of labels or developing a competition to nominate featured neighbourhoods.

AREAS OF STRENGTH

- Humour is one of the most psychologically potent tools at a marketer's disposal, and is a tactical device that is predicted to be increasingly leveraged by brands following the pandemic. A number of the AMEE brands used humour to great effect, successfully building emotional connections with the audience. Highlights in this respect included **Txilar's** *Preta Ou Black?* campaign (reminiscent of the Budweiser *Wassup* TVCs), **Birell** (well observed vignettes on the theme of 'brotherhood') and **Harar** (good comedic tension and release).
- There were specific examples of strong and single-minded storytelling. **Star's** story of the Sierra Leonean diaspora, and one man's return to his hometown, was well delivered and rooted in strong insight work. Similarly, **Life Continental's** powerful narrative around the struggles faced by the Igbo community carried real emotional weight. These campaigns were in contrast to some communications from other AMEE brands, that involved well-worn montage formats and featured multiple characters and locations.
- A number of the AMEE brands showed an appetite for less conventional campaign elements that had the potential for high levels of talkability and buzz. **Primus'** non-traditional initiatives in the areas of music (branded competition) and sport (branded show), if orientated to really involve the consumer, have the potential to embody the brand essence of 'igniting connections'. Similarly, **Life Continental's** original music track served as a marquee asset within the *Turu Ugo Lota* campaign.

AREAS OF OPPORTUNITY

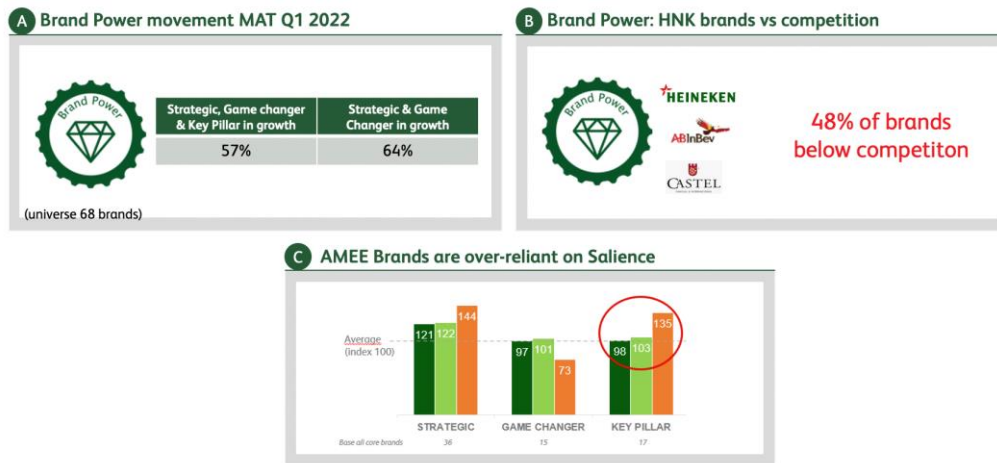
- A number of AMEE campaigns were firmly centred on the product and product attributes, rather than trying to develop insights around the audience or around culture more broadly. In some instances the campaign messaging was focused on product characteristics (**Txilar, Quality Credentials**), whilst in others the product had an inflated and forced role in the narrative (**Ivoire**). This product-centric, 'inside-out' approach is problematic when it comes to developing emotional resonance and meaningfulness, and is preventing a number of brands from achieving scores above 'Cliché' and 'Ownable'.

- There is the opportunity for a number of the AMEE brands to bring the audience much closer to the campaigns, and in the process further commercialising the creative idea. For instance, for a brand that has produced a football-related TV show (**Primus**), could tickets to the show be hidden in the caps of select bottles of beer? Similarly, there is evidence that consumers are collecting the different label designs for **Bourbon** - could this organic behaviour be adopted and codified by the brand, providing people with brand-related incentives to collect the set?
- A number of the brands have compelling elements in their brand DNA (**Star**'s focus on togetherness and return of the Sierra Leonean diaspora; **Primus**' brand essence of igniting connections). These elements could be the foundations for real-world brand actions, which could then inspire powerful communications. However, their influence seems to be currently limited to messaging and more conventional brand campaigns.

CMI PERFORMANCE UPDATE:

Brand Power analysis:

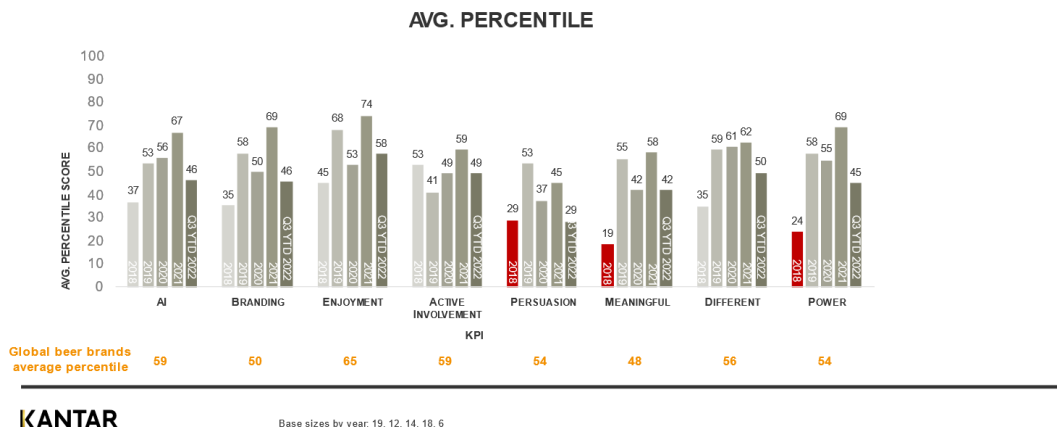
AMEE 48% of brands below competitor, but 57% of core brands in growth



Pre-testing results:

TV – all brands, Africa: General recession across the board in Africa, but base size is too low to extract broad learnings at this point

X: KPI || Y: YEAR [2018, 2019, 2020, 2021, Q3 YTD 2022]



Countries included: Ivory Coast, Kenya, Mozambique, Nigeria, South Africa

HEINEKEN CREATIVE COUNCILS STATE OF THE NATION REPORT – APAC

OVERVIEW

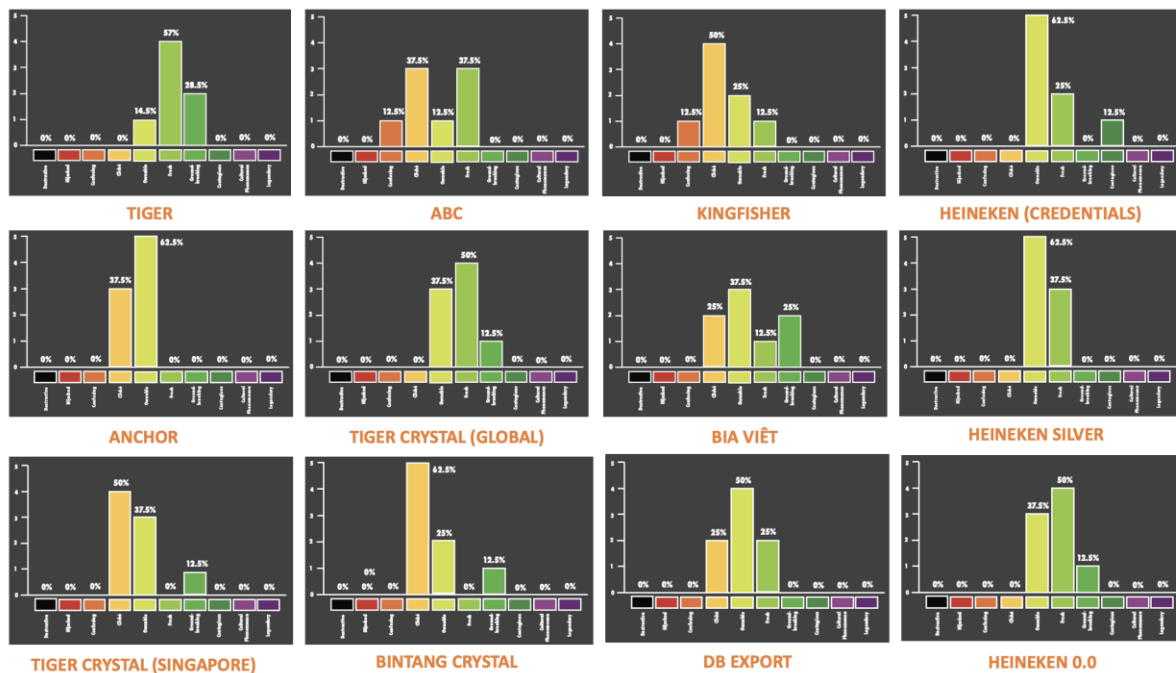
In Q3 2022, two APAC Creative Council sessions were held: the first on 20th July (Taiwan, Myanmar, Malaysia, India, Cambodia) and the second on 27th July (Vietnam, Singapore, New Zealand, Korea, Indonesia).

Work was reviewed from the following internal brands: **Tiger, ABC, Kingfisher, Heineken, Anchor, Tiger Crystal, Bia Viêt, Heineken Silver, Bintang, DB Export, and Heineken 0.0.**

The featured work for each of the Creative Council sessions can be accessed via the password-protected links below (username - 'guest', password - 'welcome').

- 20th July group: <https://apac-july20.heinekencreativecouncil.com/>
- 27th July group: <https://apac-july27.heinekencreativecouncil.com/>

Pre-voting results for each of the brands are captured in the charts below.



OVERALL CREATIVE 'STATE OF THE NATION' IN THE APAC REGION

APAC has significant variance in the creative maturity of its constituent markets. The audiences in some markets appreciate nuance, subtlety and charm, whilst in others there is a need for literalism and simplicity (independent of the *commercial* maturity of the markets). In addition, a number of brand teams are operating under significant regulatory restrictions (ie. 'dark' markets), although this can and should in some cases be a positive spur to creativity. There are spots of real excellence from the region, but the region's creative output, whilst often ownable, can sometimes stray close to the 'Cliché' level. It should be said that this is a general, endemic problem in the region, across different brands and sectors. While many of the featured campaigns were well produced, they sometimes lacked depth of insight and depth of connection with the core DNA of the brand. In addition, while a number of campaigns experimented with more exciting and non-traditional campaign elements (for instance, **Bia Viêt's** proprietary music track), it seems that many brands were reticent to push the envelope when it came to innovative creative executions.

STAND-OUT BRAND CAMPAIGNS

Tiger, Year Of The Tiger: This was the highest performing internal campaign from both Creative Council sessions. The production values were consistently high across a range of assets, including a slick TVC and a best-in-class 3D billboard. The brand incorporated cutting-edge elements into the campaign, for instance NFTs (which were not just an end in themselves, but served to unlock benefits for their owners), demonstrating a sharp understanding of how to build a progressive and youthful brand in 2022. But most importantly, the campaign had a clear and compelling insight at its heart around celebrating uncaged individuality (in direct contrast to many Chinese New Year campaigns).

DB Export, The Beer For Here: This campaign impressed with its intriguing and highly campaignable creative idea of ‘the world’s greatest beer garden’. The hero TVC captured the laid-back essence of New Zealand (vital for a brand that positions itself the nation’s house beer) whilst bringing the brand’s DNA to life with charm, humour and storytelling acumen. While the campaign touchpoints were traditional, these will act as foundations for more innovative and fame-driving initiatives in the near future.

AREAS OF STRENGTH

- The production quality of many of the featured campaigns was high. The final assets looked slick, modern, and thoughtfully crafted. The global **Tiger Crystal** and regional **Heineken Silver** campaigns were notable in this respect. On a similar note, there were examples of outstanding packaging design work from a number of the smaller, local brands including **Anchor** in Cambodia and **Bia Việt** in Vietnam.
- There is clearly an appetite across a number of the brand teams to push for less conventional and more buzz-worthy touchpoints. These ranges from the relatively small-scale (for instance, the **ABC** stout-lager mixing towers, embodying the ‘Better Together’ creative idea) to large-scale initiatives (for instance, the **Tiger Crystal** Fire Stages event series). To celebrate their partnership with the SEA Games, **Bia Việt** developed an original music track and video – a strong and enduring piece of branded content.
- A number of the featured campaigns had robust insights at their hearts – invariably, these were the stronger campaigns across the two Creative Council sessions. The **Heineken 0.0** campaign in Korea stayed true to the global platform, but felt locally relevant thanks to strong insights around work and exercise habits in the market. The global **Tiger Crystal** campaign draws its power from strong insights around self-confidence and people’s inner fires.

AREAS OF OPPORTUNITY

- Across a number of the featured campaigns, the creative executions didn’t seem to reflect the brands’ fundamental DNA. As a result, the campaigns run the risk of being attributed to almost any brand within the category. Each brand in the APAC region needs to be telling a clear, coherent, and consistent story over time and across touchpoints – this can be achieved by bringing the brand DNA to life across the full spectrum of creative assets.
- A number of the brands have developed valuable relationships with external organisations and individuals (for instance, with the Indian Premier League and a number of cricketing stars). However, these relationships are often being leveraged in quite predictable and bland ways. There is the potential to be more imaginative (for instance, looking for inspiration to Tide’s relationship with the NFL or to Amstel Ultra’s non-sports-focused relationship with Rafael Nadal).
- While some of the APAC campaigns were rooted in strong insights, a significant number were not. These campaigns often had an ‘inside-out’ focus – telling audience about the

product or brand, rather than trying to incorporate and explore insights about the audience. Building on core human insights will help to develop meaningfulness and establish enduring connections with audiences.

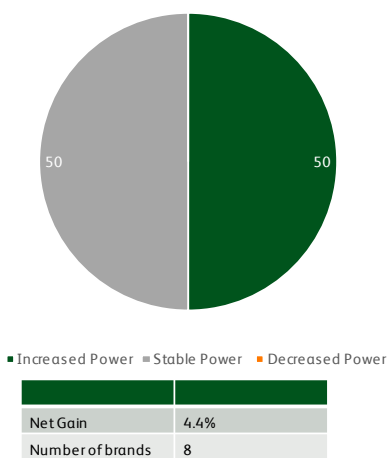
CMI PERFORMANCE UPDATE

Brand Power analysis:

50% of the top 8 brands in the APAC region increased Brand Power. Other 50% of top 8 brands are stable.

Brand Power MAT Q2 2022 (or nearest available data point) vs Q2 2021

Brand Power



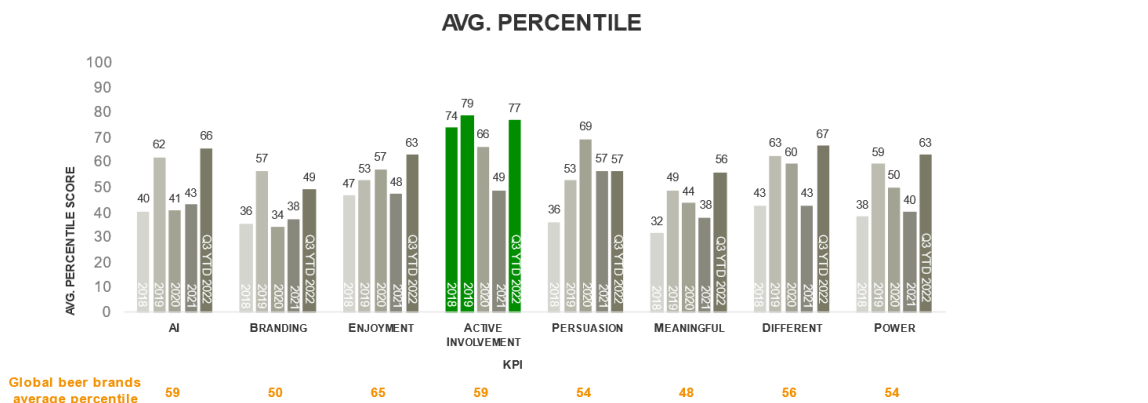
Opco	Brand	Net vs LY	Index vs LY
Malaysia	Tiger	0.7	+4
Myanmar	ABC	1.6	+19
Taiwan	Heineken	0	0
Cambodia	Anchor	-0.5	-2
Vietnam	Bia Viet	0.1	+17
Indonesia	Bintang	-0.3	-1
New Zealand	Export	1.0	+19
Korea	Heineken (Master Brand)	0.8	+11



Pre-testing results:

TV – all brands, APAC inc. Australasia: Strong improvement across the board, but Persuasive power is a bit stagnant vs. Last year

X: KPI || Y: YEAR [2018, 2019, 2020, 2021, Q3 YTD 2022]



KANTAR

Base sizes by year: 43, 39, 25, 20, 11

8

Countries included: Australia, Cambodia, China, India, Indonesia, Japan, Korea, Malaysia, New Zealand, Philippines, Singapore, Taiwan, Vietnam

HEINEKEN CREATIVE COUNCILS STATE OF THE NATION REPORT – AMERICAS

OVERVIEW

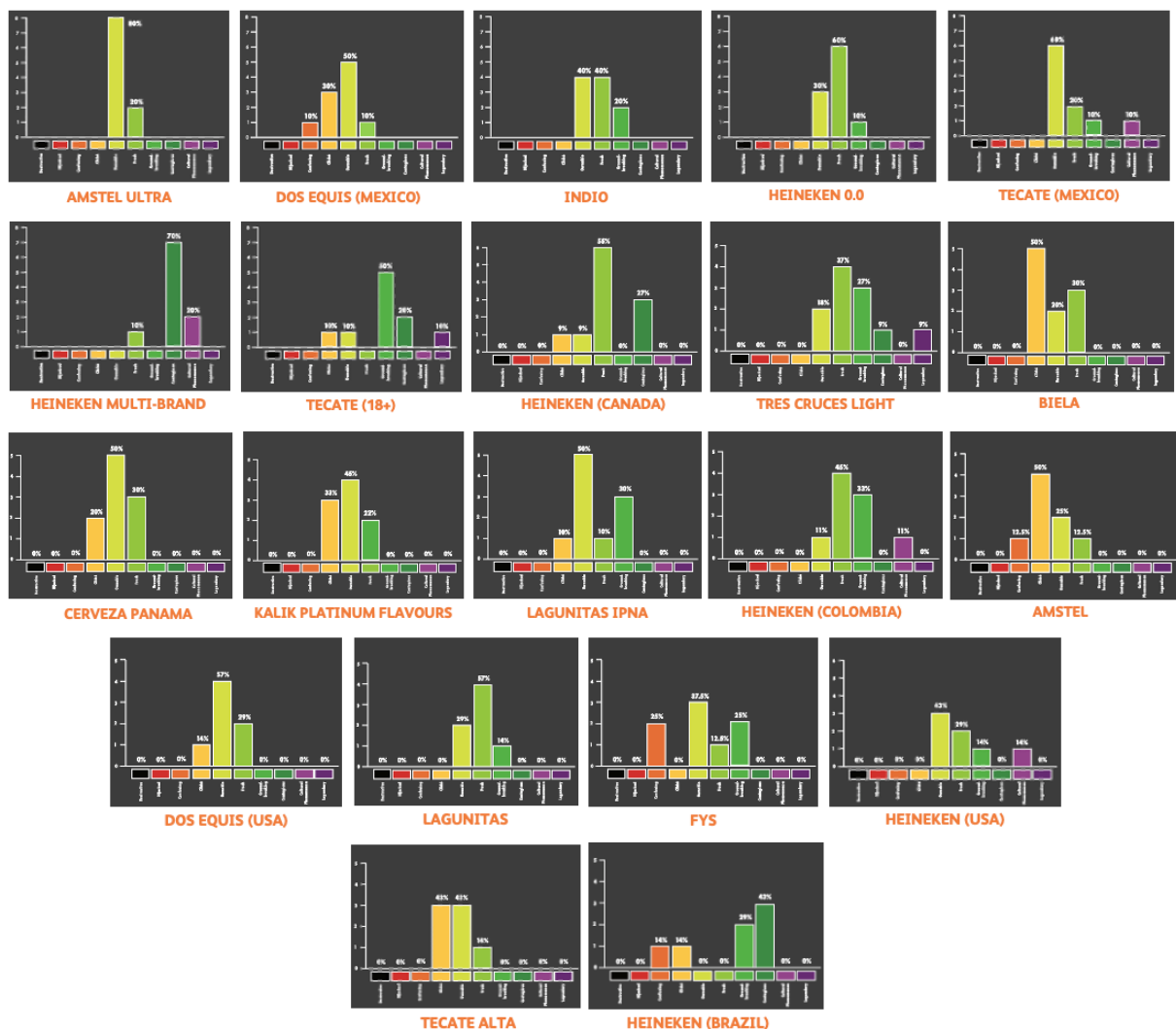
In Q2/Q3 2022, three Americas Creative Council sessions were held: on 13th June (**Mexico**), on 16th August (**Canada, Peru, Ecuador, Panama, Bahamas, Lagunitas USA, Colombia**), and on 17th August (**Brazil, USA**).

Work was reviewed from the following internal brands: **Amstel Ultra, Dos Equis (Mexico, USA), Indio, Heineken 0.0, Tecate, Heineken multi-brand, Heineken (Canada, Colombia, Brazil, USA), Tres Cruces Light, Biela, Cerveza Panama, Kalik Platinum Flavours, Lagunitas IPNA, Amstel, Lagunitas, FYS, and Tecate Alta.**

The featured work for each of the Creative Council sessions can be accessed via the password-protected links below (username - 'guest', password - 'welcome').

- 13th June group: <https://mexico.heinekencreativecouncil.com/>
- 16th August group: <https://americas-aug16.heinekencreativecouncil.com/>
- 17th August group: <https://americas-aug17.heinekencreativecouncil.com/>

Pre-voting results for each of the brands are captured in the charts below.



OVERALL CREATIVE 'STATE OF THE NATION' IN THE AMERICAS REGION

The output from brands within the Americas region is consistently strong. Robust and well-considered strategies are in place across the brand portfolio, creative ideas are predominantly clear and compelling, and skill and care is on display at the executional level. A select number of brands are pushing boundaries creatively – extending expectations for the brands themselves and for the category more generally. The campaigns from these brands were able genuinely to surprise and delight the Creative Council participants. There are a number of creative platforms that have the capacity to endure for significant lengths of time and to enter the cultural bloodstream, whilst distinctive brand assets are leveraged in effective ways. There is perhaps still an overemphasis on TV-led campaigns and a number of less traditional campaigns (for instance, brand activations) sometimes felt unremarkable. There was also a distinct 'stock-shot' quality to a number of the campaigns, with executional polish being prioritised over depth of idea. However, in general, the Americas is a leading region for creative excellence at Heineken.

STAND-OUT BRAND CAMPAIGNS

Tres Cruces Light, *Rescate De La "S"*: This campaign from one of the smaller Americas markets, Peru, was one of the highest performing campaigns in pre-voting from across the region. The campaign demonstrated the agility, the humility, and the creativity that is often lacking from large organisations. The Creative Council were impressed by how the brand leant into a position of weakness (a spelling mistake on a specific run of cans) and deployed a 'reverse jujitsu' move – turning that position of weakness into one of commercial advantage and brand strength. The 'Rescue of the "S"' campaign imbued this young brand with a sense of humour and humanity, and required fleetness of foot and bravery from the brand team. The creative idea was simple but delightful, and was executed with a puckish sense of fun – from the brand communications to the prizes on offer for the winners of the competition. This is a textbook example of how, in the right hands, adversity can be a powerful spur to creative excellence. The campaign was identified by the Contagious Editorial team earlier in the year, and was written up in a [campaign report](#) and in an ['Insight & Strategy' profile](#).

Heineken (Colombia), *Writing The Match*: This campaign thoroughly impressed the Creative Council on 16th August with its deft understanding of what appeals to a football-focused audience and its willingness to defy modern received wisdom with respect to message and medium. Heineken, of course, has huge stature within football thanks to its sponsoring of key properties, including the UEFA Champions League. But this campaign underlined the brand's understanding of how fans see the game – as an epic narrative, with a cast of intriguing personalities. The long-form print ad, and the conceit of turning the Champions League final into a written drama, was perfectly aligned with fan sentiment (underlined by how fans cut out, kept, and framed the piece in *El Espectador*). It also demonstrated how the brand was willing, and brave enough, to defy modern industry orthodoxy about how print is a dying medium and how copy should be limited to a small number of words per page. The power of this campaign came from its surprising format, the beauty of the copywriting, and the smartly observed insight at its heart.

AREAS OF STRENGTH

- There were a significant number of strong insights and human-centric campaigns on display across the three Councils, particularly from the Heineken brand. There were repeated demonstrations that portfolio brands understood and wanted to tackle big issues, with **Heineken (USA)** engaging with the issue of work/life balance, **Tecate** leading the category in

confronting underage drinking, and **Heineken (Brazil)** effecting substantive change in the clean energy space. This active engagement with issues confronting consumers is a key strategic and creative strength.

- There were multiple examples of strong distinctive brand assets and ownable creative platforms. The clear visual identity and quirky tone of **Lagunitas** enabled the brand to stand out in the category, while the ‘guardian’ archetype was deployed smartly and engagingly by **Tecate** (it is particularly interesting how this brand asset could evolve beyond TVCs and beyond the partnership with Bruce Willis). In terms of stimulating creative platforms, **FYS** (*50% less sugar and marketing*) and **Dos Equis (USA)** (*Get a Dos*) both stood out – these are platforms which enable strong engagement with popular culture, and have the potential to endure.
- A number of brands in the Americas were willing to embrace unconventionality – when others zigged, they zagged. Frequently this came in the form of original touchpoints, from the physical creation of the ‘The Closer’ by **Heineken (USA)**, to the tie-in with the live news by **Cerveza Panama**. Alternatively, unconventionality was also seen in executional details, from the long-form press ad from **Heineken (Colombia)**, to the (necessarily) low-fi production values of the **Heineken multi-brand** campaign (Mexico), to the cheekiness and playfulness of **Tres Cruces Light** and the ‘Rescate De La “S”’ campaign.

AREAS OF OPPORTUNITY

- As has been the case across the other regions, a number of brands in the Americas presented TV assets that risked feeling ‘stock-shot-esque’, with montages of youthful groups behaving in ways that felt slightly synthetic and exaggerated. Examples from the region were **Biela** (although there was good use of an original, catchy and branded music track in this), **Kalik Platinum Flavours**, and **Cerveza Panama**. All three of these campaigns had high energy and were produced to a good standard (particularly Kalik Platinum Flavours). However, they also felt conventional and less distinctive than other campaigns, which was reflected in the pre-voting scores.
- As identified above as a strength, there were a number of creative platforms that feel very flexible and ‘sticky’, as well as being excellent gateways into popular culture. **FYS** and **Dos Equis (USA)** were the two stand-out examples. However, one consideration moving forwards for both of these brands is that the creative platforms have the potential to become unfocused because of how flexible they are. It will be important for these and other brands to consider which areas of culture they want to play in and how they interpret their own creative platforms, so that there is an implicit and underlying consistency to their communications.
- A number of brands seemed to prioritise production or design quality over conceptual and human-focused depth. **Indio** in Mexico presented a cinematic TVC which had high production values, but which lacked emotional power and was firmly product-focused. Similarly, **Tecate Alta** demonstrated some of the best packaging design and cinematography across the three Americas Councils, but the “Bring Your All, Bright Your Alta” campaign didn’t deliver on the promise of its nuanced and intriguing strategy.

CMI PERFORMANCE UPDATE

Brand Power analysis:

Brand Power Development Americas: Positive momentum in Brazil. Watch out Mexico where HNK softens while ABI gains

	HEINEKEN Core (GC / Strat. / KP)		ABInBev	
	MAT Q1'22	VS. MAT Q1'21	MAT Q1'22	VS. MAT Q1'21
TTL Americas*	34,3%	+0,11%	55,5%	-0,12%
Brazil	26,8%	+0,64%	58,7%	-0,76%
Mexico	45,4%	-0,67%	50,7%	+0,83%
USA**	(not yet tracked)	/	(not yet tracked)	/

▲ Significant momentum (+/- 0,3%)
▼ Significant momentum (+/- 0,3%)

*TTL Americas including Brazil, Mexico

**USA not applicable for yoy comparison as the BSG only H2'2021 (significant changes on brandlist) conducted in Q2'22; Vietnam not applicable for yoy comparison due to trendbreak in H2'21

Heineken® brand: Up in Brazil driven by Salience; Declines in Mexico led by declining Meaningful Difference and Salience. Amstel growing in Brazil.

HEINEKEN (MAT Q1'22 vs. MAT Q1'21, Top 3 core brands)			Power Share%		Meaningful index		Difference index		Salience index	
Country	Brand	Segment	MAT Q4'21	vs. LY	MAT Q4'21	vs. LY	MAT Q4'21	vs. LY	MAT Q4'21	vs. LY
Brazil	HEINEKEN	Strategic	12%	0,5%	187	3	170	-2	159	11
Brazil	AMSTEL	Strategic	5%	0,6%	138	3	113	2	86	9
Brazil	EISENBAHN	Game Changer	4%	-0,3%	127	-5	126	-6	64	0
Mexico	TECATE	Strategic	11%	-0,5%	99	-2	110	0	187	-3
Mexico	INDIO	Key Pillar	8%	-0,3%	117	-3	114	1	122	-1
Mexico	HEINEKEN	Game Changer	7%	-0,4%	105	-4	138	-6	91	-1

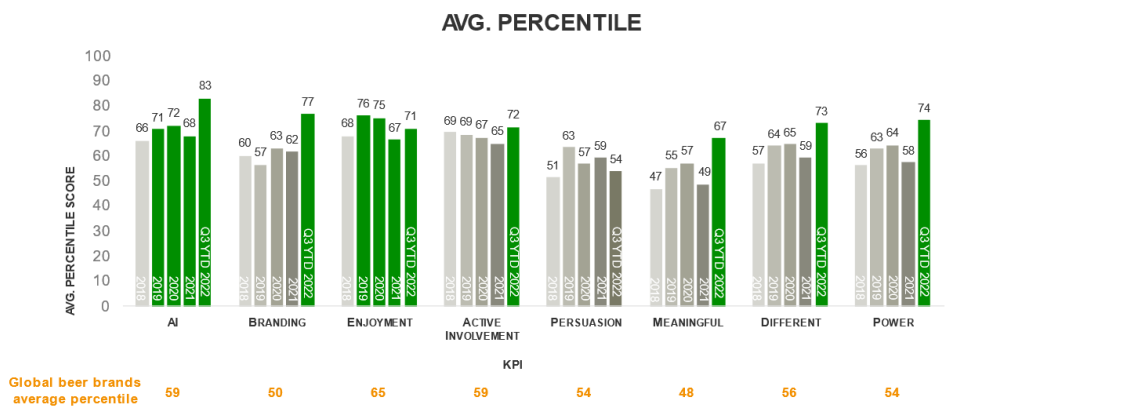
Trend of MAT Q1'22 vs. MAT Q1'21 includes 14 common TOP markets Excluding USA which has data only in Q1 Vietnam trend break in H2'21.

Red font significantly lower than last year
Green font significantly higher than last year

Pre-testing results:

TV – all brands, Americas: Very positive progression in driving long term Brand Power through well-branded and enjoyable advertising, but Persuasion has marginally decayed

X: KPI || Y: YEAR [2018, 2019, 2020, 2021, Q3 YTD 2022]



KANTAR

Base sizes by year: 39, 38, 58, 73, 11

7

Countries included: Mexico, Brazil, Chile, Argentina, USA (Note: HUSA locally doesn't use Kantar but a vendor called Sentient so these Kantar tests are only the ones done by the global teams.)