

Lessons from the Planning Summit

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Introduction

Simon Frazier, Head of TouchPoints Marketing & Data Innovation, The IPA

It all started with a conversation. One of the top planners in the industry, who has won more awards than I even knew existed, came to me and said, “We have so many initiatives which celebrate the various facets of the advertising industry and the disciplines included, but one area where I think the industry needs to do more is to recognise the great work which goes on within media strategy and planning.”

Now, as someone who has always been fascinated by this area and super excited whenever I've seen a new agency planning system or implementational reach and frequency case study from one of our members, I was initially quite surprised. Being so close to planning and strategy made it easy to forget just how much amazing and often very complex work underpins every decision in order to ultimately deliver the best results for clients.

But, on reflection, I immediately realised that this was the case. We hadn't been giving media planning and strategy the recognition it deserved. So after extensive planning, and “favour asking” of some of the finest planning and strategy brains in the industry, finally, at 9:30am on Wednesday 14th of September 2022, the Inaugural IPA Media Planning and Strategy Summit (The Planning Summit) began.

The purpose of the Planning Summit was to elevate the vital role of planning in the communications process; to really put a spotlight on why the discipline of planning is so essential in building effective marketing campaigns that deliver against business objectives. The morning



also served as a benchmark to highlight what the disciplines of planning and strategy can achieve, with a stellar line up of experienced practitioners who have worked on building some of the leading global brands.

We hope that both the Planning Summit and this publication will not only invigorate planners of today but will inspire the future planning leaders of tomorrow. On the morning of the Planning Summit, and now over the next few pages, you will be hearing from experts from Ogilvy, OMD, MediaCom, Republic of Media, MGOMD, Carat, Meta, Global Media & Entertainment, Zenith and finally Wavemaker.

One of the great benefits of the adaptable and hybrid way in which we now work is that we have the ability to engage with the content from the Planning Summit in many ways. 100 lucky people were able to be there in the room at the IPA on the day, while over 500 have since watched the sessions, either live online or via catch-up. For those who want a ready reference on hand from some of the top planners and strategists in the industry, the contents of this publication will be a tangible asset that can be referred back to for years to come.

Whilst it's certainly impossible to do the fantastic presentations we witnessed on the day full justice, over the next few pages we have attempted to summarise some of the key takeaways.

Join the complexity club with behavioural science

Tara Austin, Consulting Partner of Behavioural Science Practice, Ogilvy



Tara began her career as a strategist in advertising agencies and has worked with many of the world's biggest brands, from Unilever and Coca-Cola to the Bill & Melinda Gates Foundation. Then, ten years ago, she began to specialise in the new field of applied behavioural science and led Ogilvy Behavioural Science Practice's inaugural experiment, for which the agency won a gold Cannes Lion.

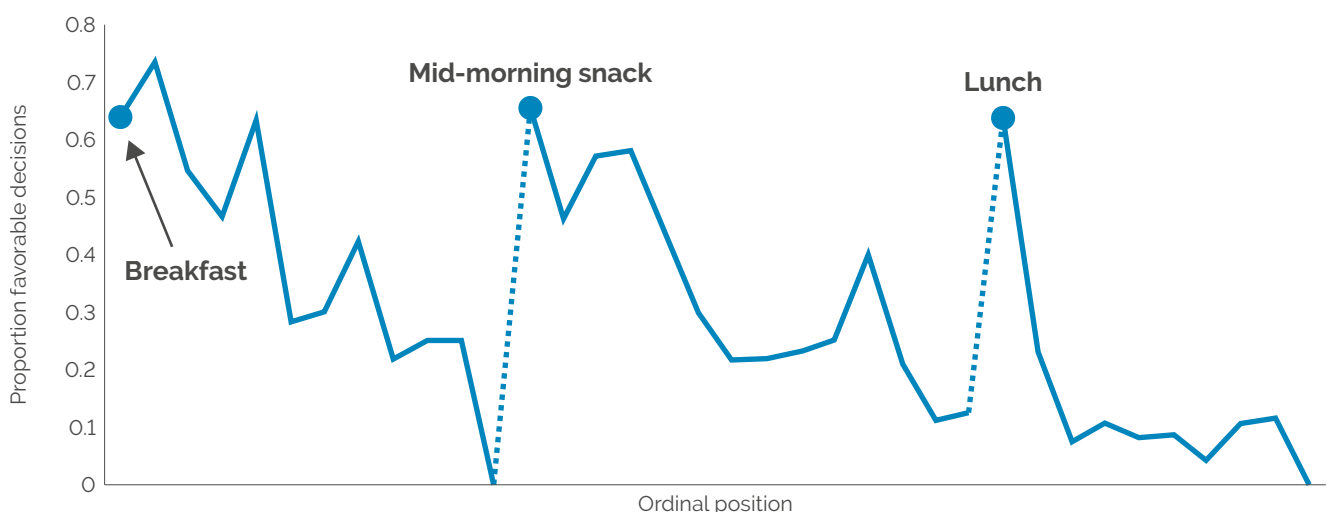
Today she creates integrated behaviour change campaigns for clients, such as HM Government, Recycle for London, and Public Health England, as well as private-sector clients like Unilever and Nestlé. Tara – alongside former IPA President and now Ogilvy vice chair Rory Sutherland and her colleague Sam Tatam – is host of Nudgestock, the world's biggest annual festival and celebration of behavioural science and creativity and their applications to problem-solving. Outside her work at Ogilvy, she is a lobbyist for psychedelic medicines.

We were thrilled to welcome Tara Austin as our first keynote speaker, who really set the tone for how we can better understand human decision-making and the impact that influences have on how we make decisions. Tara really needed no introduction since she already has a phenomenal following due to her work in the applied behavioural science field.

Tara's presentation entitled "Join the complexity club with behavioural science" sought to provide a new model for understanding both the self and how meaningful relationships are formed.

Tara set the scene with a fantastic chart which looked at the ways in which hunger can influence positive decision-making. This is shown below. The chart tracks the likelihood of favourable decisions being made by judges on parole cases in Israel across a day.

Fig 1. Consequences of hunger and mental fatigue.



Source: Jonathan Levav. The Proceedings of the National Academy of Sciences¹.

In the study, Jonathan Levav of Columbia Business School in New York and his colleagues analysed 1,112 parole hearings for inmates of four Israeli prisons made by eight judges over a ten-month period. Judges' days were divided into three sessions broken by two meal breaks – a morning snack and lunch. Judges decided when to break, but had no control over the ordering of cases, which was determined by when a prisoner's attorney arrived.

At the beginning of a session, a prisoner had a 65% chance of being paroled, the authors found. This declined to almost zero by the end of a session, and leapt back up to 65% after a break. The severity of the crime, the time served in prison, any previous incarcerations, and the availability of rehabilitation programmes were not enough to explain the effect on the probability of parole, and the nationality or sex of a prisoner made no difference. The findings of the study were published in the *Proceedings of the National Academy of Sciences*. "The work shows the consequences of mental fatigue on really important decisions even among excellent decision-makers," says Levav. "It is really troubling and quite jarring – it looks like the law isn't exactly the law."

We're not transparent to ourselves

Often in market research, it can be easy to ask people questions as to why they made a decision to do a specific thing, and to take their answers at face value and as if they are coming from a primary source as truth. In reality, as the great David Ogilvy once said, "The trouble with much conventional market research is that ... people don't think what they feel, they don't say what they think and they don't do what they say." Tara demonstrated this in practice with a great study looking at how people rarely understand the hidden truths of the decisions they make.

Is this a wine up?

Imagine you've just walked out of a wine shop and a nice researcher asks you, "Why you have purchased that particular bottle of wine?" You tell her that the label caught your eye, you thought it was a good price point, and that you were considering making steak and chips for dinner so a French wine would be the perfect accompaniment. That sounds like a perfectly reasonable answer. Because it is a perfectly

reasonable answer – and it's the answer you believe to be true. **But it's the wrong answer.**

As one academic study showed, whilst you may not have been consciously aware of it, your choice was in fact subconsciously influenced or "primed" by the French music playing inside the shop.

In that experiment, on days where French music played, French wine outsold German wine by 5:1. On the days where German music played, German wine outsold French wine by 2:1. But when asked about their purchase, only 14% of respondents were even conscious that music had been playing in the store – yet they all had other perfectly good, reasonable answers for why they chose their bottle of wine.

"Your brain is the most complex object in the known universe, but you aren't aware of that complexity."

Tara Austin

We need to understand our audiences better than they understand themselves

To fully understand decision-making, Tara proposed a model of "3 layers" of complexity, which were universal, cultural and individual.

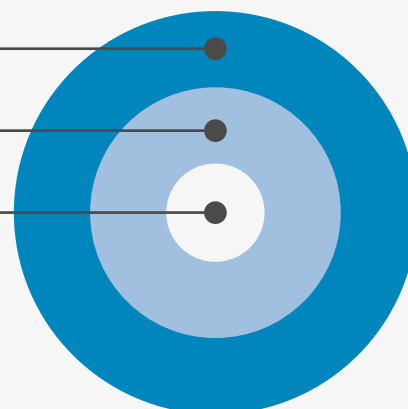
Fig 2. Decision making layers.

3 layers

Universal

Cultural

Individual



Source: Tara Austin Ogilvy.

The three layers of complexity

Universal

Universal relates to universal human truths that are hard coded into our psyche by the virtue of the fact that we are human beings in order to stay alive. Tara demonstrated in the following slide how, regardless of cultural, sociological, language or economic boundaries, looking at the two shapes below 95% of people would identify the rounded cloud-like shape as Bouba and the spiky jagged shape as Kiki due to the ways in which human beings use synaesthesia to blend things with sounds to make them meaningful.

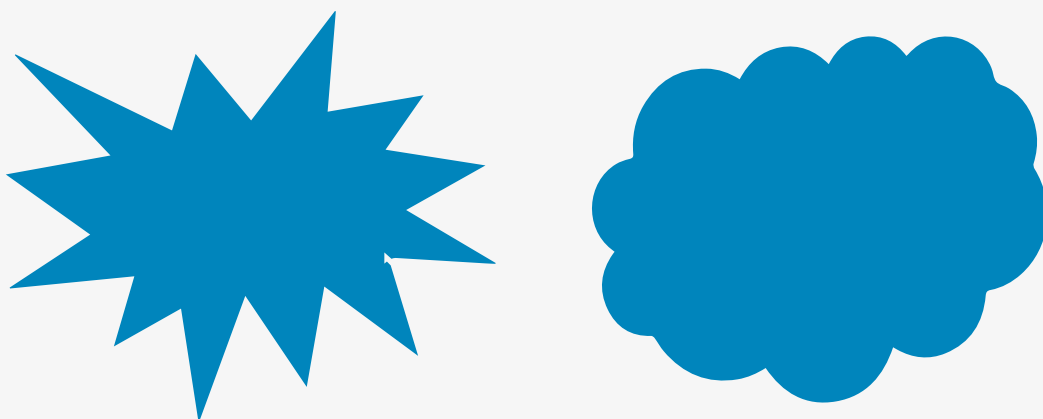
Another example Tara demonstrated was the "cocktail party effect" whereby if you are in a busy public place and someone says your name, even far away, your brain will automatically hear it even if it is quieter than other surrounding conversations and despite the fact that you

haven't been specifically listening for your name. This is due to the fact that an individual is very, very tightly associated with their name. This goes back to how we perceive threat and fight or flight states. In reality, the reason people are able to so aptly identify their name in a cacophony of noise is that they are constantly on high alert for any form of direct threat to them. As Tara said, "We've stayed alive throughout history because we're very good at identifying the information which may keep us alive."

Cultural

While universal layers of complexity are heavily aligned with the hardware of the human body, cultural layers are more aligned with the 'software' of our lived experiences that shape the way we see and understand things. We see what we are conditioned to see.

Fig 3. The Bouba / Kiki effect.



Which is **Bouba** and which is **Kiki**?

Source: A. Cwiek. Nov 2021, The Royal Society.

Fig 4. Map image.



Source: From American Journal of Psychology. Copyright 1951 by the Board of the University of Illinois. Used with permission of the author and the University of Illinois Press.

Tara drew on an example from Karl Dallenbach on how by conditioning the brain we can shape what it sees. The picture above (see Fig 4) is allegedly a map. In isolation our brain may struggle to decipher what we are looking at. It may see patterns and be slightly confused.

However, if we were to look at the image of a cow (see Fig 5) and then back at the image of the map in Fig 4 what we see may be totally different to what we initially saw. As the old saying goes, "There's no way to unsee" as our brain has been conditioned to see something which in reality isn't there at all.

Individual

The individual layer of complexity relates not only to our personal experiences of universal and cultural factors in how we make decisions, but also to all of the genetics, upbringing and lived-experience factors that differentiate us as individuals.

Fig 5. How conditioning changes perspective.



Tara closed the opening address by saying, "Only when we truly understand what makes people individual can we start to really engage with them." One thing to consider when thinking about behavioural sciences is to never be too satisfied. Question everything. Just because you think something may be a universal truth, how can you tell that it's not culturally conditioned?

The reason that understanding the three layers of complexity is so vital is that ultimately you can drive efficiency and save money whilst having the largest possible impact. If you're targeting something that is a universal human truth, you don't need ultra-individual advertising since most people will understand it in the same way. If however you're appealing to very individual motivations, don't make the mistake of thinking that something that appeals to someone in a demographic category will automatically appeal to someone else in the same demographic space.

Lessons in planning

Vicky Fox, Chief Planning Officer, OMD UK



Vicky is responsible for leading the planning output at OMD UK. Most recently she has overseen the creation of a new department – Connected Performance – which joins media planning with biddable expertise, delivering full-funnel solutions for the agency's client base.

Prior to joining OMD UK in 2013, Vicky worked on some of the biggest campaigns for household names, including John Lewis, Virgin Media, Nissan, and Apple at Manning Gottlieb OMD (MGOMD) launching the first iPod with the iconic “1,000 songs in your pocket” campaign. She continues this passion for the craft of media planning with her current clients, including McDonald's, Lidl, and recent win Compare the Market.

With over 25 years' experience and twice named winner of Campaign's Media Planner of the Year (2020 and 2021), Vicky was also honoured by the IPA 2021 with a fellowship in recognition of her services to media planning. Vicky is a leader in the field of change and is committed to ensuring a diverse and inclusive industry, both in the planning work she does and by championing representation across the agency.

Vicky's presentation was not necessarily a case study, but more of a personal journey – lessons that she has learnt over her illustrious career.

In order to provide key takeaways on how to plan smarter, Vicky focused her presentation on three rules which have shaped her career:

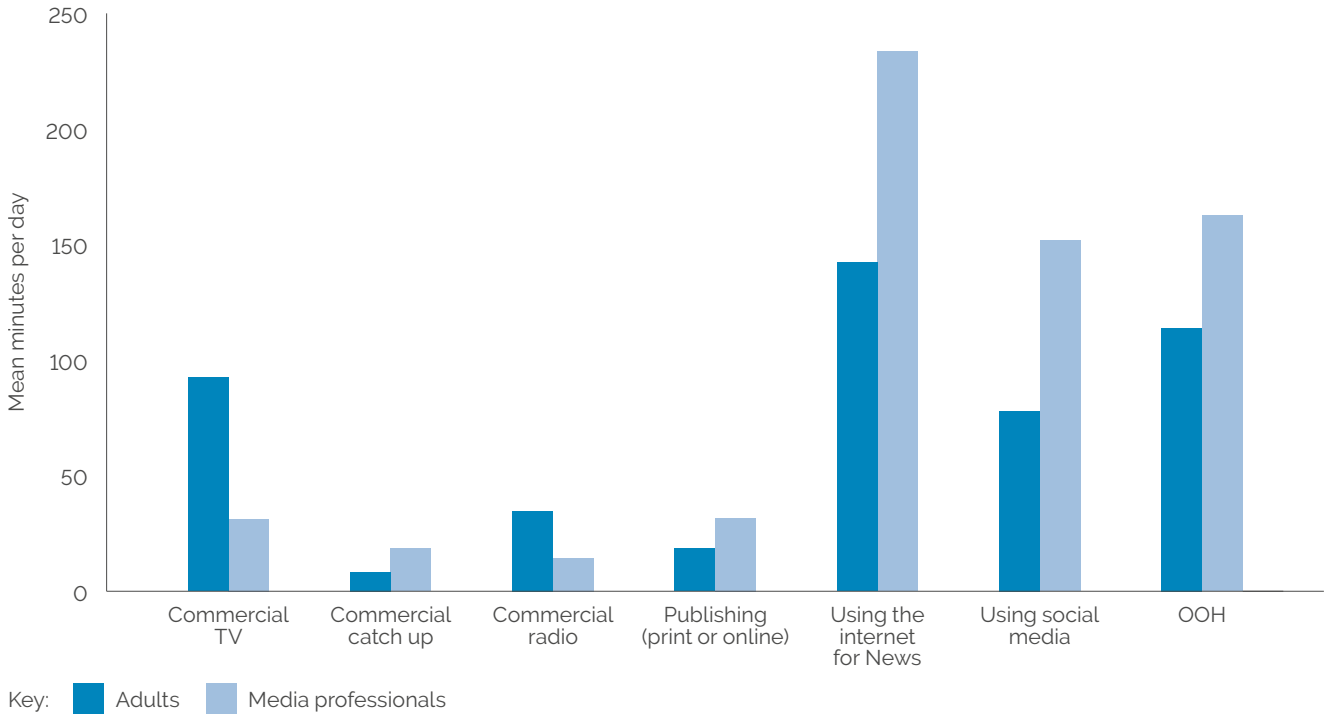
1. Be a Consumer
2. Be Curious but Rigorous
3. Be You

Being a consumer is fundamental to being a planner. Vicky asked us to take part in a game show and guess if media professionals were higher or lower in terms of average minutes per day consuming different media types (see Fig 6 on page 11). There are huge differences between what media practitioners do compared to the average population.

Vicky makes sure that she visits Lidl (OMD client), she watches Channel 4, another of OMD's client base, she visits McDonald's and she uses the McDonald's app. In summary Vicky is a consumer of her clients' businesses. Vicky feels that one has to experience the brand as a consumer to have genuine conversations with clients about their business goals and objectives.

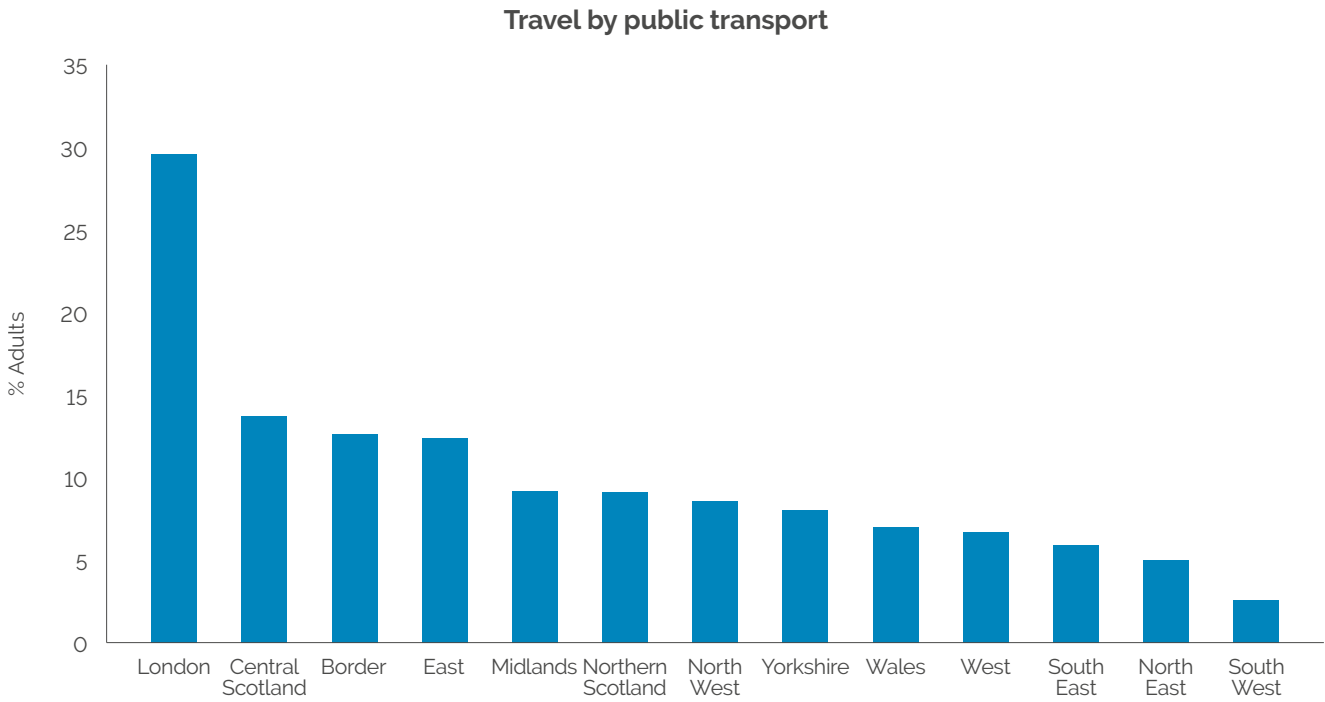
Vicky believes we should all beware of the London bubble. Londoners live differently compared to the rest of the country (see Fig 7 on page 11).

Fig 6. Higher or lower?



Source: TouchPoints 2021.

Fig 7. Burst your London bubble!



Source: TouchPoints 2021.

Media practitioners live differently and consume media differently, so when you are planning your clients' business be aware of your own bias and do not plan using your own lens.

Be Curious but Rigorous. Vicky warned the audience that when looking at only demographic targeting, mistakes can happen. Often two people with the same demographic profile are very different targeting opportunities. Just Look at the former Prince Charles and the Prince of Darkness – Ozzy Osbourne, on paper they are demographically the same. Both are male, 73 years old, have high income, are grandparents and own dogs, but in reality they are very different people.

Vicky urged the audience to have a very deep understanding of the audience. OMD use a planning process (see Fig 8 below) that looks at Category, Culture, Consumer, Comms, Brand and, finally, Diversity. Each level has implications on the plan. You have to ask yourself, "What does that mean for my brand, for my campaign and

for my planning?" Planners have to deliberately plan and include diverse audiences. Plans have to be challenged to make sure that you are reaching diverse audiences.

Vicky then went on to describe very different consumer journeys and how data can be very powerful in order to deliver connected journeys across funnels. Vicky wants us to be aware of different channels delivering different consumers in that you should know what audience you are paying for and how your message will be delivered.

Be You. Your opinion is valid. When you are in the planning team, it does not matter what level you are, your opinion matters. Continue to learn, develop and grow yourself. This industry expects that of you. Embrace your difference, bring the true you to this industry, and you will be brilliant.

Fig 8. Part of OMD UK's planning process for deeper audience understanding.



Some insights may be more emotive, or human, that get to the heart of the problem

Others may be more important to help inform channel and platform selection

Challenge yourselves to be Consciously Inclusive

Source: Vicky Fox OMD.



Section 1

The trials and tribulations of being a media planner: What are the issues that keep top planners up at night?

For this section of the Planning Summit, we asked three top planners and strategists to tell us about the trials and tribulations of being a media planner. We wanted to look retrospectively at the shared pain points which were keeping them up at night, in order to see how these elements could be addressed to enhance the lives of planners going forward, and ultimately deliver better results for clients.

In this segment we saw three excellent presentations which all approached the questions posed quite differently, giving a wide spectrum of responses that resonated with the audience on the day.

What's keeping planners up at night?

Lindsey Jordan, Head of Creativity and Joint Head of Strategy, MediaCom



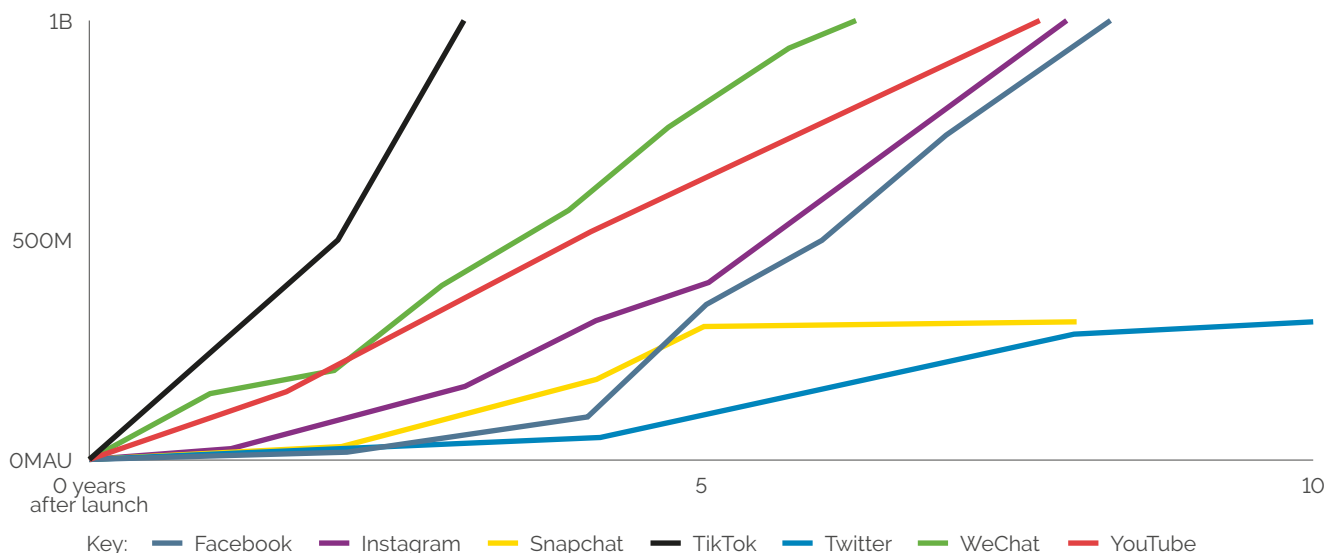
Lindsey has been at MediaCom since 2005, working in planning and strategy across a range of categories, from FMCG, to retail, to tech, to telecoms. Her current role is focused on developing award-worthy, innovative ideas that drive growth for our clients, as well as creating the cultural conditions for creativity within the agency.

Lindsey canvassed the media-planning brains at MediaCom in order to find out five things that are keeping them up at night. In a fantastically visual presentation, Lindsey demonstrated the challenges faced by media planners using song titles and stock imagery.

1. 'Losing My Edge' by LCD Soundsystem

One fear which Lindsey talked of as keeping us up at night is that the pace of change within the industry will leave planners unable to keep up. Powered by tech capability we are seeing faster than ever developments in how consumers watch, listen, create and buy. For example, the rapid shift to e-commerce over the pandemic and platforms growing faster than ever before. It took Facebook eight years to get to a billion users, while more recently TikTok only took two-and-a-half years to reach the same user milestone, and let's not even talk about the metaverse. The job of the planner is still the same, but the amount of media opportunities they need to juggle has vastly increased, and the common question is, "How do we not lose our edge, when the edge is constantly moving?"

Fig 9. Platform user size over time.



Source: Lindsay Jordan MediaCom.

2. 'Let It Go' by Idina Menzel from Disney's Frozen

How do we let go of control at the same time as building our brands? Over the past few years we have seen the rise of creator led content on platforms such as TikTok. In fact there are now 50m people globally who consider themselves content creators. And in the UK since 2020 over 8m new content creators joined the creator economy, meaning now ¼ of the UK population consider themselves content creators, that's 16.5m people! With so many people - or so much user-created content in the media space, how do we build brands and distinctive memory structures in spaces where content authenticity is so vital without seeming inauthentic?

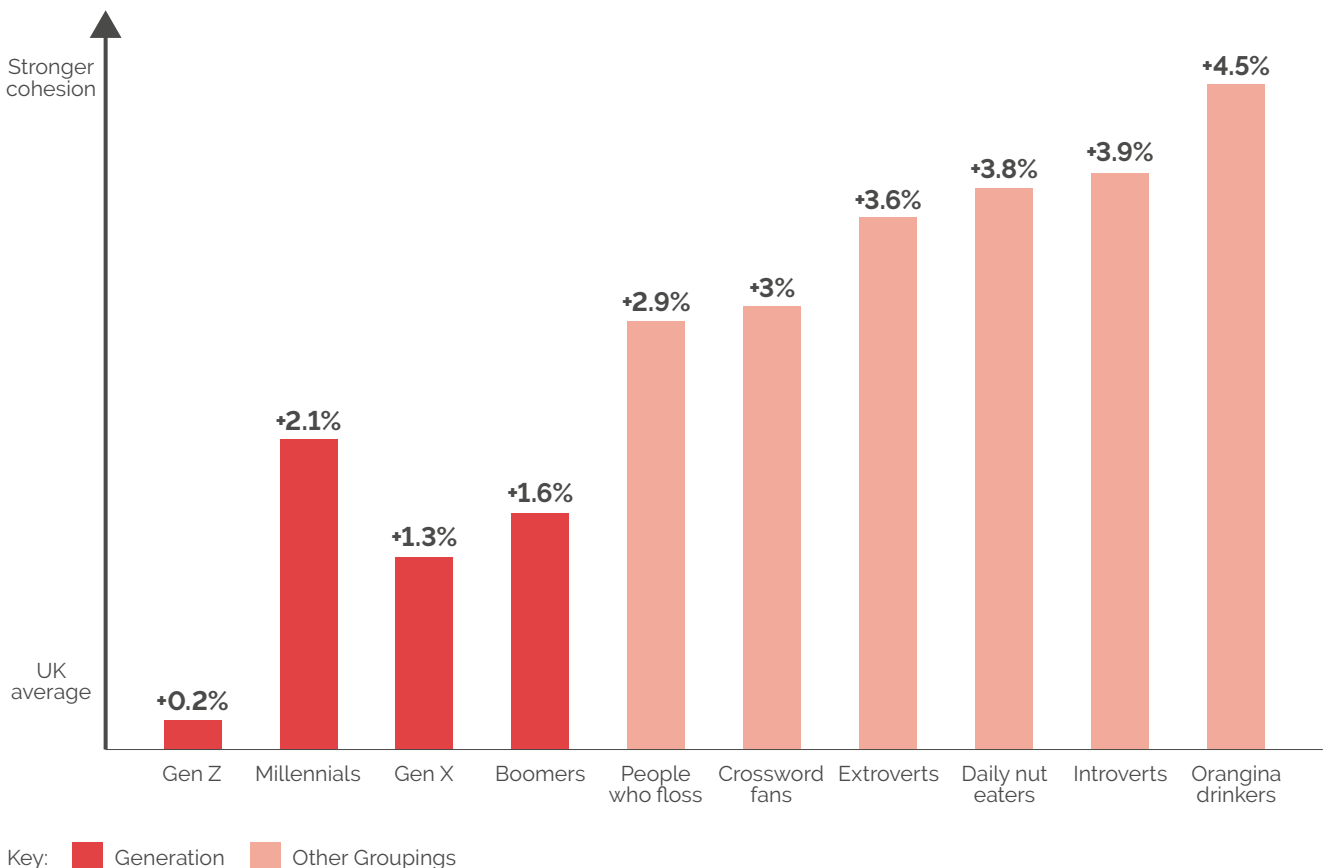


3. 'Stereotypes' by Blur

Are we too reliant upon stereotypes within the industry? Stereotypes exist for a reason, to help us characterise and classify, but how do we avoid blunt stereotyping and misunderstanding what actually unifies people? This great piece

of research from BBH shows that people who floss have more cohesion as a group than Gen Z, or millennials, for example. So how do we go beyond stereotypes and understand what drives cohesion in modern Britain.

Fig 10. Teeth flossing cohesion.



Source: BBH.



4. 'Video Killed The Radio Star' by The Buggles

Another fear is whether personalisation at scale will kill the ability of brands to build themselves in culture? We all know the power of building our brands in culture. And if you want to do that you need to build common knowledge of the brand. So it's not just enough for you to think your brand is cool, you need to know that everyone else does too. And to build common knowledge we need communications that acts at that mass, unifying level. Not hyper targeting, individual comms. So personalisation has its role, but not at the expense of also driving common knowledge.

5. 'Right Here Right Now' by Fat Boy Slim

After two years of global change under the COVID-19 pandemic, where we have scarcely had a period of stability that lasted more than two weeks, have we become too focused upon the short term? We didn't know what was going to happen next week, never mind next year. So of course we became more short term focused. What now keeps us up is how we balance the short and the long term as we emerge from the COVID-19 pandemic.



Freethinking

Leigh Herbert, Director of Client Services, Republic of Media



Leigh is Client Services Director and sits on the board of Republic of Media, one of the UK's fastest growing independent media agencies, with offices in Manchester and Edinburgh. His 15-year media agency experience includes stints at PHD and MediaCom, where he has led planning for brands such as tombola, New Balance, Beaverbrooks, Severn Trent, Subaru and Isuzu.

Leigh spoke to the teams at Republic of Media in order to put together a toolkit for overcoming some of the challenges faced by planners. Leigh talked of three fundamental principles to bear in mind that are vital in successful planning and building long-term relationships with clients and brands.

1. Never lose sight of the people behind the numbers. As planners, we love to talk percentages and we love creating big homogenous audience sets – but the best audience insight will often require moving away from spreadsheets of data and into the real world.

To really understand audiences, we need to bear in mind some key points.

- ✓ Find and speak to your target groups. Don't be lazy and stereotype who you think you are talking to. Go out and meet the audiences or even better, live a day in their lives.
- ✓ Keep asking why. If you take the first fact you arrive at as your key insight, you can guarantee you haven't found the best insight.
- ✓ Learn the fundamentals of behavioural economics. Learn how people make decisions and why they make the decisions they make.
- ✓ Keep your finger on the pulse of culture. (It has the power to change thinking overnight). The survival of so many well-known brands through the COVID-19 pandemic just demonstrates why closely monitoring change and being agile are so vital. Keep your strategy flexible to accommodate change at a moments notice.

2. When you've thoroughly researched and understood a brand, a market, or an issue, the temptation is to share your depth of knowledge and understanding. Market researchers are particularly guilty of wanting to show all their workings out – all the data that underpins the insights they bring to their clients. To be smarter with numbers, think of the ideas below.

- ✓ How much better as a storyteller to have the audience hanging on very twist in the story and begging for more than be bored into submission!
- ✓ Resist the urge to share too much. In an increasingly complex world, clients will thank you of you if you can summarise and focus on the answer – save the heavy data slides for the appendix!
- ✓ Beware the curse of knowledge. When you know a lot about a subject, it's hard to know what you don't know. Approach every existing client brief like it's the first one you've ever received from them.
- ✓ Talk Human. It's a curious truism of corporate and agency behaviour that many insiders speak in a dialect that is very unlike how people talk. At worst, jargon-laden and almost pretentious ways of speaking can sometimes explain very little and convince very few. Use emotion when talking and most importantly, talk everyday human!

✓ I would have written you a shorter letter – but I didn't have the time. Less is more when it comes to sharing information with clients. Focus on delivering only the most relevant and hard-hitting information. Make every slide count – if you're response to brief contains 100 slides, it's probably at least 50% too long

3. During a period of prolonged reflection, finding and retaining the right people – the best planning talent – is business critical. An agency is nothing without the minds and characters that make up the teams. To retain planning talent, you need to:

- ✓ Encourage a culture of inquisitiveness and learning.
- ✓ Leaders, take on board opinions from across the business, and employees make sure your voice is heard.
- ✓ Understand that meaning can be more powerful than money.
- ✓ Encourage more periods of reflection and celebration.
- ✓ Don't be afraid to mix up account teams to keep things fresh.
- ✓ Have pro-active strategies to recruit new talent from a range of backgrounds.

The Trials and Tribulations of being a media planner

Flora Williams, Head of Implementational Planning (OmniGov), MGOMD



Flora started her career 12 years ago, taking a keen interest in particular in the digitalisation of AV channels, especially Audio. After eight years in the AV planning team she moved over to a multimedia planning role and soon afterwards moved into Vicky Fox's Connected Performance team at OMD in order to really hone her planning skills.

At the beginning of last year Flora moved downstairs to MGOMD as Head of Implementational Planning for OmniGov, pitching and retaining government business and driving forward the department's planning expertise.

Flora opened with a statement, "Anything that is difficult is always quite exciting," and that was a great way to sum up what we heard throughout the trials and tribulations session. For many planners and strategists, complexity breeds creativity and innovation, and that's always fun.

Flora looked at three different aspects that are challenges faced by planners.

1. As multimedia planners, we're Jacks of all trades and masters of none.

When you plan multi-media, there is so much to learn. Anyone coming from a media specialism background will often feel overwhelmed, thinking that they must have the same level of knowledge they previously had on one or two specialist channels for all channels, and this isn't necessarily the case.

Ultimately it is about knowing what you don't know – things like knowing how to reconcile campaigns, knowing how to book them, or the software required, or even new media platforms that you may not have heard of – and gaps in knowledge can often be overcome by simply asking for help from people with more experience in these areas.

Remembering the following two things will really help you.

- ✓ Lean into your weaknesses, not your strengths. Put effort into the places where you are less confident rather than focussing on the areas where you have the most experience.
- ✓ Learn from the best. Try to work with people who have more diverse backgrounds from yourself so as to gain the best and widest-reaching experience. Specialists are your friends, not your competitors, as a multimedia planner, and it's a great idea to embrace reverse mentoring.

2. Planning bandwagons

Attention, diversity, carbon footprints, green planning, addressability. There are always new planning approaches and considerations which are the trendy new way of doing things.

This is a challenge since ultimately we need to deliver plans that are best for clients, but also we need to make sure we evaluate new ways of doing things and look at how we can keep pace with changing consumer need and marketplaces. For example if considering attention and how it can be used for a client, start by looking at what options are available and then look with a more critical eye at 'how will this work for the client, is it helpful for the objectives and are there any trade-offs?'. Remember less is more. If you layer multiple planning approaches to try to tick every box, you'll end up with a confused plan which will probably appeal to very few people and misses on achieving objectives.

3. Innovative thinking versus doing

Awards and recognition are nice, but it's important to remember that while it's easy to have an award-worthy idea, it's very difficult to win an award. Innovation is a scale ranging from pioneering to tweaks and optimisations. Due to this it's very tricky to aim for the award-winning work because some innovations don't have big payoffs that align with the core objectives, yet they may be small but of substantial value to the client.

When innovating, make sure you focus on delivering against business objectives and ensure you focus on innovations which concentrate on the consumer as they are the ones you are seeking to influence, not media professionals. It's also vital to make sure that you tailor innovations to the client you are working for. Pick your battles on which innovations will be palatable to the client, can be measured and are demonstrable against business objectives.

Section 2

Planning and Strategy Client Case Studies

Following the session looking at the key challenges faced by planners, we asked three top planners to talk about particular pieces of work they have done, either for their clients or within their organisations, which demonstrated how they used tools and data within their planning approaches.

Making Sense: Using IPA TouchPoints as a Launchpad

Pete Buckley, Connection
Planning Director, Meta

Pete Buckley is Connection Planning Director at Meta. Previously Pete led planning at Wavemaker, where he was Head of Journey Design, winning multiple awards, including IPA Effectiveness, Effie and APG Golds.

Pete opened by talking of how in his role he speaks to a lot of clients and agencies, and there has never been a time before where planning as a skillset has been more needed, given the complexity of media and the decisions clients need to make.

Pete said that just looking at the room on the day, it was amazing to see that almost everyone in the audience had experience of using IPA TouchPoints in their roles. Not surprisingly, every single attendee claimed to have read the landmark IPA publication *Making Sense: The Commercial Media Landscape* as it has been downloaded over 50,000 times. This really was heartening to hear, that studies such as these are informing the decisions planners are making day to day.



Pete talked of how the industry came together behind the *Making Sense* initiative to use the single-source IPA dataset TouchPoints to better inform clients and agency planners on how the commercial media landscape is evolving. *Making Sense* is trusted, independent data that busts myths. Before going on to detail how *Making Sense* provides the ideal foundational launch pad upon which further investigative studies and analysis can be layered. Pete talked of how it is so vital to have this solid foundation, since without this bedrock good planning is simply impossible.

Pete talked about looking at busting myths in media. Saying how we so often focus on younger audiences as being the “ones to watch” for significant shifts in media usage. Although this may have been the case back in 2019, in the 2022 edition of *Making Sense* we see that actually 16–34’s media behaviours have experienced very little change, whilst the 55+ audience has seen substantial growth in digital usage. Of course understanding audiences isn’t just about busting myths. It is often also about revealing surprising truths that may not be what we expect. **“Reach, time spent and attention are proxies of potential, but it’s outcomes that really count,”** Pete said, adding that without these proxies of potential, you can’t build a solid hypothesis upon which test and learn can occur.

In 2021, Oxford University and Kantar ran the largest ever academic study into brand building based on \$13 billion of brand spend and found that campaigns that used a diverse mix of channels are more efficient and effective.

The study recommended three key considerations for effective brand planning.

1. Different outcomes require different plans.

The shape of the optimal plan should depend upon the desired brand outcome.

2. Mix channels and attention levels. Kantar recommended that no single channel on a brand plan should take a greater than 50% share of the media budget.

3. Digital/traditional is a false dichotomy.

Functionality is not cleanly segmented and combinations of media are key.

Sometimes as an industry we jump on bandwagons and look for silver bullets, but in reality the media landscape is extremely complex. A nuanced understanding which utilises data from many different sources is often required to really see what is going on. This approach will ultimately help us to understand how plans can be made to be as effective as possible in delivering against brand outcomes.

Understanding the split between long and short-term ROI for campaigns and how each media varies in its delivery against these metrics is fundamental to planning media today. Some media, such as Search, will perform very well for short-term activation but won't have any real impact on long-term brand building, while TV, for example, may prove to be the opposite. Back in 2013, Les Binet talked of the 60:40 rule for brand building and activation in *The Long and the Short of It*. Today in 2022, whilst this may vary by category, largely the rule still holds true.

The final fact Pete closed on is that Dr. Simon Broadbent, the creator of the IPA Effectiveness Awards, was actually a media planner at Leo Burnett. One of Pete's favourite quotes from him is, "*Evaluation is like spotlights on a statue from different angles: the more you use, the more clearly you can see what you're looking at.*" This has never been truer in the industry than it is today.



“Evaluation is like spotlights on a statue from different angles: the more you use, the more clearly you can see what you’re looking at.”

Dr. Simon Broadbent



OMD UK & McDonald's AV Planning Principles 2022: IPA TouchPoints Case Study

Jessica Bates, Communications Planning Manager, OMD UK



Jessica Bates is a Connections Planning Manager at OMD UK. Jessica has worked on multiple award-winning campaigns for McDonald's and was shortlisted for Thinkbox's Young TV Planner of the Year 2022.

Jessica presented how TouchPoints data played a crucial role for McDonald's AV Planning. OMD needed to understand the challenges of the AV market and gain insight into the ever-changing consumption trends, including the new AV opportunities available, in order to optimise McDonald's AV activity.

When looking at the AV landscape holistically, there were three clear challenges OMD needed to overcome. Those were: the decline of linear TV viewing; high TV inflation; and SVOD increasingly stealing attention away among younger audiences.

OMD needed to analyse the changing AV habits among McDonald's predominant audiences; to safeguard AV reach and align with industry trends.

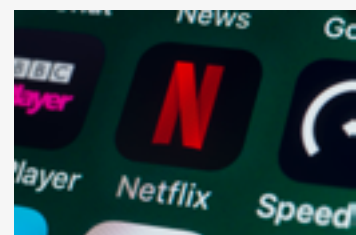
Fig 11. Audio visual landscape challenges.



Linear TV viewing is declining vs. younger audiences



TV inflation is increasingly high

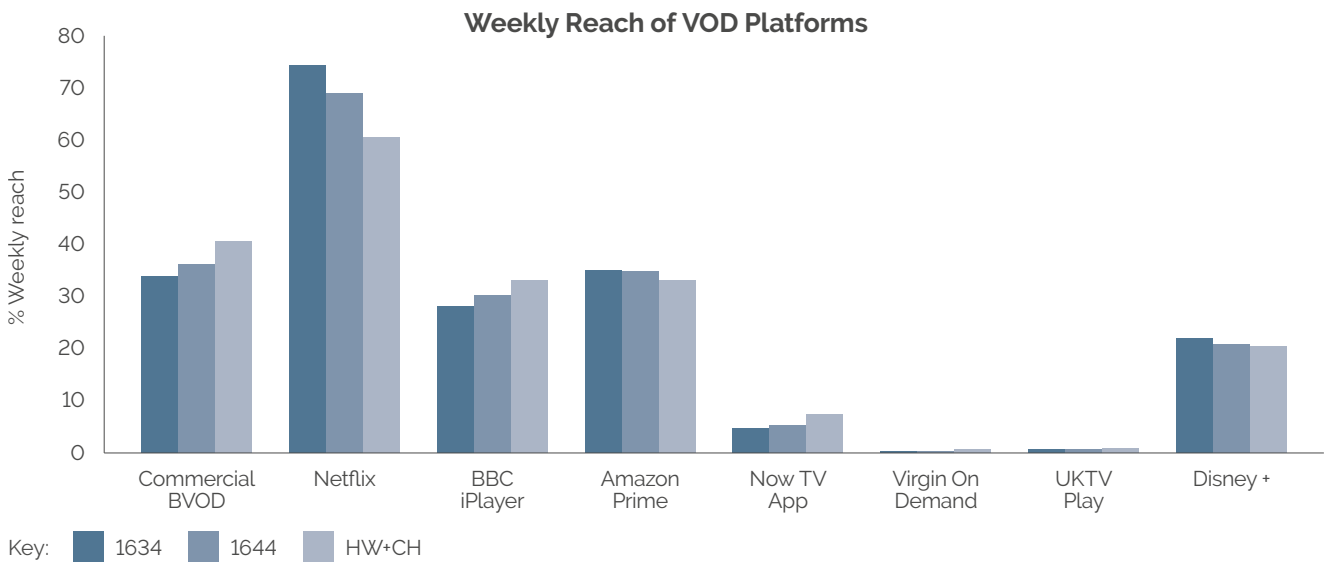
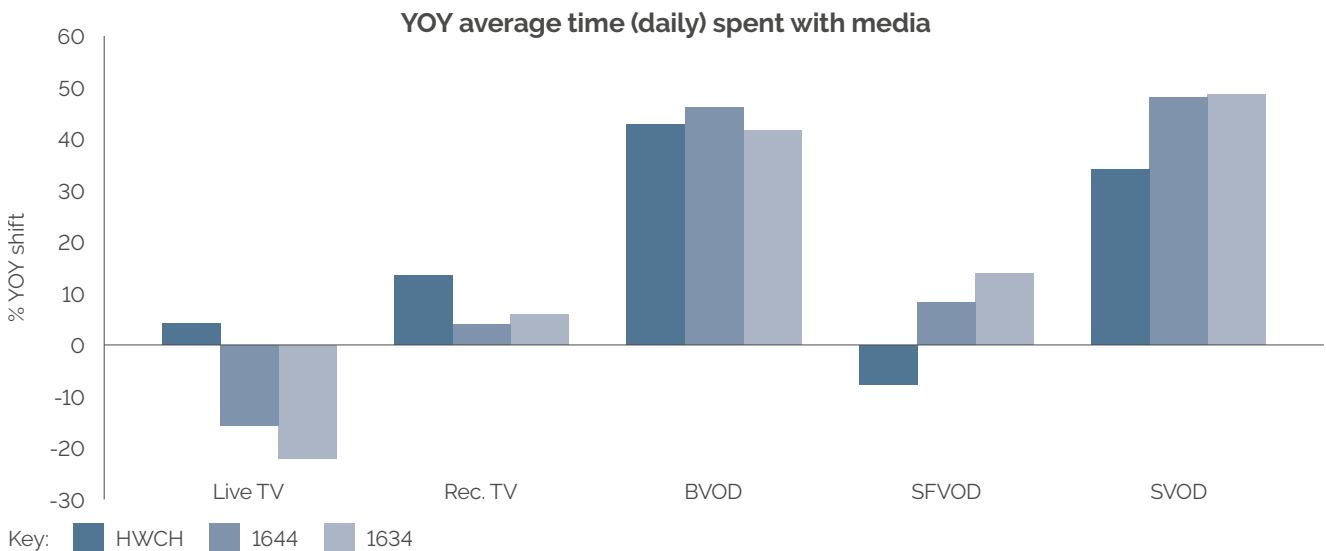


SVoD viewing is rising in conjunction with a rapidly changing media landscape

We needed to understand new AV trends to understand where our audience are and how their consuming

Source: Jess Bates OMD.

Fig 12. Using TouchPoints to show AV trends.



Source: IPA TouchPoints 2020, 2021.

TouchPoints allowed OMD to see a clear picture of the current AV landscape for their core audiences. Using the 2020 and 2021 surveys, OMD were able to work out the YoY changes in time spent and weekly reach for each AV channel to see where consumption habits were shifting to. This would ensure that their future AV activity optimised reach, through channels McDonald's audiences are consuming the most.

TouchPoints data also allowed OMD to understand which VOD platforms McDonald's audiences were turning to and to compare reach of the main VOD players in the market. This was important for OMD to understand in light of the surge in VOD consumption, and to identify new opportunities within highest reaching platforms.

TouchPoints data set the foundations for OMDs new AV planning principles. The insights reflected the main challenges and also highlighted where consumption habits were shifting – towards increased short form VOD viewing and further AV digitisation.

In the face of declining linear TV impacts, OMD recommended new AV investment splits to drive optimal AV cover throughout their campaigns. The data also led to exploring new in-market AV opportunities in channels/platforms where OMD could see audiences spending the most time.

In Loving Memory: How Co-op supported the bereaved during COVID-19

Tom Goddard, Account
Director, Carat

Tom is an Account Director at Carat UK, leading teams that deliver media strategy, new business pitches, and transformative client/partner relationships. Tom joined Carat in 2013 as a graduate and, over the last 9 years, has progressed to director level, where he has gained experience across retail, travel, finance, and fast-food. Tom's focus on putting people at the centre of his work has resulted in award-winning campaigns that have been recognised by the industry.

Carat had a challenge to address. Funeral care is a very difficult category. People don't want to engage with thoughts about death. This results in people being unprepared at times of extreme emotional stress. Co-op also had a legacy perception challenge of "the Co-op funeral." Co-op wanted to be the preferred choice for consumers, offering a more personal experience.

Therefore a new brand proposition – "Personal every step of the way" – was developed with a focus on personal choice, flexibility and tailored products and services. Carat had to make sure that the communication would not be misinterpreted with overly staged sympathy.



Carat gathered insight resulting in an understanding that Co-op Funeralcare was seen as more functional rather than emotionally supportive. Carat needed to change this perception by re-evaluating their channel mix with this new goal, of offering a more personal experience, in mind.

Fig 13. Shifting from the functional to the emotional presented an opportunity to re-evaluate our channel mix against our new brand goals.



Source: Carat.



Fig 14. Informative articles across Reach's national and regional titles.

Source: Carat / Reach.



Fig 15. Bespoke locally sourced obituaries providing the opportunity for the bereaved to celebrate the lives of loved ones lost.

Source: Carat / Reach.

Carat worked with media partners to create an authentic platform to tell the full story of Co-op's Funeralcare service. This included personalised touches, the dedication and expertise of the funeral directors, simplified admin, and the wider support network, such as probate and bereavement counselling. Then COVID hit... people couldn't give their loved ones the send-off they wanted to. People were confused, scared and lacked guidance on how to navigate through such a tough time.

So Carat went back to the Co-op mission – championing people that need help. Carat decided to use media for good; to help and support people in their grief through practical guidance and a personalised dedication to their loved ones at a scale not previously achievable.

Carat needed to use media channels that people trusted. IPA TouchPoints and CCS showed that the highest-ranking channel for their audience was Press. Carat worked with The Storylab & Reach. Carat used Reach to deliver a national update on everything people needed to know about funeral arrangements during COVID, providing the clarity that people weren't getting.

Then, at a time when people were not allowed to enter hospitals to say goodbye to dying relatives, Carat brought the obituary back into local press; a space in which families were given the chance to pay tribute and say goodbye in the absence of being able to attend funerals.

They proved that both emotional (not functional) and branded media can help build consideration, which was vital for Co-op to grow their business. Most importantly, Carat saw how the campaign affected real people; Reach received lots of messages of thanks for the tributes, proving that Co-op really did help people in their darkest hour.

Carat have been able to develop Co-op's activity to maintain a consistent brand strategy, showcasing the "Personal very step of the way" proposition. They are delivering more brand partnerships, as well as a return to broadcast media, through Brand TV, Radio and OOH.

The campaign provided the catalyst to prove that brand media works and is vital in driving media effectiveness and ultimately business performance.

Section 3

**Expert Panel:
How do we resolve
the challenges faced
by planners and
what does the future
of planning look like?**

Expert: Zehra Chatoo

Zehra Chatoo, Head of Connection Planning, EMEA, Meta



Zehra's key focus is on driving consumer insights and brand building to achieve business growth. Zehra is currently co-running the Insight Live webinar series that over 18,000 marketers across EMEA have attended. Zehra has been a guest marketing lecturer at the University of Oxford, focusing on brand building in the digital age.

Previously Zehra was Head of Strategy at MGOMD, working across a range of brands, including Estée Lauder Companies, Starbucks, Virgin, Sony Pictures and government comms.

Zehra has won numerous industry awards for her strategic work, including IPA Effectiveness, Cannes, MediaWeek and Campaign awards, and was named as one of the top 30 ecommerce influencers of 2021.

Simon: Today we have celebrated planning and how sometimes it may be a forgotten discipline. But we are hearing about the growth of planning and the migration of media planners from agency to media-owner side – can you tell us about the role of a media planner in a media owner and how it differs from agency planning, and also about some of the similarities?

Zehra: The first thing I would say in terms of the migration of media planners from agency to media-owner side is that it's actually more of a growth. My role at Meta was actually a newly created role and we're seeing this increasingly in media owners. That's a great sign to see that planning is being celebrated and, more importantly, being invested in.

In terms of similarities and differences between the two sides, the similarity is that we are all, as planners, looking to solve business challenges for our clients and unlock growth, and that doesn't change.

The thing that differentiates the two sides is really the toolkit available. As a media owner, you just have such a great level of depth to the data available about your platform. I'm a huge lover of research and insight, and, needless to say, I've loved every presentation we've seen today, and, for me, just having such a huge amount of data to work with for 3.6 billion users on Meta platforms is hugely exiting.

Simon: If there is one thing that you could change now to improve planning and strategy in the future, what would it be?

Zehra: One trend that has come out really clearly from this morning is the point about diversity. We know from extensive research that diverse teams create better work and we also know that representative advertising drives better performance. To spotlight one thing, it's not just about diverse teams, but we have to create the environment for diverse teams to challenge things and call things out in order to get to that great work, and that's not easy. We need to make space for uncomfortable conversations. As we know, ideas don't go wrong at the end; they go wrong at the beginning. We need to create space for the right people and the right conditions to challenge bias and that will ultimately lead to better work going forward.

Expert: Rich Kirk

Rich Kirk, Chief Strategy
Officer, Zenith



Rich is CSO at Zenith UK, the ROI agency. After starting out in SEO and building Zenith's organic search team, Rich moved into media strategy and has led planning teams for major brands, including Toyota, AEG-Electrolux, NatWest, Aviva and Nespresso. He also spent two-and-a-half years at Amazon Advertising, leading their brand strategy capability.

Simon: There are so many great examples today of fantastic planning and strategy initiatives going on within agencies and media owners. Can you tell us a bit how you relay these ideas to your clients and how receptive are they to new strategies and ways of planning?

Rich: In terms of receptivity, yes, clients are certainly receptive to of the idea that media planning is becoming a more important field, and the reason I can say that with confidence is that with every client contract we re-negotiated at the end of last year, for the first year ever, every single client signed off on having more senior level media planners working on their accounts, and largely this was driven by the clients' requests.

With COVID-19, to some degree our ability to confidently understand reach and time spent with media was diminished. I think a lot of clients were looking at media fragmentation as a slow burn trend, but now they're coming back after COVID-19 and realising fragmentation has vastly accelerated. A quote that I'm using quite often at the moment in relation to this is from Hemingway, "How did I go bankrupt? Well I went bankrupt in two ways. Gradually and then suddenly." I think this is pretty apt - Just look at linear TV decline.

So this is what is really driving the upskilling within planning, and there has never been a more interesting and exciting time to be a media planner than now.

The big thing that great planners are doing in terms of new ways of planning is really showing how different approaches to planning would have yielded different outcomes, using historical client data. This is how you convince clients to try new approaches. It's much quicker than a standard test and learn approach.

Whilst before COVID-19 media pricing was fairly predictable, now, in this new world we're in, not so much, and this has meant that now you can differentiate your agency from other agencies on fundamentals rather than fluff, and this is exciting.

Simon: If there is one thing that you could change now to improve planning and strategy in the future, what would it be?

Rich: I think I'd like to see more self-awareness as a planner about our own personal biases. As the media landscape becomes more fragmented, you are much more likely to have advanced in your career as a specialist in a channel, rather than a generalist. We need to remember winning is not getting more money into your favourite channels; winning is getting the best possible plan that produces the best possible results for your clients.

To be a great strategic planner, you need to be the person in your agency with zero agenda around media choices. Others may have agendas, but ultimately strategic planners need to be completely focused on only delivering the best results for the client.

Expert:

Monica Majumdar

Monica Majumdar, Head of Strategy, Wavemaker



Monica is currently Head of Strategy at Wavemaker UK, where a central part of her role is pushing the strategy team to understand audiences and their motivations. She was previously at Verizon Media, where she was Head of Strategy for over two years, leading the comms strategy team, creative solutions team, and helping adapt Yahoo's ecommerce offering in the UK. Prior to Verizon Media, she worked at the Spark Foundry, PHD UK and Starcom MediaVest, working on a range of clients from Mondelez, Heineken, Bel, Royal London, Marriott and P&G.

Simon: Monica, you have extensive experience working in agency and media-owner side. Now you are back on agency side, does your media-owner experience have an influence on your planning process? Could you give us some examples?

Monica: The one key thing I have learned is to really be specific on the questions which you are asking the data source. What can I find out and how can I find out what I need? That's more from a planning or insight perspective. The importance of the clarity of the brief, both for internal and external teams, is universally vital to ensure that nothing is lost along the way. Working across media-owner and agency side really gives you the experience needed to identify exactly what a good brief looks like and how it can really influence outcomes for the best.

Lastly, whether you're a planner or strategist, I would say to have a greater awareness of the numbers and the financials at play ensures that ideas are not only feasible within budgetary constraints but are attainable against the client objectives, and this is true on both sides, media owner and agency.

Simon: If there is one thing that you could change now to improve planning and strategy in the future, what would it be?

Monica: Mine's probably an old one, but very relevant. The idea that "just because you can measure something, doesn't mean that it's the right thing to measure." I think we need to get back to being a bit more discerning. Under COVID-19, we were tracking and measuring everything we could and, to some extent, we moved away from what we actually needed to find out. We need to get back to clarity of objectives and clarity of what you're measuring and, if we can remember that, I think it's a great step towards getting back to great planning for the future.

Expert: Mark Hatwell

Mark Hatwell, Director of Group Strategy, Global Media & Entertainment



Mark leads the Group Strategy team at Global, a team of expert media planners who advise and inspire advertisers on how to best use Global's brands and platforms to meet their marketing and communication goals.

Mark joined Global in 2009, bringing with him ten years of media-planning experience, including planning director roles on L'Oreal, British Airways and Lloyds TSB.

Simon: Mark, as Director of Group Strategy at Global, you have a huge portfolio of audio and out-of-home brands. Historically, audio and out-of-home may have had very different strategy approaches. Can you tell us how you have harmonised strategy that runs across your entire portfolio, and some of the challenges and benefits?

Mark: First of all, in terms of everything we have seen and heard today, it's clearly a hugely exciting time right now to be a planner. I think planners' core craft skills and their ability to bring people together has never been more needed than it is now, we're certainly seeing that at Global.

In terms of Outdoor and Radio, these are two different disciplines of media in relation to their historic commercial cultures. At Global it's important to note, it's not just about reconciling radio and outdoor. We're also social video, branded content, events, experiential, podcasts, streaming, etc. It's almost the entire media landscape in microcosm! The only way you can manage that is by complementing

the established sales approaches with a more planning-led approach that addresses client question first. You've got to be able to look at the offerings we have and say, "How can I tailor this in the best way possible to really deliver against the clients' objectives?"

Different objectives require different planning approaches. For example, at Global we have introduced a planning process which we call Portfolio Playbook which, in essence, allows you to take a "single-page" look at Global properties and start to create different media mixes that optimise against different media objectives.

Simon: If there is one thing that you could change now to improve planning and strategy in the future, what would it be?

Mark: I think it's about a mindset or body language for planning. As mentioned by Flora Williams, we need to accept that we can't ever know everything. Rather than constantly self-doubting what we don't know, I'd call for a boldness across planning; a confidence that we can use our people skills draw on the experience of experts in specific fields to bring people together. It seems like in recent years we have gone through a period of disinvesting in planning, but it feels like we are coming out of that now – in particular, with initiatives such as this inaugural IPA Planning Summit. So, for young planners, I'd say back yourself, be bold, and strive to be the people that the rest of your team will come to first to solve problems.

Until next time

But the Planning Summit didn't end there of course. On the day of the event, it was so wonderful to see new friendships being formed between planners and strategists in attendance. We saw people stepping up to ask questions of those they admired in the industry. Presenters shared their email addresses and opened the doors for new discussions on planning and strategy to happen.

Since the event, we have made the event video and all of the presentations available on the IPA website at www.ipa.co.uk/planningsummit, we have written the first edition of this book *Lessons from the Planning Summit*, and we've been busily planning the second annual IPA Media Planning and Strategy Summit, which will take place on Wednesday, 13 September 2023, so don't miss it.

In the meantime, do feel free to reach out to us with any questions you may have – we're here to help – via Simon@ipa.co.uk or Rebecca@ipa.co.uk

**This is only the beginning.
See you next year.**



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0201. Edition 1. 12/12/22.