Addressing Total Market
Research Initiative
Clients & Agencies TM Roundtables Report

TM Client Roundtable
June 3, 2014

Carlos Santiago
Chair, AHAA Research-Thought Leadership Committee
Chief Strategist, Santiago Solutions Group
# Total Market

## Client Roundtable Participants

<table>
<thead>
<tr>
<th>Name</th>
<th>Title and Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>David Cardona</td>
<td>Director, Shopper Marketing, Category Advisory &amp; Multicultural Capacities – The Clorox Company</td>
</tr>
<tr>
<td>Christopher Rivera</td>
<td>Associate Director, Brand Marketing Multicultural Kellogg’s Company</td>
</tr>
<tr>
<td>Xavier Turpin</td>
<td>Director Multicultural Marketing – Dunkin Brands</td>
</tr>
<tr>
<td>Lizzette Williams</td>
<td>Director Multicultural Marketing – Kimberly Clark</td>
</tr>
<tr>
<td>Bill Duggan</td>
<td>Executive Vice President Association of National Advertisers</td>
</tr>
<tr>
<td>Gilbert Dávila</td>
<td>President &amp; CEO Davila Multicultural Insights, Chairman ANA’s Multicultural Marketing &amp; Diversity Committee</td>
</tr>
<tr>
<td>Carlos Santiago</td>
<td>Chief Strategist Santiago Solutions Group, Chair, AHAA Research-Thought Leadership Committee</td>
</tr>
</tbody>
</table>
TM Roundtables
USA

Multicultural Nation

Mainstream Redefined
Multicultural Drives…

84% of U.S. pop growth

81% of U.S. job growth

77% of U.S. job growth aggregate income

43% of Buying Power growth in Top 10 TM states

Source: SSG Total Market ROI Watch; Analysis of BLS Quarterly Census of Employment and Wages Q1 2014 v 2013; Selig 2010-2013; SSG 10 Most Influential TM States model
Multicultural Millennials

38% Multicultural Share of Employed Millennials

52% Of Millennial Job Growth

47% MC Share of Millennial Incremental Personal Income

Source: Santiago Solutions Group Total Market ROI Watch, analysis of BLS Quarterly Census of Employment and Wages q1 2014 v 2013; Selig 2010-2013; 10 Most Influential TM States model
One

‘General Market’

Message?

Focus on the

Growth

Opportunity
Total Market Approach
(TMA)
TMA Definition

A marketing approach followed by corporations with their trusted internal and external partners which proactively integrates diverse segment considerations. This is done from inception, through the entire strategic process and execution, with the goal of enhancing value and growth effectiveness.

In marketing communications this could lead to either one fully integrated cross-cultural approach, individual segment approaches, or both in many cases, but always aligned under one overarching strategy.
Anatomy of Total Market Approach

Total Market Business Planning (GM and MC cuts)

Today: GM and MC planning are managed separately

Business Problem

Brand DNA

Integrated Outcome

Differentiated Outcome
What TMA Is

• Supported and shepherded at the highest level of the organization.

• Intends for all marketing executives to be well versed on relevant segments and feel that they have “skin in the game”.

• Reflected and embraced across the organization, its partners and its communications strategy.

• Characterized by a collaborative dynamic between the marketer and the partner agencies from the outset.

• Recognizes that the market is composed of a more diverse mainstream in addition to individual ethnic segments.

• The sum of “GM“ strategies that are culturally nuanced, PLUS dedicated segment strategies.

• Reflected at the strategic AND the tactical/executional level.
What TMA Is Not

• One size fits all cost reduction plan.

• *Translation or adaptation of a general market campaign without diverse consumer insights from the beginning of the process.*

• An assignment that is a consideration only for the multicultural team.

• Lead agency sets the strategy without effective integration of MC and GM from inception.

• A short term test or project.
HUGGIES: A TM Case Study
When & How to Apply Total Market

INTEGRATED

Core Brand Strategy
Multicultural = 50% of babies TODAY

DIFFERENTIATED

Growth Strategy
Births driven by a few key Multicultural regions

Emerging Needs - Innovation
Scented Baby Wipes

Shared by: Lizette Williams,
Director Multicultural, Kimberly-Clark
## Client – Agencies Models In Action

<table>
<thead>
<tr>
<th>Model #1</th>
<th>Client Leads/Includes All Agencies Simultaneously</th>
</tr>
</thead>
<tbody>
<tr>
<td>Model #2</td>
<td>A Selected Agency Leads Multi-Agency Team</td>
</tr>
<tr>
<td>Model #3</td>
<td>One Agency Responsible for “GM” Work and Segment Work</td>
</tr>
</tbody>
</table>
Beyond TM Definition & Criteria...

- Marketers are seeking best practices for effective integration and implementation of TMA.
- Potential next steps and topics of development in the AHAA-Client journey could include elements like:

  - Planning & Strategy
  - Ad Messaging
  - Customer Experience
  - Refining ROI Modeling & Metrics
  - Org Structure & Education
  - Media Planning & Buying
  - Digital
  - Validation of Concept – Case Studies
  - Defining TM Insights
  - Agencies Model
  - Shopper Marketing
  - Tracking TMA Evolution

Highest Need = Priority  ✔ Completed  ⊗ In-Progress
To share case studies, questions, comments, or participate in TM Roundtables, please contact:

Gilbert Davila, Chair Multicultural & Diversity Committee:
GILBERT@DAVILAMI.COM

Carlos Santiago, Chair, AHAA Research Committee:
Carlos@SantiagoSolutionsGroup.com