

A photograph of a woman with dark hair, wearing a light-colored top, smiling warmly as she holds the hands of a baby lying on a bed. The baby is wearing a green long-sleeved shirt and a white diaper, and is looking up at the woman with an open mouth. The bed has a white and grey striped sheet. The background is softly blurred, showing a window with a dark frame.

Bepanthen Baby & Kids Audience Strategy

2025

Bepanthen[®]



Contents



**Objective &
Context**



**Executive Summary of
Audience Strategy**



**Growth Audience
profiling**



**Addressable Audience
Recommendation**



01

Objective & Context



Our objective is to build a growth- focused audience framework supporting an evolving Bepanthen Baby & Kids portfolio

We are pursuing **three main goals**

01

Robust **Growth Audience** analysis that is used to activate the brand and inform the development of a multi-market, multi-region IMC supporting both existing core nappy rash and future innovation in the Baby & Kids Skin Health demand space

02

Provide a framework of **Addressable Audiences** to target through addressable media and customized messages and product offerings

03

Create closer connection between existing Bayer CSJ analysis and newly developed targeted audiences



We aim to ensure audience planning sits at the heart of future IMC, media strategy and content development, by:

11 markets

analysed across Growth And Addressable Audiences



Identifying **growth-focused audiences** to unlock insights for media and **inform global content and creative development**



Fine-tuning existing media approach by analysing audience **media channel preferences according to existing communications priorities (salience, trust, conversion)**



Driving more consistency of Addressable Audience application - **consistent definitions, wider application and adoption across markets**

Key Data Sources



KANTAR

Current audience understanding & **consumer shopper journey** - work to build on

Audience Origin
By CHOREOGRAPH

Used for **single-source analysis** across markets and integration with media planning



Audience Translator

Understanding **targeting across global media** platforms, connected to Audience Origin

We're following the New Audience Hierarchy outlined in **TB4L**

The TB4L audience targeting framework

Category users and prospects

Understand broad potential and uncover growth opportunities



Growth Audiences

Focus on priority audiences with shared behaviours, reflecting product need



Addressable Audiences

Develop specific, relevant audiences to enable precision targeting and activation



New Audience Hierarchy Sits At The Core Of The Analysis For Bepanthen Baby & Kids

Category Users And Prospects

- Category user and prospect data analysis, eg volume of use, share of usage occasions, segmentation and headroom for growth
- **Foundation for portfolio and brand strategy**

Informed By Existing Bayer Research

Growth Audiences

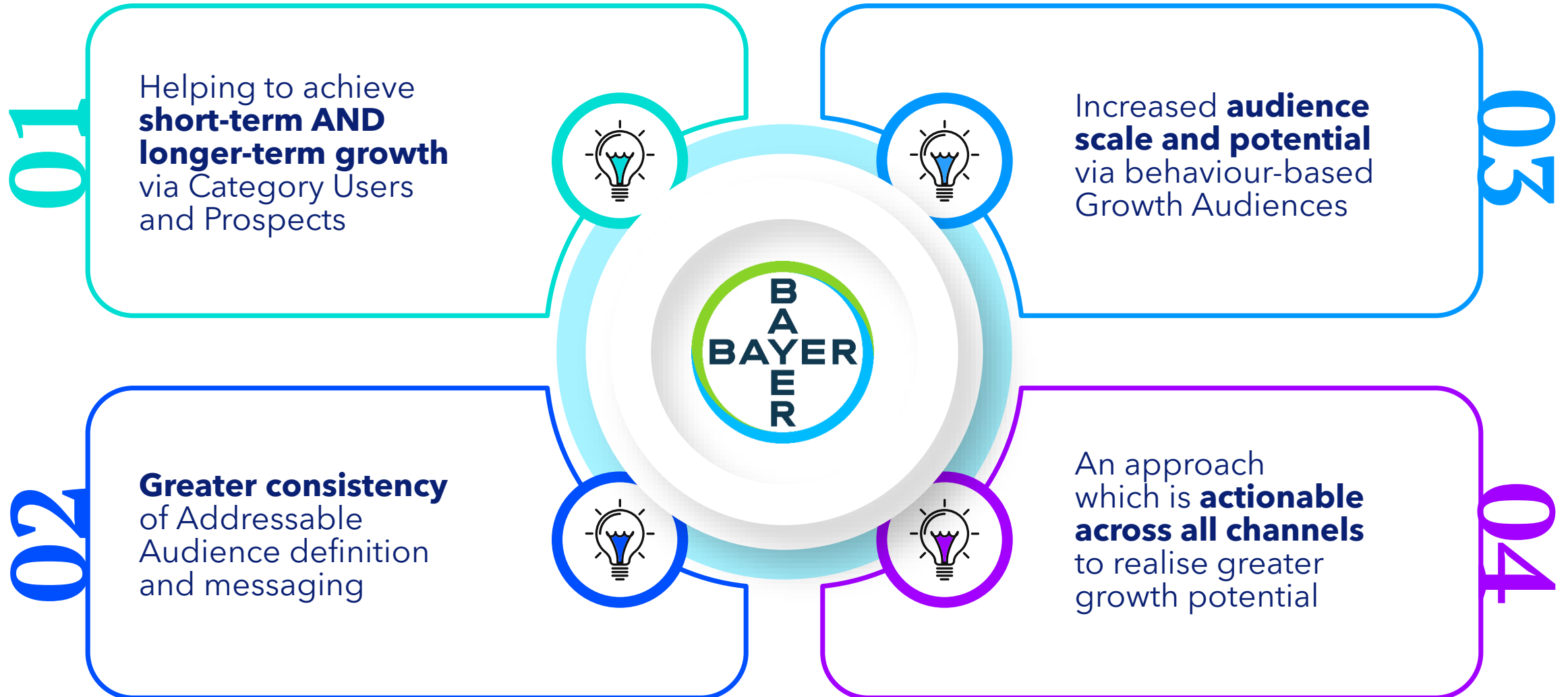
- A targeted, scaled subset of category users and prospects identified as priority Growth Audience for brand planning
- **Guiding brand planning, NPD, brand architecture, IMC development, creative and media strategy, and broad media targeting**

Our Focus for this document

Addressable Audiences

- Deep analysis of Growth Audience characteristics to define Addressable Audiences, **informing more personalised targeting, messaging and activation, primarily in digital platforms**
- Specific platform-level data signals selected to enable accurate and scaled Addressable Audience identification, ensuring effective and **efficient targeting in relevant digital platforms**

There are several key advantages to this approach





02

Executive Summary & Action Points

Bepanthen Baby & Kids Audience Strategy

Category Users and Prospects

All Parents Expecting And With Children Under 10 yrs of age

Category buyers



Expecting parents

Growth Audience and Sub-segments

Skin Conscious Parents

All expecting parents and parents with a child up to 5yrs of age conscious about their child's skin health

Expecting parents

Preparing for the arrival of a baby, open for education and information

Reactive parents

Typically approach skin health reactively, treat when symptoms arise

Preventative parents

Holistically care for baby skin with preventative approach using a daily regimen

Addressable Audiences

Expecting & Newborn Parents

Baby Parents

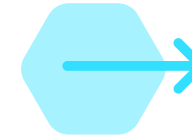
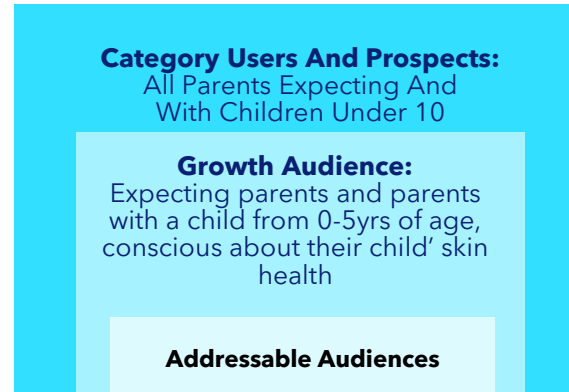
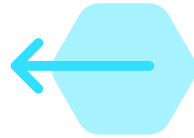
Kid Parents

Out-and-About Parents

Events around Birth
Baby Shower/ Gender Reveal / Celebrating Birth

Overall Sequence of Steps towards Audience Activation

Broader for markets
with category leadership



Narrower for markets:

- Being outspent
- Limited ambition
- Lack of universal product relevance

How To Build Audience Approach

01

Determine market priorities based on current brand strength, width of portfolio, ambitions and NPD rollout plans

02

Build activation plan to establish **regular and impactful** communication with **high reach for Growth Audience and its relevant sub-segments in line with local JTBD(s)**. Media target audience will look differently in different sets of channels based on what is most appropriate for a given tool (e.g. soc-dem based for TV, interest-based for influencer, adjacent category-based for Retail media etc.)

03

Select targeted **addressable audiences** according to brand position and portfolio in market, as well as brand ambition. The list provided in this document is **a list of all options - not every audience needs to be activated in all cases.**

04

Check addressable audiences for incrementality - avoid excessive overlap / duplication of reach

05

Build plan across the year - optimize for regularity of reach vs. reaching the same audience with different types of communication at the same time

Markets to apply this framework based on local context and priorities

Bepanthen Baby position in market

STARTER OR LAGGING

CHALLENGER

STABLE LEADER

Priority Audience

Growth Audience
and its relevant sub-segment(s)
dependant on local JTBD

Growth Audience
and its relevant sub-segment(s)
dependant on local JTBD

Growth Audience
and its relevant sub-segment(s)
dependant on local JTBD

Main Role for Addressable Audiences

Addressable audiences to drive better conversion

Addressable = Growth
(being choiceful in who to target, and relevant to that audience)

Addressable audiences to deepen the connection through personalized messages

COMMS PRIORITY

01



CONVERSION
Building up purchasing base and volume



SALIENCE
Making sure brand is top-of-mind for growth audience



SALIENCE
Staying top-of-mind, dominating category

02



TRUST
Targeted education and establishing the brand



CONVERSION
Converting at or above fair share of brand preference



TRUST
Addressing more need states, embedding deeper

03



SALIENCE
Broadly informing only when resources available



TRUST
Deepening connection, building equity



CONVERSION
Maximizing POS share, protecting from hijacking










Examples on how to apply the framework based on local context

Bepanthen Baby position in market

Priority Audience

Addressable Audiences

COMMS PRIORITY

| | Example: Country 1 | Example: Country 2 |
|-----------|---|--|
| | LEADER in Nappy Rash | CHALLENGER in Nappy Rash |
| | Growth Audience Sub-segment: Expecting Parents (linked to JTBD: Get Expecting Parents to buy Bepanthen nappy rash ointment as part of the preparation for the arrival of their baby By convincing them that only Bepanthen Baby provides complete protection from nappy rash whilst being gentle even on newborn skin) | Growth Audience Sub-segment: Preventative Parents (linked to JTBD: Get Preventative Parents who already trust and buy Bepanthen for nappy rash To adopt Bepanthen Baby & Kids moisturizing and bathing products into their baby skin routines By raising awareness and driving trial for the new Bepanthen Baby & Kids range) |
| | Addressable Audiences: (1) Expecting & Newborn Parents, (2) Events around birth | Addressable Audiences: (1) Newborn Parents, (2) Baby Parents, (3) Out & About Parents |
| 01 |  SALIENCE Staying top-of-mind for growth audience, dominating category |  CONVERSION Building up purchasing base and volume as a starter |
| 02 |  TRUST Addressing more need states, embedding deeper |  TRUST Targeted education and establishing the brand in the new segments |
| 03 |  CONVERSION Maximizing POS share demonstrating leadership and protecting from hijacking |  SALIENCE Broadly informing only when resources available |
| | |  SALIENCE Making sure brand is becoming top-of-mind for growth audience |
| | |  CONVERSION Converting at or above fair share of brand preference |
| | |  TRUST Deepening connection, building equity |

Important: the above are **hypothetical examples for illustration only**. Local JTBDs, relevant sub-segment and addressable audiences are to be defined locally.

Media Laydown Within Communications Framework

Saliency

Trust

Conversion



Media Challenges

Intelligent Reach

Meaningful Difference And Trusted Voices

Connection To Conversion And Trial



Media Channels

- **OLV**
- **Social**
- **Connected TV**
- **Traditional TV**

- **Audio**
- **Ecommerce** (depending on price/format availability)
- **OOH** (subject to local specifics)

- **Influencer and partner activation**
- **Audio (Digital / Radio)**

- **Publisher partnerships targeted towards parents across online and offline**

- **POS / Instore**
- **D-Com retailer media & search**
- **Social/display conversion formats**

- **Social platform partnership for conversion mechanics**
- **Influencers**
- **OOH formats** (close to point of sale)



03

Growth Audience Profiling



The concept of Growth Audience explained

Who

- > A **targeted subset of category users/prospects** that the brand chooses as its focus for growth

How

- > Defined by a **shared product need and common behavioural/attitudinal traits**, shaped by multiple data sources (eg segmentation studies, shopper data, consumer panels etc)

Role

- > Guides **brand planning, NPD, brand architecture, CSJs**, and informs strategy and planning across multiple comms elements such as **platform idea development, IMC development, and media strategy**



Bepanthen Baby & Kids Growth Audience

Our Growth Audience are **soon-to-be** (expecting) and **recent parents with a baby between 0-5yrs of age**, especially those that are undecided in their **skincare brand preferences but conscious about their child's skin health**.

Skin Conscious Parents

All expecting parents and parents with a child up to 5yrs of age, conscious about their child's skin health

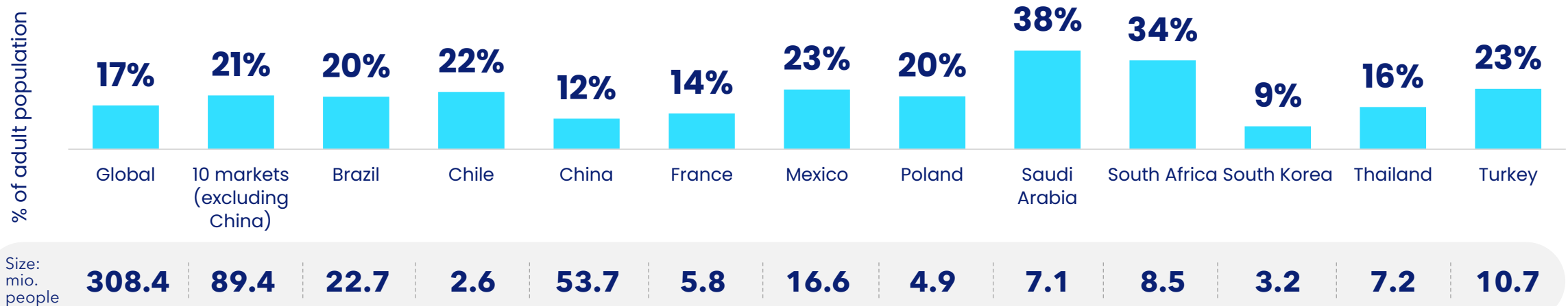
What they want above all else is **peace of mind in knowing they're doing the best choices for their baby** as well as **convenience and availability** of product to help speed research and speed shopping to free up time.

They invest a lot of time in preparing for parenting, but **when it comes to baby/child skin health, parents are largely unprepared** for the reality of these needs. They tend to have a rather 'reactive' approach to skin health, changing the purchase behavior as and when skin issues arise.

They aspire to have a **healthy lifestyle** preferring **gentle, clean and natural products for their baby**, but their life is tricky to balance, and they **often opt for** easily available or recommended **alternatives**.

Sizing and validating the Growth Audience across markets

Growth audience scale across markets



Low spill-over outside of category

80%

Of GA is in category of baby/kid products every 6 months

Provides headroom to grow penetration

143m

Potential consumers headroom

Covers significant portion of all parents

60%

Of parents with children of relevant age (0-10) are covered by growth audience

Three key elements of Growth Audience Profiling outlined on next pages



01

Socio-demographic characteristic:

Gives a general understanding of **audience's lifestyle**

Creates **efficient targeting** for broad (mostly offline) media



02

Media channel usage, comms behaviour:

Informs Media Mix decisions, explains roles for different types of media depending on comms objectives, supports media creativity



03

Interests and passion points analysis:

Helps deepen understanding of the audience, can inform contextual targeting and partnerships, supports creative ideation, helps define addressable audiences

Introducing our Growth Audience

Key Points on Socio-demographic and life circumstances

Soc-Dem

01

25-45 mid+ income core targeting applicable (except for China, where parents are concentrated 25-35), **but mostly useful for TV/OOH**

03

Where parent targeting exists explicitly, it is advisable to use it without soc-dem filtering, **as 25-45 targeting leaves 30% of audience unreached**



02

Parent audience exists mostly in midsize and large cities across the markets. China is even more urban than other markets: **85% of parents vs. 75% in others**

04

Parenthood is naturally skewed to high income in Brazil, Thailand, Turkey, Poland and France, **suggesting that additional income filter might be unnecessary**

Socio-Demographic Profiling of our Growth Audience



143m
Segment Size

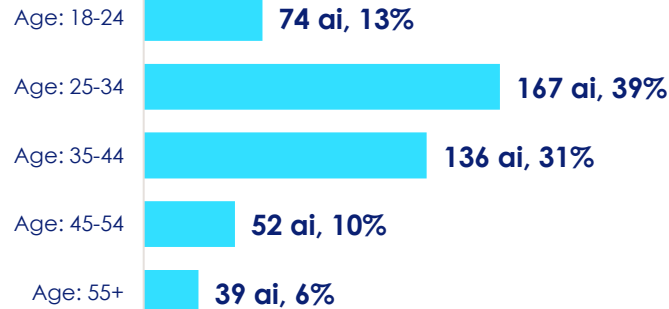
16%
of Population

In analyzed markets



More likely to be working parents, earning mid-high income; vast majority living with their partner or spouse **Soc-Dem**

They are heavily concentrated in the 25-44 yr old demographic group, living in cities with their partner/spouse:



54%
Females

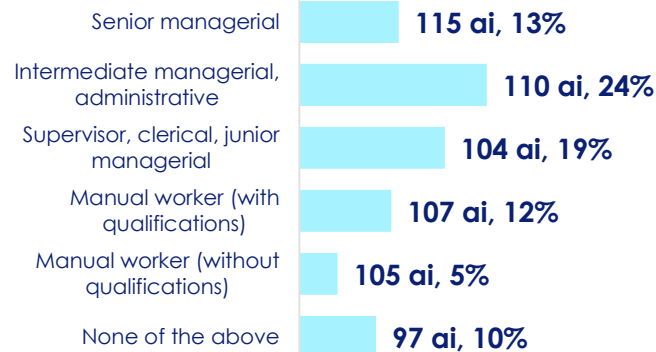


80%
Living with a partner/
spouse



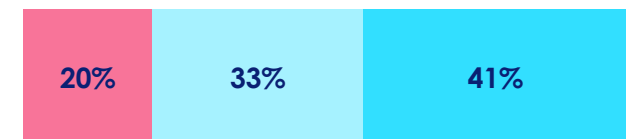
75%
Living in mid-large cities

Tend to be more advanced in their careers:



They skew towards mid-high end of the income spectrum:

■ Low income ■ Middle income ■ High income



99ai

102ai

105ai

Source: Audience Origin | Base: Growth Audience in target markets, n=80764
ai (Affinity Index) = Measures Growth Audience preference vs. overall population. Index > 100 = more affinity; Index < 100 = less affinity

Socio-Demographic Profiling of our Growth Audience



143m
Segment Size

16%
of Population

In analyzed markets



They gravitate towards big brand names and remain loyal, **they are price-conscious**, and their homes are important to them

Soc-Dem



Support Local
71%
(110ai)



Brand Loyalist
70%
(104ai)



Price Conscious
80%
(106ai)



House Proud
85%
(110ai)

Value a large set of attributes in brands and products they buy:

Design =
Functionality

68% (106ai)

Convenience

74% (107ai)

Best Deals

80% (105ai)

Heritage

66% (109ai)

Quality

77% (104ai)

Natural
Ingredients

47% (115ai)

Source: Audience Origin | Base: Growth Audience in target markets, n=10681
ai (Affinity Index) = Measures Growth Audience preference vs. overall population. Index > 100 = more affinity; Index < 100 = less affinity

Socio-Demographic Profiling of our Growth Audience



143m
Segment Size

16%
of Population

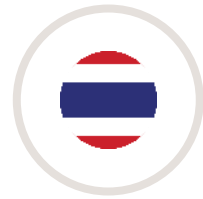
In analyzed markets



Parents in **China, Saudi Arabia and Thailand** are particularly conscious of the ingredients within their personal care products

Soc-Dem

Parents to babies and kids in **China, Saudi Arabia and Thailand** are eager for personal care products to be made with natural ingredients



74%
(159ai)

Would like all their personal care products to be made of natural ingredients (vs. 47% across markets)



69%
(148ai)

Would like all their personal care products to be made of natural ingredients (vs. 47% across markets)



62%
(132ai)

Would like all their personal care products to be made of natural ingredients (vs. 47% across markets)

Introducing our Growth Audience

Key Points on Media Consumption

Three foundational reach-building channels are:

- **OLV** (including short-form video platforms)
- **Social** (reach incrementality, cost optimization, reminder role)
- **TV incl. Connected TV** (total budget permitting). Also ranks highly as a trusted channel

Beyond that, key channels to consider are:

01 Audio (digital audio + radio)

indexes very highly against all parents, especially in Europe. Useful for both reach and trust-building, as it ranks among most helpful channels. Less relevant for China.



02 Influencers

Outstanding for trust-building and capturing attention. **Choice of influencers is crucial (parent-oriented content)**

03 Ecommerce

is high in usage and indexes highly across all markets, but China, Thailand and Turkey have especially high usage rates, warranting increased attention. **Investigate usage as reach media (costs permitting)**

04 Press partnerships

(highly relevant as trust-building) - **investigate press placements** encompassing both online and offline and tailored towards parent audience

“Day in the life”

provides opportunities to target holistically

Communicating at different points throughout the day can help maximize relevance.

Morning

Many commitments in the morning, a rush of chores to be done and actions in preparing the baby.



Mid-Morning

Busy with activities and planning for the rest of the day. Very goal-driven.



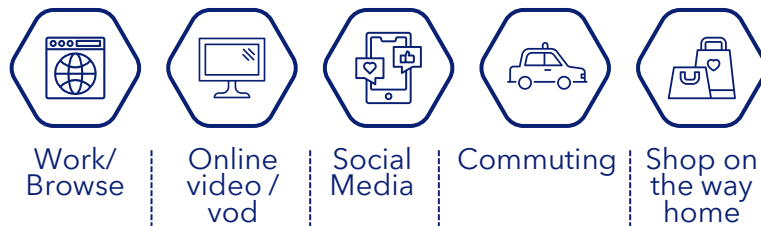
Noon

Lunchtime provides the opportunity to have a meal, check on the baby again and maybe buy something urgent.



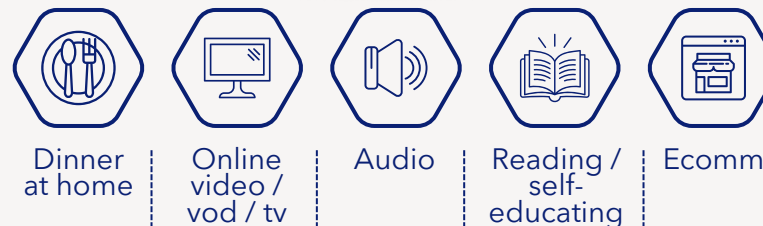
Mid-Afternoon

Wrapping up, trying to get everything done on time. Crazy life rhythm starts to slow down.



Late Afternoon

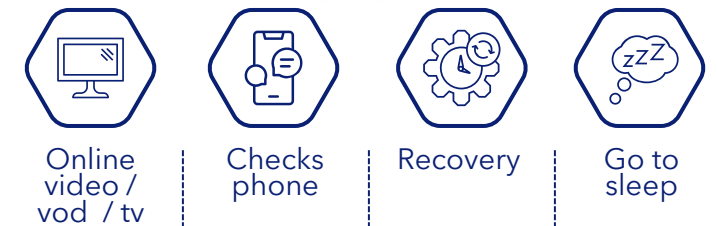
Less goal-oriented, though many chores are still left. Decompressing from the day, continuing to slow down.



Order food

Evening

Shared time with the baby & family. Winding down, relaxing before going to sleep.



Media Consumption of our Growth Audience



143m
Segment Size

16%
of Population

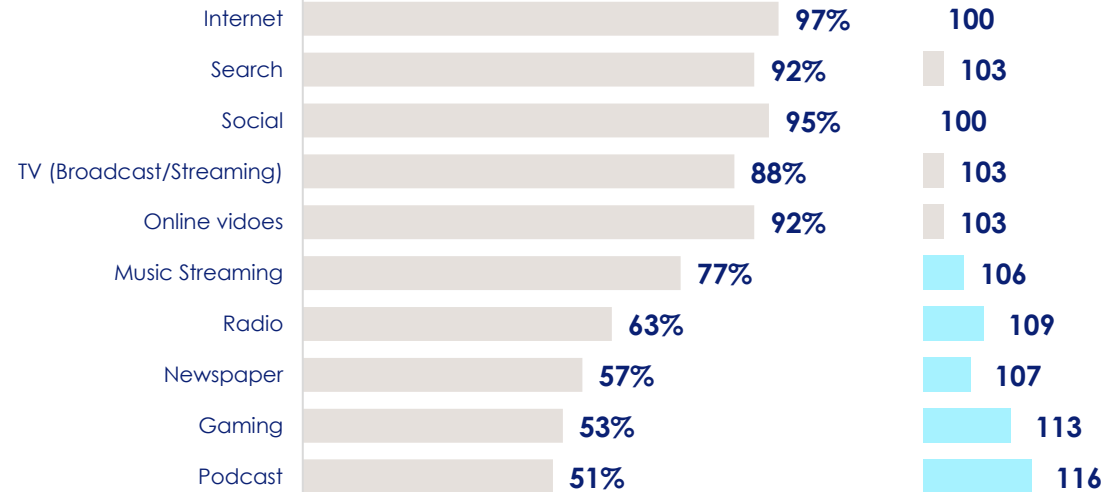
In analyzed markets



Their niche digital behaviours and preference for audio content consumption presents interesting **opportunities for media & comms planning**

Media

Media Penetration (weekly)



Opportunity to test audio streaming and podcast platforms



They are selective on where they get advice for Skincare products from:

Social Media

Noticed: **31% (114ai)**
Helped: **17% (112ai)**

TV Ads

Noticed: **32% (116ai)**
Helped: **17% (111ai)**

Advice from friends and Family

Noticed: **32% (116ai)**
Helped: **17% (111ai)**

Source: Audience Origin | Base: Growth Audience in target markets, n=10681
ai (Affinity Index) = Measures Growth Audience preference vs. overall population. Index > 100 = more affinity; Index < 100 = less affinity

Media Consumption of our Growth Audience



143m
Segment Size

16%
of Population

In analyzed markets



Social media is a discovery and research tool, utilised for **information gathering and inspiration**

Media



Reach%

78%

77%

73%

50%

26%

24%

24%

Affinity Index

108

106

106

121

109

143

107



Mainstream social platforms (FB, YT, IG) remain our first choice due to their high reach

Opportunity to explore TikTok and Snapchat

Social media categories followed:

Parenting/Kids
39% (226ai)

Fashion
37% (122ai)

Food/Baking
50% (116ai)

Beauty
42% (125ai)

They use social media for research, as a source of information and inspiration:

Follow celebrities/celebrity news 23% (117ai)

To research/find products to buy 41% (114ai)

To learn something new/support a hobby 39% (107ai)

Source: Audience Origin | Base: Growth Audience in target markets, n=10681
ai (Affinity Index) = Measures Growth Audience preference vs. overall population. Index > 100 = more affinity; Index < 100 = less affinity

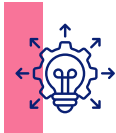
Purchasing Profiling of our Growth Audience



143m
Segment Size

16%
of Population

In analyzed markets



Our base audience is eager to gather information and advice on potential purchases, and also seek convenient purchasing opportunities

Media

They meticulously gather information to ensure they are making an informed purchase



Have asked expert advice online
12% (128ai)



Talked to other people who have brought the product
24% (126ai)



Subscribed to a product to be delivered on a recurring basis
12% (124ai) - even more prevalent in China
18% (149ai)



32% have ordered groceries via delivery services/ supermarket apps in the last 3 months



18% (125ai) have reserved a product online and bought from a physical store



Social media shopping and by live-stream shopping (e.g. Amazon Live) indexes the highest
(138ai, 126 ai resp.)

Source: Audience Origin | Base: Growth Audience in target markets, n=10681
ai (Affinity Index) = Measures Growth Audience preference vs. overall population. Index > 100 = more affinity; Index < 100 = less affinity

Introducing our Growth Audience

Key Points on interests and passion points

Main topics of interests:

Parenting and Family

Is naturally their highest concern and most popular interest

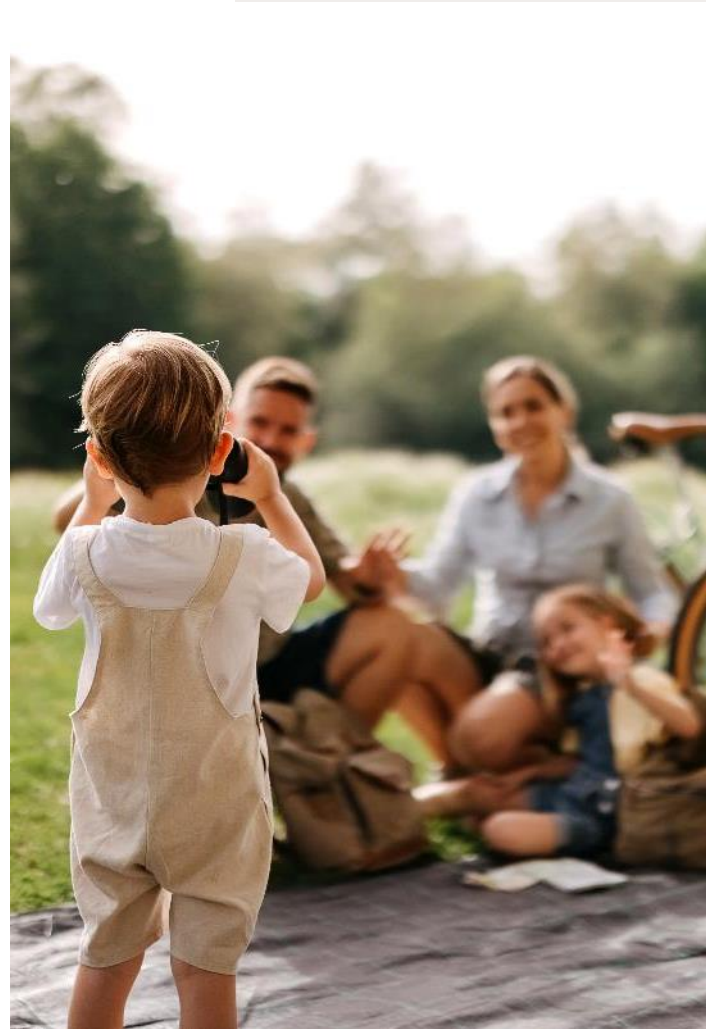
Other highly relevant and popular themes are:

Everything around home

Cooking/baking, homemaking, DIY/home improvement and gardening (last group is especially relevant to France and Poland)

Image and beauty

especially of interest to younger parents



Going out/cultural life

(staying active, going to theatres/concerts, is especially important in China and Turkey, and active entertainment (dancing, music) is especially relevant in Brazil and South Africa.

Feeling pressured and the need to save time

is an important throughline in their lives, visible both in their attitudes and the way they engage with the world

Travel

is of interest and indexes positively, particularly in Brazil, but interest varies throughout the markets

Interest Profiling - Growth Audience



They lead a **multifaceted lifestyle**, enjoy travel, but overarching interests largely focused in indoors

Interests

They enjoy a broad range of group-based activities



Socialising / spending time with family

65%
(107ai)



Travel

53%
(97ai)



Cooking/ Baking

63%
(117ai)



Football

56%
(111ai)

Interests are primarily indoors

44% (99ai)
Reading books / literature

53% (99ai)
Music

51% (104ai)
Exercise / Gym

43% (120ai)
Beauty



These activities are closely considered as basis for **behaviour-based Addressable Audiences**.



Potential to consider media properties within these spaces for **partnerships/ influencer activation/ sponsorships**

Source: Audience Origin | Base: Growth Audience in target markets, n=10681
ai (Affinity Index) = Measures Growth Audience preference vs. overall population. Index > 100 = more affinity; Index < 100 = less affinity

143m
Segment Size

16%
of Population

In analyzed markets

Interest Profiling - Growth Audience



143m
Segment Size

16%
of Population

In analyzed markets



Parents in China, Saudi Arabia, South Korean, Turkey and Brazil invest in cultural experiences

Interests

Parents in these markets are significantly more interested in the cultural experience of going to the theatre/musical/opera, travel, and food experiences



19%

Going to theatre/
musical/opera (vs.
15% across markets)



19%

Going to theatre/
musical/opera (vs.
15% across markets)



23%

Going to theatre/
musical/opera (vs.
15% across markets)



20%

Going to theatre/
musical/opera (vs.
15% across markets)



70%

Travel (vs. 53%
across markets)

65%

Food/Gastronomy (vs.
52% across markets)

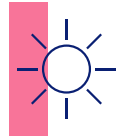
Interest Profiling - Growth Audience



143m
Segment Size

16%
of Population

In analyzed markets



Parents in Turkey and Poland are active outdoor enthusiasts

Interests

Parents to kids and babies in Poland are keen on getting outside and enjoy practical activities such as gardening



41%

Gardening (vs. 31% across markets)

39%

Outdoor activities (vs. 30% across markets)

Turkish Parents are more interested in staying active & outgoing compared to global



44%

Outdoor activities (vs. 30% across markets)

49%

Playing Sports (vs. 36% across markets)

Interest Profiling - Growth Audience



143m
Segment Size

16%
of Population

In analyzed markets



In France, Thailand and South Africa parents are more focused on home centric activities

Interests

Parents to babies and kids in France are significantly less interested in trendy/current behaviours, significantly more interested in homemaking & home comfort



42%

Playing Board Games
(vs. 28% across markets)

46%

DIY / Home Improvement (vs. 33% across markets)

South African and Thai Parents are also more interested in home-centric activities



66%

Playing Music and singing (vs. 34% across markets)



45%

Gardening (vs. 31% across markets)

Overall Conclusions on Growth Audience



01

Soc-dem and life circumstances:

When using socio-demographic targeting with broad media, start from the base of **25-45**, and apply income filter based on:

- **Difference in income between market average and parents** (apply filter if parents demonstrate higher income)
- **Bepanthen Baby Price Index vs. average** (apply if Bepanthen significantly above average)

There is enough geographic concentration among parents to allow for use of OOH in big cities as a way to capture attention (less so in France), though this is subject to specific comms objectives being actionable through OOH



02

Media Channel Usage:

Maintain reach-building approach **consisting mainly of A/V media:**

- **OLV** as intersection of reach, quality and targetability
- **Social** to supplement reach and remind
- **TV** (incl. Connected) where budget allows, to boost reach and create more Trust

Then supplement salience and maximize **Trust-building using the following:**

- **Audio** (online + radio, different forms)
- **Influencer and partner** activations
- **Ecommerce**
- **Specialized and targeted press** across online and offline



03

Interests and Passion Points:

Parenting is the key topic that is most widespread and should sit at the core of contextual placement and interest-based identification. Other widespread topics that define and further subdivide the audience are:

- **Home improvement** and homemaking
- **Staying active with children**, physically and culturally
- **Busy life**, convenience, life hacks to save time

Other topics that trend among the audience are **Image & Beauty and Travel**

Overall Sequence of Steps Towards Audience Activation

Category Users And Prospects:

All Parents Expecting And With Children Under 10

Growth Audience

Skin Conscious Parents:

All expecting parents and parents with a child up to 5yrs of age, conscious about their child's skin health



Traditional media:

- **Soc-dem targeting is still applicable for TV and OOH in most cases** (unless parenthood filter is available in market). Markets will vary in need to apply an income targeting (based on Bepanthen Baby price index vs. category).
- **OOH placements related to children's health and wellness** (around and inside relevant locations) is a way to **more directly target parents conscious and engaged with children's skincare.**



Online & contextual:

- Parenthood filter and age of children as core targeting mechanisms. **Interest in content on parenthood** (age-appropriate to the product). Additional interests are more useful for content ideation than for targeting, as **parenthood content is sufficient for targeting.**
- Placement in contexts specifically related **to child skincare, child skin and child health can help target conscious parents** more specifically.



Retail & Shoppable:

- **Purchase Categories related to parenting and children/kids is a key targeting mechanism.**
- **Targeting those that are already in-category is a key lower-funnel tactic,** but also allows to better target parents conscious ~about children skincare and skin health.



04

Addressable Audiences Recommendation



The concept of Addressable Audiences explained

Who

- > **Highly targetable audiences in digital media**, which can be part of the Growth Audience, and beyond

How

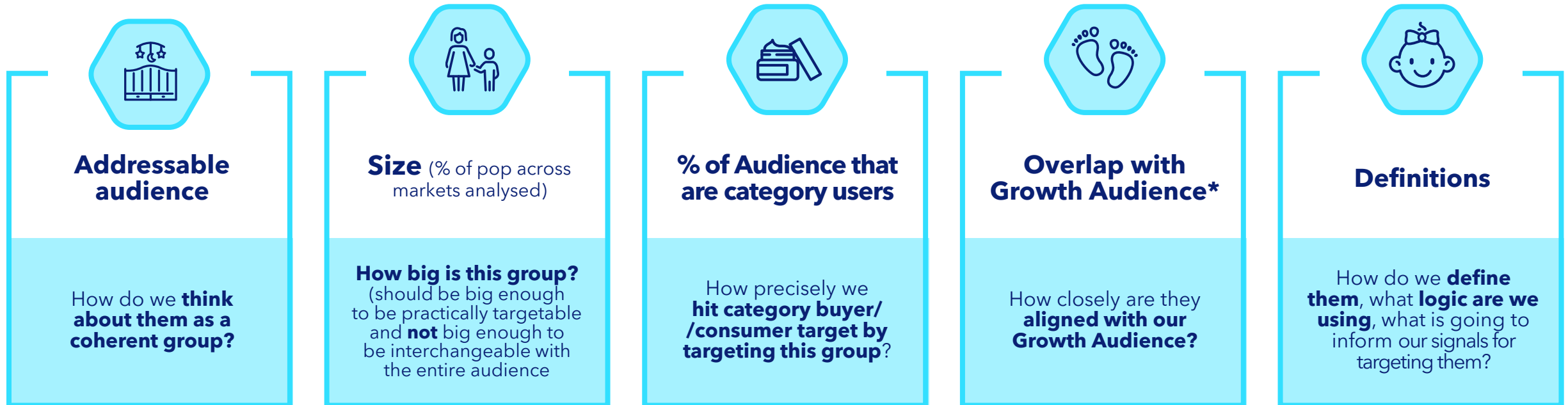
- > Defined by **overindexing lifestages/interests/occasions** within Growth Audience analysis

Role

- > Enables **precision marketing via data-driven targeting**, driving relevance via **more personalised digital media targeting, creative and messaging**






Our analysis led us to the short-listed Addressable Audiences based on the below approach



PARAMETERS STEMMING FROM BRAND ALIGNMENT:

- Is there a distinct need/concern to address with this audience?
- Is there a separate claim relevant for this audience?

Bepanthen Baby & Kids Addressable Audiences Overview

| Criteria |  Relationship to the category | | |  Interests and Behaviours |  Moments |
|--|---|--|--|--|--|
| Addressable audiences | Expecting and newborn parents (up to 3 months old baby) | Baby Parents (3 month-2 year of age) | Kid Parents (2-5 yrs of age) | Out-and-about Parents | Events around birth Baby Showers / Gender Reveal / Celebrating Birth |
| Product Range | Newborn & Baby products (e.g. nappy rash, bath and cleansing, moisturizer) | Baby products (e.g. nappy rash, bath and cleansing, moisturizer) | Kid products (e.g. bath and cleansing, moisturizer) | Baby & Kid products (e.g. on-the-go pack sizes / formats such as spray or wipes, SPF products, protective moisturizers from cold, wind or insect) | Newborn & Baby products (e.g. nappy rash, bath and cleansing, moisturizer; gift-sets) |
| Size (% of pop across markets analysed) | 4% | 6% | 16% | 18% | |
| % of Audience that are category buyers (decision-makers) | 75% | 79% | 78% | 74% | Addressable Moment, not an audience |
| Overlap with Growth Audience* | Fully aligned with Growth Audience | | | 121 ai | |
| | Expecting & Newborn Parents , especially first-time parents | Parents of children aged 3months-2yr | Parents of children aged 2-5 yrs | Spend a lot of time out of home with their children. Weather may put extra strain on skin (cold, heat, humid, polluted, etc). | Engaged in rituals and moments preparing for and around childbirth |
| Definitions | Direct targeting identifying a person as an expecting, newborn or recent first-time parent OR • Active interest in educational content dealing with parenthood | • Direct targeting identifying a person as a parent of a baby 3months-2year of age OR • Indirect qualifiers: in-market for categories specifically relevant for babies (baby bedding, baby formula, baby feeding supplies, diaper & baby wipes etc. etc.) | • Direct targeting identifying a person as a parent of a kid 2-5 OR • Indirect qualifiers: in-market for categories specifically relevant for kids (car seats, children's apparel, toys for kids) | Parent 0-5 AND Demonstrates interest in active social, cultural life and/or active physical lifestyle , opportunities to stay active with their children. May live in a combination of place and time of year with at least 1 of the below conditions: <ul style="list-style-type: none"> • Cold, dry weather • Excessive heat and sun • Harsh winds • High pollution • Insect bites | Attending baby showers and other similar events in proximity to someone who is about to have a baby (not necessarily parents but relatives and friends) |

Source : Audience Origin
 *ai (Affinity Index) = Measures Addressable Audience preference vs. Growth Audience population. Index > 100 = more affinity and overlap; Index < 100 = less affinity and overlap

Category audience signals

Expecting and newborn parents (up to 3 months)



Baby Parents (3month old to 2yr of age)



Kid Parents (2-5yrs of age)



Out-and-about Parents



Google Display
& Video 360

Not Available to Define on DV360

Demo: Parents of Infants (0-1years)

Demo: Parents of Toddlers (1-3years); Parents of Preschoolers (4-5years old)

Demo: Parenting signals outlined in parenting tables

Affinity: Lifestyle & Hobbies: Art & Theatre Aficionados OR Frequently Attends Live Events OR Outdoor Enthusiasts

Meta

Not Available to Define On Meta

Demo: Parents up to 12 months; Parents with toddlers (aged 1-2)

Demo: Parents with toddlers (aged 1-2) OR Parents with pre-schoolers (3-5 years)

Demo: Parenting signals outlined in parenting tables

Interest: Entertainment: Theatre OR Entertainment: Musical Theatre OR Restaurants: Coffeehouse OR Restaurants: Diners OR Restaurants: Fast Casual Restaurant OR Restaurants: Fast Food Restaurants

TikTok

Not Available to Define on TikTok

Interest: Baby Bedding OR Baby Feeding Supplies OR Baby Formula OR Baby Shoes OR Child Car seat OR Diaper & Baby Wipes OR Strollers & Cribs OR Toys

Interest: Child Car Seat OR Diapers & Wipe OR Toys OR Children's Apparel OR Toys for Kids

Interest: Culture & Art: Dance OR Music: Music & Instruments OR Other Culture & Art OR Culture & History: Tourism

Pinterest

Interest : Baby Shower Décor OR Baby Shower Food OR Baby Shower Gifts OR Baby Announcement OR Baby Registry OR Baby Tips OR Baby Boy Names Or Baby Girl Names

Interest : Baby Clothing OR Car Seat OR Diaper Bag O High-Chair OR Natural Bay Products OR Play Gym OR Stroller OR Baby Food OR Baby Formula OR Baby Stage OR Baby Tips

Interest : Children's Clothing OR Daycare OR Potty Training OR Toddler Activity OR Toddler Development OR Car Seat

Interest : Musical Theatre OR Drama Theatre OR Comedy Theatre OR Dance Theatre OR Theatre Performance OR Travel: Restaurant OR Outdoor Travel OR Travel: Family Destination

Approach To Addressable Audiences Can Be Prioritized Based On **Activation Budget Availability**

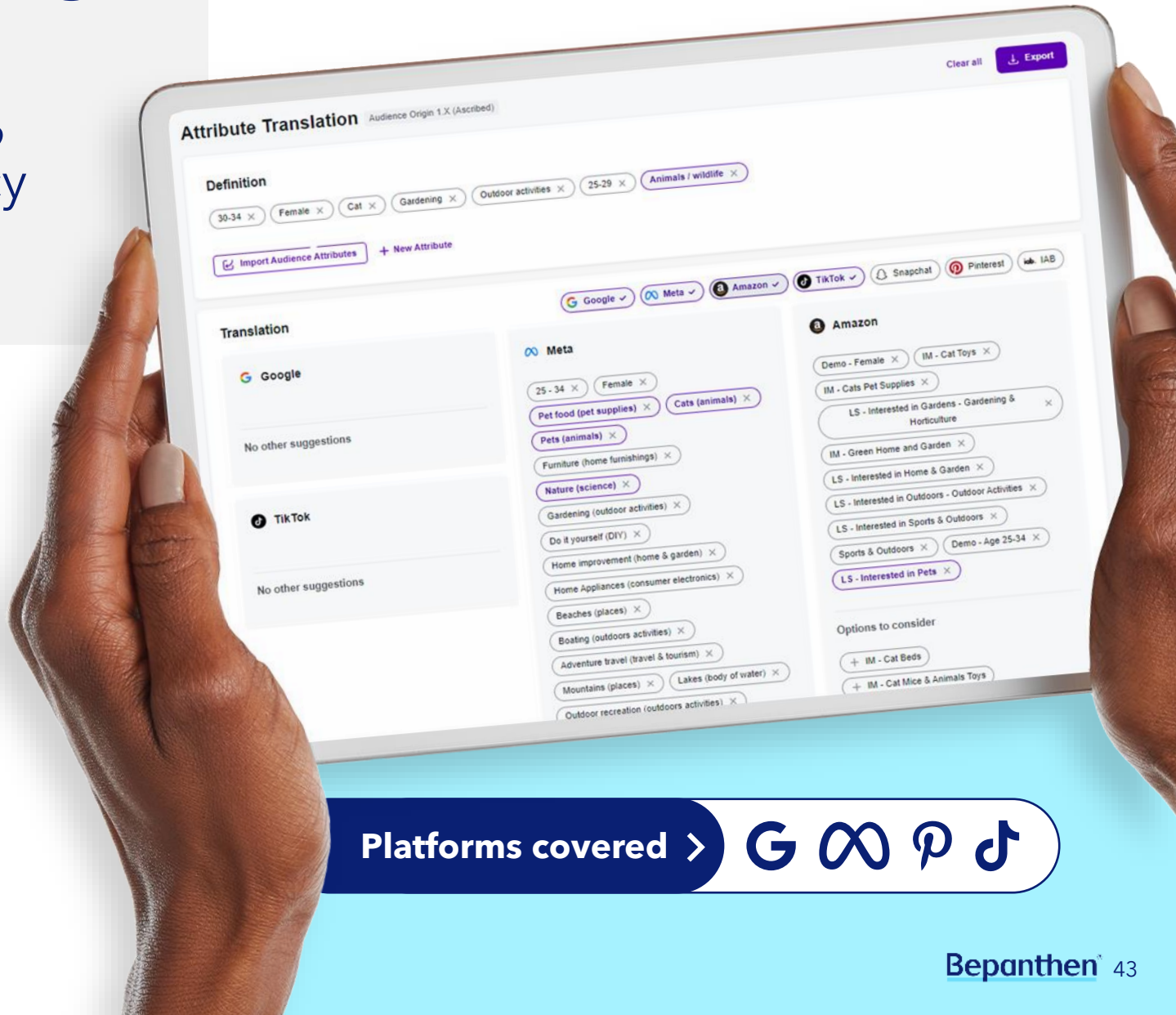
| | | | |
|-------------------------------|--|---|---------------------------------|
| <p>Priority 01</p> | <p>\$ Budget</p> <p>Maximize addressable communication with parents of specific ages of the child, enabling us to show them a specific product addressing specific need</p> | <p>Expecting and Newborn Parents</p> <hr/> <p>Baby Parents</p> <hr/> | <p>Kid parents</p> <hr/> |
| <p>Priority 02</p> | <p>\$ \$ Budget</p> <p>Address moments of high relevance - they combine scale and increased effectiveness</p> | <p>Events around Birth Baby Shower/ Gender Reveal / Celebrating Birth</p> <hr/> <p>The only target stretching outside of parent audience</p> | |
| <p>Priority 03</p> | <p>\$ \$ \$ Budget</p> <p>Interest-based audiences provide deeper relevance. Use when other communication priorities are saturated. Address them with specific products related to on-the go lifestyle and harsh weather</p> | <p>Out-and-About Parents</p> <hr/> | |



Appendix



Blending machine learning and automation with institutional knowledge, to deliver accuracy and consistency in audience activation



Audience Translator uses the addressable audience profiles created in the Audience Origin data spine, as a base to provide a list of the best matching audiences for the platforms of choice



Markets can then use these 'translated' segments for seamless audience activation across platforms, to achieve more effective campaigns with enhanced targeting precision, while maintaining multi-market consistency

Platforms covered >



Putting Addressable Audiences into Action

Activation Guidance



Detailed playbook and templates



are available to use when building audiences at each stage of the process.
[Link to document](#)



Identify relevant audience signal and data use on platforms locally

for each addressable audience, ensure availability across platforms locally and richest data being used with ease of activation.



Data range:
3PD



Determine correct audience size

for each addressable audience and validate it to ensure they are scalable and quantified.



On average:

- **2M-7M per campaign OR 70% of category buyers**
- **With <25% - 40% overlap** between audiences (this is varied in each region)



Balance reach and cost efficiency

at campaign level by deploy higher reach within niche/relevant audiences to scale reach at low cost, whilst balance cost with broader cost-effective audiences.



Data range:

- **40-70% target reach per campaign**
- or with the best practice to reach at least **50%-70% of audience size** for an effective reach, then calculate the cross-platform for campaign reach.

Precision Marketing Identification



2+ Audiences

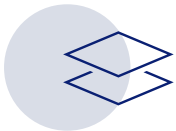
Have been defined within the same brand campaign at line item or ad set level

2+ Personalised Creative

Are served to a relevant addressable audience within the same brand campaign at line item or ad set level

PM-True

tag used in taxonomy



All three requirements must be fulfilled at line item/ad set level in order for a campaign to be considered as Precision Marketing,



Addressable Moment campaigns

need to adhere to the same principles as all precision marketing campaigns & set up as a part of a wider brand campaign.



Platform coverage:

DV360

Google Ads
(from Q2-2024)

Meta (FB & IG)

TikTok Ads
(from Q3-2024)

Format coverage:

Video & Display

Bepanthen Baby & Kids Audience sizing

Category Users And Prospects:

All Parents Expecting And
With Children Under 10

Growth Audience:

Expecting parents
and parents with a child up to 5yrs
of age, conscious about their
child's skin health



Bepanthen Baby's **most valuable "bullseye" audience** are parents who are:

- **Expecting and New** parents typically **undecided** in skincare brand preference
- Actively looking to **support their child's skin health and skincare**

In most cases, there is no need to include these markers in targeting definition. And we can keep overall audience to **expecting parents and parents of kids up to 5 y.o.**

How does this fit with best practice?

In best practice of global advertisers, optimal size of **Growth Audience vs. Category** varies based on the targeted sub-segment(s) and several criteria:

Maximum, ~85% of all category users

More relevant for:

- Well-established Leader brands
- Wide distribution strategies (available everywhere)
- Ambition for quick and drastic growth

WIDER in:

- Markets launching Fortis/Sky to quickly grow penetration
- Markets in leadership position

Bepanthen Baby & Kids, 60% of category users

- Leader or Challenger depending on the market, fighting for leadership in the market
- Different portfolio in different markets

NARROWER in:

- Markets with limited growth ambition

Minimum, ~30% of all category users

More relevant for:

- New emerging / challenger markets
- Targeted distribution approach
- Limited growth ambition

The Need to Profile 1st-time Expecting Parents

Parent's confidence & familiarity with skin issues impact how they shop

Confidence is largely determined by parenthood stage – whether a new parent or an experienced parent

Our opportunity is to both **recruit New Parents** having a baby for the first time, and to **convert Experienced Parents**, especially those who have no clear default go-to skin health brand or those searching for better efficacy

Importantly, while **Experienced Parents** may have more familiarity with children's health or skin health needs, parents realize every child's skin is different and therefore may need different solutions



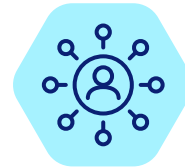
First-time Expecting Parents are:

The key audience for Bepanthen Baby as they are at their **Point of Market Entry**, where their preferences and consumption habits can be influenced the most



And simultaneously:

Can not be directly targeted in any of the global addressable platforms. While many educational and informative topics will move us closer to First Time Expecting Parents as an audience, there are **no direct digital signals** that identify them as such



Solution:

Include First-Time Expecting Parents into broader audience characteristic. While optimizing for Parents 0-5, make sure that reach and effectiveness for First Time Parents **does not fall below average**

| | Parents 0-1 | Parents 2-5 | Expecting Parents |
|------------------------------------|-------------|-------------|-------------------|
| DV360 (Google) signal availability | ✓ | ✓ | - |
| Meta signal availability | ✓ | ✓ | - |
| Tiktok signal availability | ✓ | ✓ | - |
| Pinterest signal availability | ✓ | ✓ | |

1st | Time

Expecting Parents

Key Difference

1st-time
Parents

01

The audience skews considerably younger than the Parent of Babies and Kids 0-5 with 74% 18-34 year old **vs. 52% of the base audience sitting in this age range**

03

Overall, this audience has less capacity to focus on their own interest. **Interests they do have largely focus at home**, which aligns with the idea that they are relatively time-poor. Parenting is naturally an interest of this group, but other interests **include:** Cooking/Baking; Playing Music/Singing, Fashion & Beauty



02

First-time expecting parents have less first-hand experience to draw from. As such they **actively seek advice on products** before purchasing and are more likely to attribute purchasing selections to advertisement

04

Unsurprisingly, the younger audience **skews slightly lower in terms of income**, which is to be expected in a **younger audience who are slightly less advanced in their careers**

Socio-Demographic Profiling

1st-time Expecting Parents



19.3m
Segment Size

2%
of Population

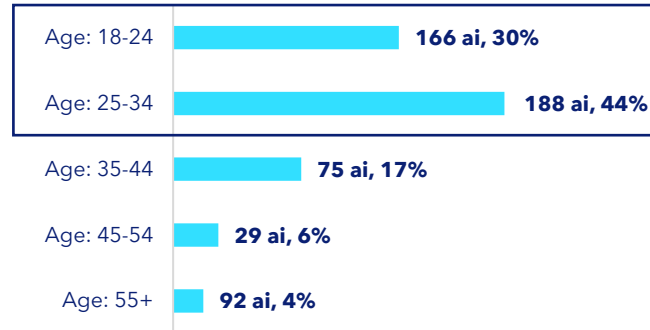
In analyzed markets



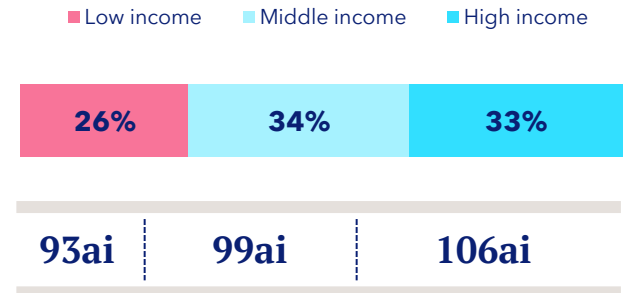
Audience skews much younger, with greater variety in terms of income, they seek guidance and convenience

1st-time Parents

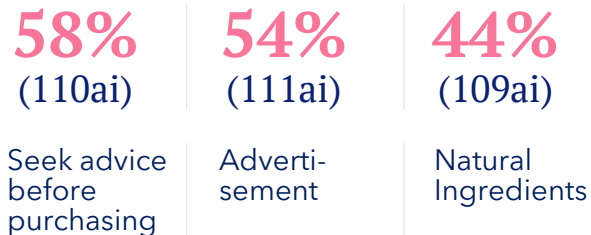
They are concentrated under the 18-34 yrs demographic group:



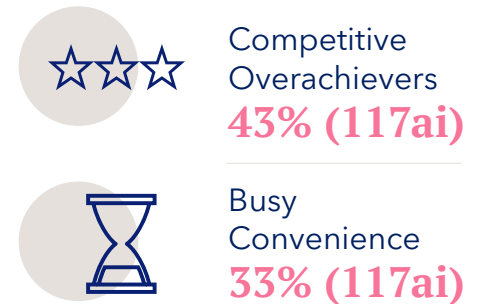
More of a spread in terms of income spectrum:



Value a large set of attributes in brands and products they buy:



As busy parents, they use social media for staying up-to-date:



Source: Audience Origin
Base: Growth Audience in target markets, n=10681
ai (Affinity Index) = Measures Growth Audience preference vs. overall population. Index > 100 = more affinity; Index < 100 = less affinity

Socio-Demographic Profiling 1st-time Expecting Parents



19.3m
Segment Size

2%
of Population

In analyzed markets



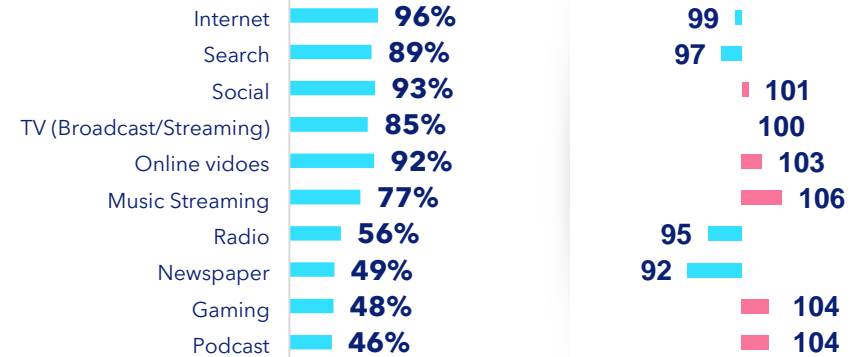
They are primarily utilising social media for inspiration, information gathering and keeping up-to-date with loved ones and the world

1st-time Parents

Media Penetration (weekly)

Key platforms:
Social & Online video

Opportunities to consider:
Influencer & Audio



Social media categories followed:

42%
(244ai) Parenting /Kids

50%
(115ai) Food/ Baking

43%
(126ai) Fashion

42%
(125ai) Beauty

As busy parents, they use social media for staying up-to-date:

23%
(114ai)

23%
(113ai)

41%
(111ai)

Follow celebrities/celebrity news

To make sure I don't miss out on anything

To share photos or videos with other

Source: Audience Origin
Base: Growth Audience in target markets, n=10681
ai (Affinity Index) = Measures Growth Audience preference vs. overall population. Index > 100 = more affinity; Index < 100 = less affinity

Implications from 1st-time Expecting Parents Audience Analysis

These learnings should be implemented into the overall audience approach alongside focus for wider audience.

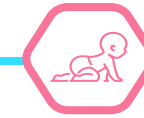
The goal is to make sure that first-time parents are sufficiently covered by overall communication and averages among wide audience don't skew our approach away from what's relevant for New Parents.



Growth Audience Analysis tells us that:



vs



1st-time Parents Analysis adds that:

Parents of children aged 0-5 yrs are **mostly 25-45 mid+** in bigger cities

+

New parents are **often 20-35** (significantly more so in Saudi Arabia, South Africa) and **lower income**. Especially in digital channels, we should **avoid putting too much of a lower age boundary**.

Their media diet is **OLV, Social, TV**, they are **heavy audio users, influencer audience**, sophisticated **ecommerce** users and pay close attention to **some specific publications** (often online).

+

Adjust **media mix** based on their media usage: **less overall audio** (though more usage of streaming platforms), **less long-form reading. More influencer and fairly high proliferation of gaming**.

They are **convenience seekers** who want their **purchasing done quickly and efficiently**. They will look for authoritative recommendation but make their decision quickly.

+

Even though they are even more overloaded and have less time, they are educating and informing themselves on many new aspects of life. **They consume more educational and informational content and approach purchases slower.**

Aside from parenting, they are very interested in **homemaking topics, culturally and physically active life and convenience**.

+

Parenting is the main topic they have time for and that's the main context to contact them. If they had more time, they would be more interested in beauty and entertainment vs. other parents.



Bepanthen®