

Brand Building in Focus

A marketing perspective on
driving sustainable growth in APAC

Foreword

2025 is proving to be a tough year for marketers across APAC. Economic uncertainty, evolving privacy regulations, and shifting consumer expectations are making it harder than ever to plan with confidence.

We speak with marketers every day who are being asked to do more with less — and to prove the value of every dollar spent. In these conversations, one word keeps coming up: brand.

In our conversations with marketing and media experts, we've learnt that marketers don't deny the value of brand building, but many struggle to confidently invest in brand building initiatives, especially when it comes to articulating the value of their decisions with insight-led, APAC-specific data. This whitepaper aims to bridge the gap between knowing and doing.

With Kantar's expertise in brand measurement and StackAdapt's own analysis of 259 million APAC impressions, we've explored how brand investment contributes to top-line growth, and how combining brand-focus with performance-focus in campaign planning leads to amplified, measurable outcomes.

Enriched by expert perspectives on today's realities and tomorrow's pressures, this report is a one-stop resource for marketers looking to make a stronger case for keeping brand and performance engines running in harmony — and for putting sustainable brand growth at the heart of budget decisions.

We believe this whitepaper will support both marketers and their agency partners in breaking down budget silos and building a sharper toolkit to strengthen the business case behind every investment decision.



Liam McCarten
VP of Sales APAC
StackAdapt



Lyn Lim
Head of Commercial
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Kantar

Executive Summary

The challenge:

Navigating an unclear future

While 85% of CMOs globally agree that brand investment drives business results, 54% still prioritise performance marketing, with only 22% prioritising brand ^[1]. In APAC, 49% increased spend on performance while just 28% increased spend on brand building in 2025 ^[2].

The contradiction comes from a lack of confidence. **Marketers know brand matters, yet many say they lack practical guidance to activate brand building, especially under tighter budgets and rising scrutiny.**

This paper responds to that challenge by offering evidence-based ways to put brand back in focus — even in a region long dominated by performance-first strategies.

Source: [1] Gartner CMO Spend Survey 2025, [2] WARC Voice of the Marketer Survey, 2024.

Executive Summary

The findings:

Sharpening our focus

This report finds that a balanced focus on both brand marketing and performance marketing should be prioritised. Aligning both unlocks greater, more sustainable growth for businesses. Marketers can make three shifts to better align performance and brand.

Widen your view

Rebalance focus on short- and long-term impact. Moving from a 70/30 to a 50/50 performance-to-brand split can lift baseline sales by up to +10%. There's no perfect ratio, but rebalancing is a strong place to start. ^[3]

Lift baseline sales by up to

+10%

See the whole picture

Plan across the full funnel. Each touchpoint shapes the brand and drives action. Limiting your mix to one part of the funnel means missing out. StackAdapt's campaign analysis of 259 million impressions finds that adding a new channel to the marketing mix boosts reach by up to +14%. Full-funnel campaigns can deliver up to 8x more conversions while increasing reach. ^[4]

Deliver more conversions up to

8x

Sharpen your lens

Measure beyond the moment. Return on Investment (ROI) depends on timeframe, yet marketers often tie Return on Ad Spend (ROAS) to campaign windows using narrow efficiency metrics. Kantar's analysis shows that media drives 13% of sales directly, rising to 28% when a longer-term view is factored in. ^[5]

Impact on sales increases

13→28%

Source: [3] Kantar's Brand & Marketing ROI Norms, [4] StackAdapt analysis of proprietary data, 2025, [5] Kantar's Total Marketing ROI analysis.



Executive Summary

Key takeaways:

Bringing brand building back into focus

Growth engine

Treat brand as a growth engine, backed by tangible metrics in your strategy

Planning level

Rebalance your split and plan full-funnel

Day-to-day

Apply smarter measurement by unifying trackers across functions and adopting more accurate Marketing Mix Modeling (MMM) tools such as Brand Health Measurement (BHM)

Brand-side

Protect and grow brand investment, using data to defend its long-term value

Agency-side

Help clients connect the dots across teams and timelines, showing how brand and performance deliver more when planned together



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Chapter 1

What Happens When No One's Looking Past the Quarter?

Over-indexing on short-term tactics may deliver quick wins but when long-term growth falls out of focus, it risks undermining sustainable growth for the business.

Even when overall growth is strong, our research shows that brands with a more balanced investment across the funnel, including consistent brand building, are better positioned to grow further and unlock new opportunities. A wider view helps marketers future-proof growth — sustaining relevance, strengthening brand equity, and setting the foundation for both near- and long-term results.

The need to zoom out and re-focus on brand value is especially urgent now that CMOs are under mounting pressure to deliver fast commercial results, all while navigating shorter tenures and rising volatility in the business environment.

"A lot of CMOs often stay only two to three years, and how they're seen — and what comes next — usually depends on the ROI they can show in that short time."

Sarah McNeil
Sunny Advertising

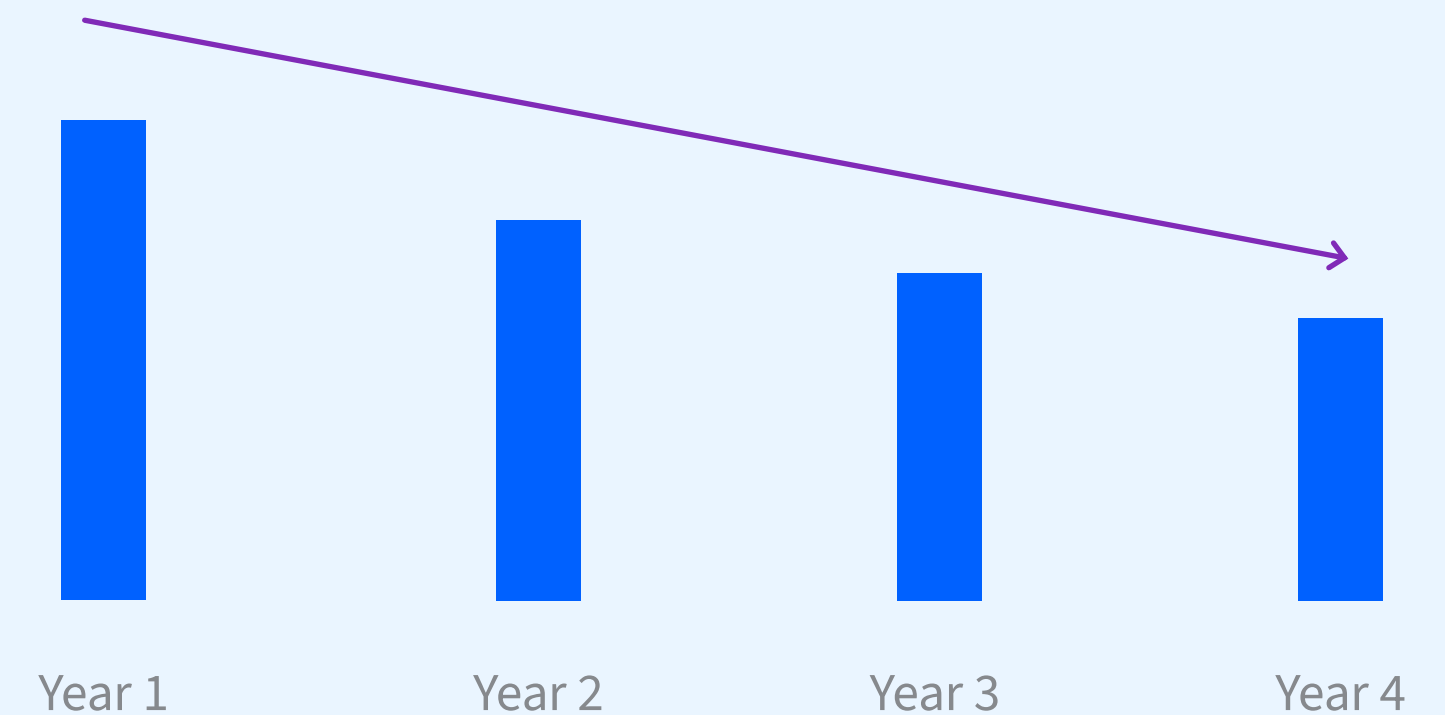
It's no surprise that marketing roles are evolving to reflect this pressure. A recent study of Fortune 500 companies found that 11% of top marketers have dropped "Marketing" from their titles, adopting "Growth" or "Commercial" instead, signalling the growing expectation on marketers to drive direct commercial impact.

Source: CMO Tenure Study 2025: The Evolution of Marketing Leadership, Spencer Stuart.

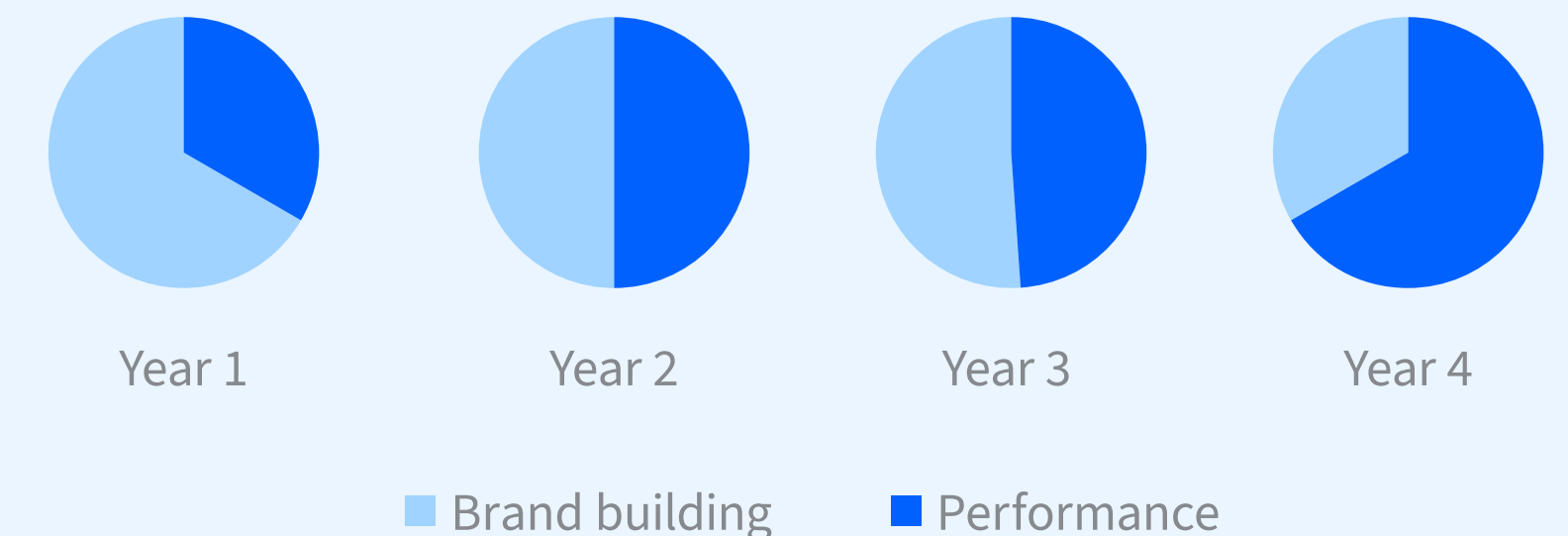
Neglecting brand building leads to sales erosion

Kantar's consolidated analysis shows that tipping too far into performance marketing results in a decline in base sales over time.

Decline in base sales



Market spend



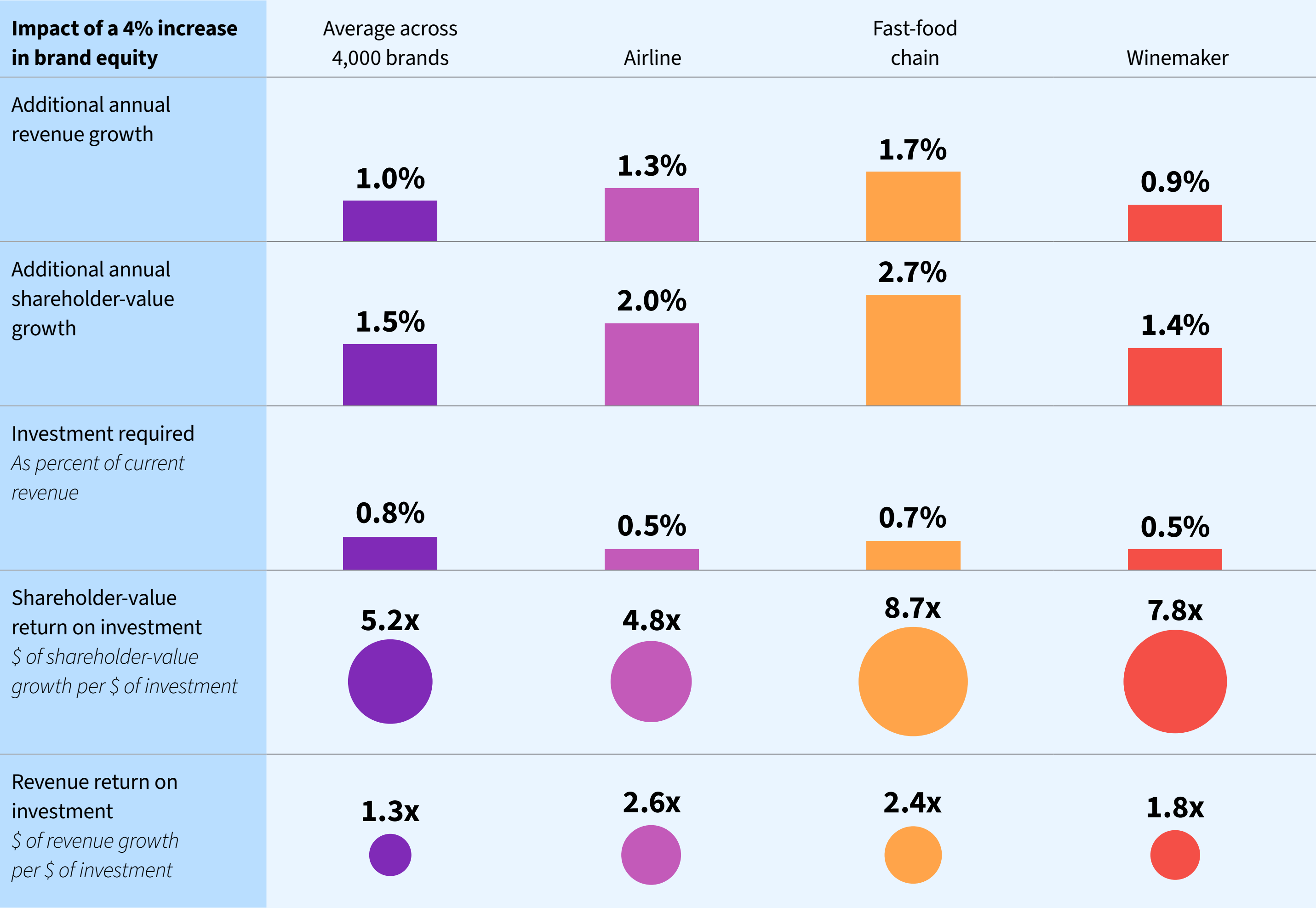
Source: Kantar Lift ROI base (global, 2024).

The most effective strategies unify brand building and performance under a shared vision for growth. By aligning measurement frameworks and success metrics, as well as using brand equity as a guiding KPI, marketers can optimise for both short- and long-term returns.

In their cross-industry analysis, the analytics company Bera.ai demonstrates how brand equity – resulting from meaningfulness, distinctiveness, familiarity and likeability – impacts both business and financial performance.

ROI of brand building is high across revenue and shareholders' value

An increased investment in brand building projects positive impacts on top-line performance and multiplies returns for shareholders across industries.



Source: Bera.ai's analysis via Harvard Business Review, 2023.

Recalibrate to grow in the APAC region

Historically, rapid growth has reinforced a performance-first mindset at the expense of long-term brand building in the APAC region. In 2024, 49% of APAC marketers planned to increase performance spend - compared to 38% globally - while just 28% expected to boost investment in brand building, trailing the global average of 35%.

“APAC was a pioneer in performance marketing — leading mobile-first and content-first marketing. (...) Now we've got a huge amount of competition competing over a finite set of inventory and a finite set of audiences, so we are seeing some inflation in performance pricing. This is forcing a re-evaluation of investing earlier in the funnel.”

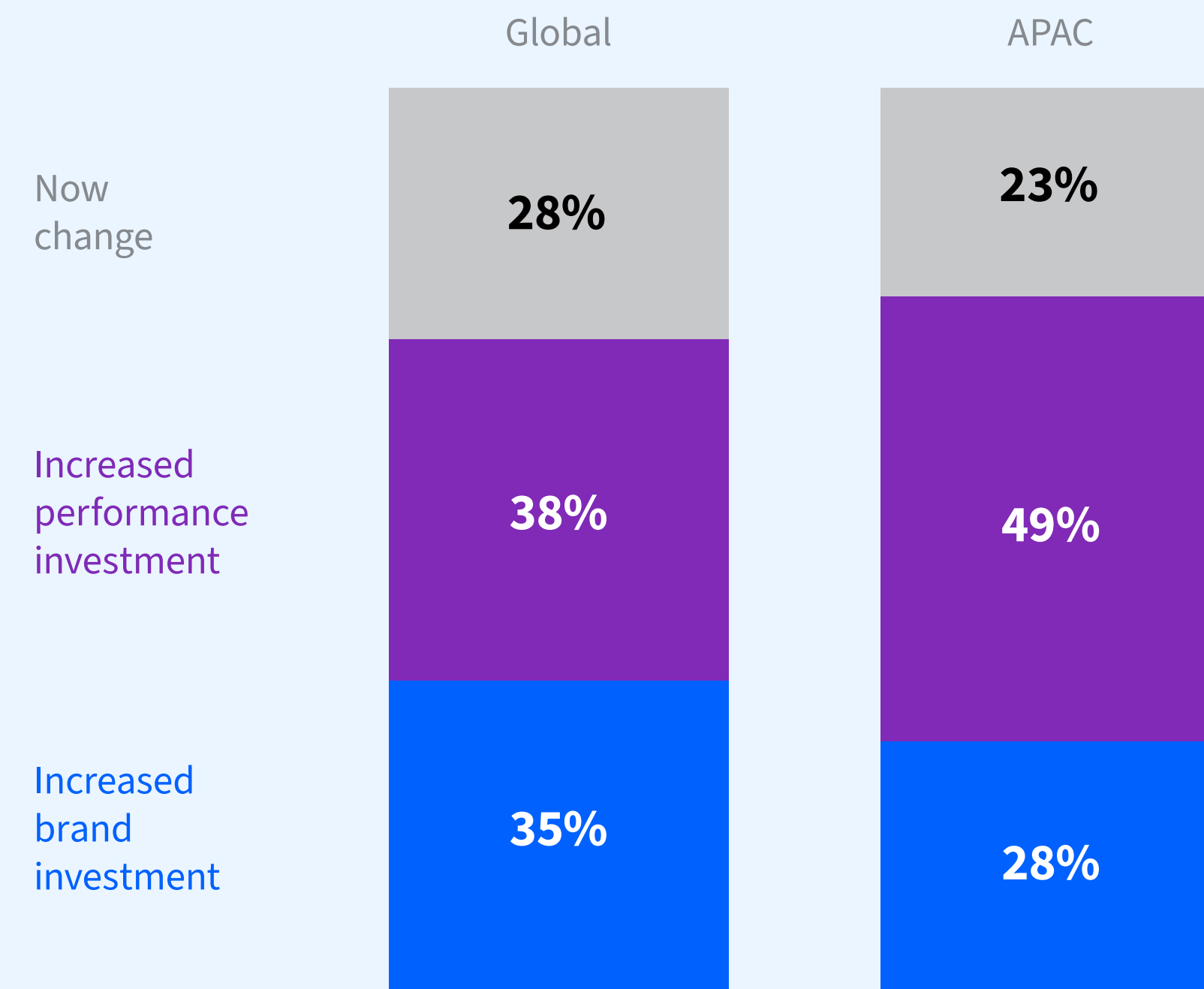
Matt Farrington
Dentsu

However, there is clear evidence that long-term brand building fuels growth while over-investing in short-term performance can stall it.

APAC favors performance over brand marketing

While globally marketers tend to rebalance their investment in APAC, the majority plans to increase investment in performance marketing.

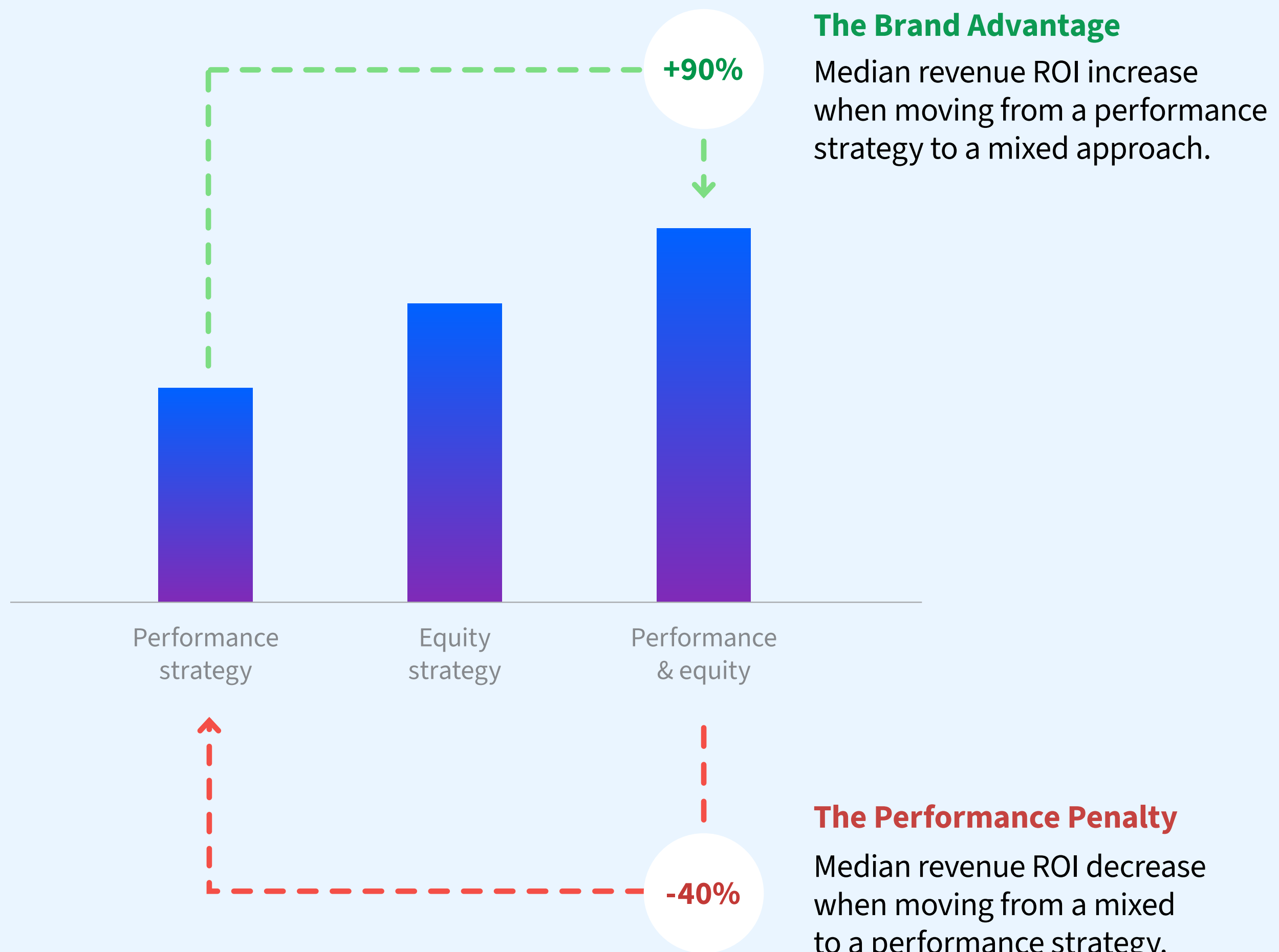
Question: Do you expect the balance of your / your typical client's investment in brand vs. performance to change over the next year?



Source: WARC Voice of the Marketer Survey, 2024.

The benefits of pairing performance and brand marketing

The greatest payback for advertisers happens when performance-led and equity-led advertising are both part of the mix.



Source: Analytic Partners ROI Genome, via WARC The Multiplier Effect report, 2024.

Chapter 2

The Missed Blind Spot

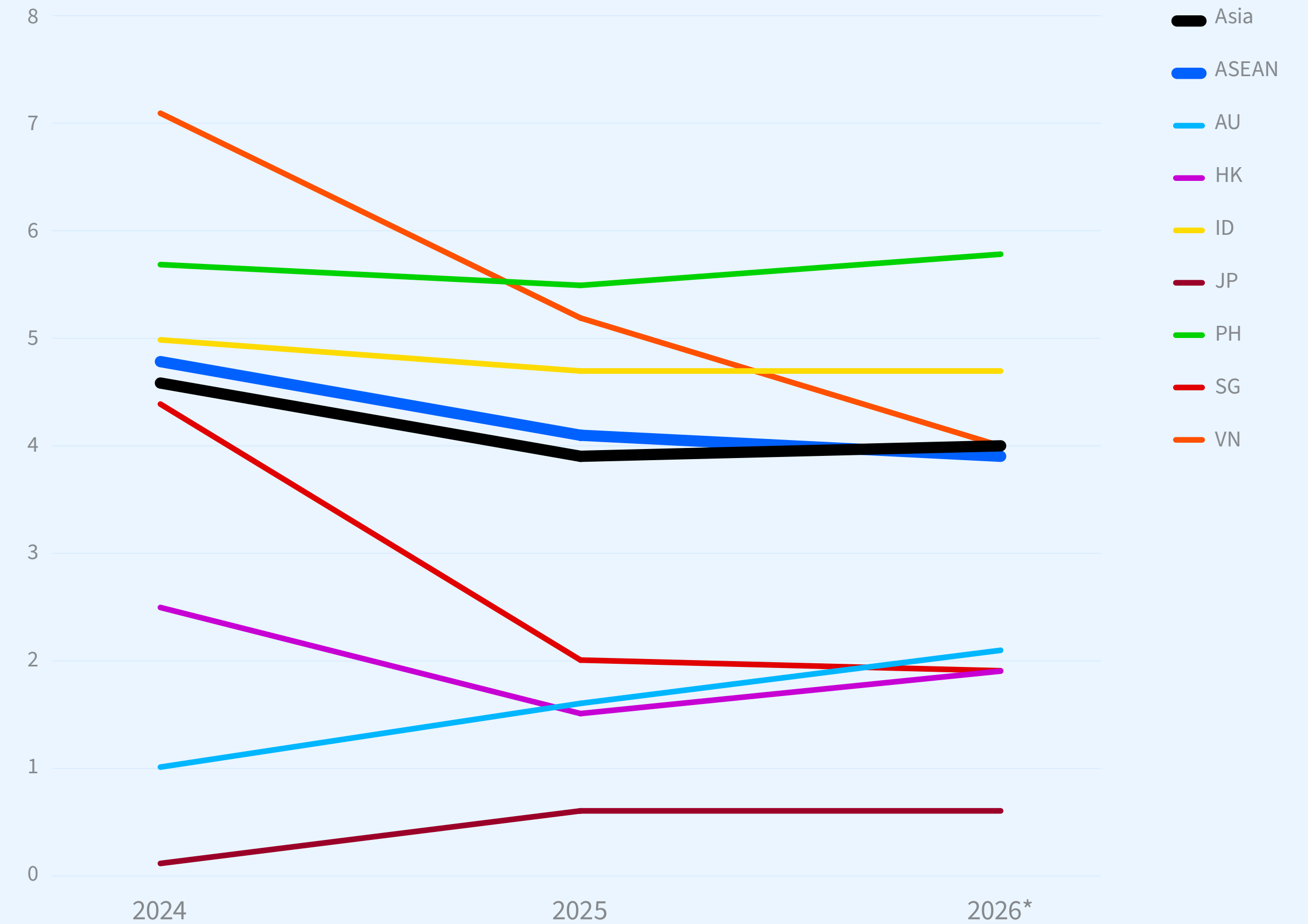
Kantar data finds that brand building is one of the most effective drivers of enduring business success. Effective brand building encourages repeat purchases and retention, simplifies acquisition, and enables premium pricing.

With increased competition in the market and slower growth projections for APAC economies, marketers can benefit from focusing on the value of brand building. Strong brands are better able to sustain demand, are more resilient, and less reliant on bottom-of-funnel tactics to convert customers.

Cautious economic forecast for Asia and the Pacific

(real GDP growth, *projections)

The IMF has revised its growth projections for APAC economies, reflecting a more cautious outlook amid global uncertainties.



Source: Regional economic outlook, April 2025.

Make your brand the easy choice

Strong brands come to mind more easily and feel more relevant to a greater number of people. This salience helps expand penetration, especially when paired with a clear point of difference, whether functional, emotional, or purpose-led.

According to Kantar's *Blueprint for Brand Growth*, brands seen as 'Meaningfully Different' are five times more likely to grow their customer base over two years than brands that are not 'Meaningfully Different'. The more people recognise and relate to a brand, the more likely they are to consider and choose it over alternatives.

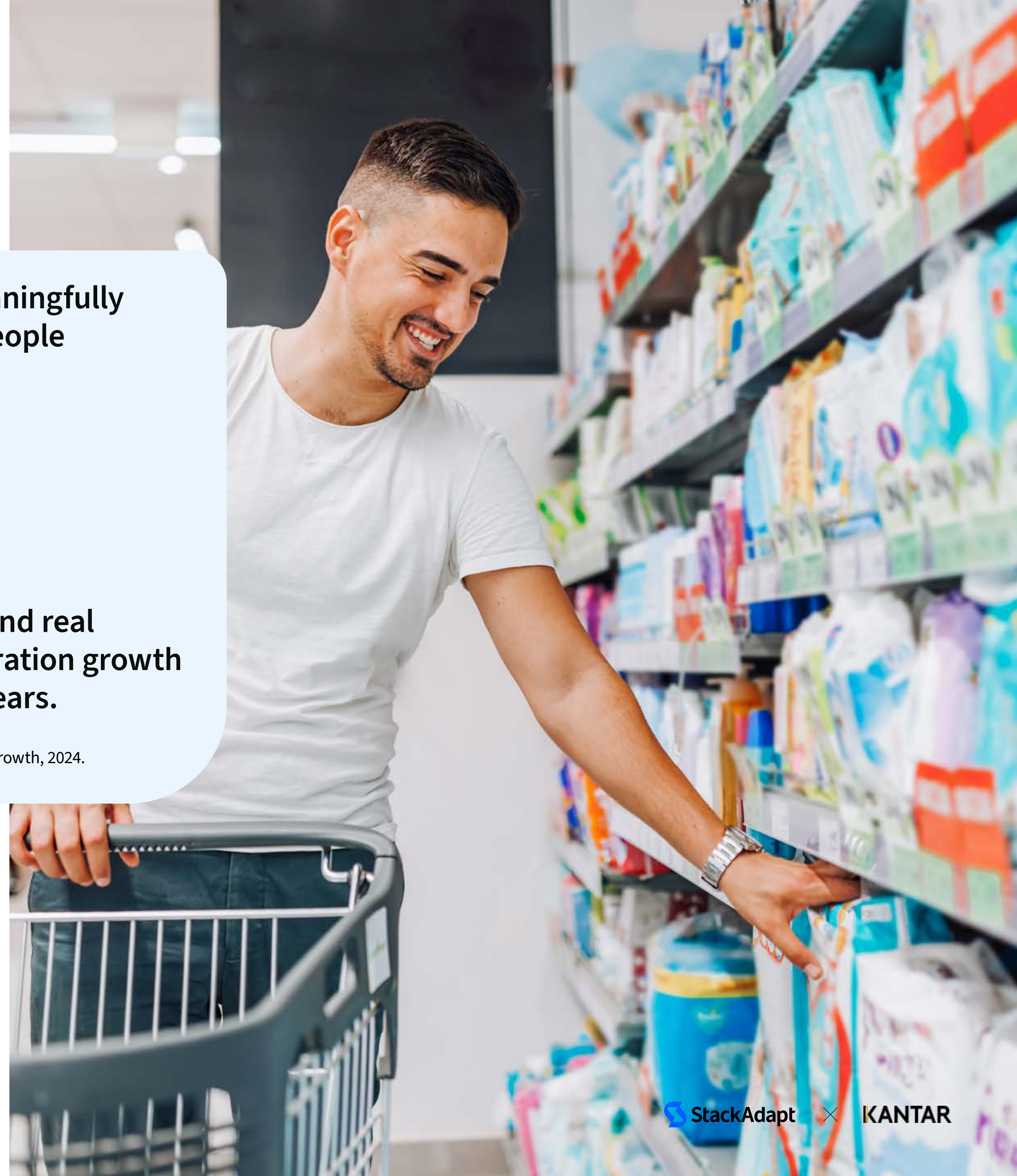
Why brand building matters:
Penetration is key to sustained growth. And strong brand equity helps unlock it at scale.

Brands that are Meaningfully Different to more people command

5x

penetration today and real advantage in penetration growth over the next two years.

Source: Kantar's Blueprint for Brand Growth, 2024.



Keep customers coming back

When people feel connected to a brand, they're more likely to come back — especially in habit-driven categories or complex purchases where trusted names win.

Repeat purchase rates exceed 50% among consumers with above-average brand affinity, compared to just over 25% among those with below-average affinity. That's twice the return rate, showing how brand-led loyalty compounds over time.

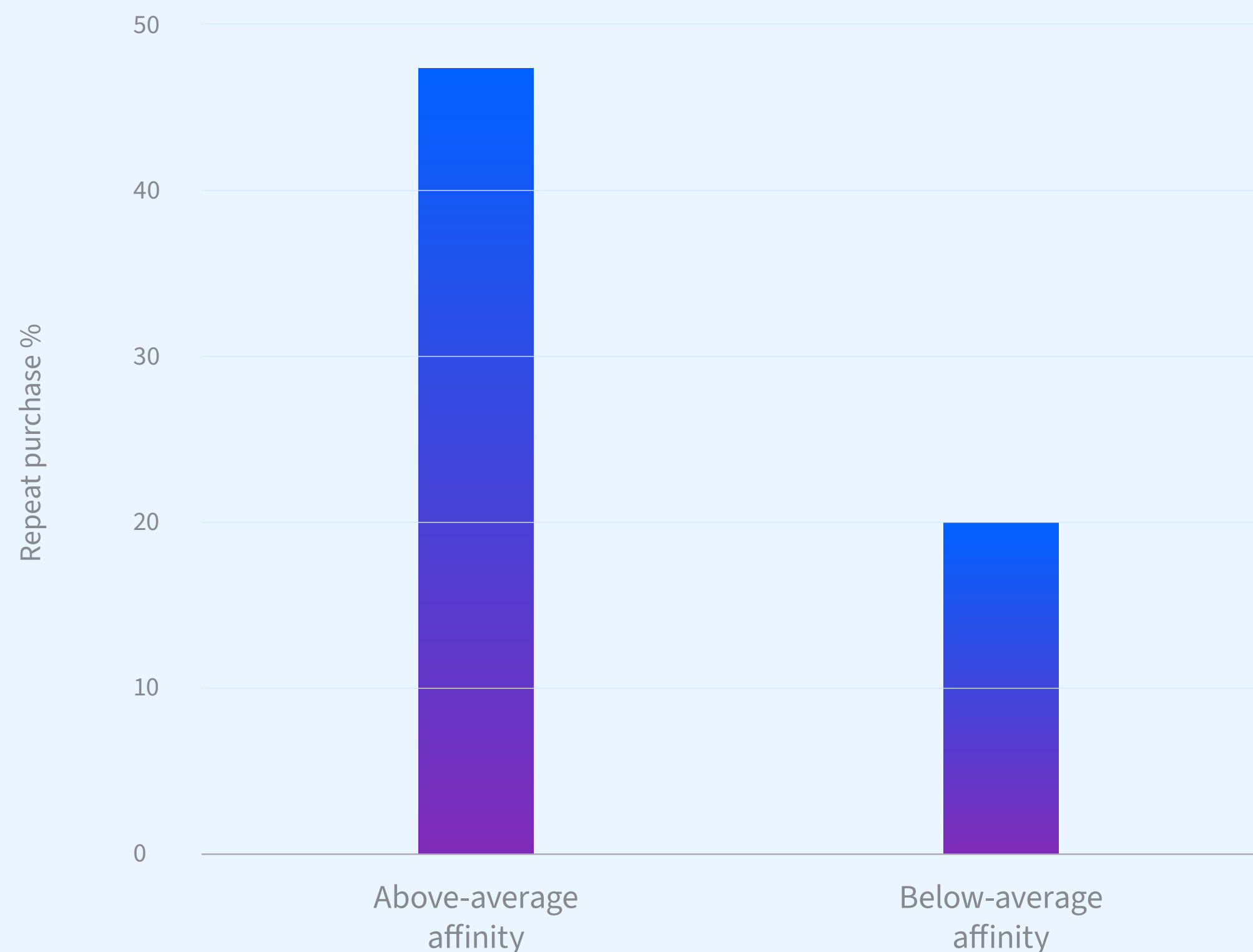
Why brand building matters:
Being relevant keeps people coming back — even when they have other options.

"It's surprising how many brands are so focused on getting new customers in and not focused on that brand loyalty piece and how they keep consumers in the ecosystem, or how they capture first party data."

Sarah McNeil
Sunny Advertising

Repeat purchase correlates with brand affinity

Findings show twice as high repeat purchases among buyers with strong brand affinity, suggesting that leveraging this affinity to boost frequency is a smart growth move.



Source: Kantar's Blueprint for Brand Growth, 2024.

Earn more by being worth more

Strong brands earn the right to charge more and rely less on margin-cutting promotions. Even in price-sensitive categories, brand equity helps reduce the pressure to discount.

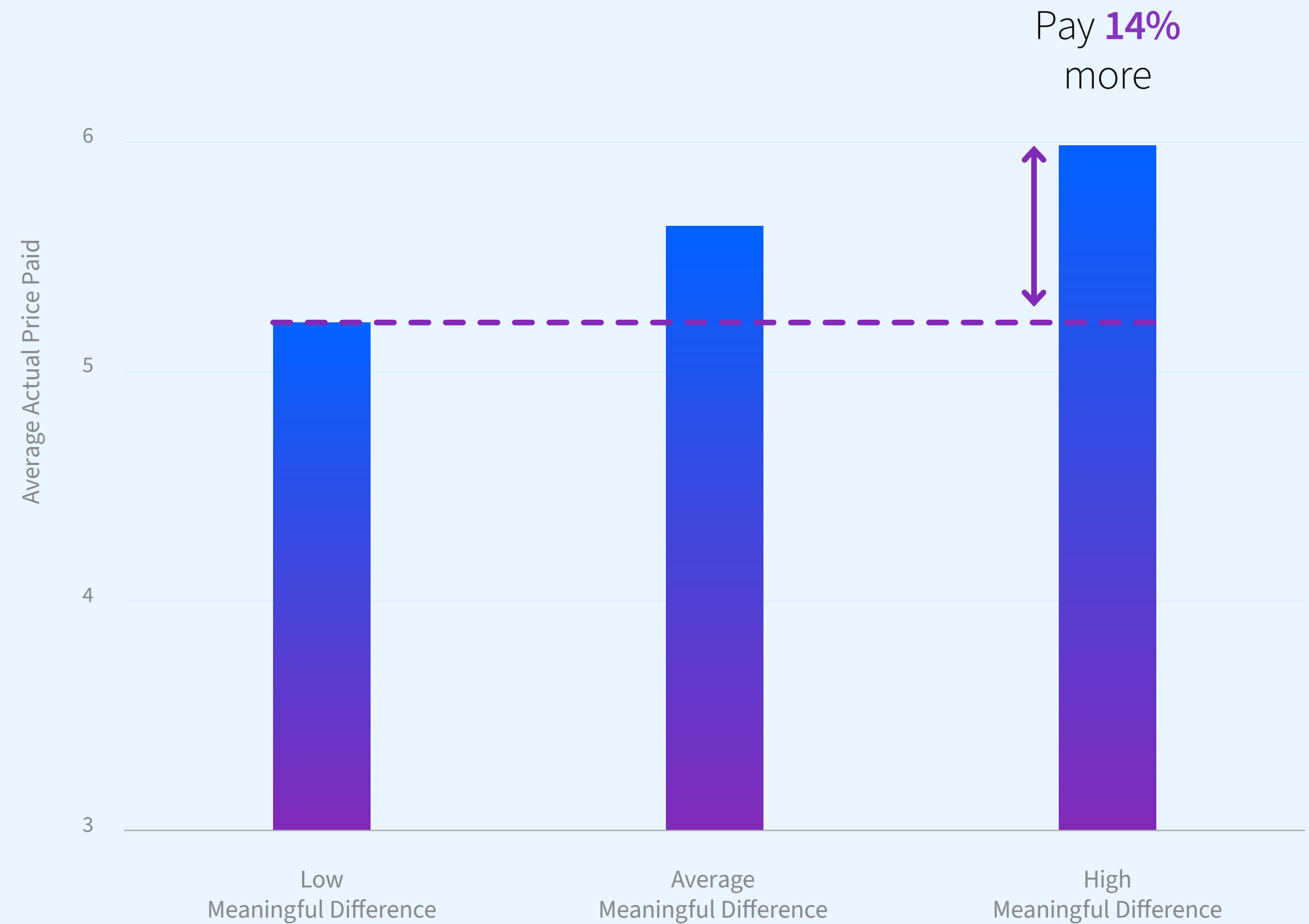
According to Kantar's *Blueprint for Brand Growth*, consumers who view brands as Meaningfully Different perceive greater value and become less price-driven. Such brands can charge up to 14% more than competitors.

Why it matters:

Consumers see more value in strong brands — which helps justify higher prices and fewer discounts.

Pricing power correlates with meaningful difference

Brands that command a higher price point in their category are typically seen as meaningful and different.



Source: Kantar's Blueprint for Brand Growth, 2024.

Chapter 3

From Snapshot to Panorama

Marketers are beginning to recognise the need to rebalance and are starting to move beyond the pandemic-era tilt toward performance marketing. However, short-term pressures, tighter budgets, and rising expectations for immediate ROI often keep brand building on the back burner.

Shifting to a more balanced strategy takes more than good intent: it requires better tools, clearer alignment across teams, and a shared view of marketing's long-term role in growth.

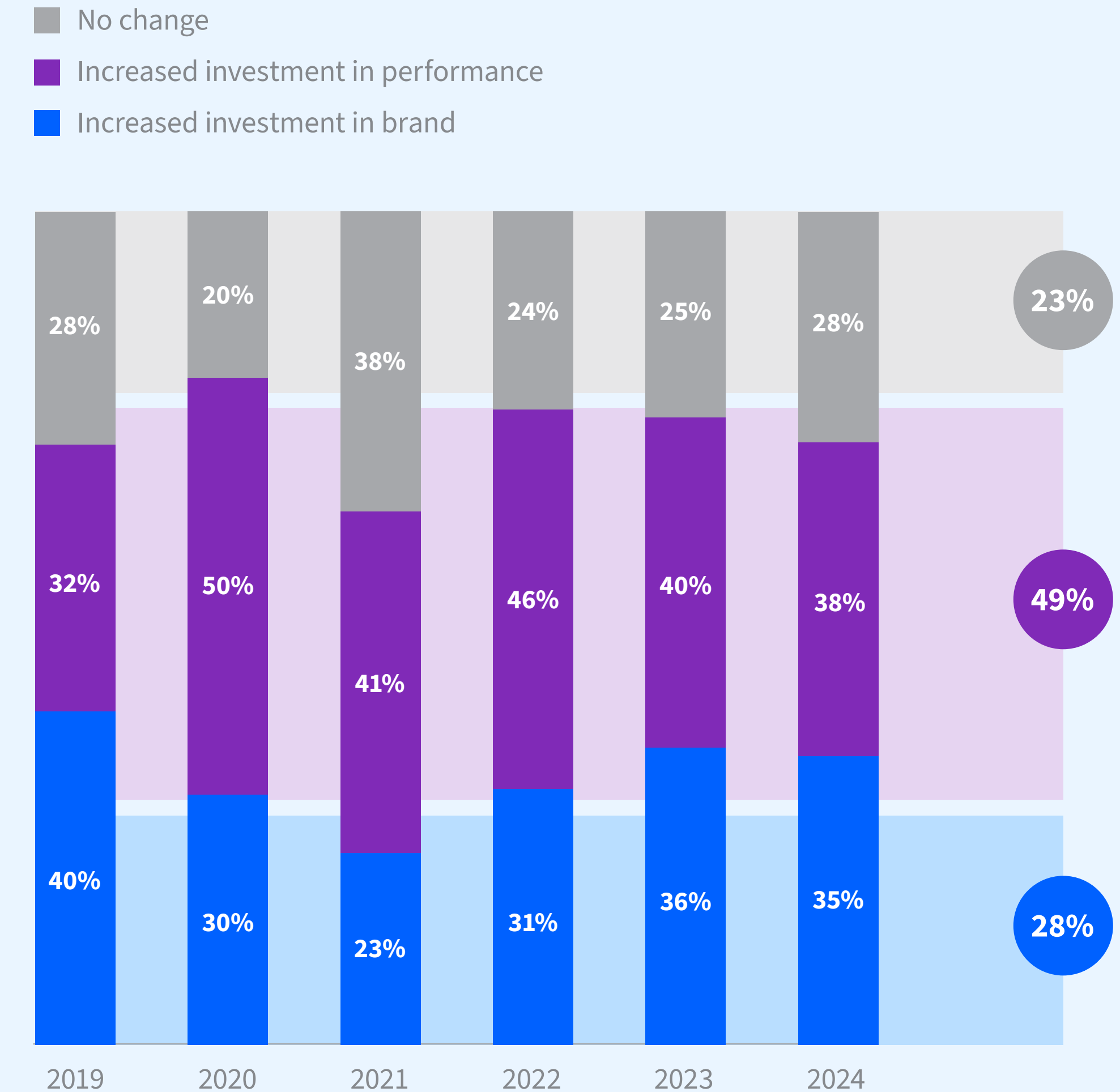
Looking past performance-first thinking helps marketers reconnect with the full picture and bring brand back into focus, even in a short-term world.

"It is easier to get lower funnel campaigns signed off because they can demonstrate a clear ROI. Broader brand campaigns across traditional media (TV, OOH, Radio) are more challenging because the measurement framework is less black and white."

Charlie Clack
Havas Media

Marketing budgets skew toward performance

Marketers globally have started to recalibrate brand and performance — but in APAC, performance is still on the rise at the expense of brand building.



Source: WARC Marketer's Toolkit 2025.

Beyond the Split: A Clearer View on Impact

Kantar's ROI analysis consistently demonstrates that brand and performance work best in tandem. Brand building not only shapes future demand by strengthening perceived value, but also boosts sales potential. The idea that they are separate is misleading.

Rebalancing spend from a performance-heavy split to a more even ratio can do more than build equity, it can lift baseline sales. Marketers should find the mix that delivers both immediate impact and lasting value for their brand.

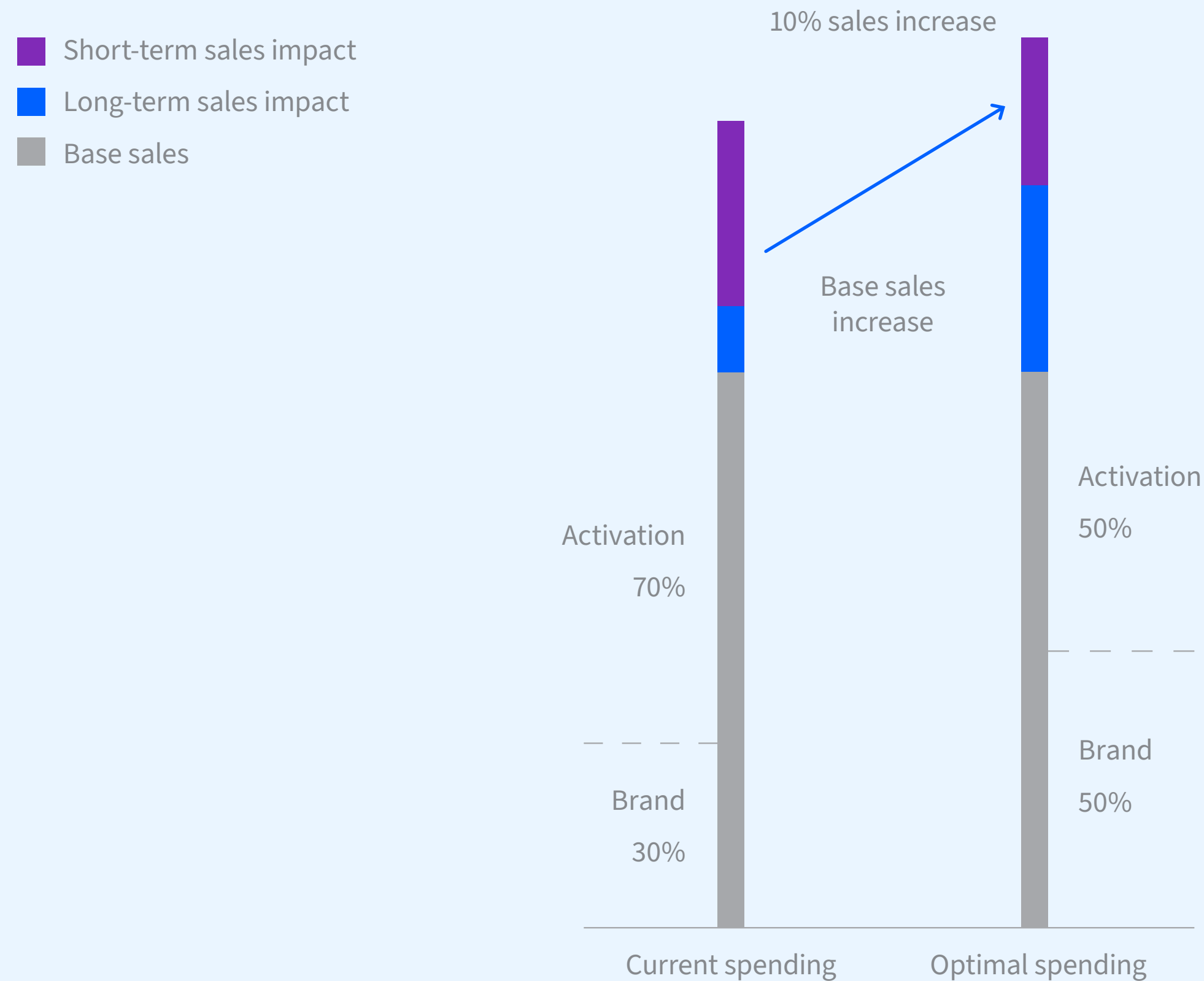
"Upper funnel campaigns should not only be KPI-ed on brand health metrics and a lower funnel campaign should not only be KPI-ed on sales metrics. A brand awareness campaign can and does impact short- and long-term sales."

Mark Krebs

Publicis Groupe

Sales impact: current vs optimal

Kantar's ROI analysis for a retail brand shows that increasing the proportion of brand spend in the mix can lift sales by up to +10%.



Source: Kantar's Brand & Marketing ROI Norms, via Jaremenko S., Balancing Act: Driving Sales Today and Generating Demand Tomorrow, LinkedIn, 2022.

Strong brands get more from their media spend

Campaigns for strong brands generate significantly more volume than campaigns for brands with weaker equity. Kantar analysis shows that building brand equity can boost media effectiveness.

"A consumer doesn't see a performance in a brand ad or vice versa, they just see a brand talking to them. Even your most price-pointed piece of comms has an impact on how you are seen as a brand. So every time you speak to a consumer, you are doing two things: you're building your brand and you're selling a product."

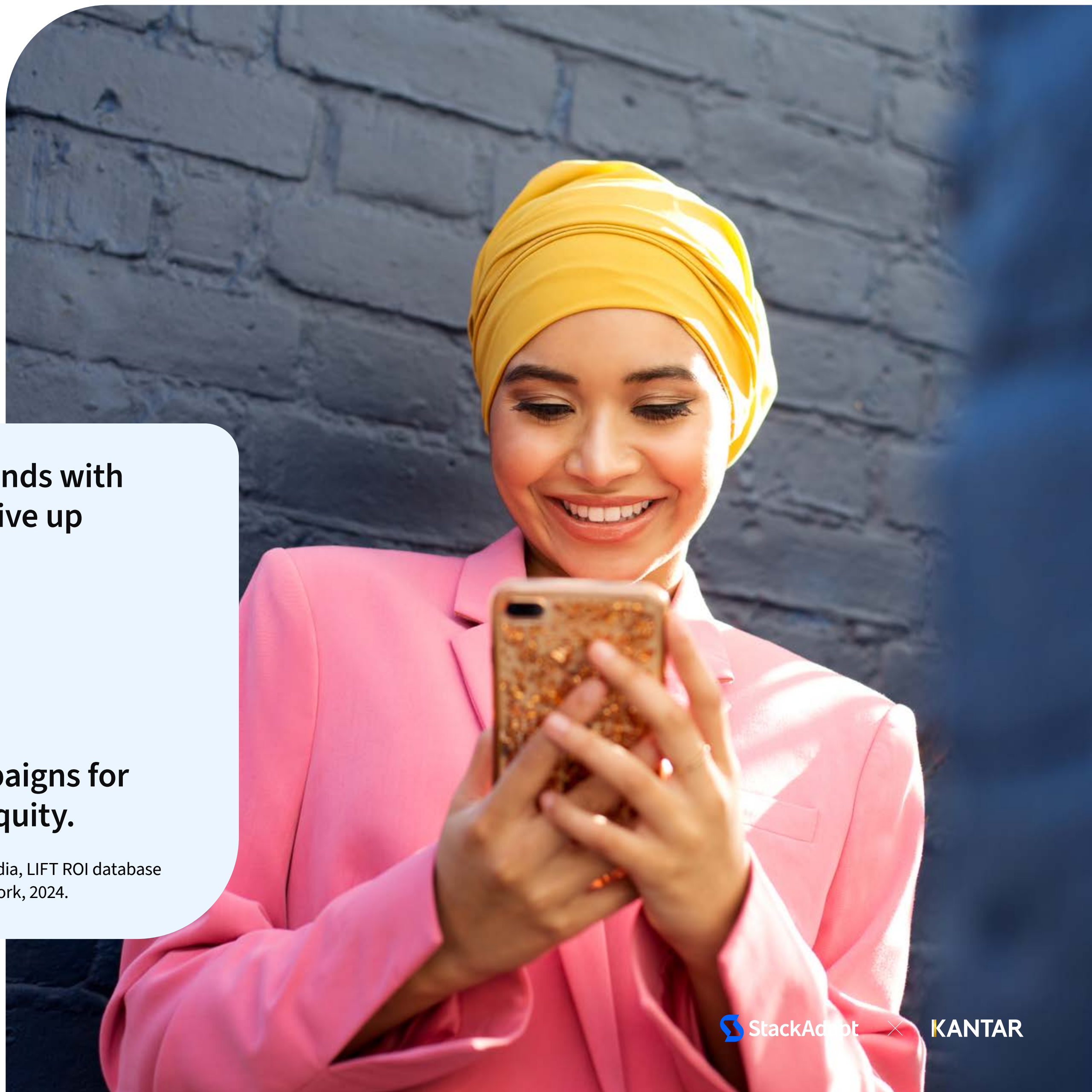
Matt Farrington
Dentsu

Campaigns for brands with high equity can drive up

9x

volume than campaigns for brands with low equity.

Source: Kantar from LINK, CrossMedia, LIFT ROI database and Meaningfully Different Framework, 2024.



See the whole picture: a unified media mix sustains growth

While some channels may lean towards short- or long-term impact, in reality every touchpoint shapes both behaviour and brand. This research shows it is not about splitting channels into brand versus performance, but understanding their true contribution to business outcomes.

Kantar analysis shows that optimising media channel allocation can make campaigns up to

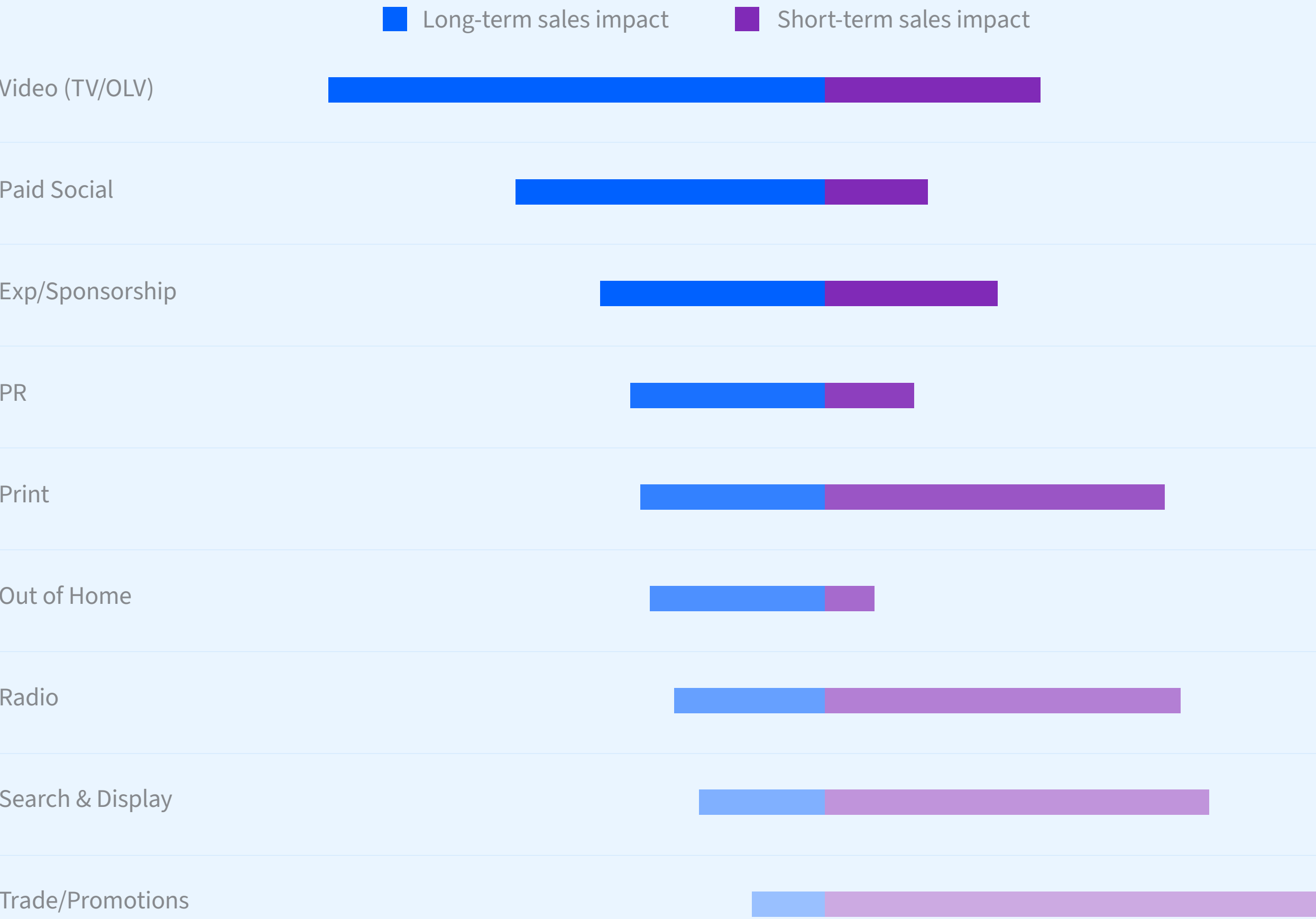
3x

more effective in driving brand equity.

Source: Kantar from LINK, CrossMedia, LIFT ROI database and Meaningfully Different Framework, 2024.

Effectiveness index across media channels

Effectiveness varies not only by channel (shown by bar width), but also by timescale (shown by bar colour). Some channels drive quicker results while others build value over time.



Source: Kantar’s Brand & Marketing ROI Norms, via Jaremenko S., Balancing Act: Driving Sales Today and Generating Demand Tomorrow, LinkedIn, 2022.

While relying on assumptions can blur the picture, a data-driven approach brings clarity and reveals the mix that truly drives results.

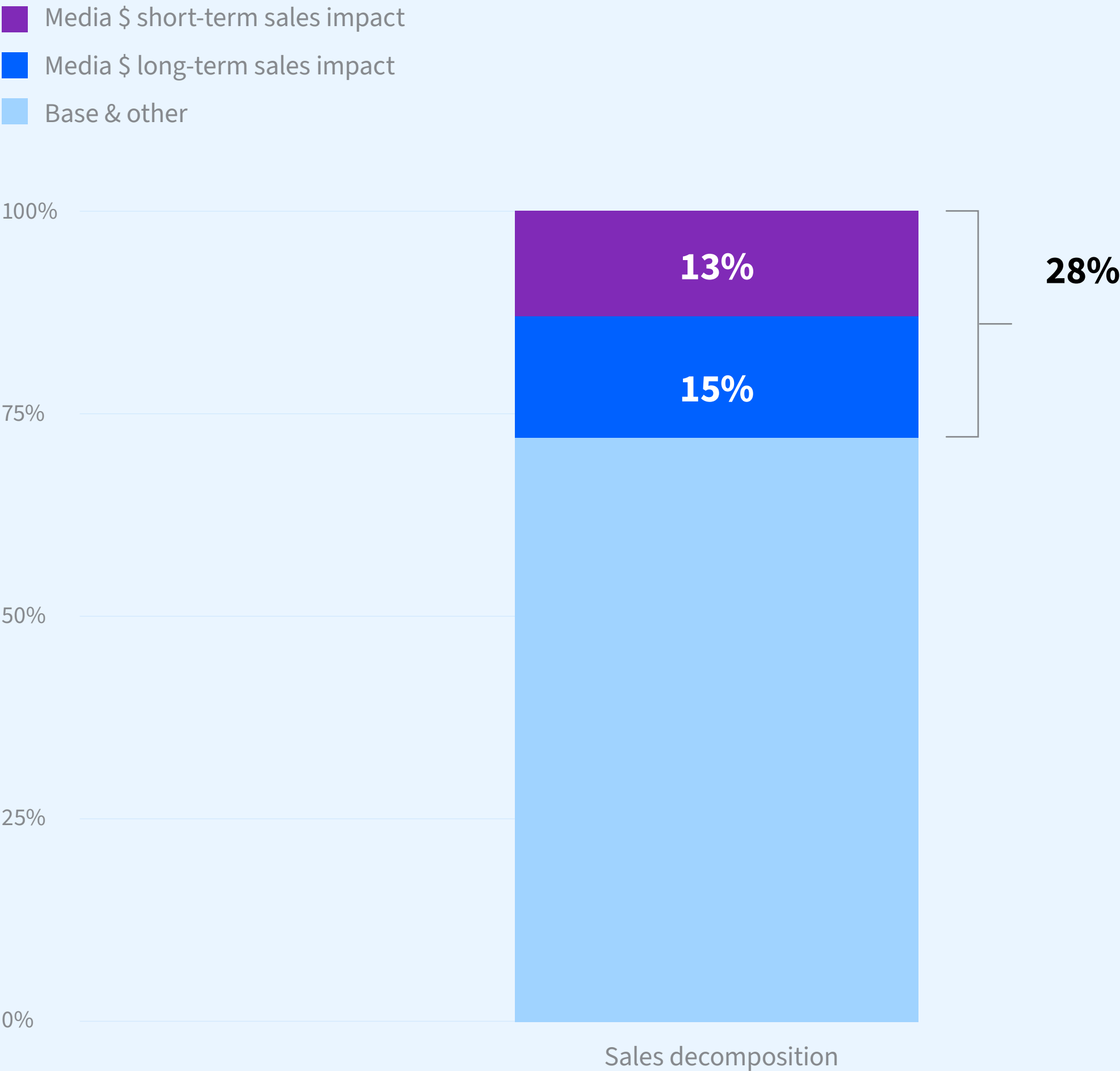
Kantar finds balancing the full marketing mix can boost campaign ROI by up to

+40%

Source: Kantar from LINK, CrossMedia, LIFT ROI database and Meaningfully Different Framework, 2024.

Media Investment's Contribution to Sales

Kantar and WARC’s joint analysis calculates that media investment drives over a quarter more sales on top of the baseline when short- and long-term impact are included.



Source: Kantar’s Brand & Marketing ROI Norms, via Jaremenko S., Balancing Act: Driving Sales Today and Generating Demand Tomorrow, LinkedIn, 2022.

Sharpen your lens: unsiloed measurement builds confidence

One of the most common objections to brand marketing is that its impact feels intangible — even when instinct says it matters. This research points to two ways marketers can overcome that hesitation and measure brand building with more confidence.

First, measure ROAS beyond campaign airtime and across multiple timescales to avoid overvaluing short-term outcomes and misattributing impact.

Including long-term brand impact in measurement gives a better picture of returns. Building equity delivers stronger overall ROI than performance alone as it influences both current and future buyers, even if the full effect takes time to show.

"Performance is a great thing and being able to track marketing is important but we shouldn't focus purely on what we can track at the expense of what we can't, because then you narrow your funnel. And I think that can be really devastating for brands."

Charlie Clack
Havas Media

ROAS over time: brand vs. performance

Equity building delivers higher total returns than performance alone — across both online and offline campaigns.

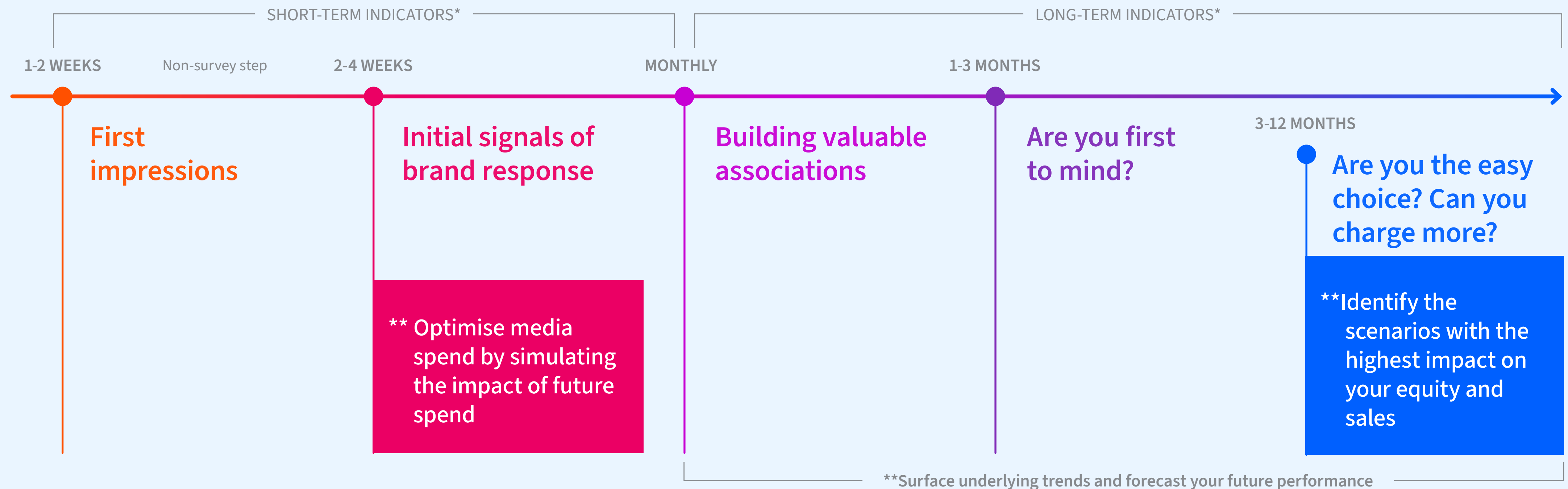


Source: Bera.ai via WARC, The Multiplier Effect report, 2024 | *Long-term multiplier = Total ROAS + Short-term ROAS.

In short: Equity building drives short-term payback too, and performance can have long-term effects. The idea that equity-led advertising delivers only in the long term, and that performance efforts drive only immediate results, is thus incorrect.

Kantar's ROAS-over-time framework

Kantar's framework focuses on understanding how Return on Ad Spend (ROAS) changes over time, offering marketers a practical way to measure campaign value.



Source: Kantar LINK and LIFT ROI database | *Both short and long-term support for a brand's sustainable growth | **Simulation to predict the impact on sales.

Second, smarter modelling and better data access are making measurement easier and more holistic.

Marketers no longer need to over-index on bottom-funnel metrics just to prove impact and build robust evidence in a way that used to be resource-heavy. Today, new tools make this evidence more accessible. Bayesian Hierarchical Models (BHM)s and other advanced solutions are increasingly available.

"There's almost like this world of MMM 2.0, where there are a lot more kinds of sophisticated modelling tools, open source modelling tools (...) and so that world's becoming a lot easier and I think a lot more clients will start to adopt that kind of approach."

Mark Krebs

Publicis Groupe

Beyond technology, partners can help marketers cut through internal silos and connect the dots.

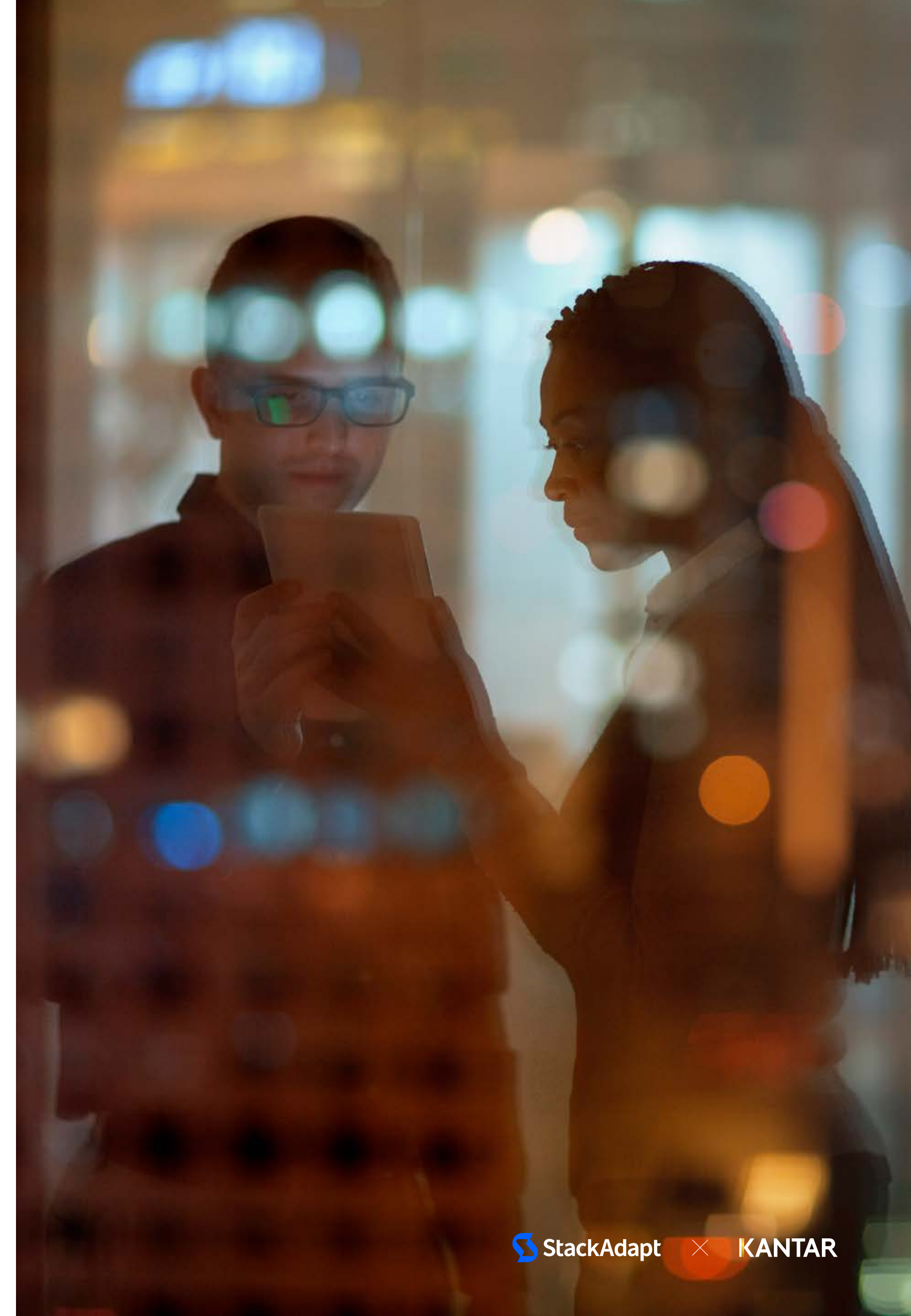
Many organisations are structured around funnel stages or campaign types, with teams tracking only narrow KPIs. That fragmentation makes it difficult to form a complete picture of brand performance. Partners with a cross-channel view can help bridge that gap.

"The glue that holds all of that together is being able to manage the data all the way through — from the first time you speak to someone to the 10th time they buy your product. That's a very powerful proposition."

Matt Farrington
Dentsu

"[Media agencies can support by] cross-functional, experienced people like strategists and senior planners and account directors who should see what's the entire ecosystem of campaigns and how it's working in unison."

Mark Krebs
Publicis Groupe



Chapter 4

Evidence in Full View

1. Plan and measure across the funnel

StackAdapt data shows that full-funnel, multi-channel campaigns deliver stronger outcomes — from reach to conversions. While some channels lean upper- or lower-funnel, measuring both together reveals the real impact.

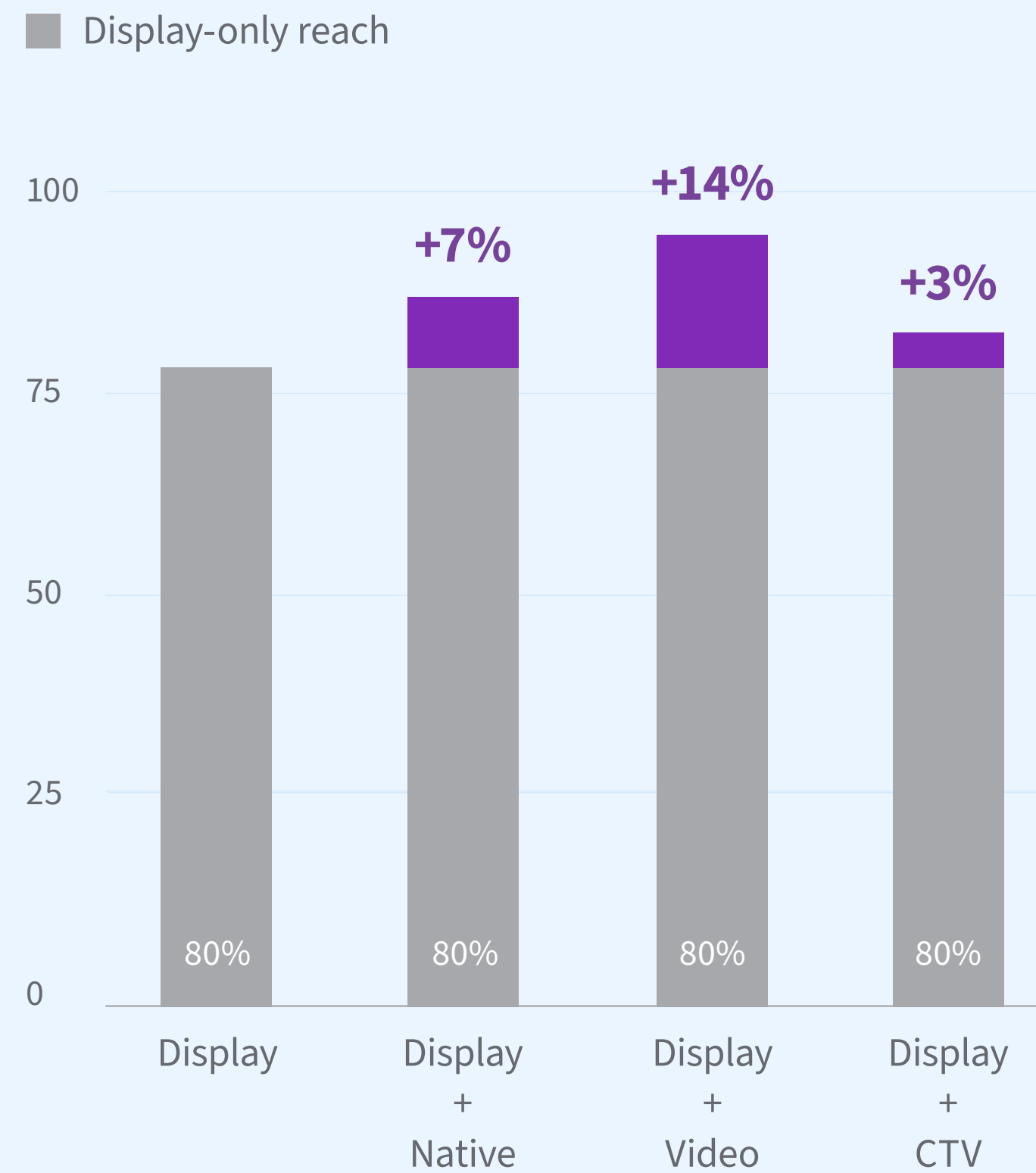


Super Sleeper expanded a retargeting campaign (native/display) with video/CTV — lifting conversion rate by

+812%

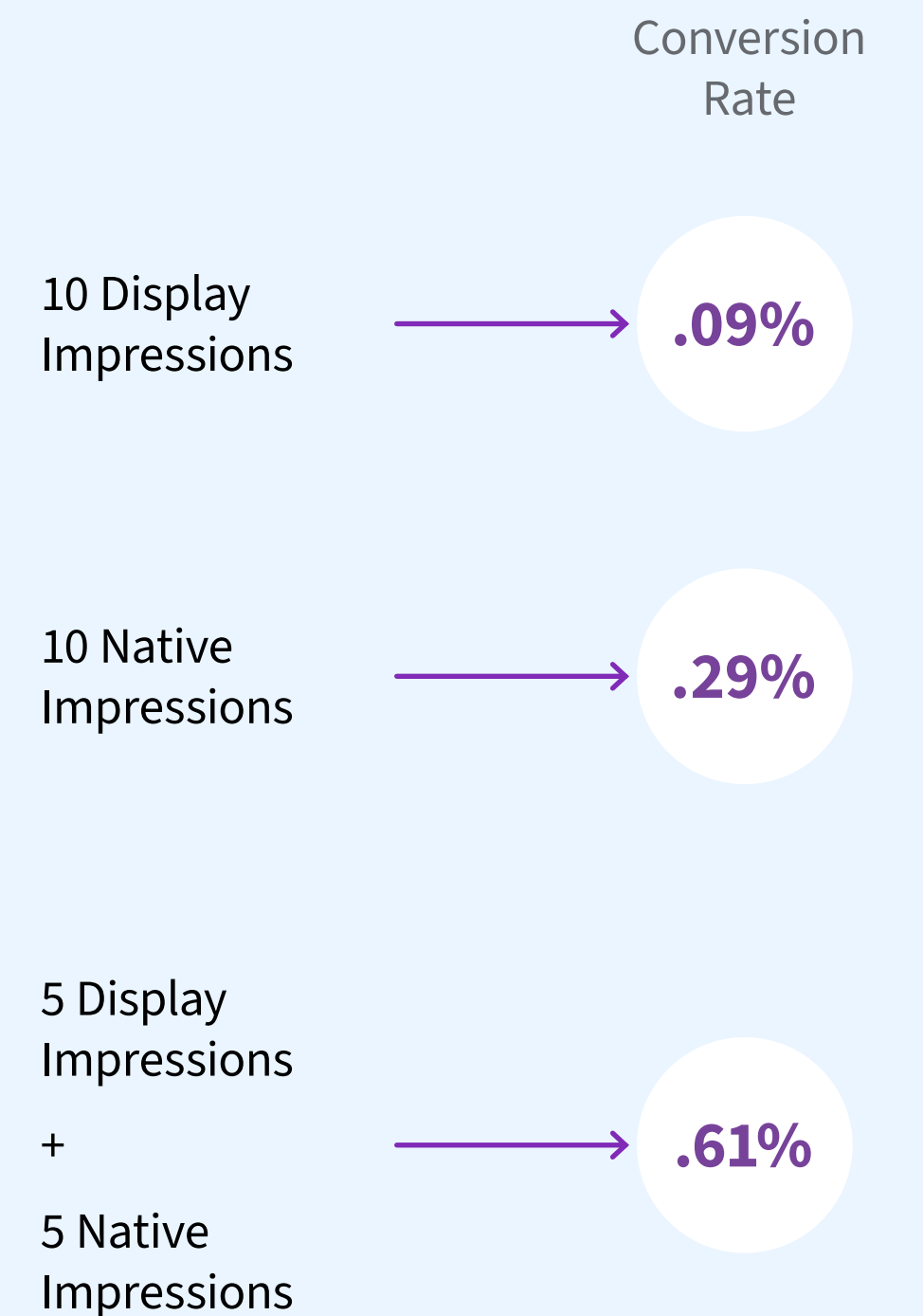
The value of full-funnel planning

In a campaign already optimised for 80% reach, adding a new channel boosted reach by +14%.



Source: StackAdapt's analysis of proprietary data, 2025.

Measuring average conversion per 10 impressions shows multi-channel outperforms single-channel.



2. Use metrics that show the full picture

Buying smarter does not mean buying cheaper. Real ROAS comes from linking efficiency (cost-based) and impact (outcome-based) metrics. Connecting the dots drives better decisions.

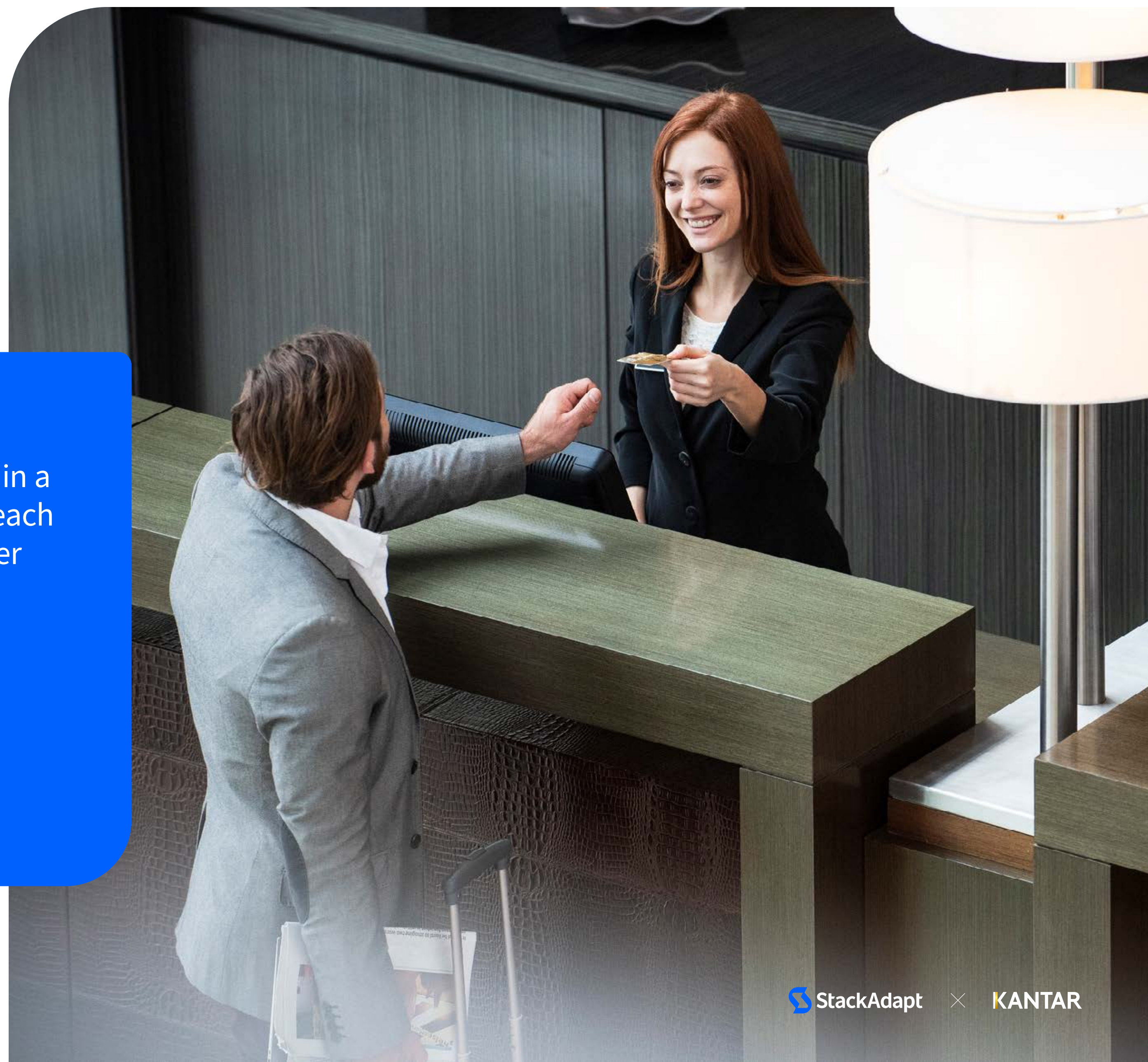
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A hospitality brand tracked cost per reach and visit in a full-funnel campaign across Asian markets. While reach cost slightly missed the goal, visit cost beat it by over

+202%

offering sharper insights and smarter value-for-money decisions.

Source: StackAdapt's analysis of proprietary data, 2025.



3. Explore new ground with confidence

When your mix and measurement are solid, new spaces feel less risky and more rewarding.

With no prior programmatic activity, a car accessories brand launched a full-funnel campaign in Australia targeting new mothers. Using intent-based and contextual targeting with pre-tested creative, the brand achieved a

9x ROAS.

Source: StackAdapt's analysis of proprietary data, 2025.



Chapter 5

Looking Further with Eyes Wide Open

Through bringing together bespoke data analysis and expert conversations, this whitepaper uncovers key strategies that can help marketers recalibrate their approach and bring brand back into focus for sustainable business growth.

Two areas have emerged where deeper exploration can further close the loop between brand building and business impact.

Firstly, the contribution of performance-led campaigns to brand outcomes — a space made more accessible by advances in modelling and forecasting tools.

"I'd like to flip that and talk about the boom loop, which is the opposite, which is realising that brand helps demand but also demand can help brand."

Mark Krebs
Publicis Groupe



Secondly, the importance of cultivating distinctiveness in an AI-shaped creative future.

While AI improves efficiency and adaptation, overreliance on it risks flattening identity and weakening the very uniqueness that drives brand relevance. As marketers and partners both seek to prove brand's value with more precision, the need for collective commitment to evidence-led thinking and continued innovation is clear.

"For brands to truly resonate with consumers and become meaningful they have to show up within culture and develop empathy with their consumers. I think this work is done best by humans."

Charlie Clack
Havas Media

The challenge now is to experiment with marketing practices and technology to keep the brand in focus as a strategic growth driver — leveraging data, tools, and creativity in tandem. This whitepaper is a call to resist short-termism, embrace bold thinking, and lead with clarity.

"In an algorithmic world, brands must work harder to earn their place in a consumer's curated reality."

Matt Farrington
Dentsu



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About StackAdapt and Kantar



StackAdapt is the leading technology company that empowers marketers to reach, engage, and convert audiences with precision. With 465 billion automated optimisations per second, the AI-powered StackAdapt Marketing Platform seamlessly connects brand and performance marketing to drive measurable results across the entire customer journey. The most forward-thinking marketers choose StackAdapt to orchestrate high-impact campaigns across programmatic advertising and marketing channels.



Kantar is the world's leading marketing data, insight and consultancy company, employed by over half of the Fortune 500 companies in 100 countries. Our global team of consultants blend people expertise and industry experience to build solutions that help drive incremental growth for our clients. This document is developed in partnership with the Consulting division, located in Singapore.

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