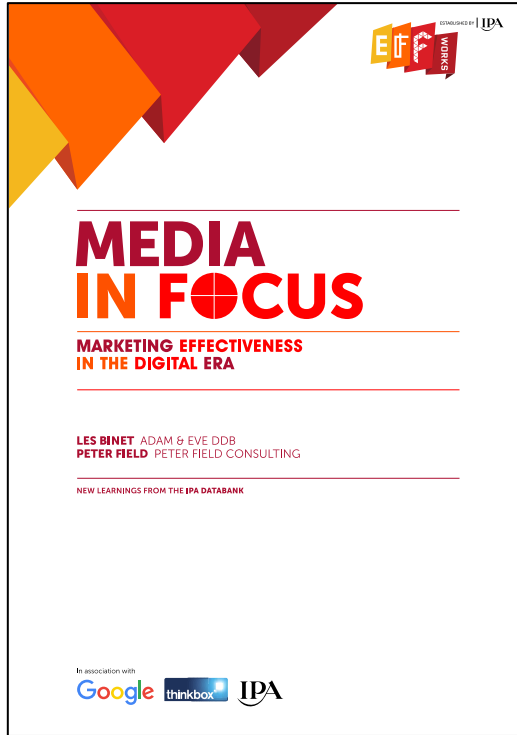


The truth about effectiveness in a changing media landscape

Peter Field

Peter Field Consulting

This research



- How is the changing media landscape altering the rules of effectiveness?
- 500 digital era cases, 120 in 2014/16

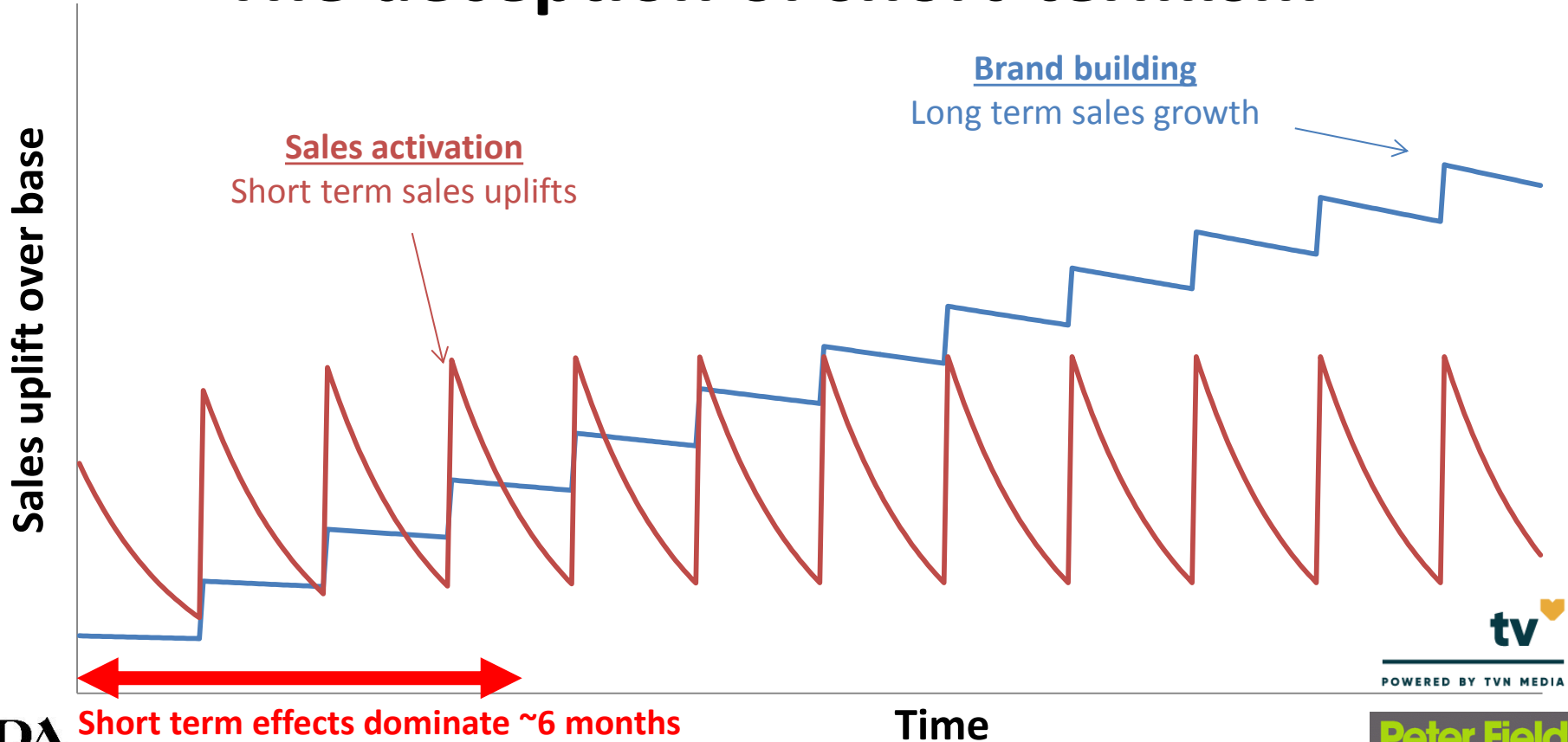
3 important truths

1. Effectiveness requires media and strategies that work over the short and long-terms:
 - The 60:40 effectiveness rule
2. Emotional campaigns and media drive long-term effectiveness
3. Mass marketing still rules effectiveness: scalability is essential for growth

1. Short and long-term effectiveness are different

You need to balance the two tasks

The deception of short-termism



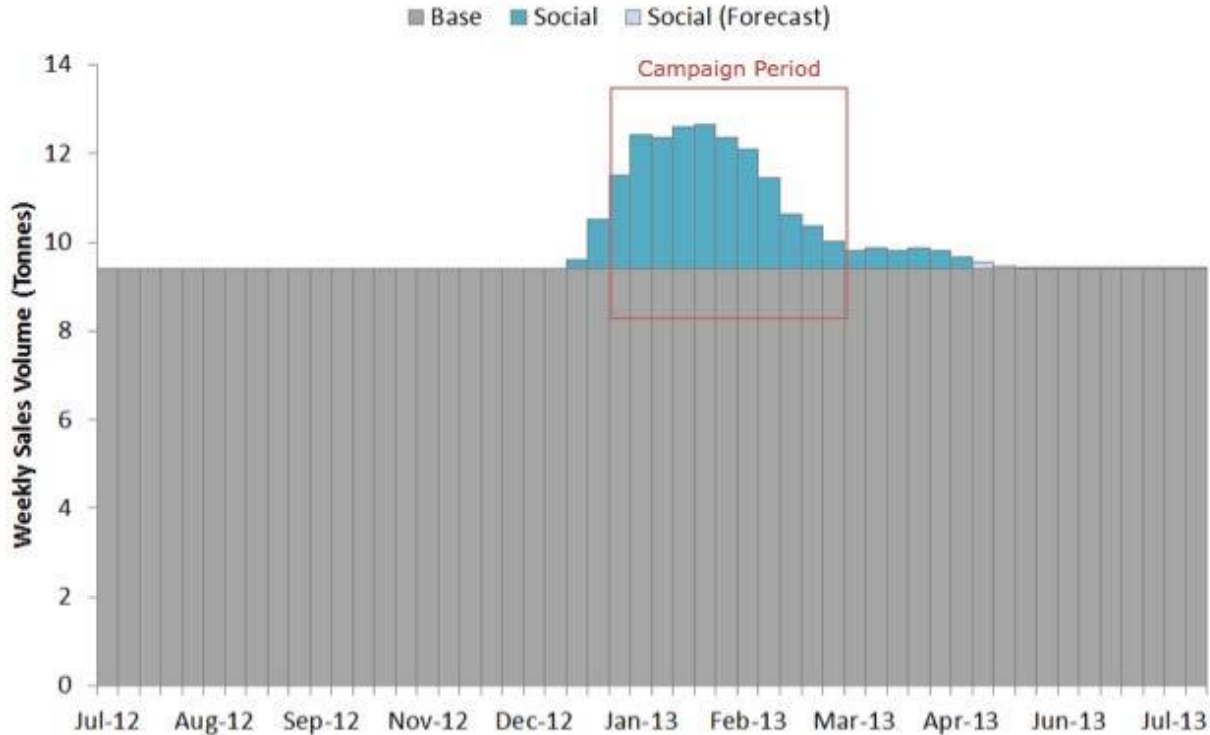
tv

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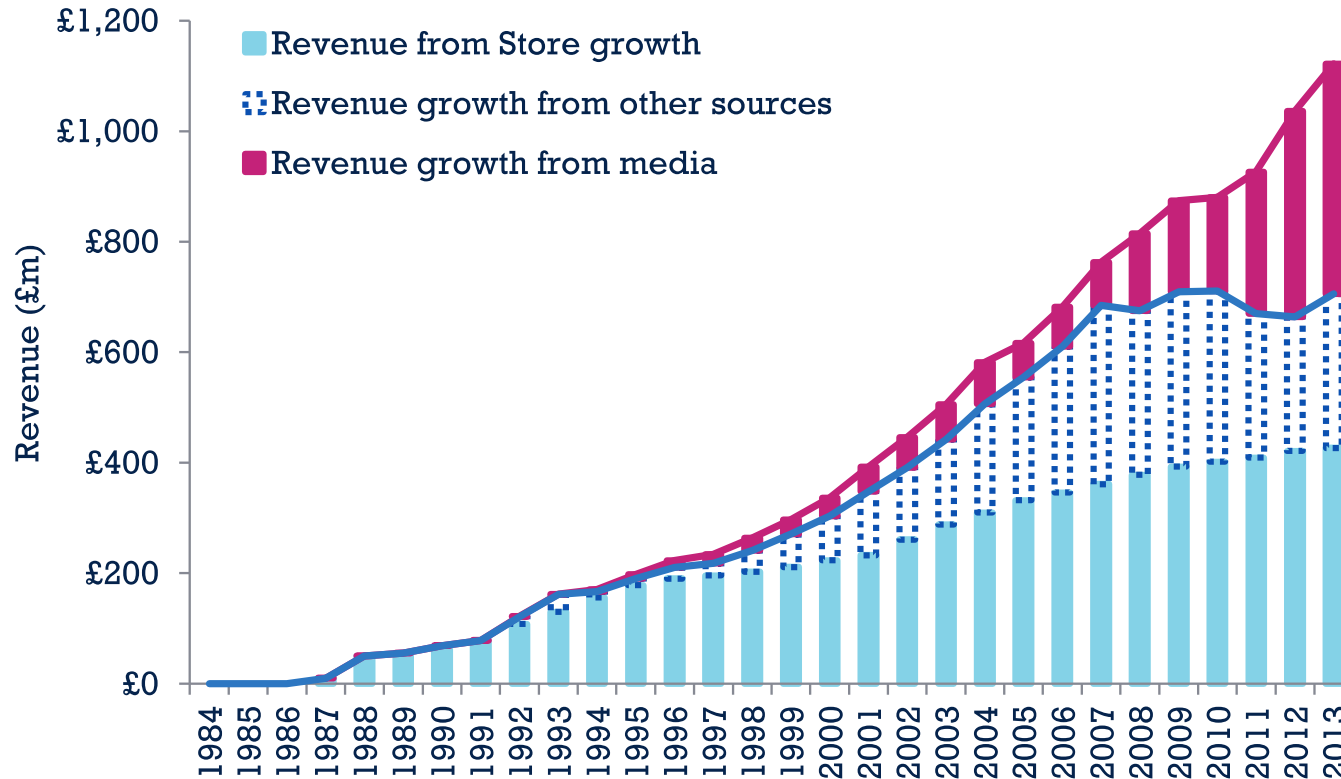
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Source: Binet & Field 2013

Short-term campaign's sales effects

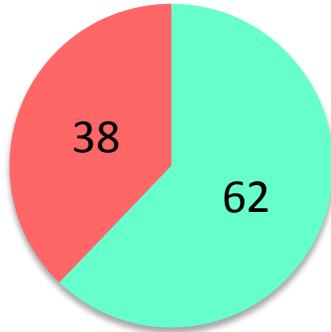


Specsavers: a long-term TV campaign



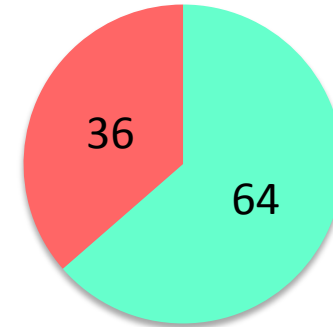
Balancing brand and activation for best success

Very large share growth cases

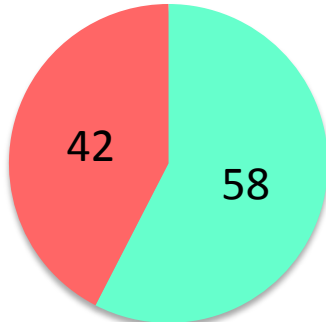


- Channel share for brand-building objectives
- Channel share for activation objectives

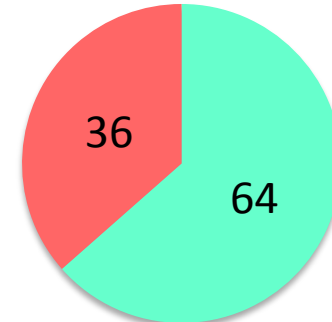
Most efficient cases



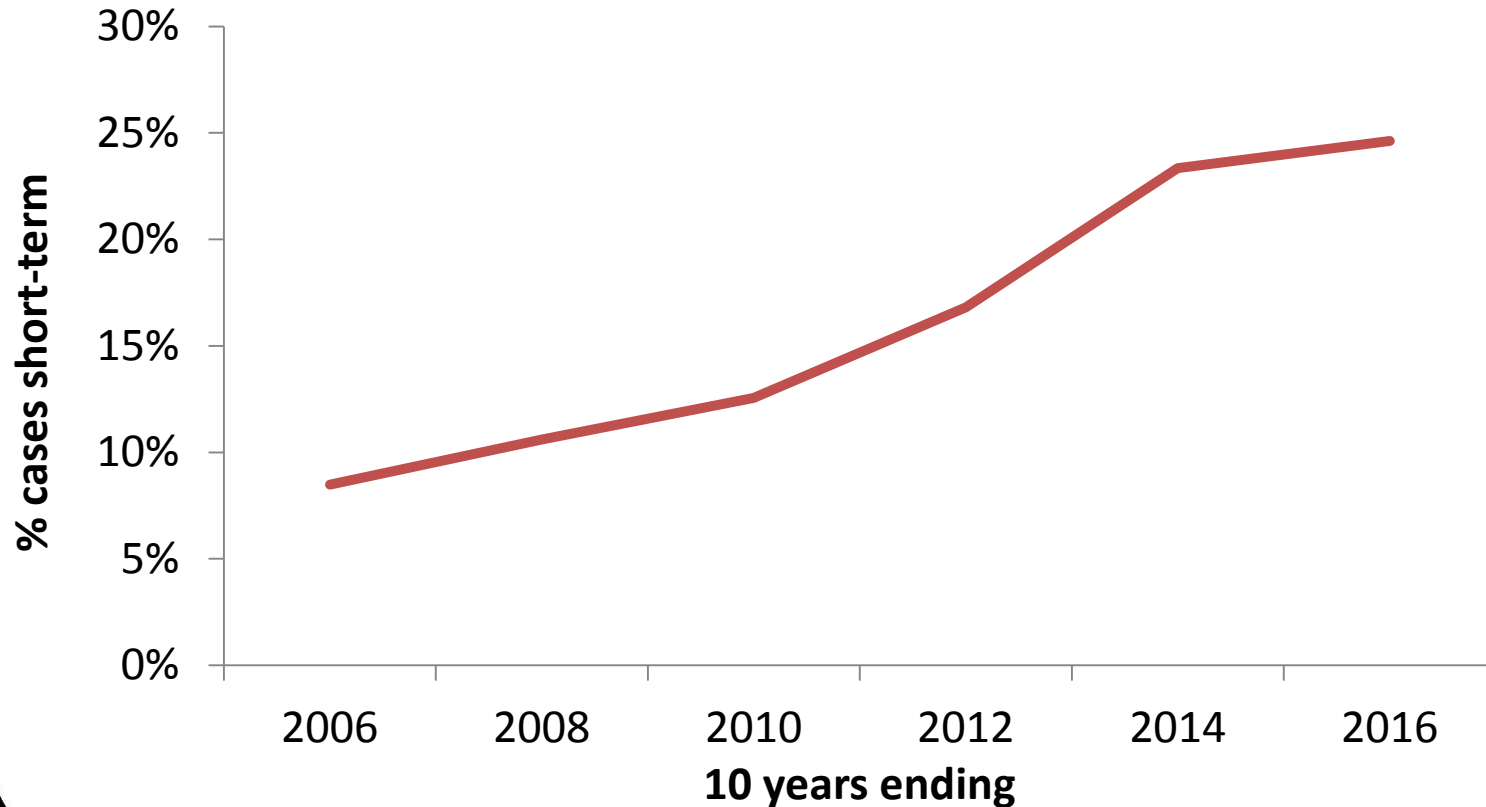
Strongest brand-building cases



Very large profit growth cases



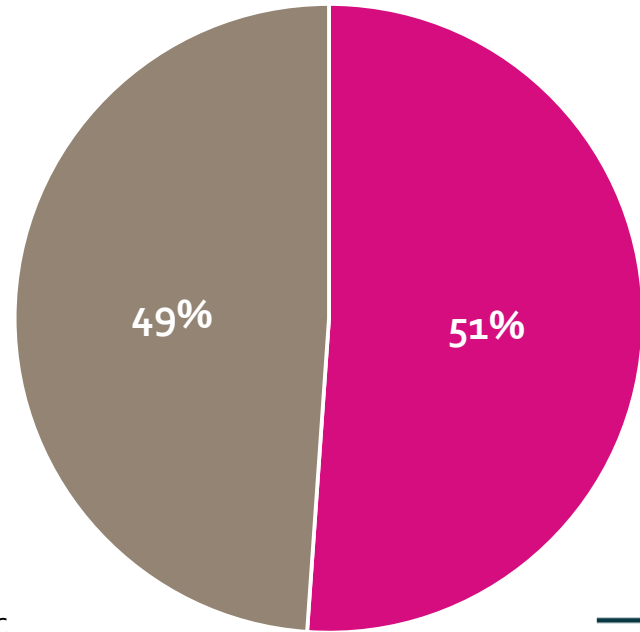
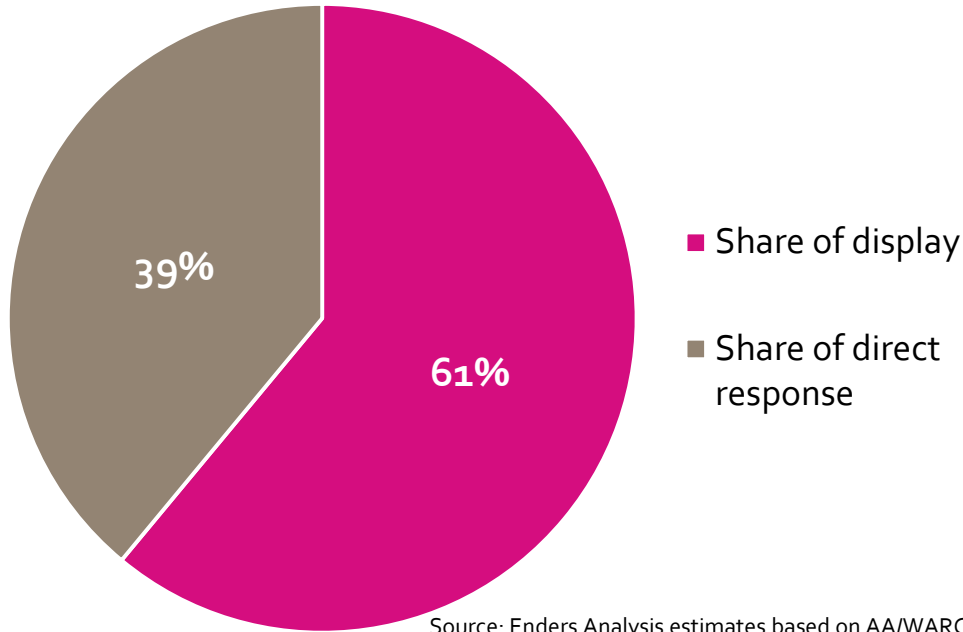
Short-termism has been rising



Activation levels have exceeded optimum

Advertising spend split, 2000

Advertising spend split, 2016



Source: Enders Analysis estimates based on AA/WARC

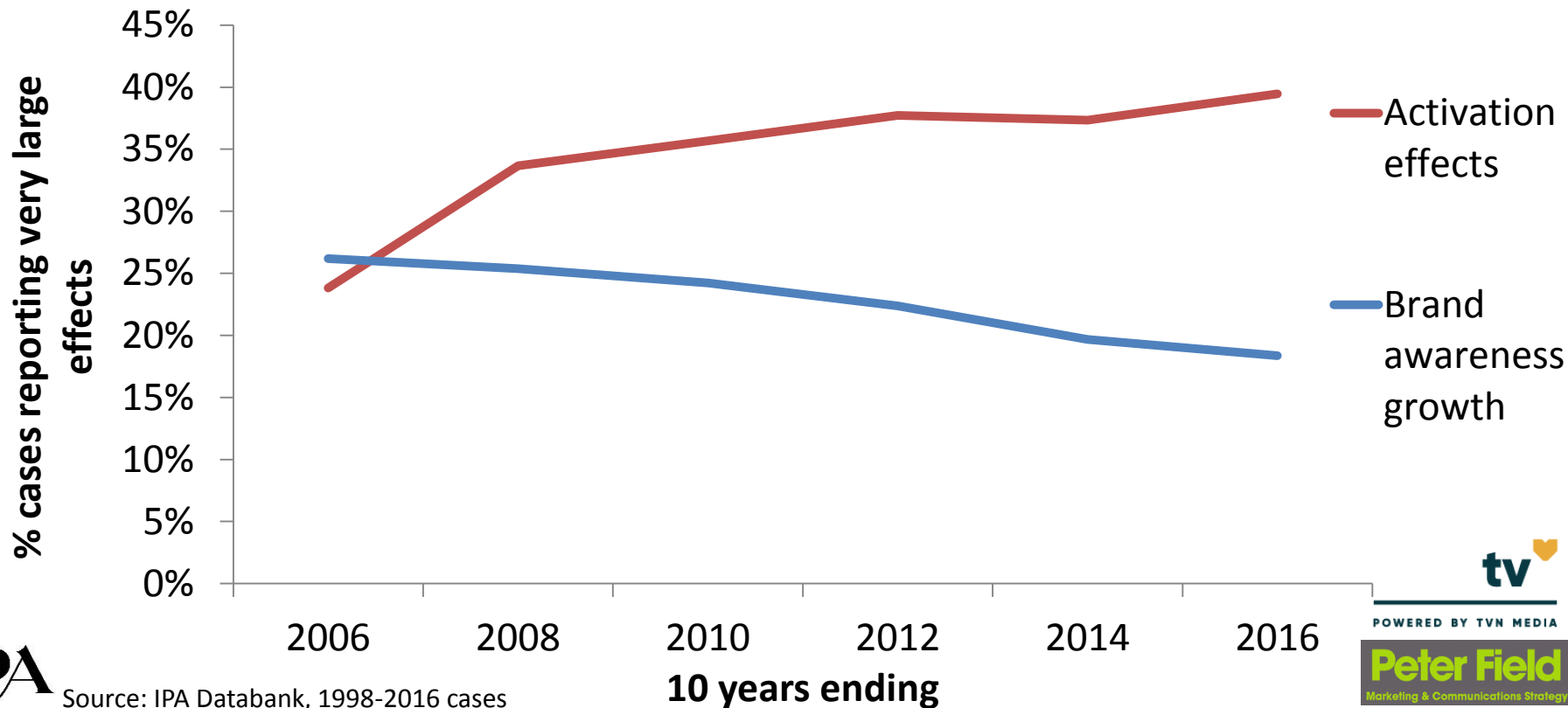
Advertising effectiveness-marketing and long-term
business benefits [May 2017]

tv

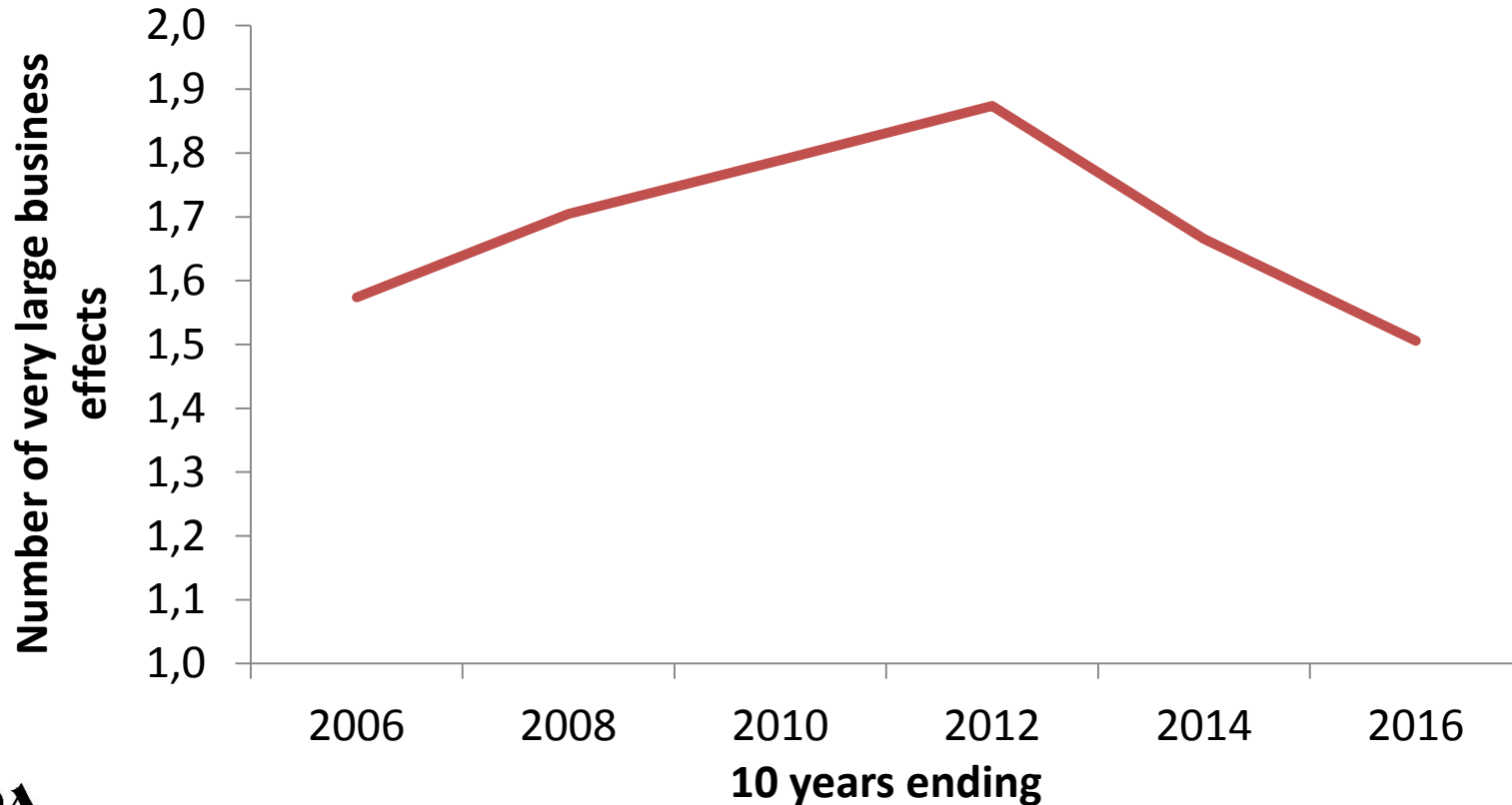
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Activation effects have been achieved at the expense of brand

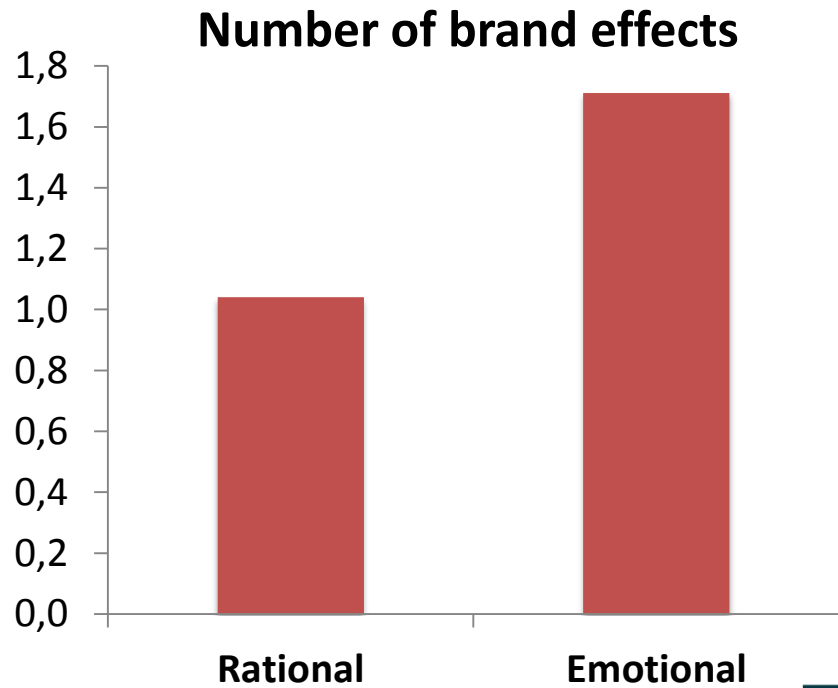
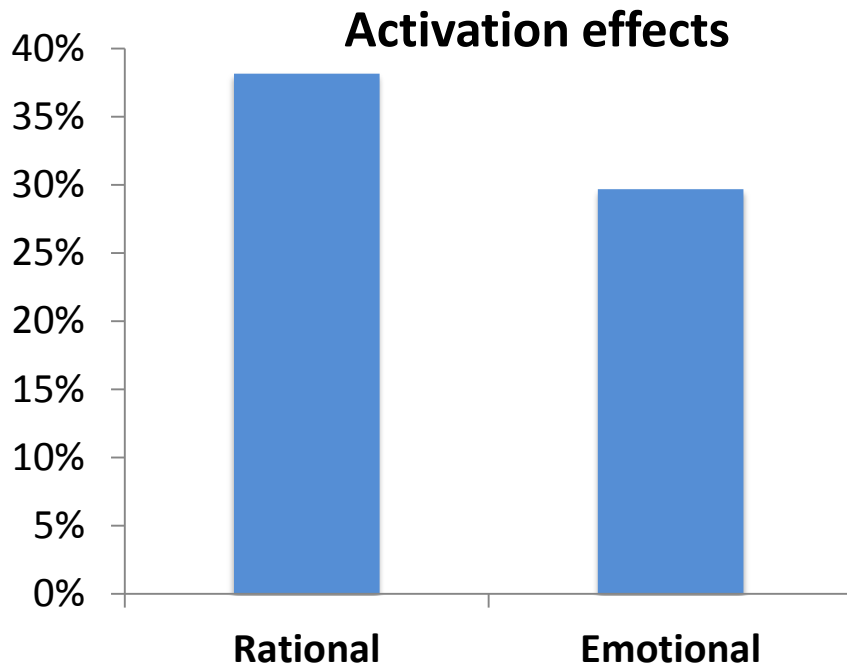


Effectiveness has fallen

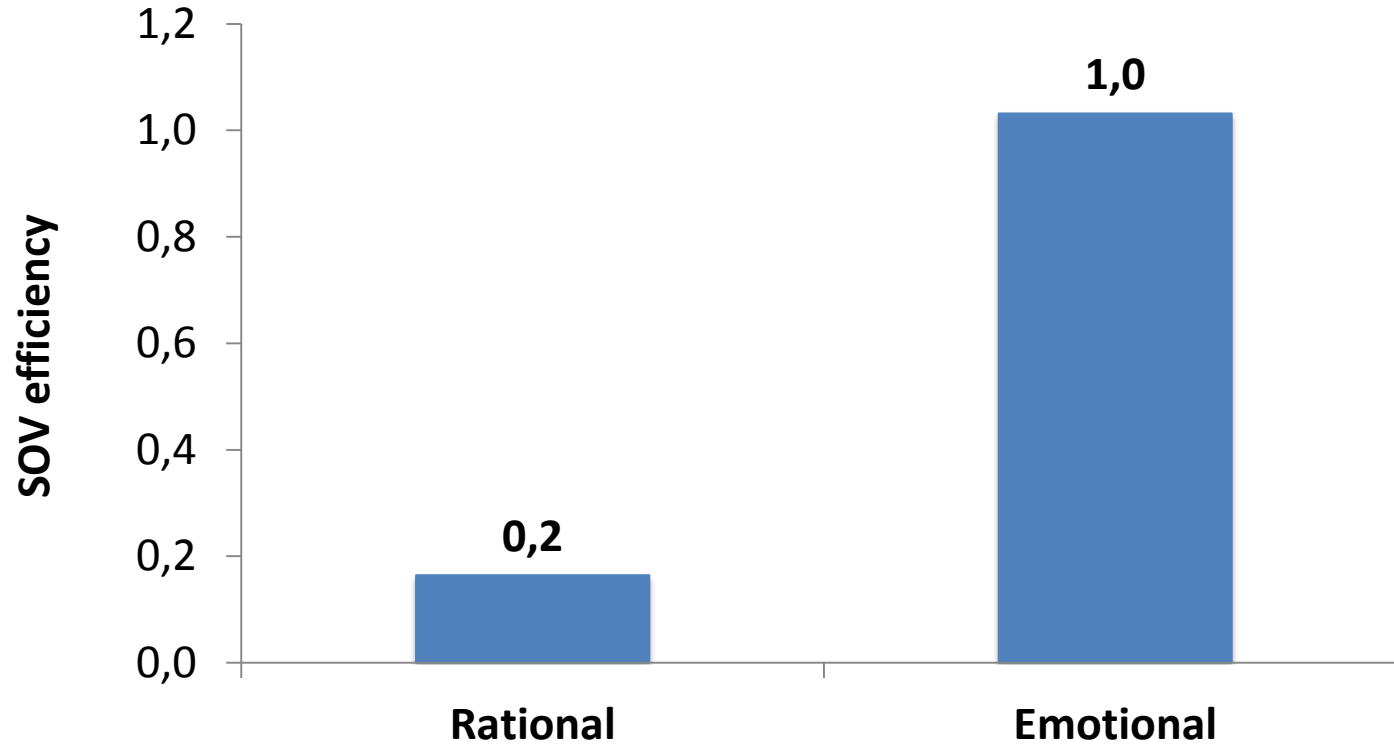


2. Emotional campaigns and media drive long-term growth

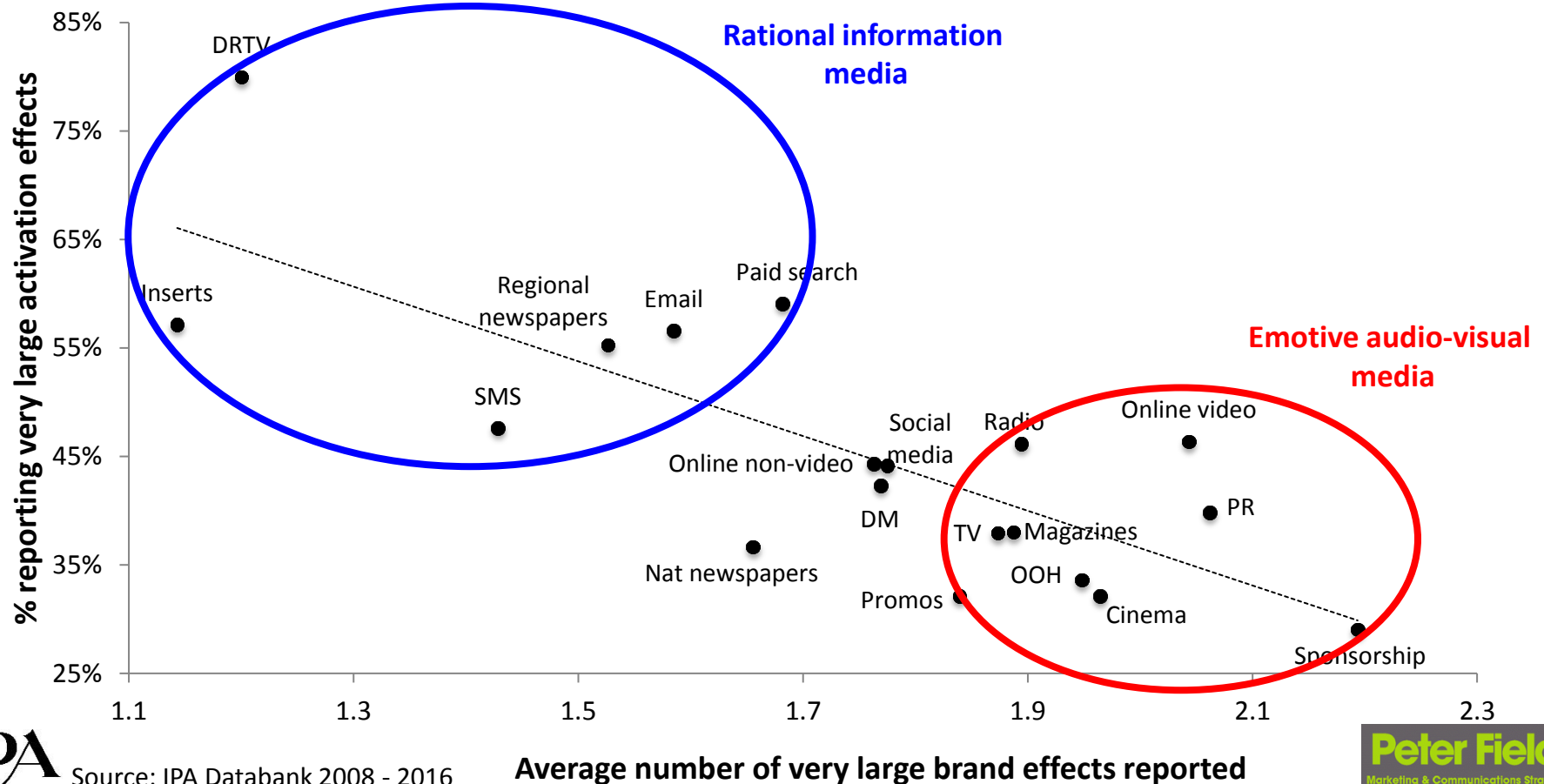
Rational & emotional campaigns work differently



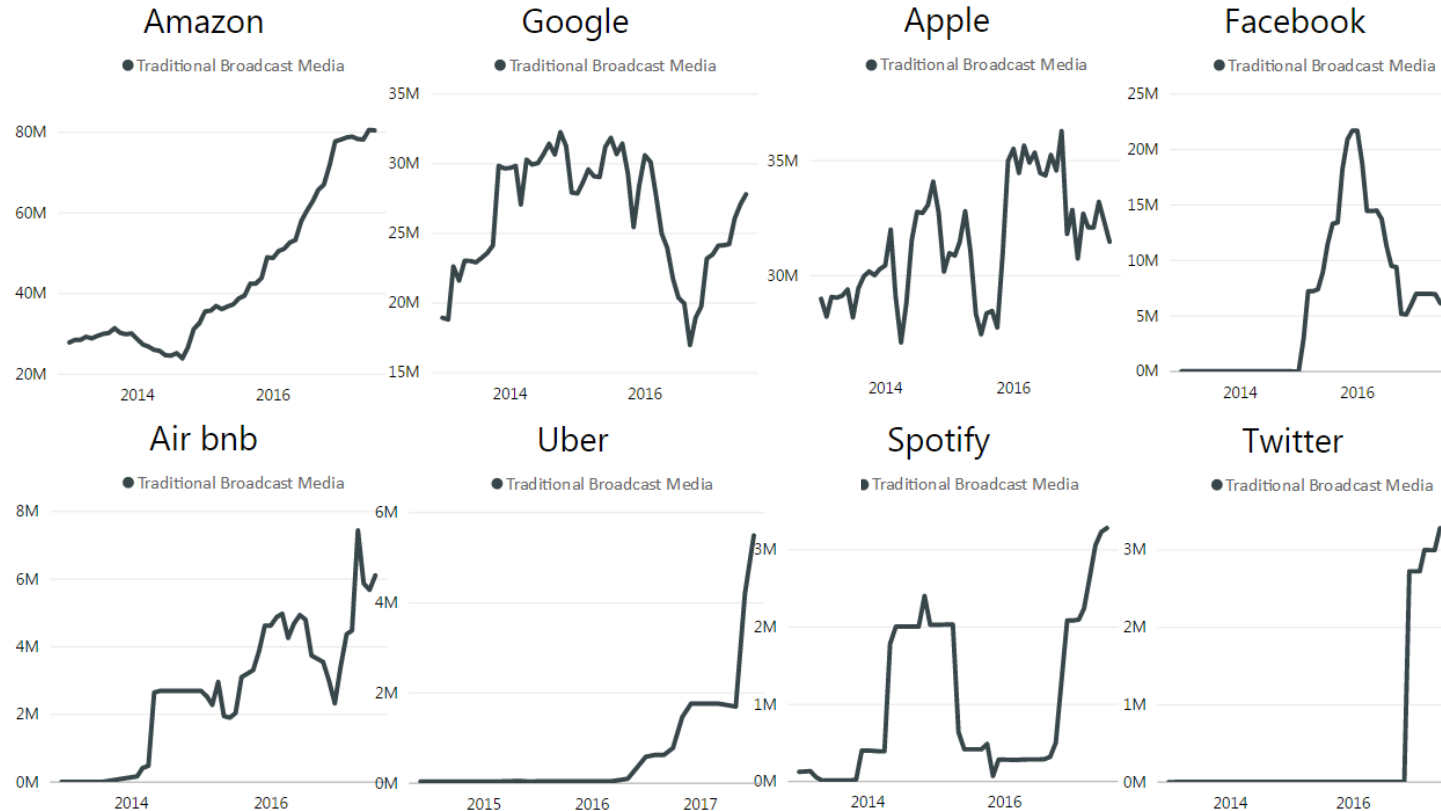
Emotional campaigns are most efficient



Emotive audio-visual media build brands



Tech firms are turning to traditional media

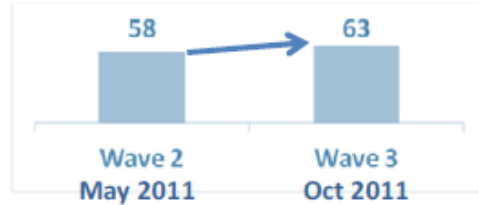


UK adspend – 12 month rolling (Nielsen)

Emotional priming – Aldi UK

QUALITY

The advert makes me think more positively about the quality of ALDI products



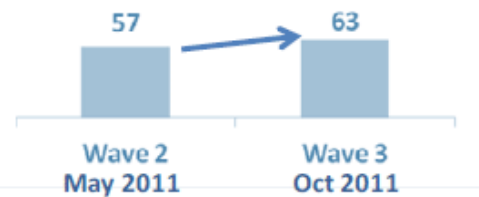
SAVINGS

The advert makes me think more positively about the saving I could make at ALDI



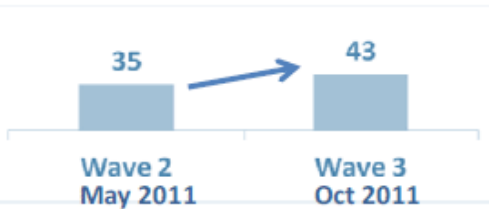
OVERALL IMPRESSION

The advert makes me think of ALDI in a more positive way



ACTION

The advert has encouraged me to shop more at ALDI



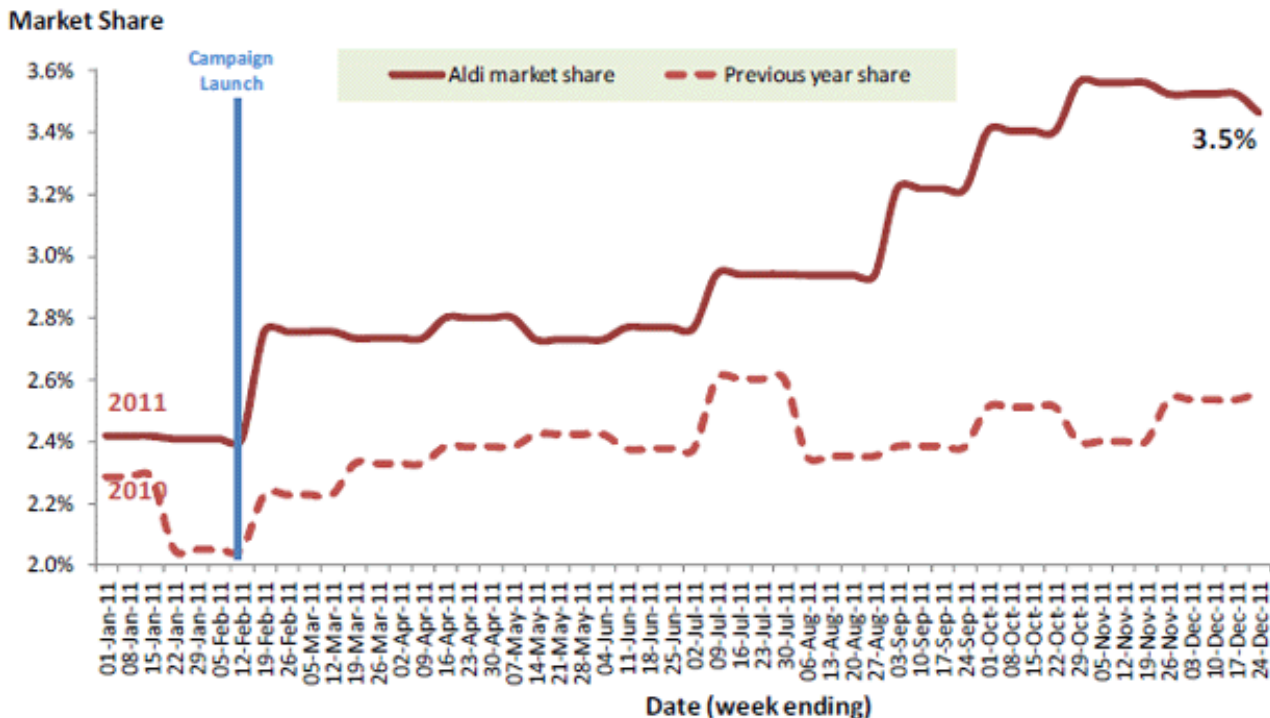
Source: Harris Interactive Aldi Brand and Market Assessment, 2011

tv

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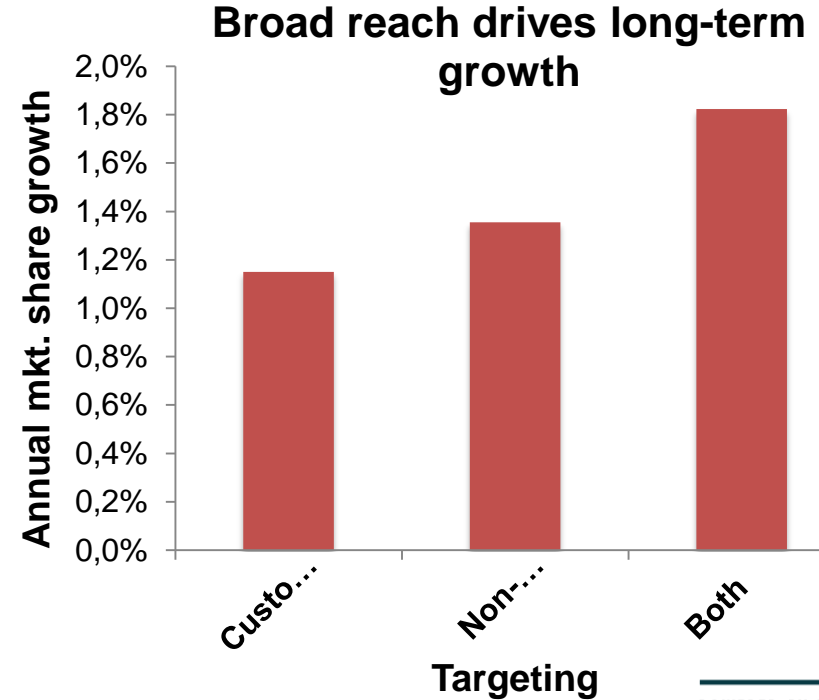
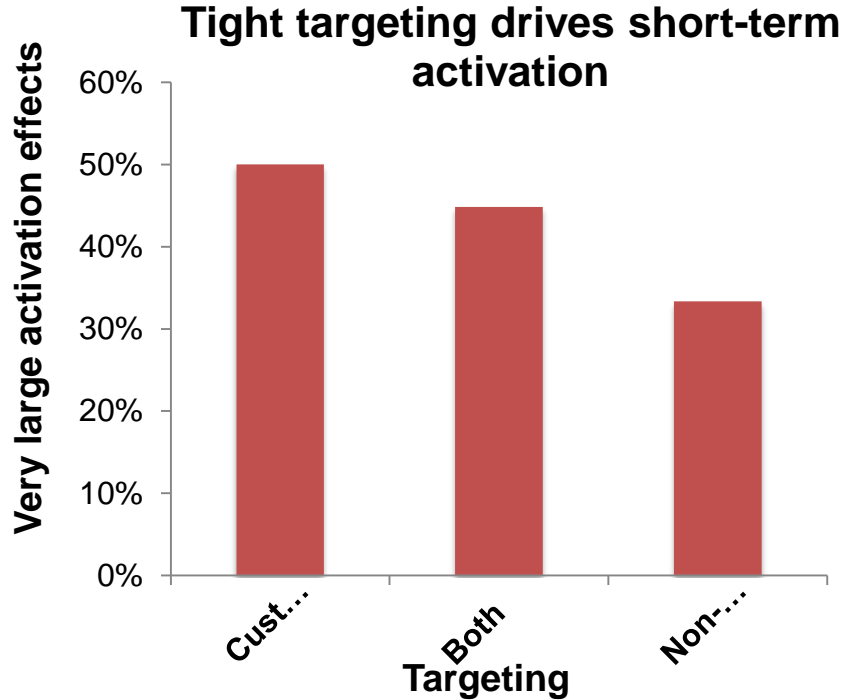
Aldi UK share growth



Source: Nielsen Homescan Total FMCG (excluding Non Food)
4 weekly data to 24 Dec 2011

3. Mass marketing and media are essential to long-term growth

Targeting vs. Reach



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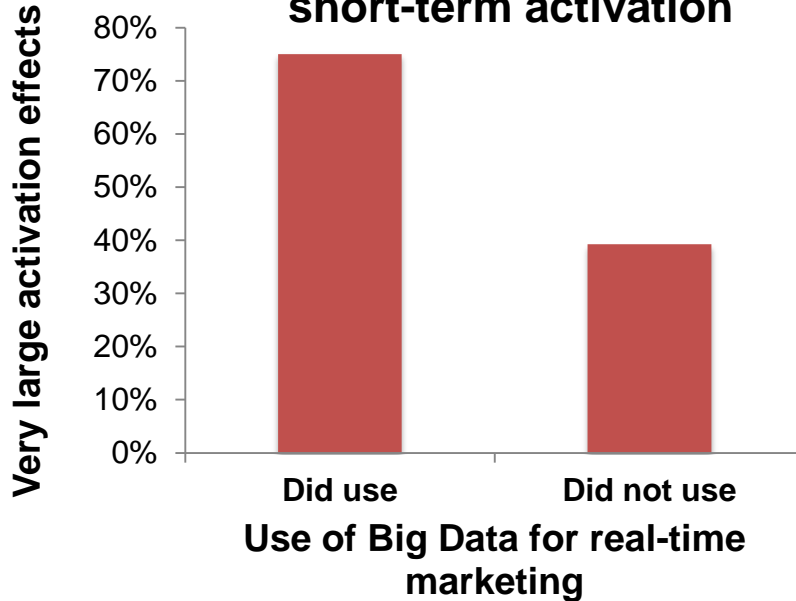
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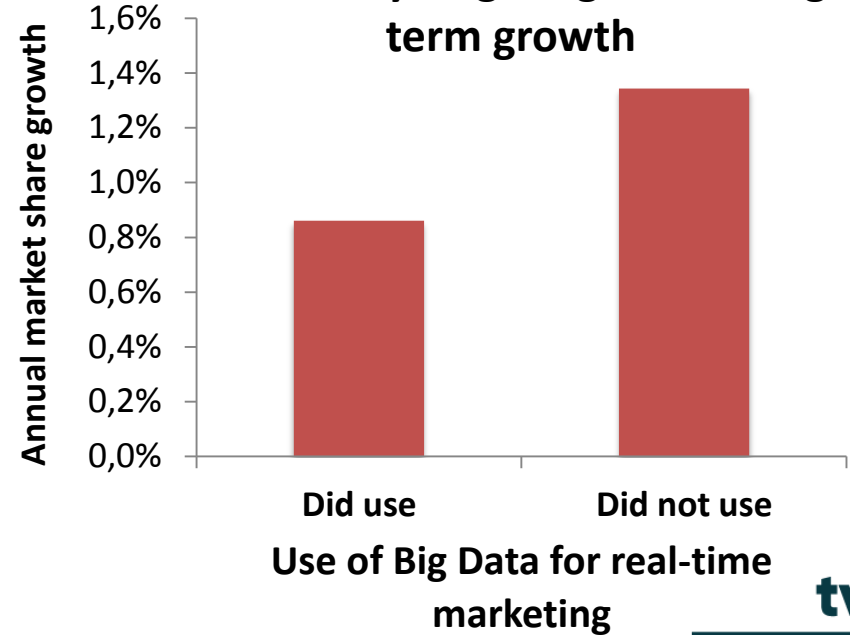
Source: IPA Databank, 2008-16 cases

Targeting vs. Reach

Real-time tight targeting drives short-term activation



Broad early targeting drives long-term growth



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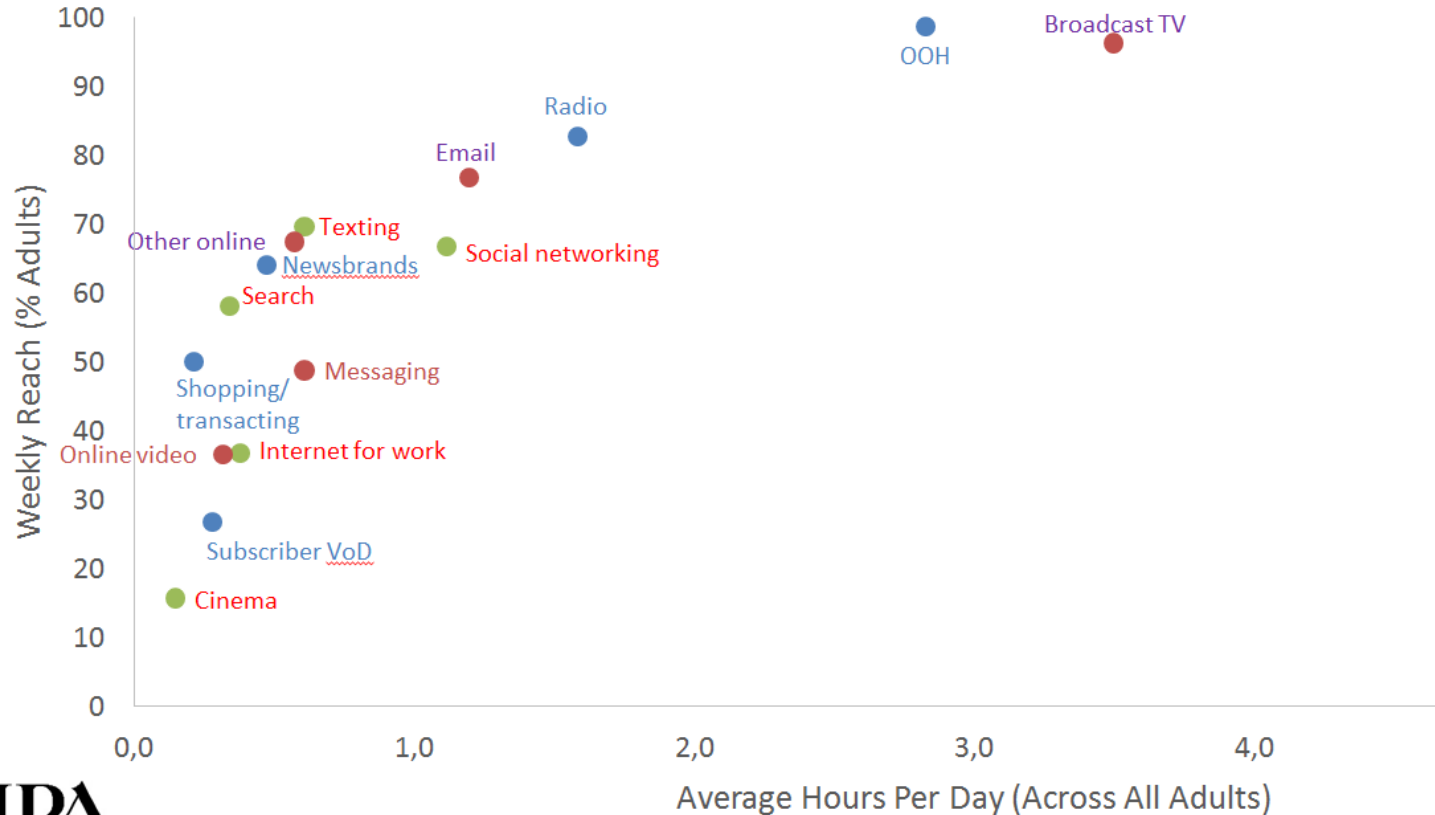
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“We targeted too much, and we went too narrow...The bigger your brand, the more you need broad reach and less targeted media.”

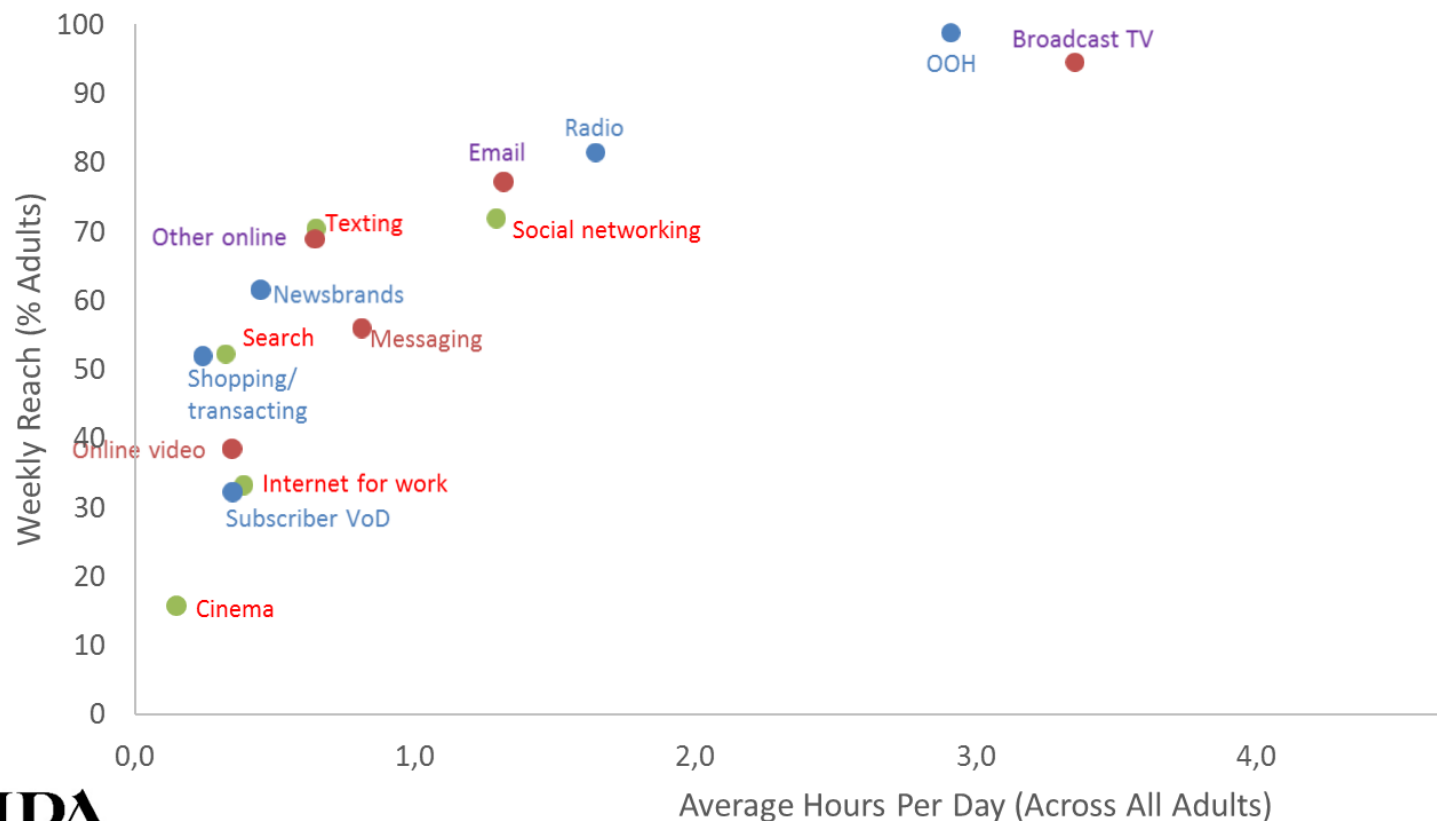
Marc Pritchard, CMO P&G

Wall Street Journal, Aug. 17, 2016

Reaching UK adults in 2016



Reaching UK adults in 2017



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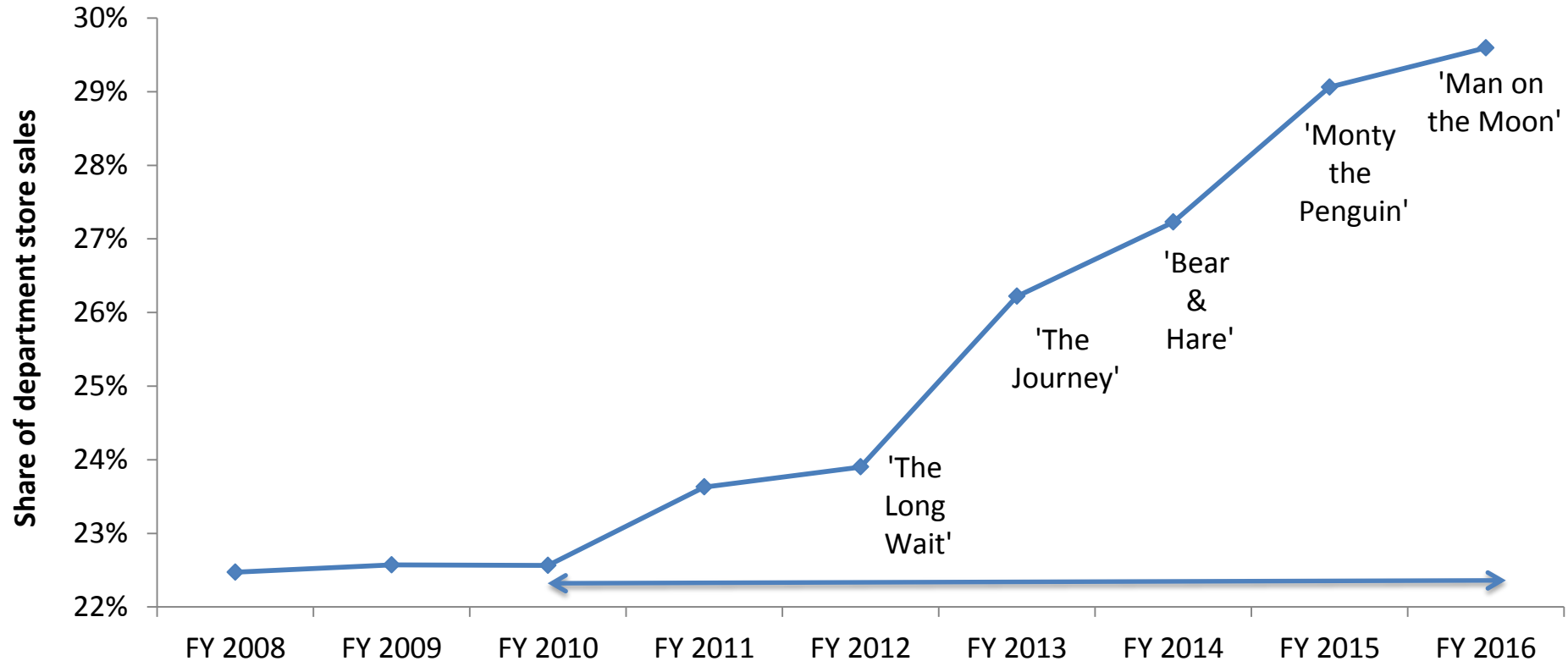
Source: IPA Touchpoints

Mark Ritson

“It’s called ‘social media’ for a reason: most Australians use it to connect with people not companies.”

Mark Ritson, Financial Review 10/4/13

John Lewis market share



Scalability of TV vs. Online video:

John Lewis

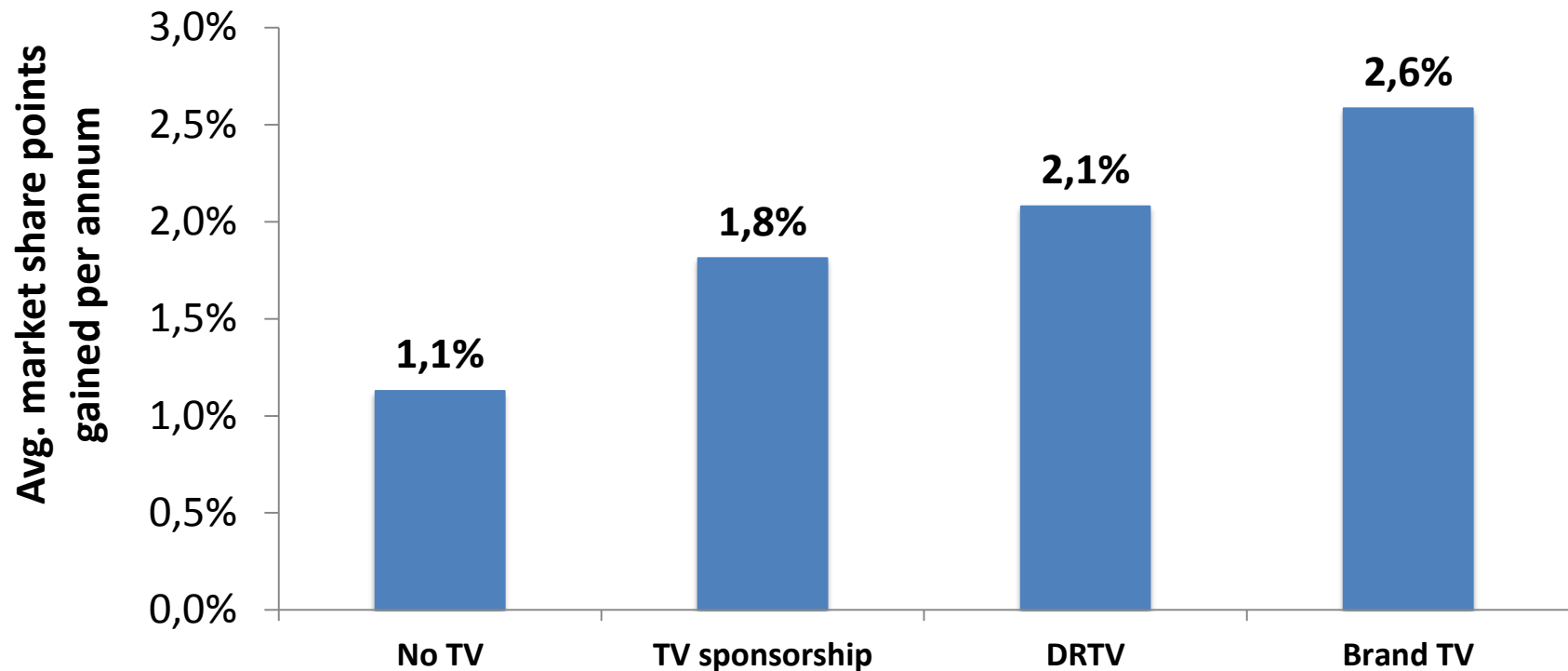
Media effectiveness and efficiency

Xmas	TV views	Online Views	Total views	John Lewis spend	Cost per view
2012	403m	3m	406m	£3.9m	1.0 pence
2013	426m	12m	437m	£4.6m	1.1 pence
2014	371m	29m	400m	£3.9m	1.0 pence
2015	1,175m	35m	1,210m	£4.1m	0.3 pence
Total	2,375m	79m	2,453m	£16.5m	0.7 pence

All adult views for Christmas video advertising.

Sources: BARB, YouTube, Facebook, Twitter, Manning Gottlieb OMD
TV views include supplier funded ads.

TV is best for market share growth



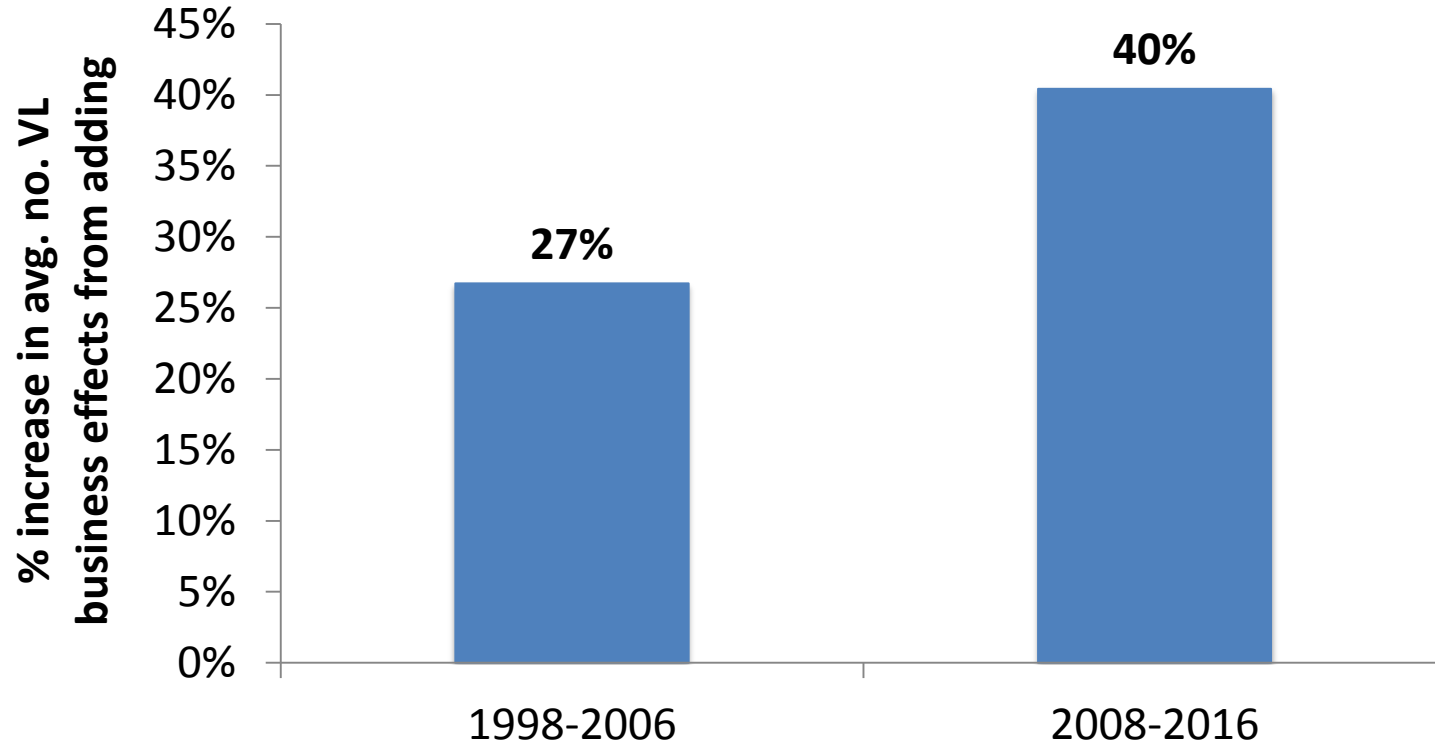
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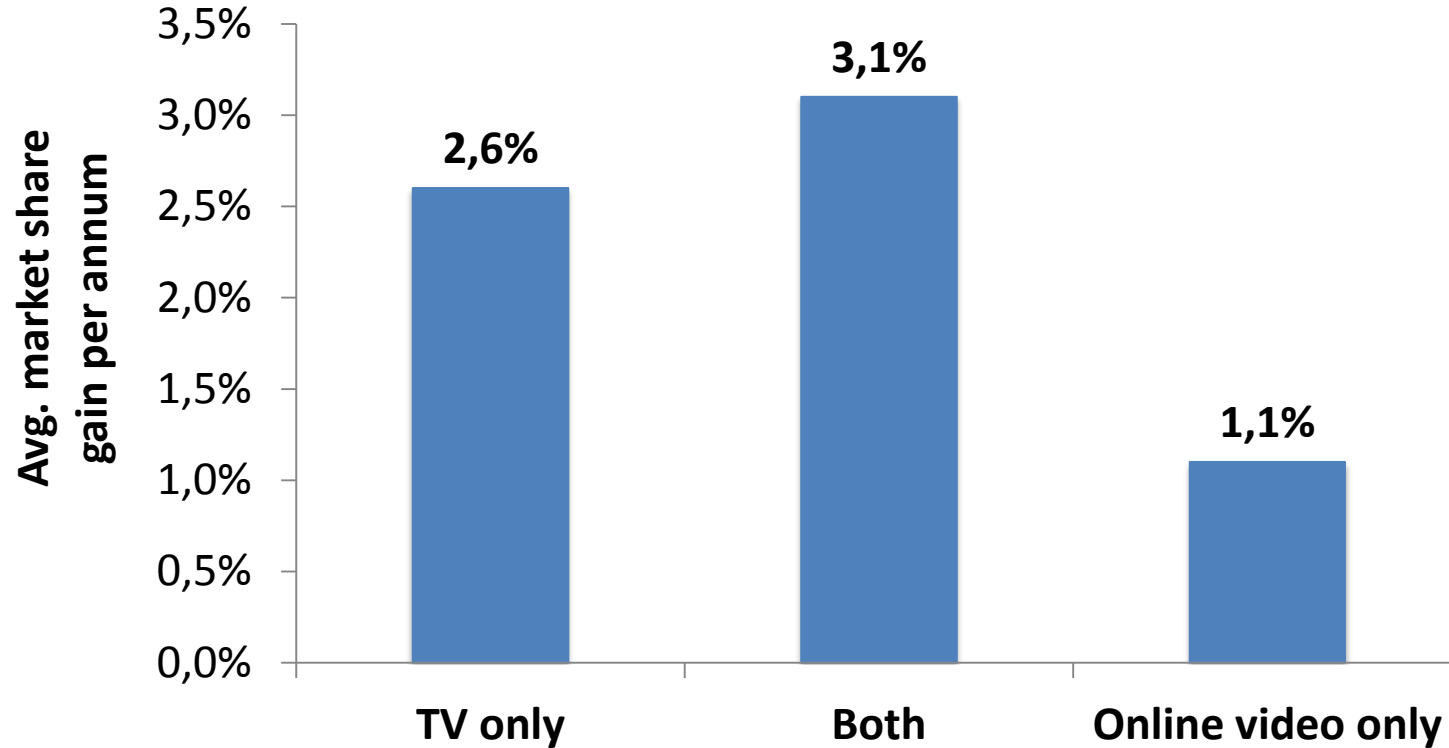


Source: IPA Databank, 2014-16 cases

TV has become more effective



Online video makes TV more effective



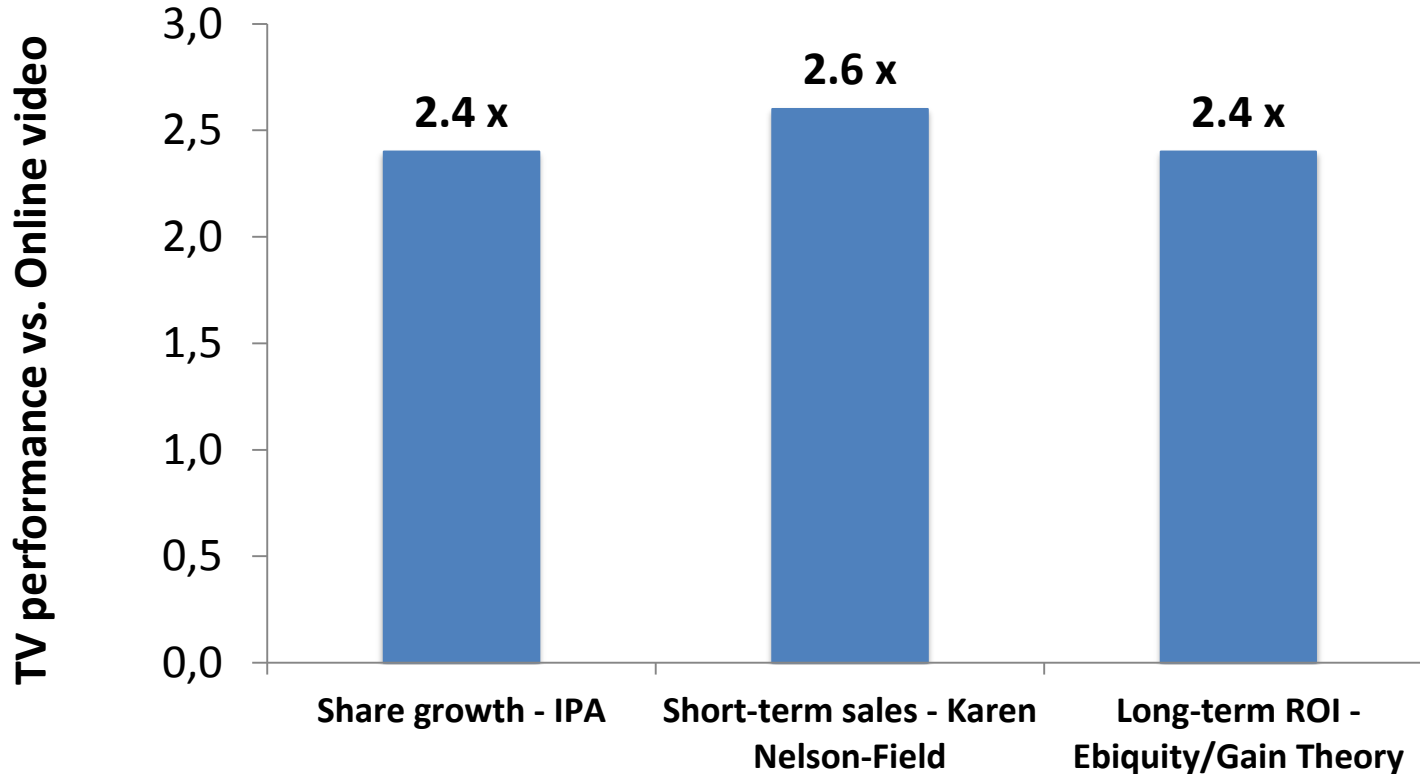
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Source: IPA Databank, 2014-16 cases

TV consistently outperforms online video across 2017 research studies



Conclusions

- Short-termism damages effectiveness: we need to ensure balance between long & short term objectives. Remember the 60:40 rule.
- TV reigns supreme for long-term effectiveness and can be a powerful short-term activation medium.
- The unique power of TV derives from its ability to stir emotions and build fame for brands.
- The broad reach and scalability of TV is important to long-term brand success.
- Narrow-targeting is seductive in the short term but underperforms in the long term.
- TV is getting more effective, not less.

Thank you

The Truth about Effectiveness: TV still works best



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