

Electrifying the *World*

A PLAYBOOK FOR CHINESE AUTO
BRANDS TO WIN GLOBALLY



May, 2024

Ogilvy

Foreword

Welcome to *Electrifying the World—a Playbook for Chinese Auto Brands to Win Globally*, an Ogilvy publication that sets out the most pressing global trends facing Chinese auto CMOs today, produced in collaboration with FGS, Wavemaker and amp.

The automotive market is experiencing a seismic shift, moving from combustion engines to electrification and mobility on a global scale. With this shift, new players have emerged and China undeniably has taken a clear leadership role in driving this transformation.

Chinese brands have established undeniable advantages. Their technological prowess in battery technology is well-documented. They possess a deep understanding of the evolving mobility ecosystem, shaped by a rapidly growing demand for intelligent features and customer-centric in-car experiences. Furthermore, they cater to a generation of digital natives, adept at navigating online platforms and embracing technological change.

However, translating these strengths into sustained overseas success requires careful consideration. Regulatory challenges, cultural nuances, diverse consumer preferences, and established competitor landscapes are just a few of the hurdles on the road to global domination. To navigate this complex terrain, a comprehensive understanding of local market dynamics and a strategic approach are essential. This report is a collaborative effort from WPP companies, led by Ogilvy in collaboration with FGS, Wavemaker and amp. With our experience in developing and managing global brands, as well as taking Chinese brands global in other categories, our goal is to equip Chinese EV brands with the knowledge needed to chart a course for long-term success. We have a long history of helping automotive companies generate brand and business

impact. From defining a global marketing operation model to building a robust digital infrastructure, establishing trust through public affairs or effectively allocating media investment. I hope this easy-to-read document can serve as a guiding roadmap for navigating this electrifying new frontier.

Chris Reitermann

CEO, Ogilvy APAC & Greater China



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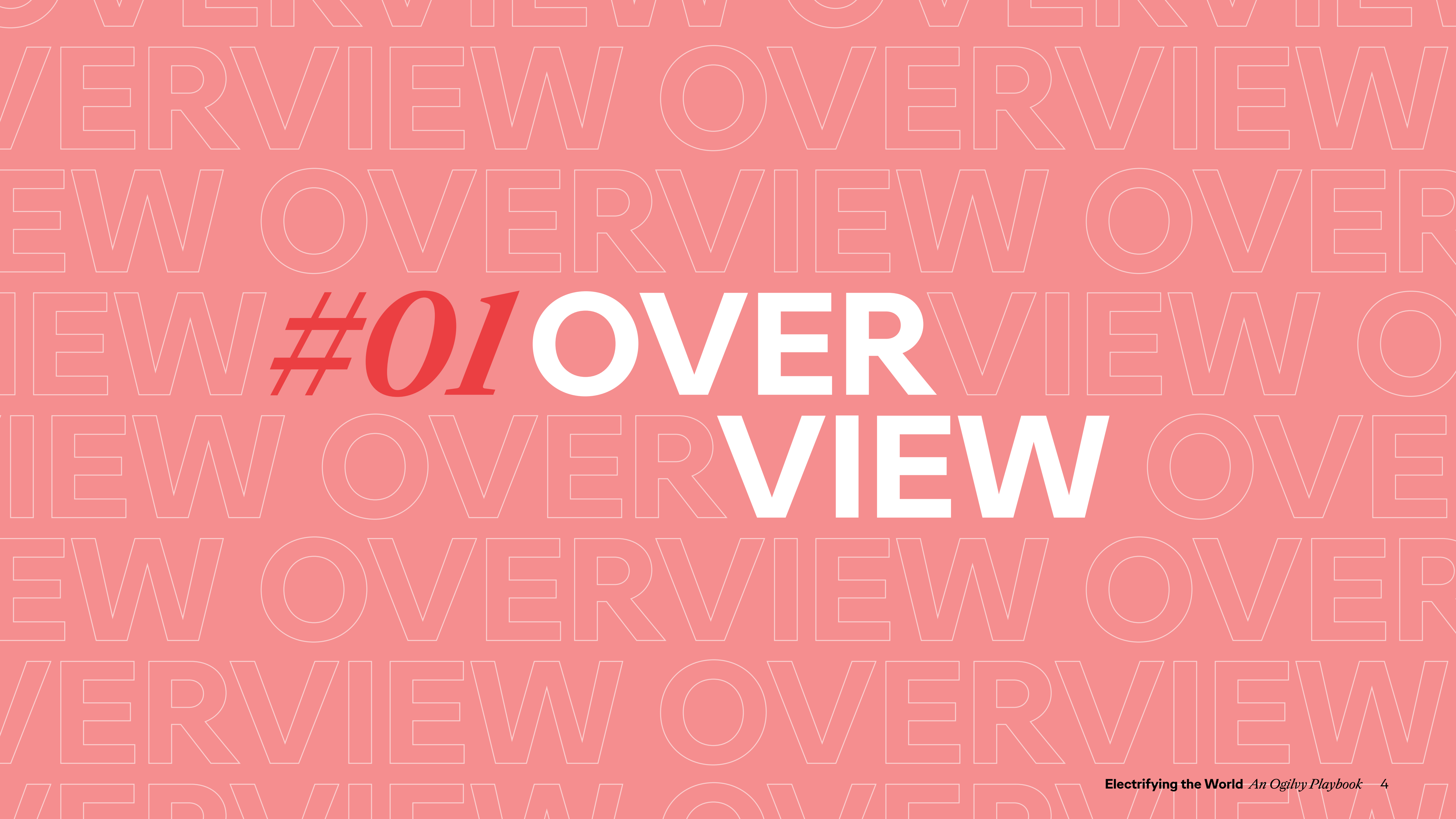
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#01 **OVERVIEW**

Overview:

The Next Frontier in EVs

The automotive industry has rapidly shifted consumer perceptions of EVs, from regarding them as novelties to recognizing their value in sustainability, convenience, safety, and intelligent features. This transition extends beyond energy efficiency, as advanced technologies redefine the driving experience with enhanced intelligence and connectivity.

However, **the EV market may not see another revolutionary technological breakthrough in the near future, emphasizing the importance of brand premium once again.** The ongoing price war is not just about production efficiency among auto brands; it's also a test of brand value. Indeed, 31

countries have already passed what experts have coined the EV tipping point—when 5% of new car sales are purely electric—according to Bloomberg Green analysis of EV adoption rates around the world. This critical point marks the beginning of widespread adoption, and signals a drop in the appeal of technological features among consumers, who will pay closer attention to new factors like customer experience and brand reputation.

Brand, scale, efficiency—these are foundational competitive elements of the traditional automotive industry and essential skills that China's new energy vehicles must gradually reintegrate.

Consumers expect brands with enduring technological visions and distinctive value concepts, attributes which clearly stand out amid similarity in features and prices.

In the initial phases of competition, many Chinese new energy brands garnered attention by emulating Tesla and offering superior cost-effectiveness. **As homogeneous competition intensifies, Chinese brands must establish their unique brand narrative and value proposition that resonates with a global audience.**

AITO: *From 0 to 1 in 18 Months*

As the lead agency, Ogilvy, in collaboration with WPP sister companies, assisted AITO's brand development from scratch. Through audience insights, brand strategy, naming, digital experiences, and media strategy, we built a comprehensive brand presence for AITO.



Overview:

Building a Global Auto Brand

The global automotive industry is a cutthroat arena, but Chinese automotive brands are rising to the challenge. Their expertise in new energy vehicle technology has helped them expand their influence beyond the domestic market.

But tech innovation alone won't win the race in a market where consumers view competing products as largely homogenous. Thus **branding is essential to enable differentiation, build trust, command premium prices, foster customer loyalty, facilitate international expansion, streamline marketing efforts, and provide resilience during tough times.**

A strong brand is an invaluable asset that influences consumer choices and audience perceptions.

Here are some key considerations for crafting a meaningful and impactful global brand within this sector:

- **Articulate global ambitions and establish a sustainable brand platform** with purpose and long-term commitments.
- **Cultivate a consistent global identity** while adapting to local market nuances and diverse audiences.

- **Harness tailored global digital platforms** for enhanced work efficiency and experiences that resonate.
- **Foster trust and a positive reputation** globally, with attention to local public affairs and key stakeholder relations.
- **Craft media approaches based on local behavioral factors** for impactful results.
- **Utilize influencer marketing to broaden target reach** with diverse, authentic content for effective engagement.
- **Define your sonic brand identity**

Chinese auto brands strengthen alongside production growth, but the road ahead is still long.

BYD is the only Chinese auto brand in BrandZ's 2023 Global Top 10 Auto Ranking.

#1	TESLA	\$67,662M
#2	TOYOTA	\$28,513M
#3	MERCEDES-BENZ	\$23,978M
#4	BMW	\$20,944M
#5	PORSCHE	\$16,144M
#6	BYD	\$10,069M
#7	FORD	\$9,110M
#8	AUDI	\$8,283M
#9	HONDA	\$8,036M
#10	FERRARI	\$7,761M

* BrandZ is a brand valuation methodology that uses financial analysis and consumer research to measure a brand's ability to create future value and impact customer behavior.



#02 GLOBAL LEARNINGS

Global Brand *Foundation*

Presented By

Ogilvy

#021



Elevate *the Brand Strategy*

A brand serves as the backbone of any global enterprise, aligning with its business strategy to shape company behavior and operations. Before all else, companies must address fundamental questions: What meaningful impact do we bring to the world? How do our actions benefit employees, customers, and governments? How can we embody a purpose beyond our products?

The most successful brands transcend mere marketing; they serve as a central guiding principle, grounded in tangible beliefs tied to overarching business goals. Crucially, they must be

both distinctive and credible. A brand strategy is a comprehensive, long-term plan delineating specific goals and objectives for a brand’s development, positioning, and management.

The brand strategy must be elevated and aligned alongside the business strategy, as it guides and drives experience, culture, performance, and action across the entire company.



Define a Brand Vision *and Platform*

A brand vision isn’t just a lofty slogan. It needs to have beliefs associated with the broader business objectives, while being distinct and authentically credible.

Long-term commitment and investment are important prerequisites to any brand-building journey. That is because in order to have an impact on a company’s operations, the brand vision should aim to be permeated throughout the entire organization, breathing life into it through products, services, and employees, etc.

In addition, a brand must earn and control the narrative, telling its story with sincerity and engaging in open dialogues with transparency, humility,

and empathy. The goal is to integrate seamlessly into local communities.

Ogilvy’s Brand Operating System is a helpful tool to establish and operate global brands. Looking at three horizons—Platform, Program, and Pulse—this system defines a brand’s purpose and architecture for the long term; drives mid-term brand impact and sales; and connects with communities and consumers daily in their environments.

OGILVY’S BRAND OPERATING SYSTEM

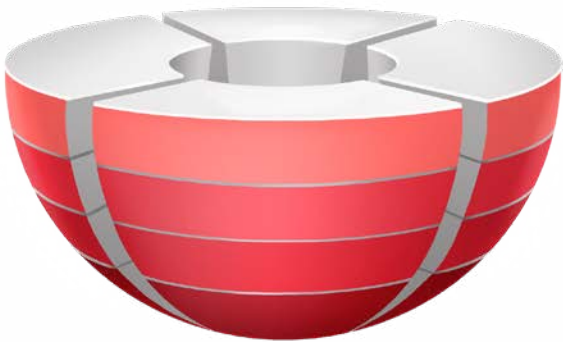
PLATFORM

Impact for years



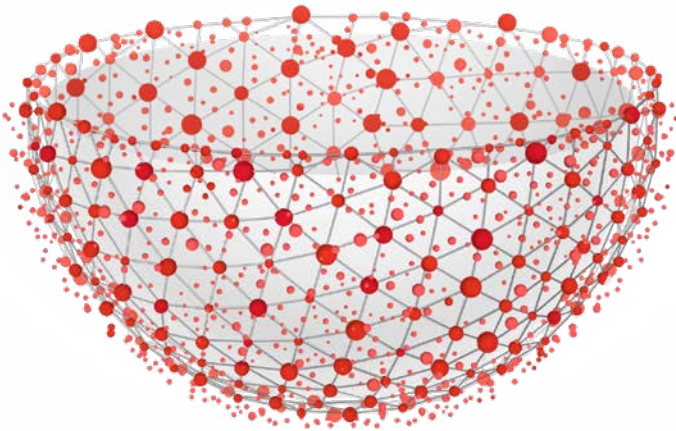
PROGRAM

Impact each quarter



PULSE

Impact right now



The brand strategy and platform

Define the brand strategy, mission, vision and agenda. The brand platform and narrative are brought to life through the company’s behaviors, culture, and master brand communications and experiences.

What does the brand offer?

At the Program level, the brand communicates about the value that its products or services can bring to key audiences.

How does the brand pop up in the audience’s world?

“Pulses” insert the brand into external events, topical conversations and cultural moments. These tend to be short-term initiative and experiences.

Optimize *the Brand Architecture*

In the fast-paced, disruptive, and competitive landscape of modern business globally, the strategic importance of brand architecture cannot be understated.

At its core, **brand architecture serves as the blueprint that underpins a company’s entire brand portfolio, defining the relationships between various sub-brands, products, and services.**

Numerous Chinese companies have dedicated substantial resources to cultivating their brand identity within the domestic market. Yet, as they expand into the global arena, they encounter two significant challenges. First, key elements like vision and

mission often lack integration across the organization. Second, companies grapple with translating these elements into cohesive and consistently managed platforms on a global scale.

The brand architecture framework not only ensures coherence and consistency in messaging; it also cultivates trust, loyalty, and recognition among key audiences. By delineating the structure of a brand ecosystem, brand architecture empowers companies to navigate evolving market dynamics with clarity and purpose. In essence, it is the cornerstone upon which a resilient brand foundation is built, guiding companies towards sustained success in an ever-changing landscape.

OGILVY’S BRAND ARCHITECTURE MODEL



Global Brand Expression: *Huawei*

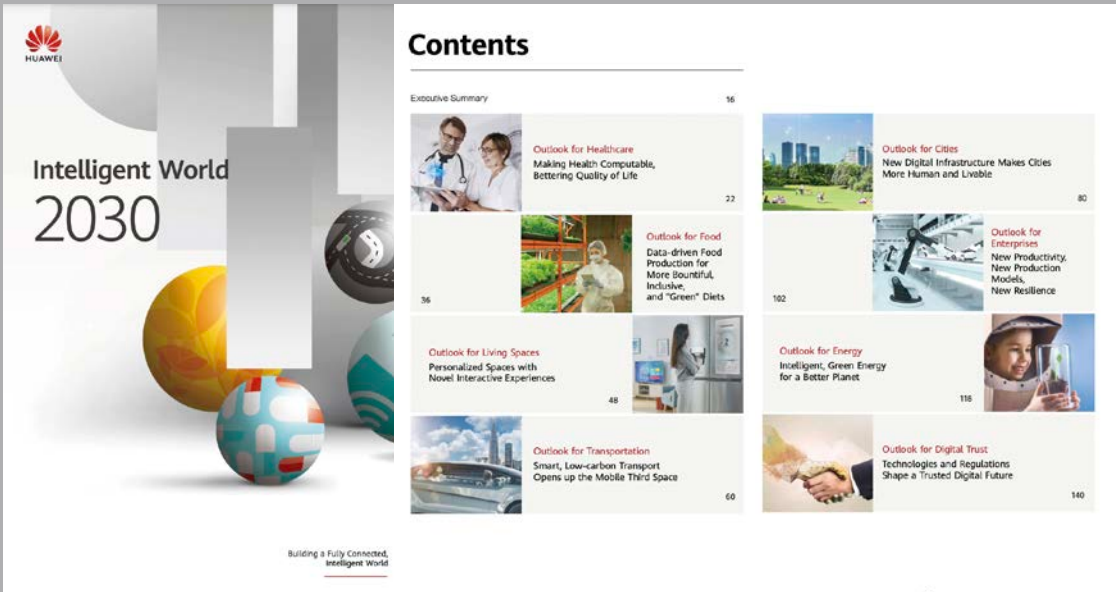
RETAIL



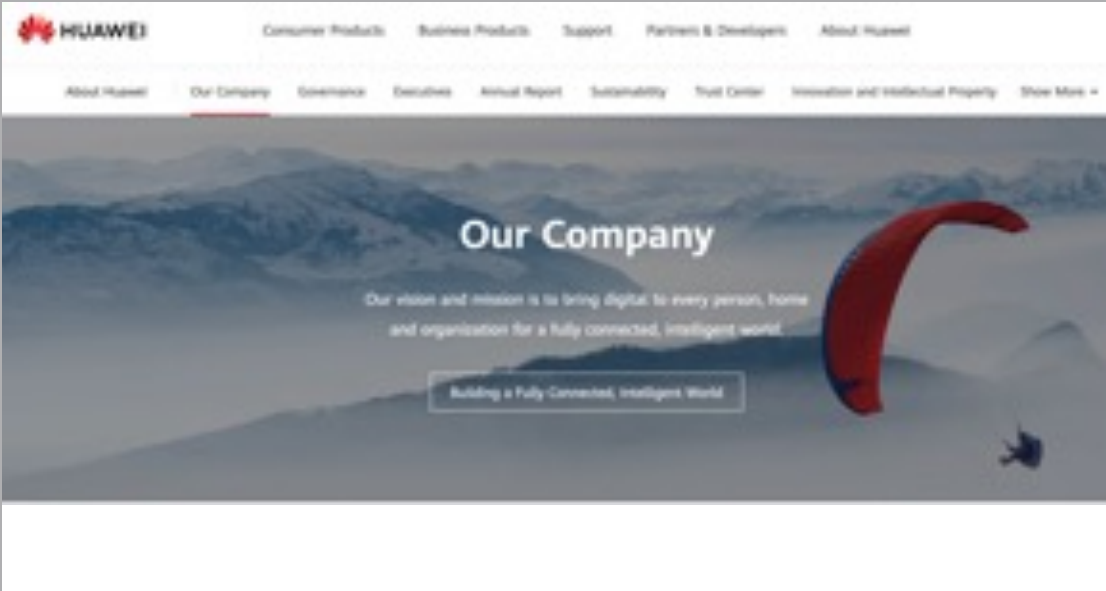
TRADE EVENT



THOUGHT LEADERSHIP



DIGITAL PLATFORM



ADVERTISING



CSR - TECH4ALL



Global Brand Management & *Marketing Operations*

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Ogilvy



Establishing a Robust Brand Management Model *for Global Success*

While brand building is a long-term endeavor involving all stakeholders, activating the brand to support business expansion is indispensable.

In the automotive sector, global business expansion involves diverse go-to-market strategies and sales ecosystems. This may range from direct retail ownership to collaboration with local retailers or reliance solely on importing, with variations across different markets.

Consequently, establishing a robust brand management model and system becomes essential to provide adequate guidance and support. An organizational structure and system must be established to facilitate



brand activation across both headquarters and local markets.

Global headquarters should formulate a comprehensive brand strategy, oversee global marketing assets, and provide centralized direction. Meanwhile,

local markets should be granted entrepreneurial latitude to activate and innovate, leveraging insights from their respective regions. However, achieving a harmonious balance remains the primary challenge, as does fostering collaboration to optimize outcomes.

In this section, we will explore different types of brand management models, including global and local role and budget allocation setups.

Global vs. Local Input *in Brand Management*




Global brands must establish a system for marketing that involves teams from all markets, allowing them to share information and resources. A clear process strengthens the global brand, ensures consistency and prevents conflicting messages.

Brand teams must unite everyone with an integrated go-to market plan. Roles and responsibilities need to be clearly defined, and local campaigns should align with and contribute to overall brand and business objectives.

But it’s not about following global guidelines blindly. Whether a project is initiated by the organization’s

headquarters, entirely steered by local teams, or delivered on a co-creation model, the output should reflect an understanding and respect for relevant local market culture and values.

The following principles can provide guidance on real-life allocation of roles and responsibilities, but it is important to remember that there is no one-size-fits-all approach:

 COMMAND CONTROL	 STRONG HUBS, STRONG SPOKES	 LOCAL AUTONONMY
PROS <ul style="list-style-type: none">• Budget saving• Communication consistency• Clear control	<ul style="list-style-type: none">• Balances local input with central direction• High levels of consistency• Flexible for local adaptation	<ul style="list-style-type: none">• Speed and flexiblity within the local market• Quick and simple decision-making• Strong local market relevance
CONS <ul style="list-style-type: none">• Slow to market demands• Inflexibility in local adaptation	<ul style="list-style-type: none">• Lack of communication between the development and execution teams• Internal politics can emerge	<ul style="list-style-type: none">• Costs from inherent duplication• Potential damage to brand coherence

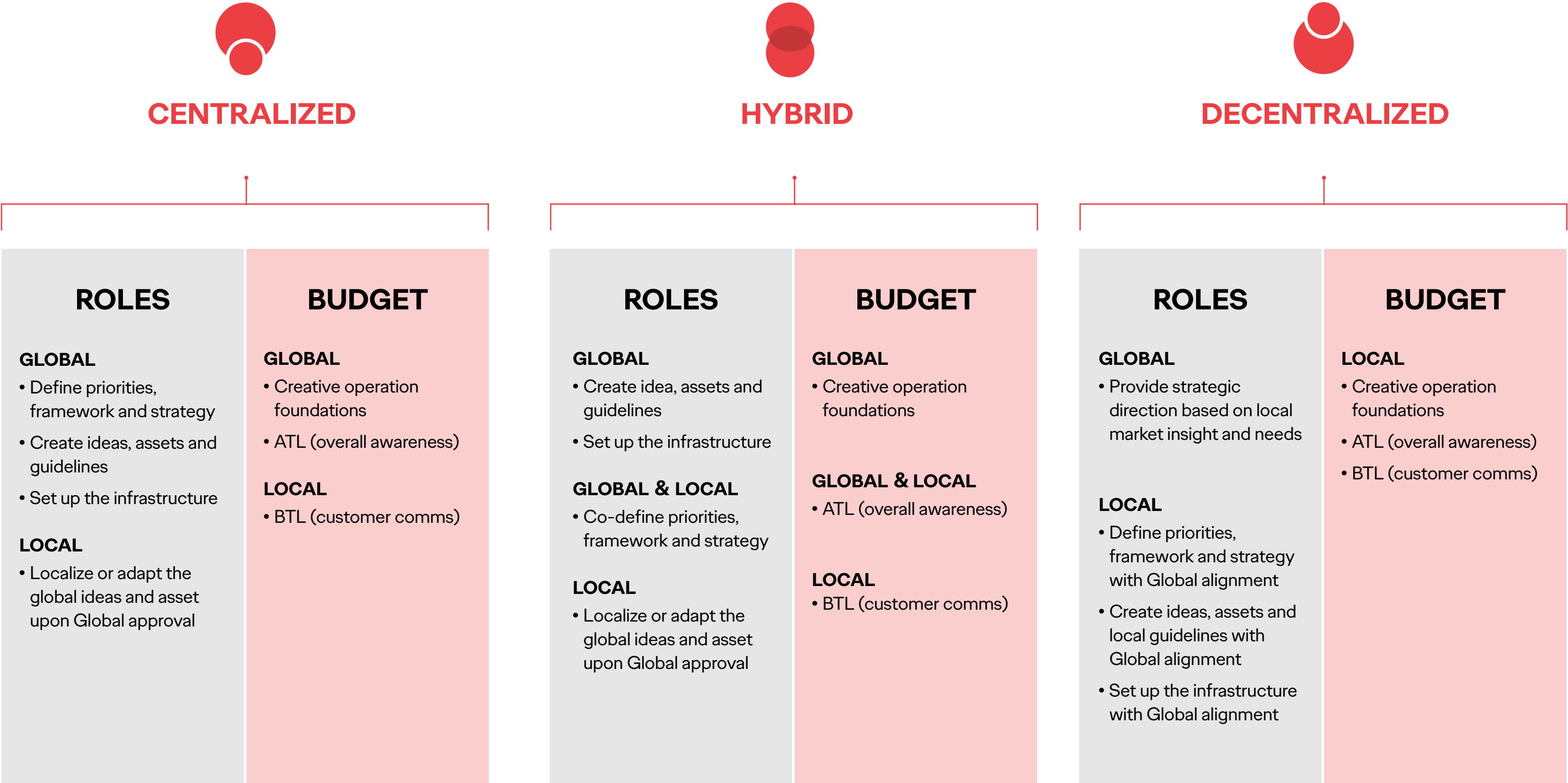


Brand Management Model

Selection and Operation

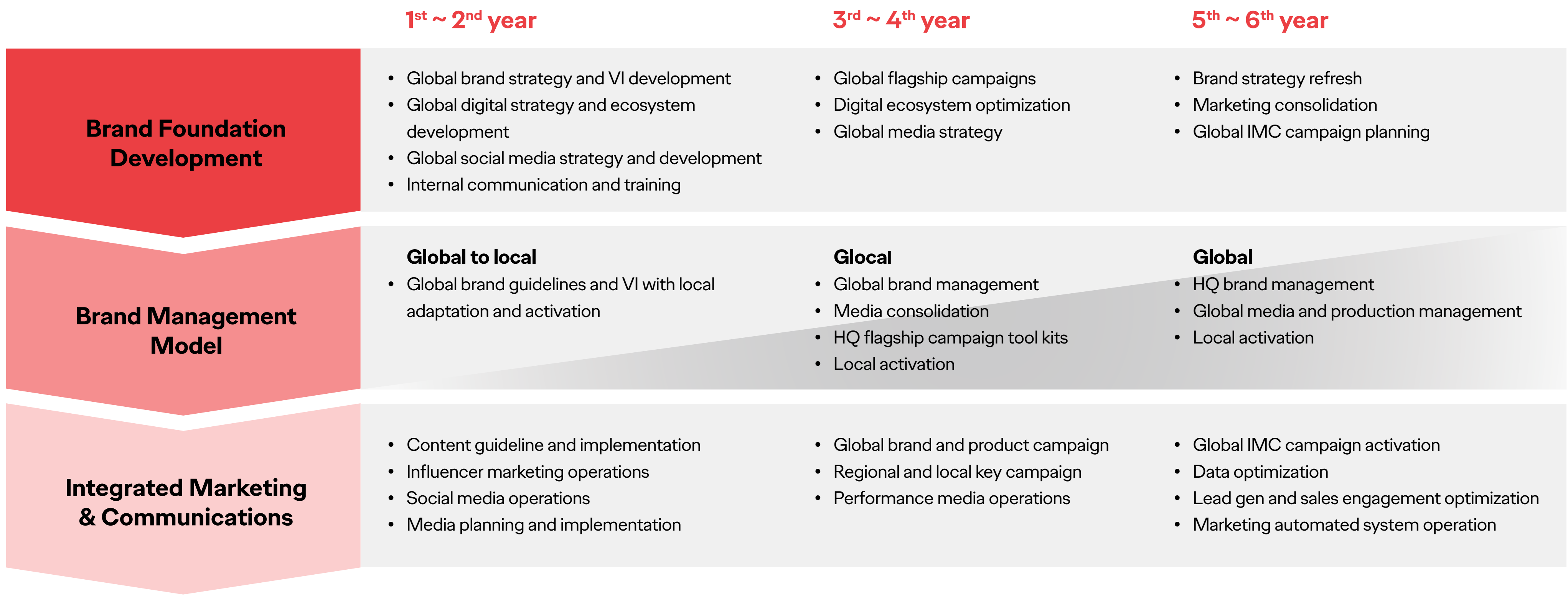
The brand management model that suits your organization best will depend on a variety of factors, including industry sector, business maturity, scale, global setup and resources.

The principles provided here offer guidance on real-life allocation of roles and responsibilities, as well as budget ownership, but again, there is no one-size-fits-all approach.



Becoming a Globalized Brand:

Indicative Timeline



Global Digital *Infrastructure*

Presented By

Ogilvy One

#02



Designing Value-Based *Digital Relationships*

x4.55

Online car sales are forecast to more than quadruple by 2031, reaching a ***\$176.24 billion market value.***

87%

of new EV buyers are open to ***fully buying online.***

Investing in digital platforms is vital for Chinese EV brands aiming to expand globally. In today's digital age, the car buying journey often begins online, with over 90% of buyers researching online before purchasing, according to Google.

While the need for prioritizing a digital-first approach is clear, Chinese EV brands face unique challenges in building effective digital infrastructures:

- **Distinct digital ecosystems:**
Expertise in China's domestic digital infrastructure doesn't translate directly overseas due to differences in digital landscapes, customer behaviors, and competitor environments.

- **Multilingual and multicultural content management:**
Scaling content across multiple languages and cultural experiences is vastly different from managing a single, unified domestic market.

- **Catching up with rapid growth:**
China's unique product and technological advantages tend to lead to fast sales growth in the EV sector, presenting a double-edge sword, as manufacturers need to scale their digital infrastructure and its operation at a similar pace.

In this context, we typically partner with Chinese EV brands around 3 key strategic imperatives:

- **Picking the right battle:**
We map the user journey and identify the most impactful areas to focus auto brands' digital investments.
- **Embracing AI:**
We leverage AIGC for global content management, both in creation, tagging, and optimization, to ensure consistency and efficiency.
- **Agility over big bangs:**
We advocate for phased, agile solutions with high interoperability and scalability. This avoids hefty upfront costs and allows for rapid expansion as the brand grows.

Powering Brand ROI *with a Thriving Digital Ecosystem*

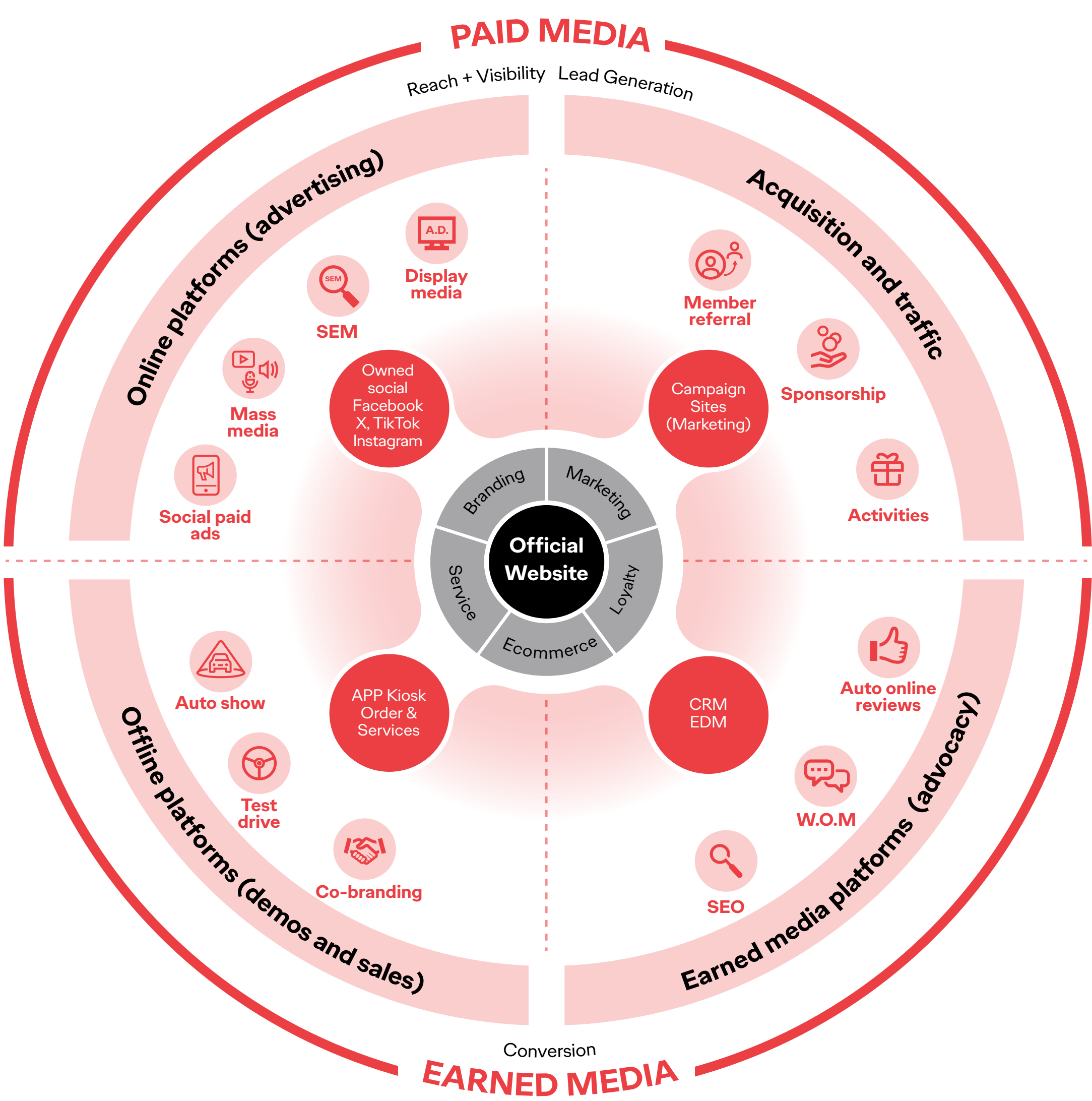
The typical overseas digital ecosystem may seem overwhelming for Chinese EV brands that are used to “do-it-all” apps like WeChat. **The first step is to pick the right battle: selecting where and how much to invest by considering the following:**

- **Target audiences’ preferences**
- **Business objectives (such as sales, awareness)**
- **Regulatory compliance**
- **Brand and product uniqueness**

Following the development of a strategic blueprint outlining the optimal interaction between websites, social media, search engines, and automotive verticals, we prioritize investment sequences. This ensures a streamlined

customer journey, optimizing digital marketing efforts for seamless integration with CRM and dealer handover processes.

This approach balances the need for immediate returns on critical investments with the capacity for future expansion.



DENZA: *Leveraging AI to Manage Global Assets at Scale*

Chinese auto brands face a growing challenge: managing a vast, global pool of assets consistently across markets. This challenge spans both organization and operations.

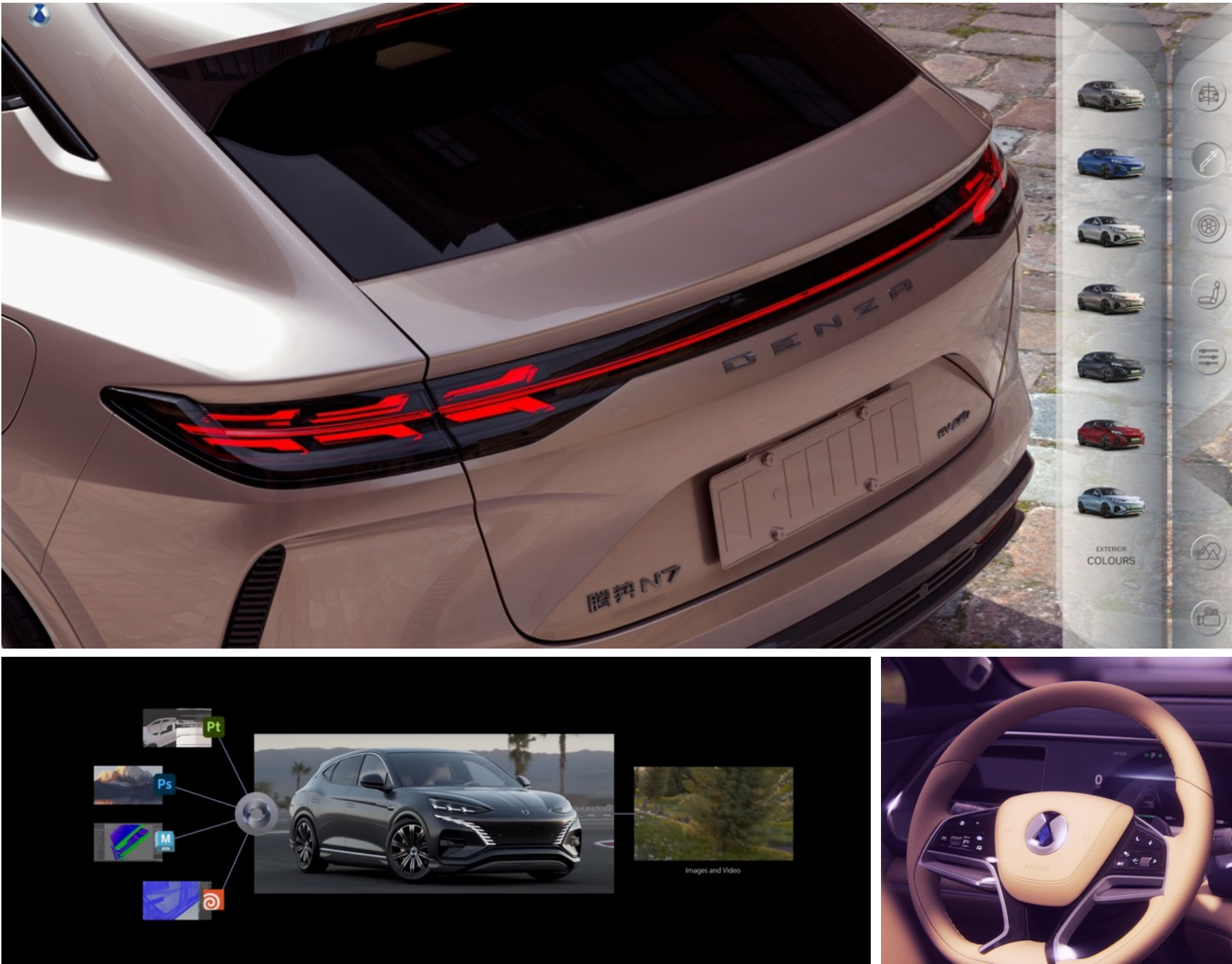
Luckily, technological solutions are available to overcome this issue. For example, DENZA—a BYD-Mercedes luxury EV joint venture—partnered with WPP and NVIDIA to develop its next-generation car configurators.

The collaboration involves using omniverse Cloud, a platform for industrial digitalization applications, to streamline DENZA’s intricate design and marketing process. This enables WPP to create a real-time, physically accurate digital twin of the DENZA

N7 model by integrating design data with Universal Scene Description (a 3D interoperability framework) to achieve seamless workflow across disparate software tools.

Combined with AI-generated content, these capabilities empower brands like BYD-DENZA to centrally manage global assets with greater efficiency. Auto brands also have huge success leveraging AI to proceed with the tagging of assets, which allows global users to find and re-use existing assets more efficiently.

Watch: WPP Builds DENZA’s 3D Car Configurator with NVIDIA Omniverse Cloud



Embracing Flexible Solutions *for Success*

EV brands can significantly amplify their marketing effectiveness and better engage with global consumers by harnessing essential MarTech tools

like Content Management Systems (CMS), Customer Relationship Management (CRM), and Customer Data Platforms (CDP):

- CMS enables brands to create tailored content for global audiences across digital platforms.
- CRM empowers EV brands to personalize communication, nurture leads, and cultivate lasting relationships globally, fostering loyalty and advocacy.

- CDP consolidates customer data to provide valuable insights into behaviors and preferences.

Leveraging these insights enables EV brands to fine-tune their marketing campaigns, deliver targeted messages, and elevate the overall customer experience.

To execute this plan effectively, it is crucial to identify the minimum viable product (MVP) and coordinate agile development with multiple teams for deployment. This ensures a synchronized approach, seamless integration of tools, and swift adaptation to evolving consumer needs and market trends.

Additionally, EV brands must validate, optimize, and iterate their products rapidly to maximize value creation under different marketing strategies. By continuously testing and refining their offerings, EV brands can ensure that they meet the evolving demands of consumers and remain competitive in the ever-changing automotive market.

CRM, MA

ORACLE®



braze

CMS

Adobe

Contentsquare

SITECORE®

magnolia®

CLOUD

aws

snowflake®

bloomreach

CDP

twilio segment

mparticle

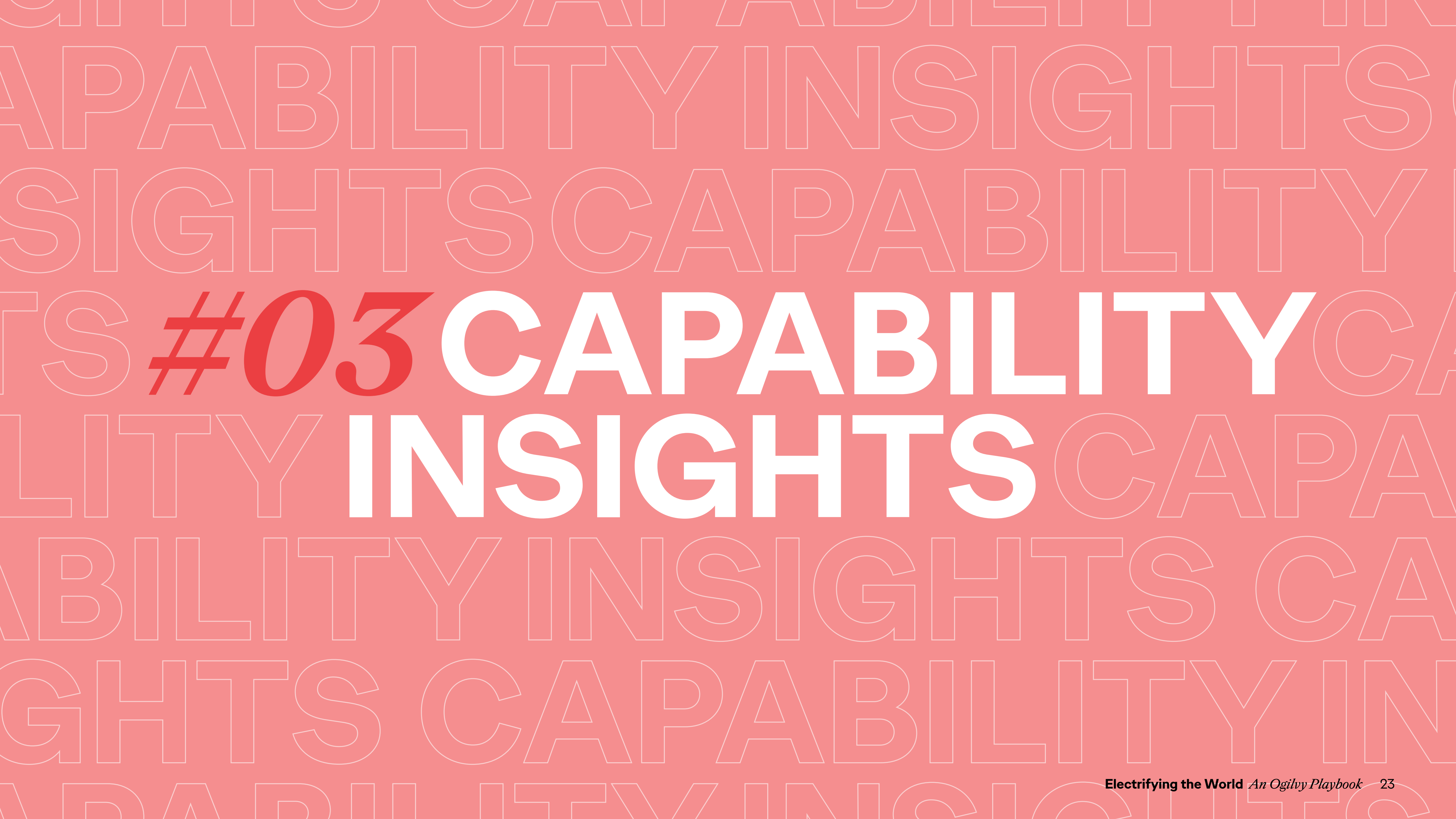
TEALIUM®

SOCIAL

Meta

Google

LinkedIn



#03 CAPABILITY INSIGHTS

The Policy Puzzle: *Navigating Public Affairs*

Presented By



Shifting Gears *for Public Affairs*

When expanding globally, careful attention to local public affairs is imperative for success, with special consideration required around trade dynamics, sustainability initiatives, and EV infrastructure development.

One of the first steps to take before entering a new market is to perform an audit of bilateral trade relations. This may include tariffs and market entry barriers unique to each country, all of which are crucial to understand to ensure a seamless integration into a new foreign market.

Sustainability issues must likewise be taken into consideration, both in terms of ensuring compliance with local sustainability regulations and adopting



eco-friendly practices appeal to environmentally conscious consumers.

EV infrastructure remains sparse in many countries that have started to invest in decarbonizing their roads. Collaborating with local governments and organizations

to establish charging stations and support the transition to electric mobility should be another component of any outbound EV brand public affairs roadmap.

In this section, we look at the areas Chinese auto brands should focus on

when expanding to the high-potential markets like the EU, Mexico, Australia, Thailand, and Indonesia.

The EU’s Tightening Grip on Chinese EVs

Electric vehicles are a strategic pillar for the EU, crucial for its climate goals, industrial strength, and job creation. However, in recent months, concerns have been mounting regarding China’s excess EV capacity and its potential impact on European producers.

In October 2023, the European Commission formally launched an anti-subsidy investigation which could lead to additional tariffs up to 20% on Chinese battery-electric vehicles (BEVs) by July 2024, on top of existing 10% duties.

Slower EV demand in the region (with car sales declining for the first time in 17 months at the end of 2023) could further exacerbate the perceived

threat of cheaper Chinese EVs. We can expect European policymakers to consider new measures, including incentives and regulations favoring domestic EV producers.

A recent approach adopted in France offering subsidies only to European-made EVs, for example, could inspire similar policies across the EU, as governments seek to shield domestic players and support their growth.

“*EU production is the foundation of our societies—we need products, we need jobs. Our job is to protect strategic sectors of our economies—that’s what keeps us out of bed.*”

– **Martin Lukas**
Director of the European Commission

Europe’s first car sales decline in 17 months
European Automobile Manufacturers’ Association



EU:

Key Challenges & Considerations

COMPLIANCE

The European Union's Corporate Sustainability Due Diligence Directive, expected to be enforced by the end of 2024, would require Chinese EV manufacturers exporting to the EU to monitor their business operations and those of their partners and suppliers for environmental and social issues.

Chinese EV manufacturers can also expect intensified attention in Western media on topics like supply chain management, data privacy and cybersecurity or intellectual property rights.

About

60%

of the European Parliament is expected to be comprised of newly elected members come June 2024, *injecting a dose of unpredictability into EU politics.*

EU ELECTIONS

New uncertainties loom for EU-China relations as the 2024 elections to the European Parliament approach. With many new, less experienced lawmakers about to take office, the political landscape is shifting. However, while conservatives and nationalists expected to gain ground, the 2030 internal combustion engine ban will likely stay in place. Fostering a robust European EV industry and reducing dependence on China will remain strategic priorities for the newly-elected legislature. And while the replacement of a few China-critical members in the Parliament might open doors for a less confrontational approach, the extent of this shift currently remains unclear.

DATA PRIVACY RULES

Further enforcement of the General Data Protection Regulation could represent another roadblock for Chinese EV makers operating in the EU, with more stringent data protection oversight within member states.

A few German car experts have already voiced concerns around data collection practices and potential security risks associated with Chinese-made vehicles.

Mexico:

Key Priorities & Considerations

SATURATED PORTS AND IMPORT CHALLENGES

The surge in Chinese car imports to Mexico has led to congestion at key Pacific ports like Lázaro Cárdenas, causing delays of up to 25 days and increased costs for brands. This trend underscores the need for infrastructure expansion and efficiency improvements in port operations.

BUREAUCRACY IN PARTS IMPORTS

Importing automotive components faces bureaucratic hurdles, especially for critical parts like motor components and materials in contact with CO2 gases. Vacancies in key import

authorization roles due to the impending change of government have led to delays, complicating supply to automotive companies.

COMMERCIAL CHALLENGES AND LACK OF LOCAL PLANTS

Chinese car manufacturers in Mexico encounter obstacles due to the absence of a current free trade agreement between the two countries, resulting in full import tariffs and affecting competitiveness. Moreover, the lack of local assembly plants impacts repair and spare parts availability. Plans by leading Chinese brands to establish local plants aim to mitigate these challenges and improve accessibility to parts.

x2

In the first two months of 2024, *the importation of Chinese-origin cars in Mexico doubled*, reaching 73,554 units, which accounted for 48.2% of the new units that entered the country.

WORKFORCE CHALLENGES AMID EXPANSION

Mexico anticipates the opening of 250 new automotive dealerships over the next 18 months, with each requiring between 30 to 40 personnel.

However, there's a shortage of skilled workers to meet this demand, highlighting the need for robust recruitment strategies and workforce development initiatives. This expansion represents an 11% increase from the current count of 2,300 new car sales outlets, with approximately one million individuals currently employed in the sector.

Australia:

Key Priorities & Considerations

BUILDING TRUST THROUGH PARTNERSHIP

What we see in Australia is a push-pull relationship with Chinese EVs: while the rise of Chinese brands fosters innovation and job creation, it is also seen as having the potential to hinder Australia's own EV industry growth. Chinese automakers can alleviate some of these concerns by:

- Advocating greater collaboration on EVs that meet Australian industry focus areas and requirements through joint R&D programs.
- Establishing formal partnerships with Australian authorities via MoU, with the goal of sharing China's expertise

in mining of critical minerals used for EV batteries and opening collaboration opportunities across the EV supply chain.

MITIGATING CONSUMERS' COST CONCERNS

Price is among the top barriers to EV adoption for Australian consumers. Amid perceived ambiguity around vehicle pricing – for example, fluctuating financial incentives from the government, or the proposed New Vehicle Efficiency Standard (NVES) that would see certain models cost substantially more than they currently do – Chinese automakers have an opportunity to position themselves as local

corporate citizens, for example by working closely with local government in the transition of their public transport ecosystem from ICE to EV.

ALLEVIATING RANGE ANXIETY

Incentives such as tax credits and cash subsidies for EV purchases, as well as Australian authorities' commitment to building a robust charging network across the country has diminished—but not completely erased—one of the key concerns for prospective EV owners: autonomy range. Chinese EV brands can take the upper hand in this area by:

- Developing a myth-busting campaign that aims to address range anxiety, shifting from fear to empowerment, providing consumers the confidence that vehicle autonomy does not need to be an area for concern.
- Partner with venues where drivers park their cars for extended periods of time, such as shopping centers, and setting up charging stations accompanied by relevant educational materials and activities.

Indonesia:

Key Priorities & Considerations

No.1

Indonesia is the *world's largest producer of nickel*, a crucial component in lithium-ion batteries, with a mined output of 1.8 million tonnes in 2023.

SUPPORTING EV POLICY UNDER NEW LEADERSHIP

President Joko “Jokowi” Widodo’s ten years in office have seen strong investment in the development of the domestic EV industry, with ambitions for Indonesia to become one of the top three producers of EV batteries by 2027. With newly-elected President Prabowo Subianto taking the reins this year, the overall policy direction around EV is expected to remain the same. However, the government is likely to face new pressures to ensure its bid to become an electric-vehicle hub presents enough economic benefits.

A key priority for Chinese brands in this context will be to proactively engage

in conversations with regulators and policymakers to own a place in Indonesia’s sustainable mobility goals, job and skills development, mining processes and supply chain and infrastructure development.

DOUBLING UP ON INFRASTRUCTURE

Insufficient infrastructure is a key factor hindering the growth of the EV industry in Indonesia, as well as contributing to issues including traffic congestion, accidents, and air pollution.

Here, EV makers have a chance to develop innovative charging solutions such as fast-charging stations or

wireless charging technology to facilitate broader EV adoption by the public.

SHIFTING CONSUMER PERCEPTION

Despite government incentives, consumer awareness and acceptance remain relatively low in Indonesia. Many are unfamiliar with EV technology, with concerns about the unpracticality of EV compared to conventional vehicles. EV manufacturers can initiate educational programs to raise awareness about the benefits of EVs and promote sustainable transportation practices in the form of workshops, seminars or outreach programs in schools, and local communities.

Thailand:

Key Priorities & Considerations

ADDRESSING PM2.5 WOES

Air pollution in Thailand resulted in around 2 million people seeking medical treatment in 2023, according to the kingdom's Health Ministry. This worrying health crisis has galvanized policy makers to invest in the EV sector to tackle toxic emissions, offering tax incentives and subsidies to accelerate the electrification of the country's vehicle fleet.

For Chinese EV brands, this is an opportunity to demonstrate how their production process for EVs and batteries contribute to cutting CO2 emissions and improving air quality for every Thai consumer.

By

2023

Thailand aims to *convert 30% of its annual production of 2.5 million vehicles into EVs*, according to a government plan.

SUPPORTING AMBITIOUS POLICY GOALS

At the end of 2023, Thailand pledged to invest \$970 million by 2027 to establish itself as a major production hub for EVs. Preferential measures have already successfully attracted Chinese carmakers such as BYD and Great Wall Motor, who have announced that they will invest \$1.44 billion in new production facilities.

To further differentiate themselves from competitors, as well as strengthen their position as the go-to choice for prospective EV buyers, Chinese EV makers can benefit from expanding their footprint across the entire EV

ecosystem. Some examples include:

- Showing their long-term commitment to the country by establishing Thailand as their innovation and design hub in Southeast Asia, rather than simply being an assembly and export destination.
- Developing compelling stories targeting potential EV buyers, addressing key concerns around pricing, autonomy and charging facilities, while reinforcing the positive impact of EVs on public health and the environment as a whole.

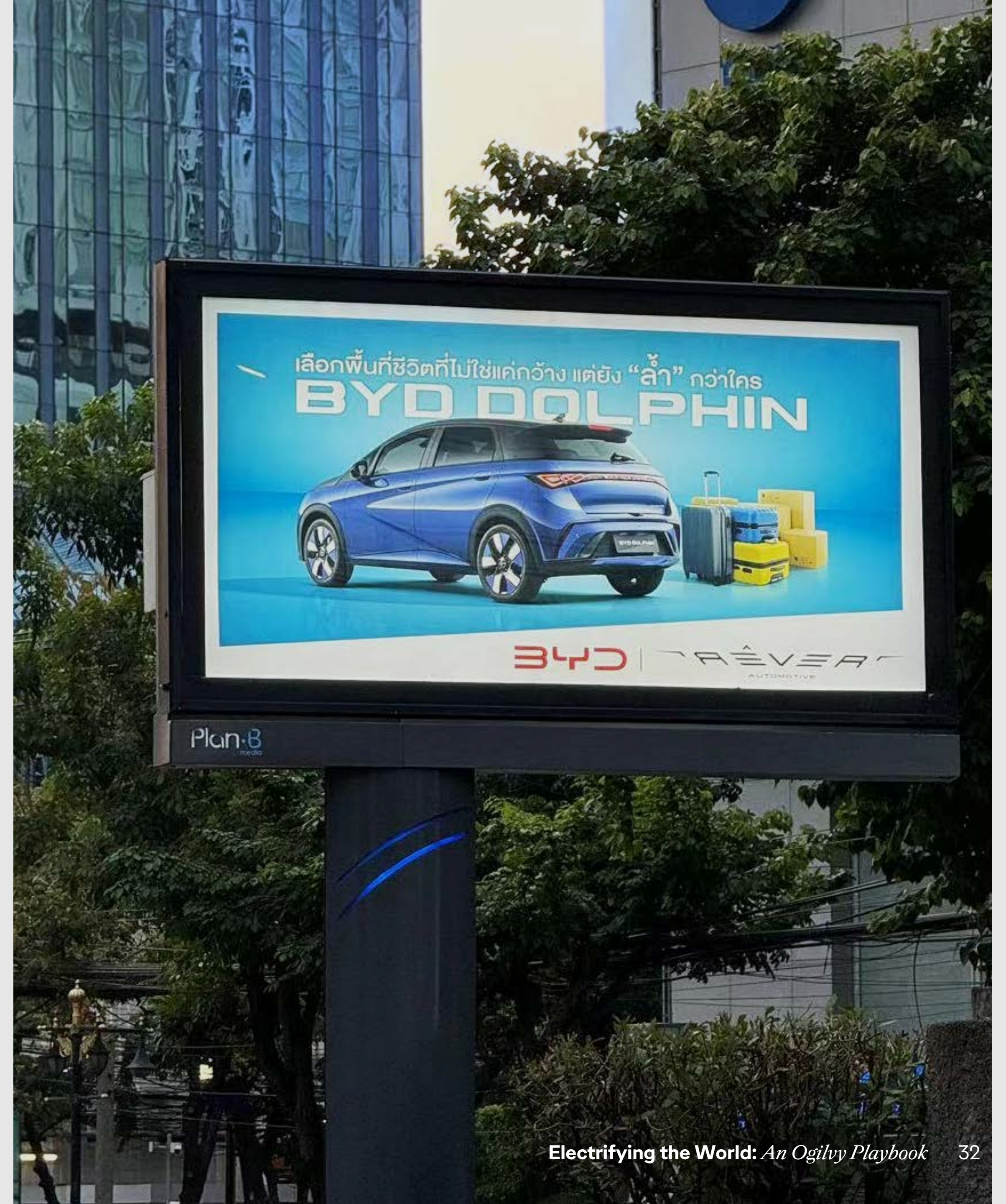
Ad Dollars in Motion

Exploring Media Trends

Presented By

Wavemaker

#32



Powering Up Your Media Strategy *in Today's Landscape*

EV adoption is far from a uniform journey across the globe. Factors including consumer wealth, government incentives, sustainability goals, and local infrastructure investments significantly impact how readily regions embrace EVs.

The complexity of this landscape extends to the media itself. Even within regions, fragmentation reigns supreme, with neighboring countries sometimes exhibiting stark differences in media consumption trends. At a consumer level, understanding the evolving needs of potential EV buyers is equally crucial. A recent PwC study shows that EV Prospects (people intending to buy an EV in the next 5 years) display regional variance in terms of demographics and

mobility, indicating different needs sought in a future EV. Considering behavioral factors like environmental consciousness, technology preferences, price sensitivity, and car usage patterns are thus essential to decide on an effective media approach for maximum impact.



Key Challenges & Considerations

67%

of buyers have a strong idea which premium car brand they will choose *before starting the buying process.*

INFLUENCING PRE-DECISION

A significant portion of car buyers, 67% in the premium segment and 54% in mainstream, already have a preferred brand in mind before they even begin the shopping process, according to a Wavemaker Momentum study involving over 1 million participants.

This underscores the critical importance of robust brand building, especially for challenger brands entering the competitive EV market.

EMBRACING DTC

Auto advertisers are about to embark on one of the most significant transformations facing markets of any industry, as the dealership model is being replaced by a direct sales model where the dealerships act as a de facto agency for the OEM (Original Equipment Manufacturer).

The rapid shift to a direct-to-consumer model could generate greater advertising spend from auto brands, funneling customers into digital experiences to browse and shop before connecting them with a dealership for on-site needs.

BREAKING THE MOLD

The EV marketplace is getting more and more cluttered and competitive with legacy brands converting and emphasizing EV credentials, and challenger brands entering the market. Auto manufacturers have indicated they will be producing marketing campaigns aimed at supporting new launches, especially in the EV category.

Even Tesla, long an advertising hold-out, has launched new initiatives aimed at communicating the brand's features to consumers while simultaneously appeasing shareholders.

Regional *Spotlight*

LATAM

- Led by strong growth in Brazil and Mexico, the advertising market for the region is expected to grow 12.7% in 2024.
- Competition between Mercado Libre, Amazon and Walmart will drive retail media growth from less than \$1.0 billion in 2023 to an estimated \$5.3 billion in 2028.
- OOH ad revenue enjoys a larger share in LATAM (7.6% in 2024) than the global figure of 4.0%.

EUROPE

- In 2024, the three fastest growing media channels are expected to be retail media (15.9%), CTV (15.7%) and digital audio (13.5%).
- While TV growth in Europe will moderate, some Central and Eastern European markets show strong growth in linear TV, due in part to lagging development of CTV advertising.
- The regulatory and judicial scrutiny facing social media and video players is intensifying, and Europe maintains some of the strictest regulations in the world.

MEA

- Thanks to a generally young population, the region is seeing a rapid adoption of technology, with digital pure-play advertising projected to be the fastest growing channel in 2024.
- OOH is growing at a fast pace, fueled by the rapid growth of the expat population, particularly in the UAE.
- Connected TV is a notable bright spot in the TV landscape, with projected growth in 2024 exceeding that of retail media.

APAC

- APAC is the world’s second largest advertising market, following North America, with 54.4% of the regional total coming from China alone.
- The region boasts four of the 10 fastest-growing markets through 2028 on a compound annual basis: India, the Philippines, Pakistan and Sri Lanka.
- In Australia, TV and internet still take the lion’s share of revenue with 83.4% of the overall market.
- In Thailand, OOH (including digital OOH) is expected to grow the fastest, after a 20.3% rise in 2023.

Four Best *Practices*

01

Distribution and vehicles on the ground are essential prior to launch. It is your brand so...

**BE
READY.**

02

Talking about sustainability in a sustainable category is only adding to the noise so...

**BE
DISTINCTIVE.**

03

EV brands are widely seen as interchangeable, and none particularly stands out in the eyes of consumers so...

**BE
UNEXPECTED.**

04

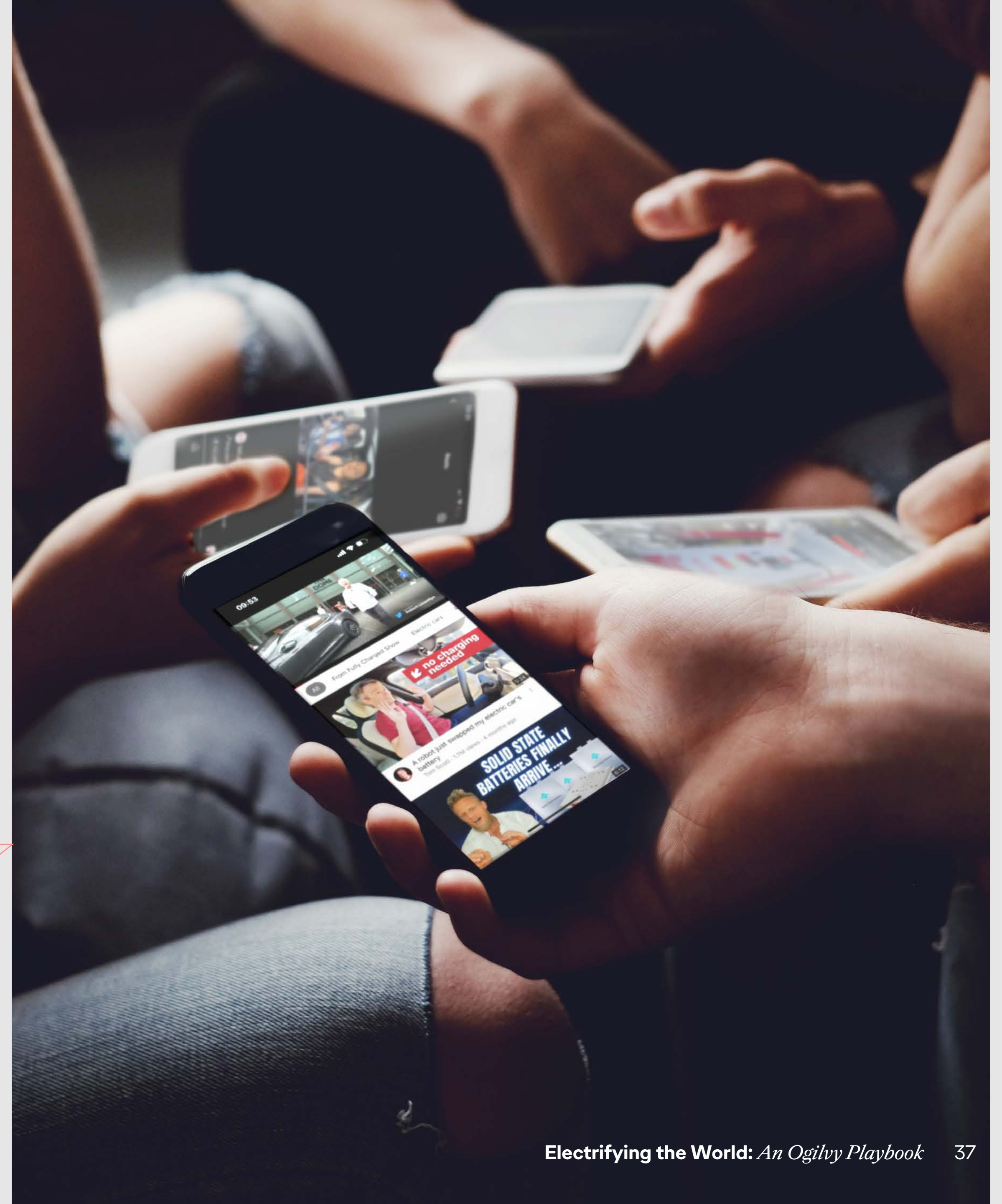
EV marketing requires more effort on the offline media front so...

**BE
GEO-TARGETED.**

Beyond the Algorithm: *Building Authentic Influence*

Presented By

Ogilvy PR



The Influence Imperative *for Auto Brands*

\$480bn

That's what the creator economy is projected to be worth by 2027, *nearly double what it is today.*

Buying a car is a major decision and investment, and one that most consumers don't want to rush into. Increasingly diversified vehicle portfolios, rapid hardware and software innovations, and in-market regulatory considerations have added a level of complexity to what used to be a relatively long, yet fairly linear car buying process.

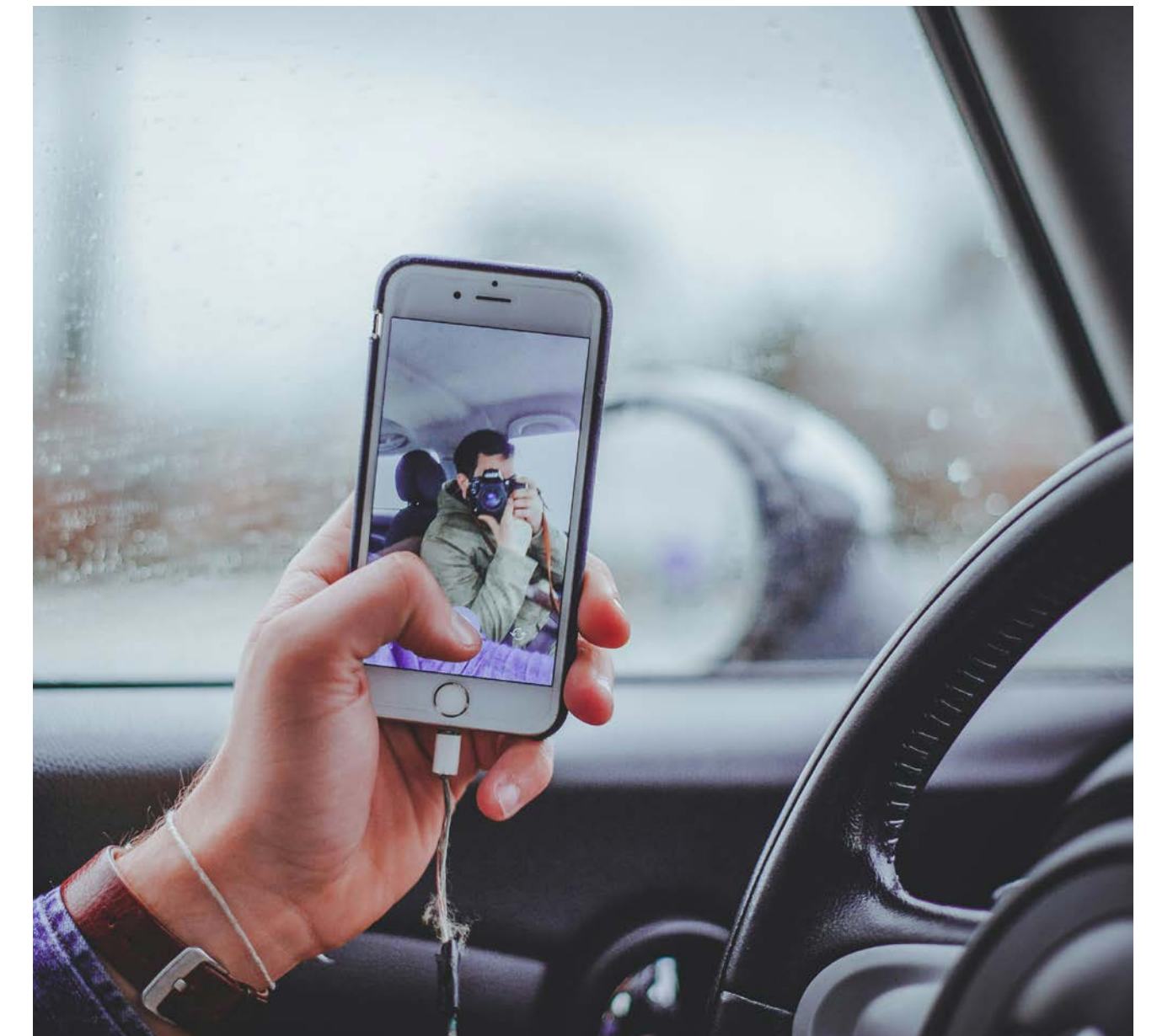
Taking into account the fact that buying journeys today start on a smartphone, long before consumers even step into a physical dealership, the potential of influencers to positively impact awareness, consideration, and sales is massive.

In a world where consumers have endless options at their fingertips, the “why” for investing in influencer marketing is clear.

Influencers enable targeted reach (their organic following is often larger than a brand's own platforms), create relevance (they speak the language of the brand's target audiences, delivering content that resonates with their specific interests and needs), build trust and credibility

(they have earned their audiences' trust overtime through consistent, authentic content that strikes a stronger chord than brand messages) and act as a bridge for engagement (they create direct connections with the passionate car community, fostering conversations about the brand).

In this section, we explore the “how”, looking at the importance of building a diversified influencer base, and integrating influencer content seamlessly into your brand's.

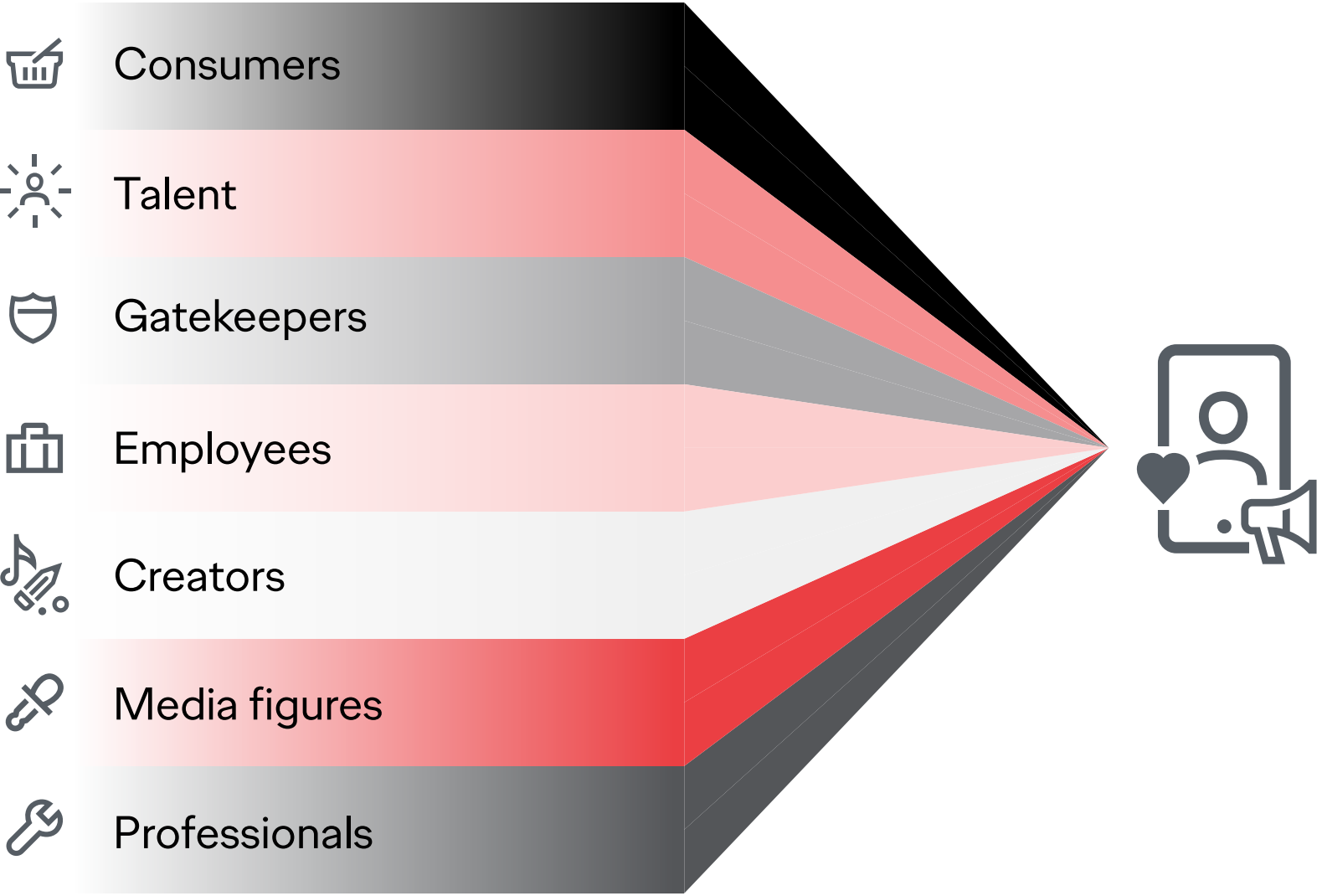


Diversifying *Your Influencer Pool*

Influencers are the new word-of-mouth for the digital age, connecting with consumers with empathy and authenticity—exactly what more traditional sectors like automotive need to break through the noise.

However, we often see marketers hold onto the idea of the influencer archetype. The reality is, influencers come in many different shapes, just like potential car buyers' profiles are highly-segmented. Not all influencers do the same job, each type having a different impact on your consumers. Think for example of how differently an A-list celebrity, car/tech expert or Youtuber will resonate with car shoppers.

THE SPECTRUM OF INFLUENCE FOR AUTO BRANDS



Another dimension of diversification lies in content formats. Gone are the days of relying on a monotonous stream of sponsored posts to drive awareness.

To create real impact, your influencer strategy should tap into creative formats. Examples include:

- Unboxing-style car reviews
- Auto event vlogs
- Daily life product integrations
- Paid trips or experiences
- Commissioned high-quality photography

Spotlight on Various Types of *Influencers* Across the Globe

Ogilvy utilizes a world-leading tech stack to source influencers against both qualitative and quantitative criteria and assess the relevance of influencers for any given campaign. Based on analysis of over 5000+ data points, InfluenceO consolidates that data into one, easily digestible score: the Oscore, accompanied by helpful context breaking down our selections.



MARQUES BROWNL
Content creator

Influential tech creator Marques Brownlee helps simplify complicated tech solutions for a mass audience, and in recent years has become a prominent EV advocate.

YouTube Followers: **14M**
Engagement: **6.8%**
Audience: **45% US**



CERO WASTE CINDY
Sustainability gatekeepers

Cindy is a first-generation Mexican-American sustainability and outdoor adventurer influencer, advocating for renewable energy and zero waste.

YouTube Followers: **24.7k**
Engagement: **8.4%**
Audience: **84% MX**



AMNA AL QUBAISI
Car influencer

Amna is a 23-year-old motorsport champion and the first Emirati female race car driver to win internationally.

YouTube Followers: **216k**
Engagement: **5.75%**
Audience: **83% UAE**



PURI HIRANPRUECK
Celeb car fan

Thai model, actor, and TV host Puri is a car enthusiast, often embarking on road trips with his family, providing great authentic storylines for multiple car models as an ambassador for Thailand.

YouTube Followers: **2.3M**
Engagement: **2.59%**
Audience: **75% TH**

Integrating Influencer *Content for Authenticity*

As Instagram and TikTok become the new search engines, brands need to actively integrate influencer content into their marketing strategies and branded content to access relevant audiences and establish an authentic voice that drives engagement.

There are 4 key steps that are critical to a successful integration:

1. Selection Synergy

Select influencers that share the same values as your brand and reflect your audience mix. They could be existing advocates or users of the brand for optimal authenticity.

2. Creative Co-creation

Whenever partnering with influencers, establish a strong brief with guidance on brand values, key messaging and desired outcomes, but trust that influencers know their audience and the platforms better than brands ever could. Give them creative freedom to create content they know works well for them to ensure it connects with consumers on a deeper level.

3. Engage, Repost and Repurpose

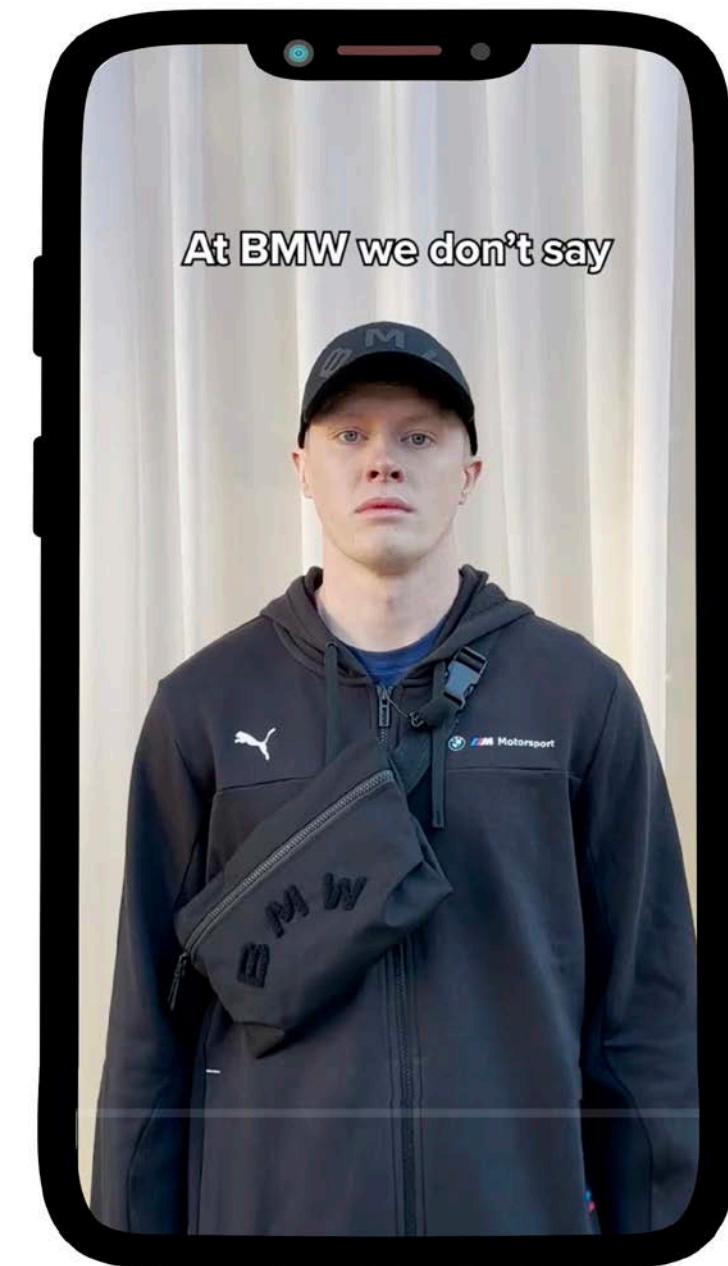
Brands should engage with influence content they are tagged in, with added-value comments. Reposting influence content on brand channels also encourages advocacy for followers and builds community. Finally, consider repurposing influence content across

other marketing channels outside of social, adapting to brand logos and styling.

4. Branded Content Partnership

When creating branded content, invite influencers to star in your production, whether that's a video, website assets or podcasts. This will add credibility to your branded content.

BMW successfully did this for the unveiling of their Vision Neue Klasse electric vehicle concept, collaborating with TikTok sensation Liam Carpenter to produce an exclusive short video on the platform. (See right)



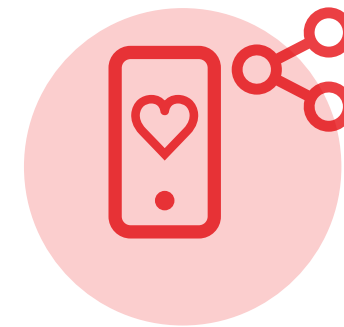
BMW partnered with German creator Liam Carpenter on TikTok

Putting It *All Together*

Below is a selection of content types that brands can use when collaborating with diverse influencers. There is no cookie-cutter approach when it comes to content strategy, but key principles like influencer selection, co-creation, and interactivity always apply.

SOCIAL POST

Basic, low impact, and sometimes provoke negative reactions from the audience when not integrated into authentic organic content. That's why influencer selection is crucial, as is adding an interactive component (product offers or giveaways).



EVENT

Brands can invite influencers to attend car shows or new vehicle launch events. One of the deliverables for the influencer will be to cover their experience through creative stories, and talking to on-site experts for increased brand empathy.



CAR REVIEW

An unboxing-style car review featuring an influencer is a simple but effective way to generate views among car enthusiasts.

This format allows the influencer to engage with their audience, show their authentic reactions and discuss detailed specs.



ORGANIC INTEGRATION

One of the most authentic ways to create content through influencers is to invite them to integrate your product into their everyday life. With the right influencer selection, this is a good way to reach different niche demographics.



SOCIAL TAKEOVER

Hand over the reins of your brand social accounts to talented content creators to speak for your brand for a full-day takeover.

With this format, influencers will create content, feature in live sessions, and engage your audience through Q&As.



TRIP/EXPERIENCE

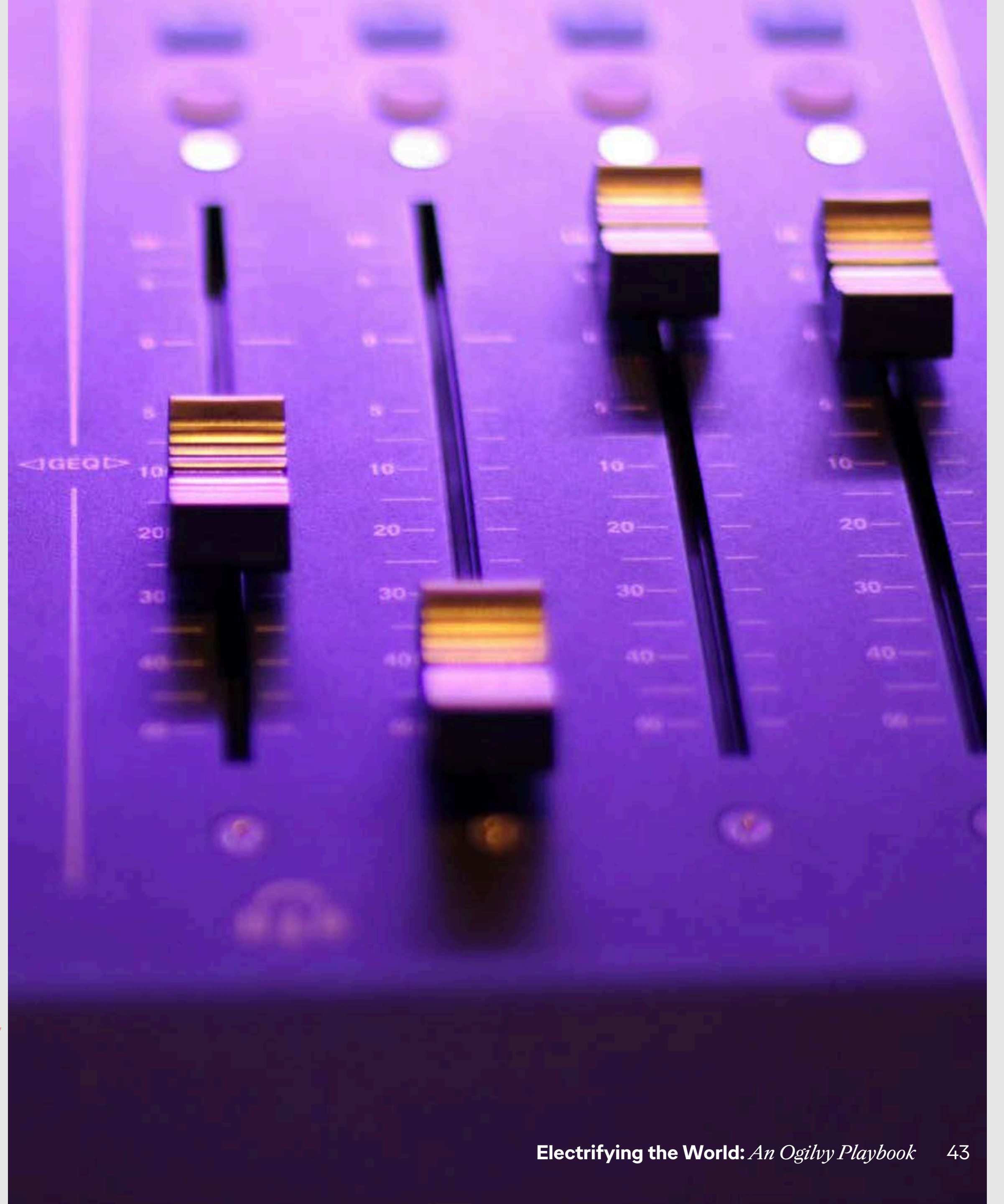
Gifting an influencer a trip using your vehicle is a chance to integrate your brand values and their audience in an organic way, while showcasing the potential of the car through a practical, real-life angle.



The Power of Sound: *Crafting a Unique Sonic Identity*

Presented By

amp



Why Sonic Branding Matters

Sonic branding has evolved way beyond jingles, becoming a holistic approach. Now, sound defines a brand across all touchpoints, using melody, rhythm, timbre, and texture to create a unique sonic identity.

While the basis of most sonic branding lies within a sonic logo—usually a 3-5 second melodic phrase—the best actors in this field are the ones that take this further to branded tracks, events sounds, and most importantly for the EV industry, UX/UI sounds. Given the competitive nature of the automotive market, brands should look to invest in a holistic sonic identity to further differentiate in the sector.

Eliciting a multi-modal experience for the consumer is more attainable for EV brands than their ICE counterparts, as their product innately has a silent implementation ready to be branded.

“Automotive brands are in a unique position having an ability to *evoke all five senses, ensuring a truly remarkable and unforgettable experience.*”

—— Bjorn Thorleifsson, Director of Research and Insights at amp

The future of mobility isn't just about cars anymore—it's about the software they run on. Thanks to AI and other tech advancements, the way consumers experience cars is changing dramatically, and sound becomes even more crucial in this new era. It creates emotional connections, from the door chime to the cabin hum. These sounds are not just functional, they're designed to evoke feelings and elevate the driving experience. Just as the engine roar once signified power, thoughtful soundscapes in EVs aim to create a desirable experience, transforming them from transportation tools into personal spaces. Software and sound work together to stimulate

EVs, transforming them from mere transportation tools into dynamic, personal spaces enjoyed by drivers everywhere.

We believe to maximize the sonic branding opportunities for EVs, there are three brand considerations:

- All touchpoints are opportunities
- Flexibility is king
- Practicality shouldn't be ignored

By considering the three points above, brands can ensure they embark upon a strategic approach to sonic branding, investing in consumer experiences and relationships.

Sonic Branding:

Key Considerations

ALL TOUCHPOINTS ARE OPPORTUNITIES

EVs, with their inherently silent engines, present a unique canvas for sonic branding. They offer the potential to personalize the consumer experience through sound, while simultaneously amplifying brand awareness. No touchpoint should be left unbranded: engine hums, seatbelt warning sounds or welcome sounds played upon entering the car, all have the potential to belong to a unique sonic identity while also creating a distinction between different driving modes.

FLEXIBILITY IS KING

While comprehensive sonic branding requires covering all touchpoints, flexibility is equally crucial. A well-crafted identity should maintain brand voice while adapting to different contexts. Just as car models evolve with new features, a well-crafted sonic identity can create distinct moods (think calming for commutes, invigorating for weekend drives) while staying true to the brand essence. This flexibility is essential to ensure a seamless experience that complements visual branding and elevates the overall journey.

DON'T IGNORE PRACTICALITY

Creating a flexible sonic identity goes beyond just pursuing creativity or distinctiveness. The key lies in practicality and enhancing the driving experience. Effective sonic branding for EVs requires balance. Sounds should not just amplify brand messaging, but also intuitively represent the action taking place.

Research from 2019 (Earcons) supports this: it found that premium branded sounds were 20% more likely to be associated with the correct action and increased user experience by 50% compared to generic sounds. Additionally, users preferred a suite of sounds for different actions over

repetitive use of the same sound. This is why having a holistic sonic identity is not only beneficial but also imperative for EV brands, considering the quantity of silent touchpoints available for branding.



Successful Sonic Branding *in Action*

Ready to crank the volume on successful sonic branding? Here, we look at a best-case example from BMW.

For the launch of their i4 model, BMW partnered with Hollywood composer Hans Zimmer to create “My Modes” – five unique driver-chosen soundscapes for the car interior. Each mode comes with distinctive sound worlds, enabling a particularly intense interaction

between the driver and the vehicle. For instance, the Comfort My Mode provides a calmer, more relaxed noise. Sport mode creates a more exciting noise, designed to convey the response of the electric motors.

This innovative approach to the in-car sonic ambiance demonstrates how brands can use sound to personalize the driving experience.

Watch: BMW IconicSounds Electric, an innovative partnership between BMW and Hans Zimmer





#04 SUMMARY

The Road Ahead: *Can Chinese EV Brands Achieve Global Dominance?*

The future is electric, and Chinese innovation is at the forefront. But the success of Chinese EVs on a global scale hinges more on their ability to translate domestic dominance into a well-defined, adaptable brand strategy than on their technological advance and manufacturing agility.

As evidenced in other categories, the journey from domestic success to global leadership is by no means easy. Unlike conquering the home market, global expansion requires patience, strategic investment, and acute local insights.

Building trust and fostering positive brand perception internationally will be a key priority for Chinese

manufacturers with global ambitions, particularly as scrutiny around foreign EVs around the world continues to intensify. Public affairs, media relations, and influencer marketing all play critical roles in cultivating a brand persona that resonates with stakeholders at all levels, from consumers to government bodies and local industry partners. To create a strong emotional connection with overseas buyers, Chinese auto brands also need to focus on tailoring customer experiences to local habits and preferences, which often requires building a completely new digital architecture, and establish partnerships with key tech players in each target continent or even market.

Can these Chinese EV champions achieve global dominance? The potential is undeniable, but success will depend on their ability to adapt, build trust, and invest strategically for the long haul.

In this playbook, we explored the following key focal points to guide you in your journey:



Appendix

Service Offering Introduction

Brand's Need	Navigating the Brand's Market Entry Strategy	Building a Global Brand Strategy and Platform as a Blueprint Directing the Brand Development in All Markets	Establishing a Global Brand Management Model Guiding Team Collaboration and Brand Behavior Across All Markets	Activating a Brand in a Particular Region / Market
Service Type	Initial Phase of Brand Expansion	Global Brand Platform	Global Brand Management Model	Local Market Brand Build Up
Service Offering	<p>Brand & Strategy</p> <ul style="list-style-type: none"> Brand Acquisition Management Brand Entry Strategy Commercial Opportunity Assessment Commerce Strategy <p>PR</p> <ul style="list-style-type: none"> Public Affairs Strategy & Support <p>Media</p> <ul style="list-style-type: none"> Media, Competitive and Consumer Landscape Analysis 	<p>Brand & Strategy</p> <ul style="list-style-type: none"> Brand Platform & Strategy Development Brand Architecture Management CI/VI Development Brand Platform Launch Planning & Activation <p>PR</p> <ul style="list-style-type: none"> Employee Enablement Engagement <p>Media</p> <ul style="list-style-type: none"> Full Funnel Media Strategy & Execution 	<p>Brand & Strategy</p> <ul style="list-style-type: none"> Brand Management & Operational Model Development Brand Campaign Development & Implementation Brand Content Hub Setup <p>PR</p> <ul style="list-style-type: none"> Crisis Management Media Management Brand Reputation Management <p>Digital Experience</p> <ul style="list-style-type: none"> Global Digital Infrastructure Development Dealer/Retailer Strategy Global UX/UI/Sonic Experience Commerce Full Funnel Activation Social and Digital Platform Operation <p>Media</p> <ul style="list-style-type: none"> Full Funnel Media Activation & Sustain 	<p>Brand & Strategy</p> <ul style="list-style-type: none"> Local Insight & Research Brand Strategy Brand Localization CI/VI Adaptation Local Campaign Launch <p>PR</p> <ul style="list-style-type: none"> Crisis Management Media Management Brand Reputation Management <p>Digital Experience</p> <ul style="list-style-type: none"> Digital/Social Platform Presence & Management Commerce Presence & Operation <p>Media</p> <ul style="list-style-type: none"> Media, Competitive & Consumer Landscape Analysis Full Funnel Media Plan, Activation & Sustain

Appendix

Contributors & Contact

KEY CONTACT

Feel free to reach out to Janet Tsai to further discuss any of the findings in this playbook and start a conversation around your business.

Janet Tsai

Global Lead, China Brand Practice, Ogilvy

JanetCL.Tsai@Ogilvy.com

KEY CONTRIBUTORS

Alex Altman

Global Client President, Global B2B Lead, Wavemaker

James Baldwin

Head of Influence, Ogilvy PR, APAC

Angela Chou

Managing Director, Ogilvy South China

Rebecca Eisert

Managing Director, Crisis and Special Situations, FGS Global

Edward Fall

Senior Client Partner, Wavemaker

Gregor Feisel

Managing Director, Wavemaker Germany

Dirk Fromm

Chief Client Officer, Wavemaker Germany

Jenny Gao

SVP Strategy, Brand Planning, Ogilvy Shanghai

Cesar Holguin

Chief Strategy Officer, Ogilvy Mexico

Joachim Koschnicke

Partner, FGS Global

Emily Poon

President, Ogilvy PR, APAC

Martin Reiher

Head of amp Asia

Chris Reitermann

President, WPP China & CEO, Ogilvy APAC & Greater China

Janet Tsai

Global Lead, China Brand Practice, Ogilvy

Jack Yin

President, Ogilvy One, China

EDITORIAL TEAM

Michael Evans

Editor, Ogilvy Beijng

Jennifer Gao

Associate, Marketing & Communications, Ogilvy China

Ivy Peng

Manager, Marketing & Communications, Ogilvy China

Mathilde Veyrat

Manager, Communications, Ogilvy APAC & China

Appendix

Agency Partners



Driven by a mission to inspire brands and people to impact the world, Ogilvy has been creating iconic, culture-changing, value-driving ideas for clients since David Ogilvy founded the company in 1948. Ogilvy’s experts in Advertising, Customer Relationship Design, Public Relations, Health, and Consulting work fluidly across over 120 offices in nearly 90 countries to bring forth world-class creative solutions for clients.



We positively provoke growth for our clients and our people. We shape your consumers’ brand decisions and experiences through media, content and technology. With one streamlined service offer:

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Consultancy — Specialist consultancy services across Content, Data and Analytics, eCommerce, Effectiveness, Precision, Product Solutions and Technology

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amp is the world’s leading sonic branding company. Utilizing its award-winning Sonic DNA® design approach and AI-fueled Sonic Hub® Ecosystem, amp creates holistic sonic identities for global brands. Leveraging sound, voice, and music, amp builds authentic connections for brands across audible touchpoints, cultures, and audiences. With a diverse portfolio of clients, including Mastercard, Mercedes-Benz, Deloitte, Zurich Insurance, Uber, Klarna, and Kraft Heinz, amp creates and implements 360° sonic experiences and assets.

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