

# IPA Media Planning & Strategy Summit **2024**

Facing the future with fresh eyes

# Keynote

**Enyi Nwosu**

Chief Strategy Officer, Universal McCann

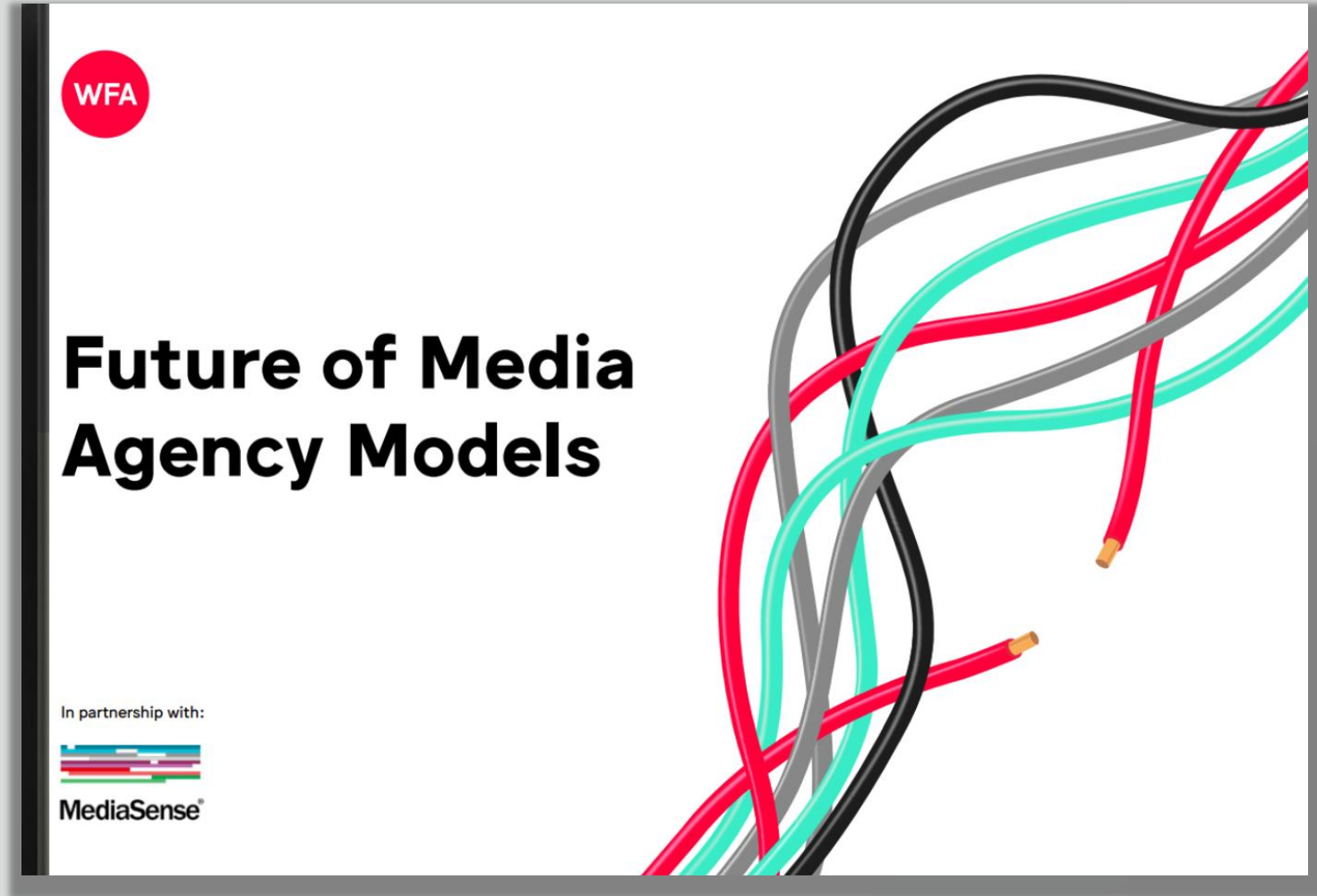
um

# Facing into the Future

## Keynote

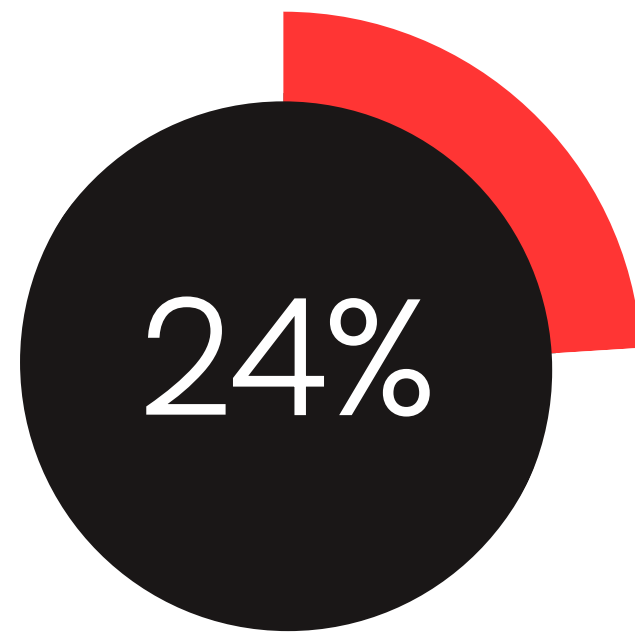
11<sup>th</sup> September

With Enyi Nwosu

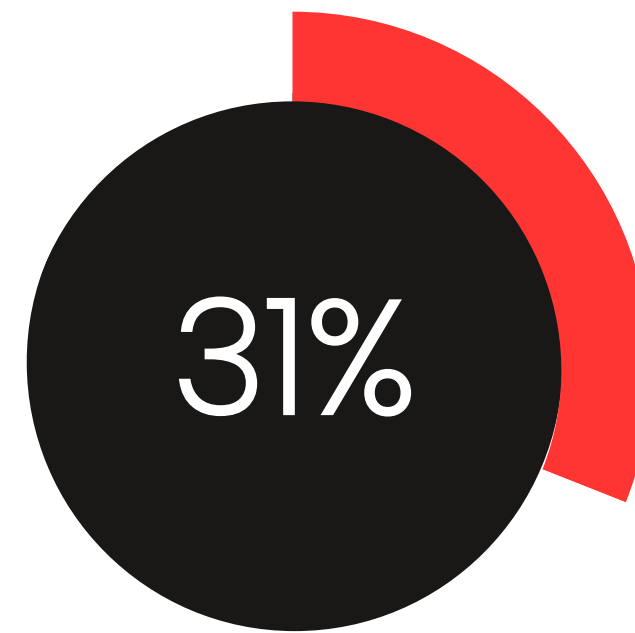




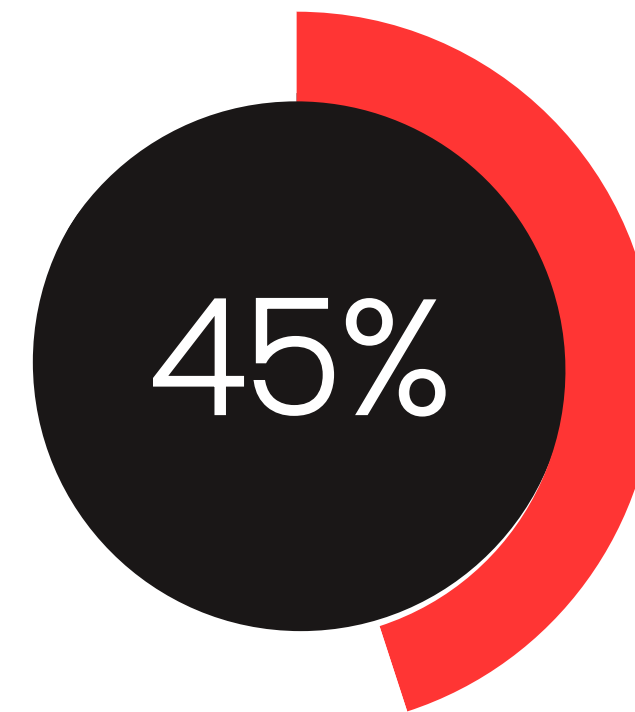
**um** The challenge facing media (all) agencies.....



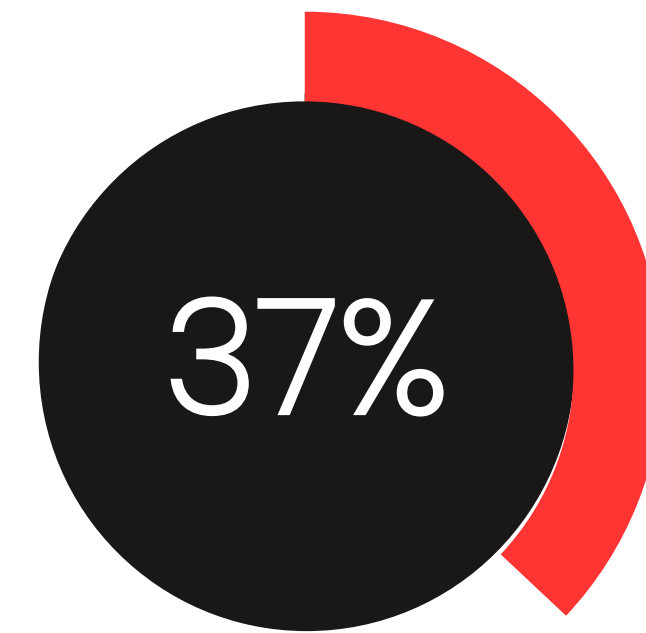
**The current agency model is unfit for future purpose**



**Believe their agencies are fast and agile enough**



**Looking for more flexibility in the way they are served**



**Looking for greater simplification through streamlined partnerships**



01.

# Ask Bigger Questions

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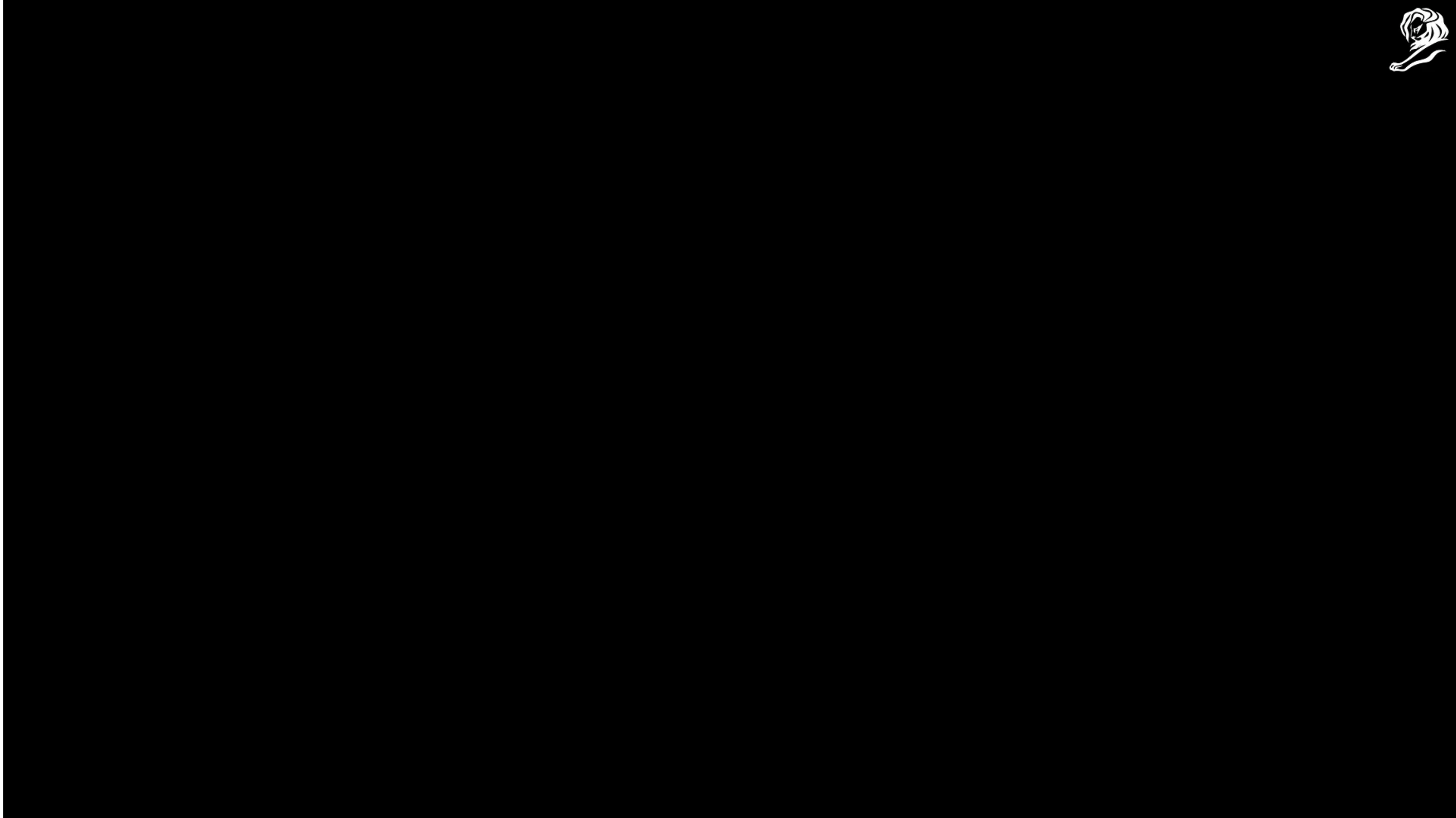
02.

# Be Human

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03.

Create a culture  
of experimentation

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04.

# Behave responsibly





05.

# Connect the disconnected

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# Five Principles



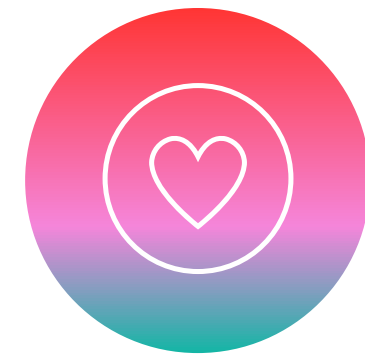
Ask Bigger Questions



Be Human



Create a culture of Experimentation



Behave Responsibly



Connect the Disconnected



um

ΚΙΤΟΣ

شكرا

Dankie

Thank You

Danke

Merci

ευχαριστώ

Mahalo

# Making Sense

The commercial media landscape 2024

**Simon Frazier**

Head of TouchPoints Marketing & Data Innovation, IPA



# Making sense

# The commercial

# media landscape 2024

2024 edition featuring perspectives from Experian, The Freethinking Group, Global Media, Meta, OMD UK, Route, Samsung and Sky Media



[ipa.co.uk/makingsense](http://ipa.co.uk/makingsense)



Since we  
last met

# It's been a real experience....

In the last 18 months, we

- **Twitter** re-brand as **X**
- **Netflix, Amazon Prime**
- A **change of government**
- **Two new annual surveys**
- A complete **re-de**
- More **disruption and innovati**
- **Making sense** switching to a **snar**



*Isn't that a pretty picture? As Sirs Doubtful once proclaimed, and never a truer word was spoken, when we look at the commercial media landscape in terms of weekly reach. Now ordinarily I would go through each media line by line and describe the changes and possible surprises in what we see, but I'm afraid in this case, what we've talked about in looking at share of commercial media time has given the game away. In the chart we have here looking at weekly reach, we can clearly see that OOH is back on form after the interruption of the pandemic period and the associated lockdowns. Interestingly we see that this is now the only commercial media which has the ability in isolation to reach over 90% of the GB population each week. And yet I still feel that OOH often isn't given the consideration it deserves in media schedules.*



## Making sense The commercial media landscape

2024 edition featuring perspectives from Experian, The Freethinking Group, Global Media, Meta, OMD UK, Route, Samsung and Sky Media

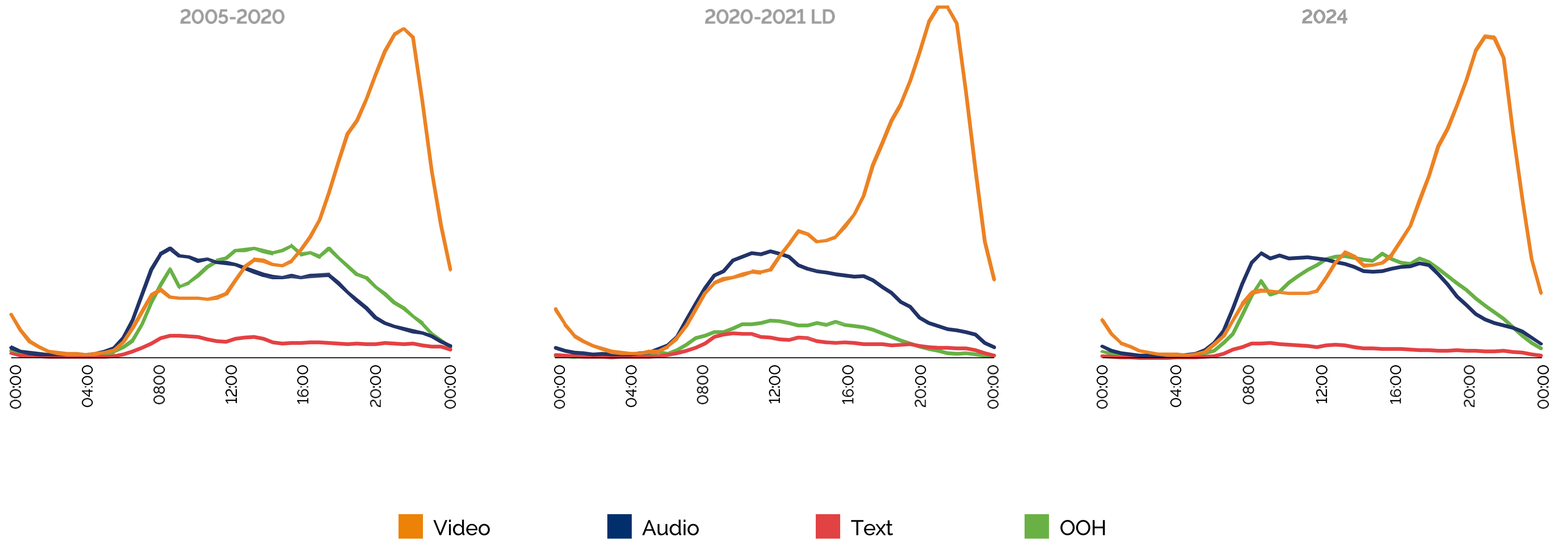
ing into their revenue models

ing and **Strategy and Insight**

for its **sixth edition**

# But has it though really, being honest?

Patterns of media consumption haven't changed at all despite all this disruption



Source: IPA TouchPoints. The patterns of video, audio text and OOH consumption across an average day.

# Inspiration often strikes in the strangest ways

“*There's nothing you can do that can't be done....*

*Nothing you can make that can't be made...*

*There's nothing you can know that isn't known...*”

The Beatles – All you need is love, 1967

**Smooth**  
Radio  
Always the best music



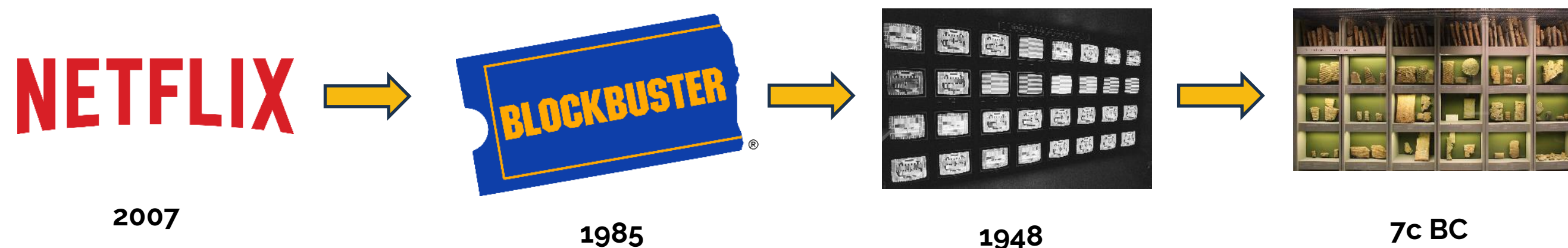
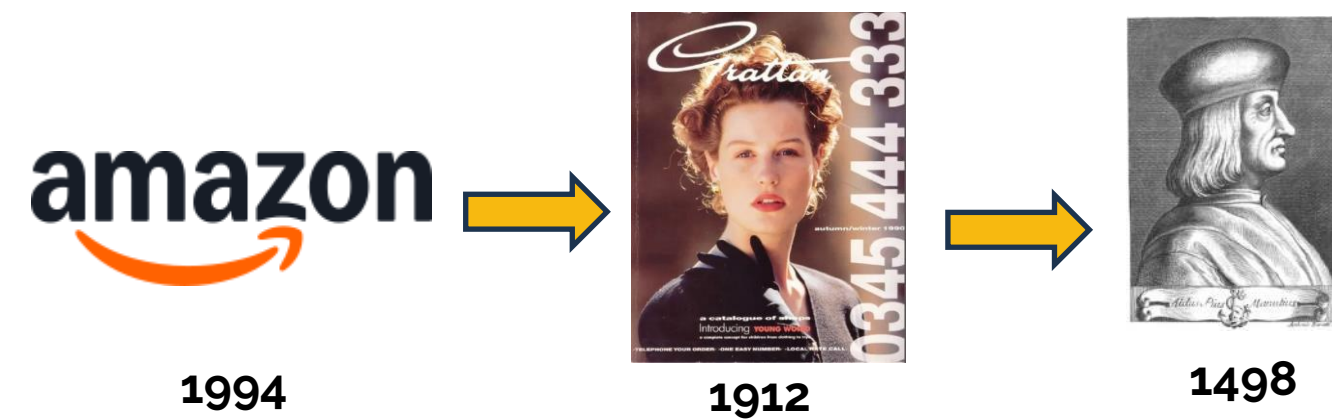
 globalPLAYER

**TUNE IN**



# But what is disruption?

**Disruption (n)** - An interruption to the regular flow or sequence of something.



**The word disruption encourages us to be dazzled when we need to be more Toto**

*Pay no attention to the person behind the curtain*

The Wizard of Oz, 1939





## **Disruption (new definition)**

– The evolution of media delivery in line with technical advances

***Pay more attention  
to the person behind  
the curtain***

**There is great power in  
precedent**





**Remember....**



















**Woody only sees Buzz as a threat until he realises...**

- 1. Buzz can't fly he just falls with style and his 'laser' is just a blinking light**
- 2. Andy's requirements of the toys are the same as they have always been**



# The battle to keep up with the Joneses / #OMGHaveYouSeen?!?!

Services required in order to answer yes

| 1995  | 2005  | 2015  | 2024   |   |
|---|---|---|--|---|
| <br> | <br><br> | <br><br> | <br><br><br><br> | <br><br><br><br> |



# The challenge of subscription choice overload

- Rising production costs
- Excessive competition
- Constant need to innovate
- A cost-of-living crisis
- An insatiable consumer demand for good content
- Slowing subscriber growth due to possible market saturation
- **If only there was an answer to all the above.....**





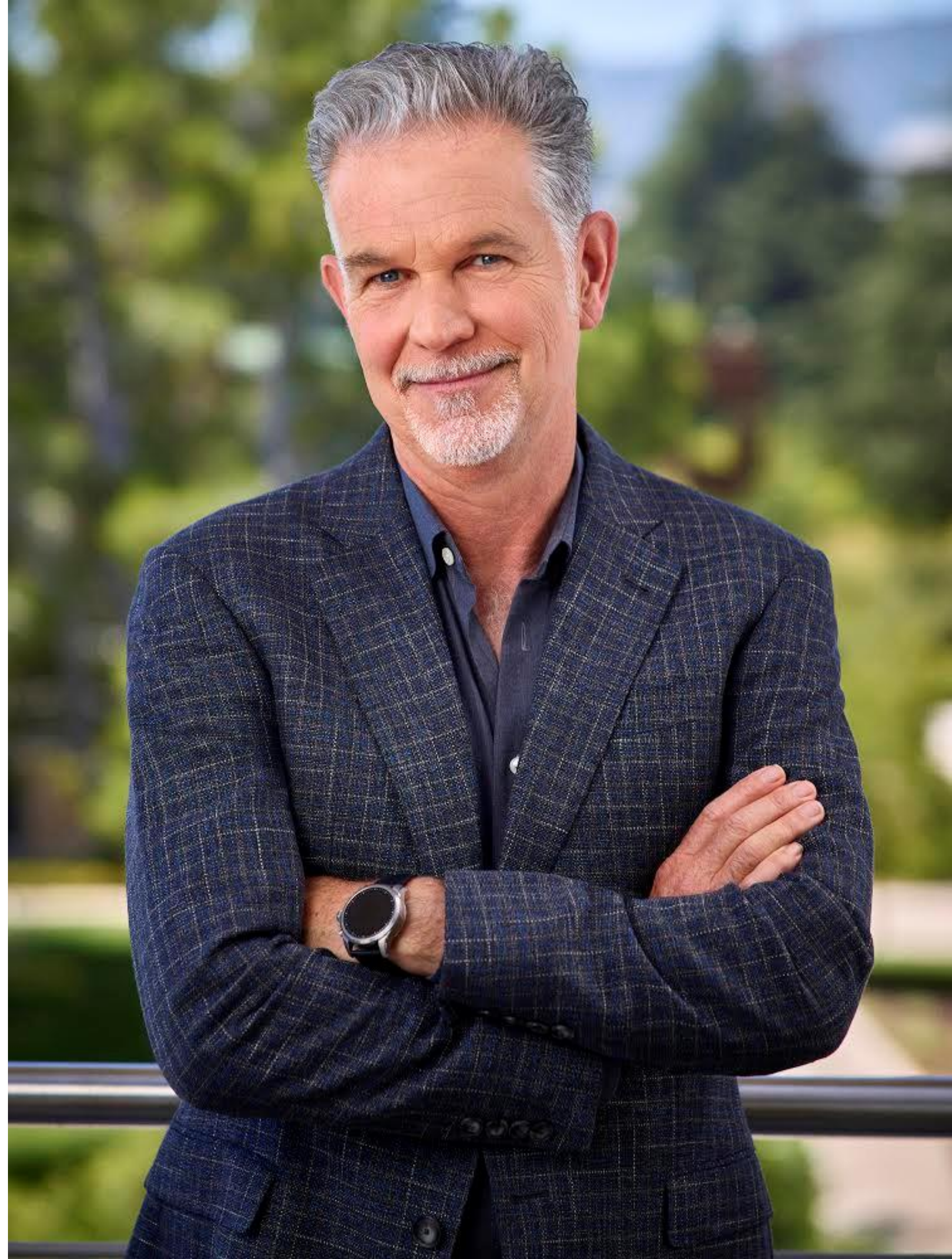
*We want to be the safe respite where you can explore, get stimulated, have fun and enjoy with none of the controversy of advertising*

*We've got a much simpler business model. We're not tied up with all that controversy around advertising*



*I didn't believe in the ad-supported tactic for us.... I wish we had flipped a few years earlier on that, but we'll catch up*

Reed Hastings, 2022







*Well, well, well, they think they can do better, but they always come crawling back to Estelle*

Estelle Leonard, 2001



*“No  
harm,  
no foul”*

Estelle Leonard, 2001

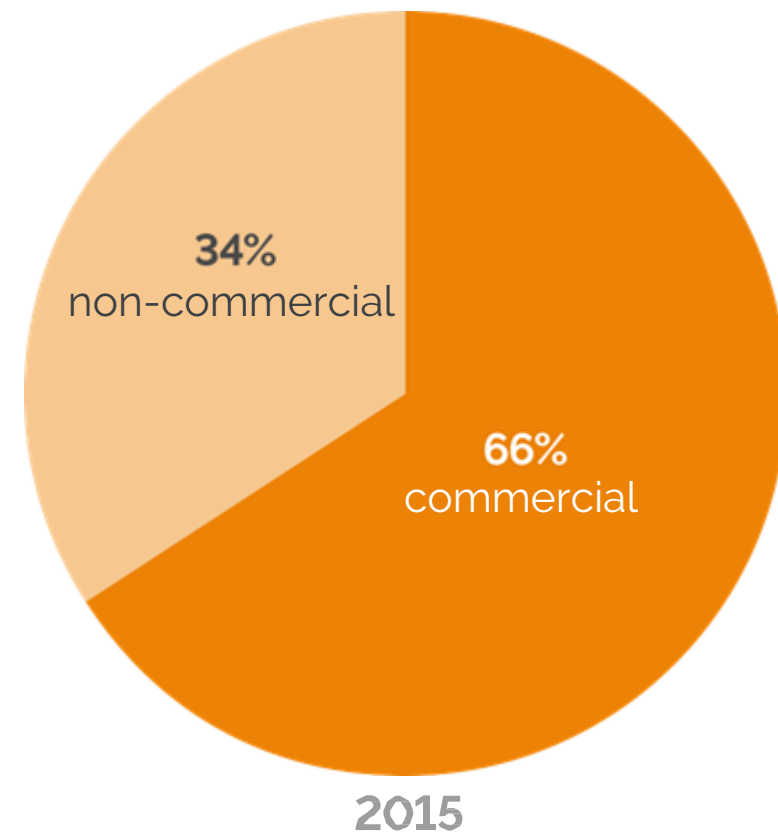




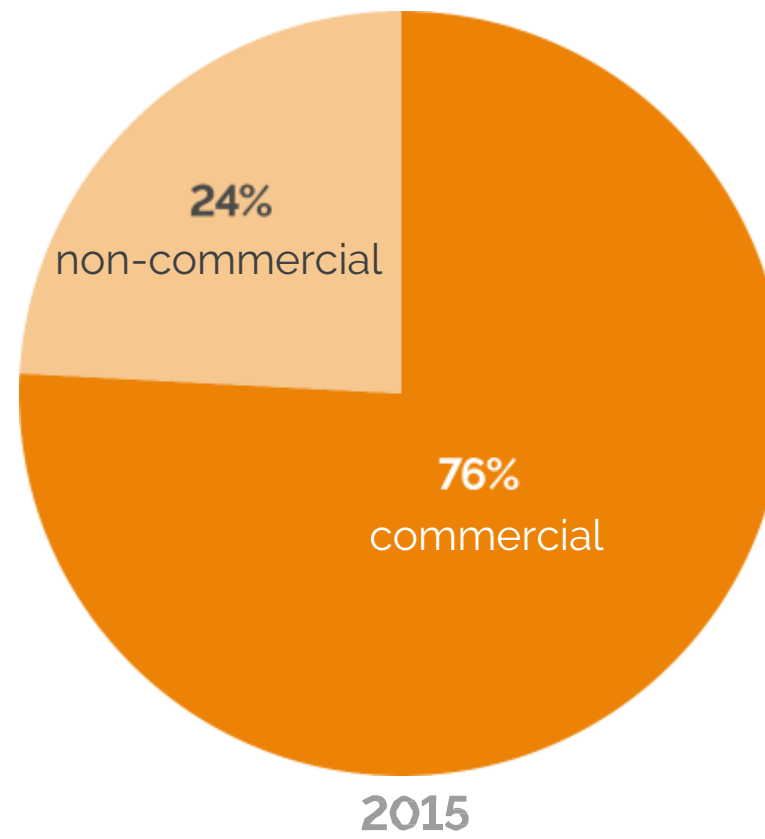
# Back in 2015, the thing I was most worried about losing was commercial media opportunities...

2015

All Adults curated media time share



16-34s curated media time share

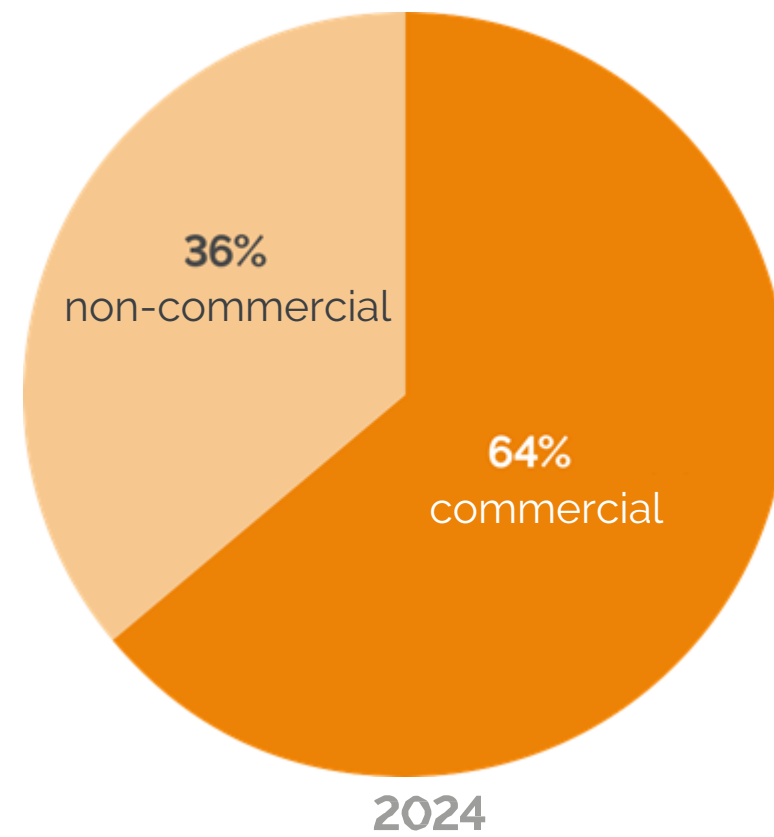




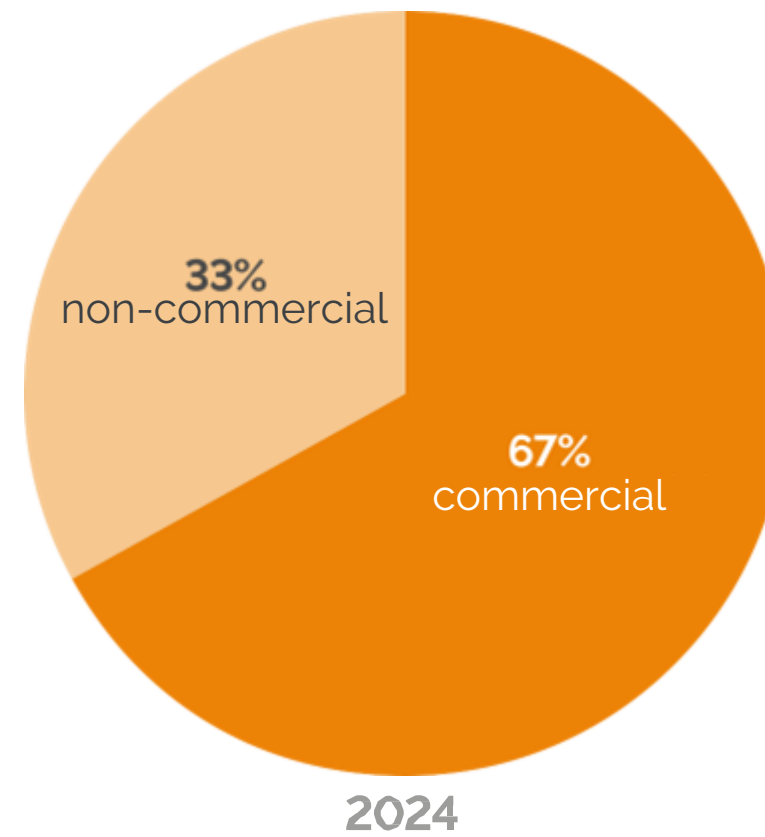
# In 2024 it turns out I was wrong...

2024

All Adults curated media time share



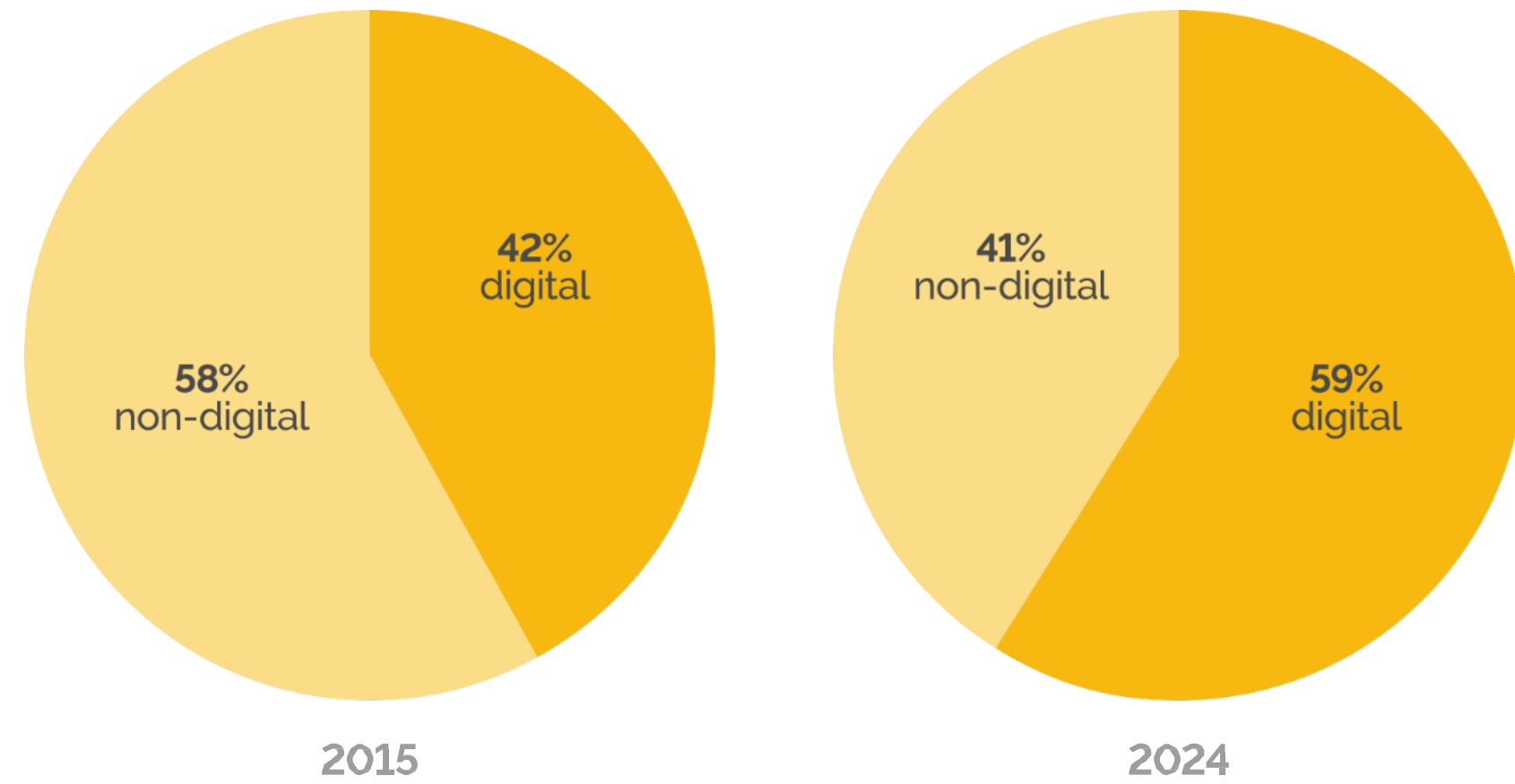
16-34s curated media time share



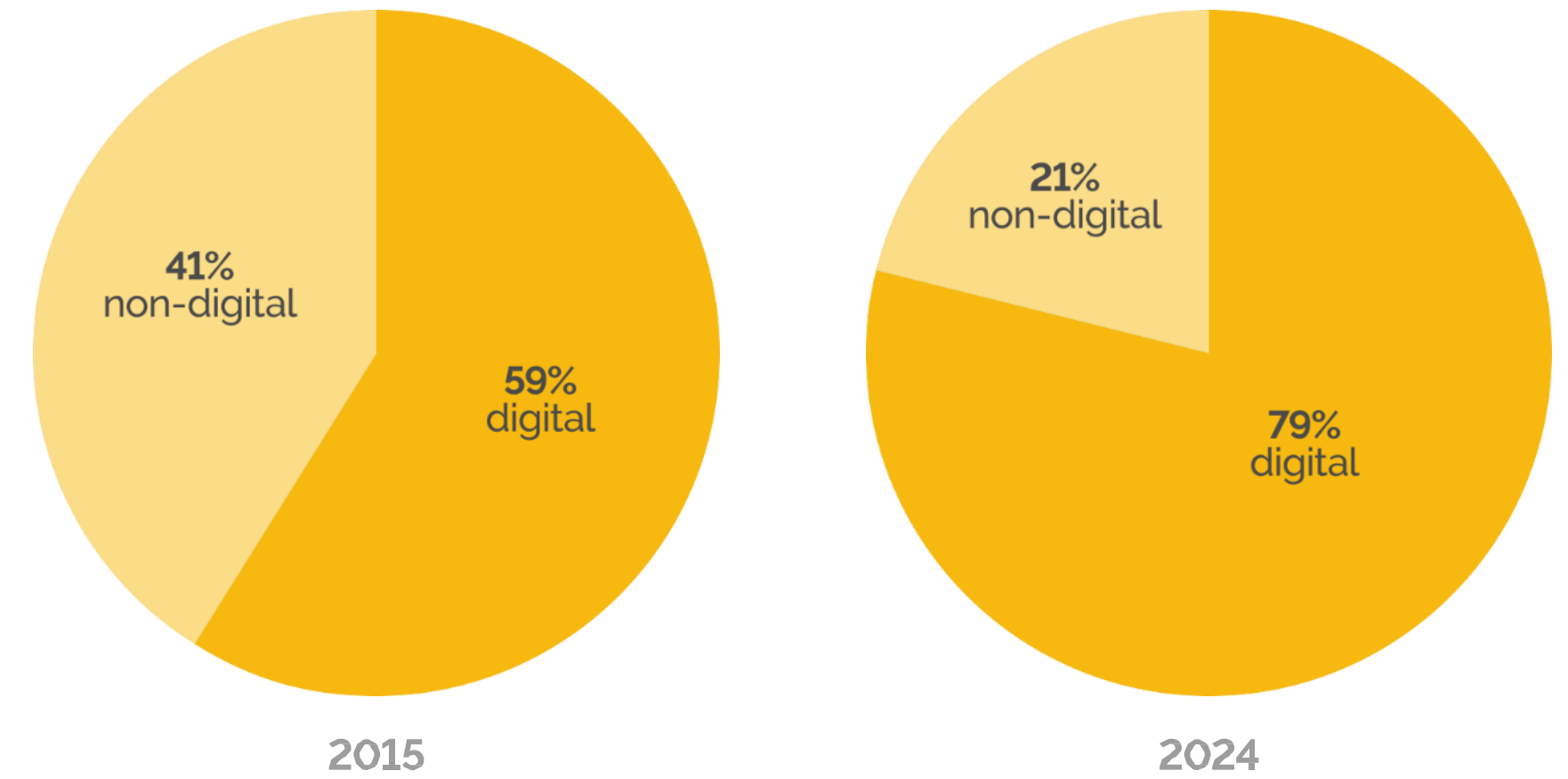


# Is digitalisation really a big deal?

All Adults commercial media time share



16-34s commercial media time share

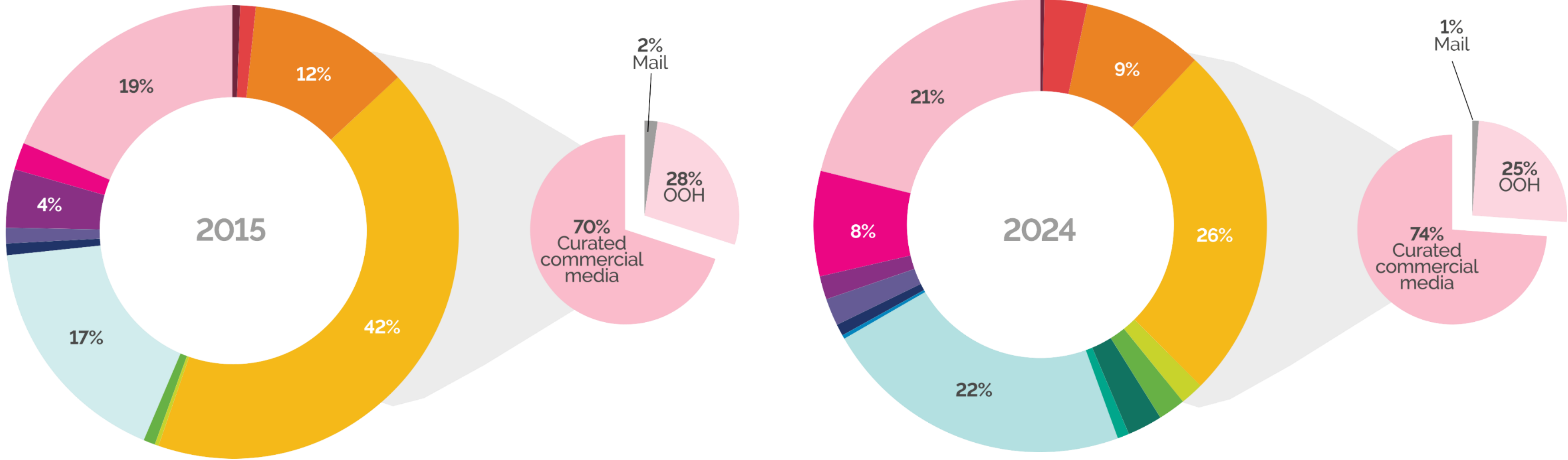




**How we spend**  
**our media day**



# All Adults With great diversification, comes great opportunity

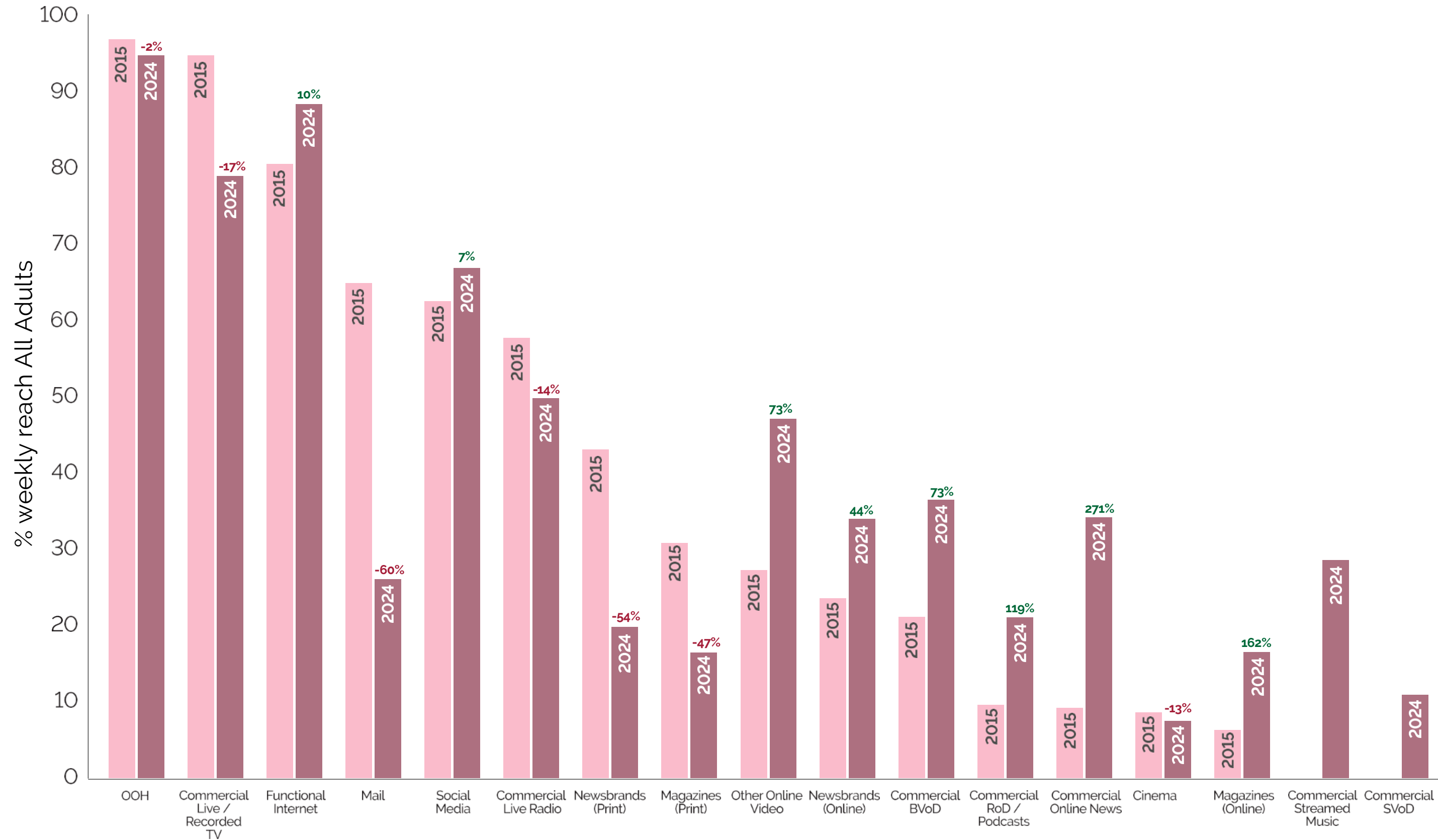


- Cinema
- Commercial Online News
- Functional Internet
- Newsbrands (Print)
- Commercial BVoD
- Commercial RoD/Podcasts
- Magazines (Online)
- Other Online Video
- Commercial Live Radio
- Commercial Streamed Music
- Magazines (Print)
- Social Media
- Commercial Live/Recorded TV
- Commercial SVoD
- Newsbrands (Online)

Source: IPA TouchPoints - Weekly total share of time spent with commercial media for All GB Adults broken down by buyable media types.



# All Adults Decline? What Decline?

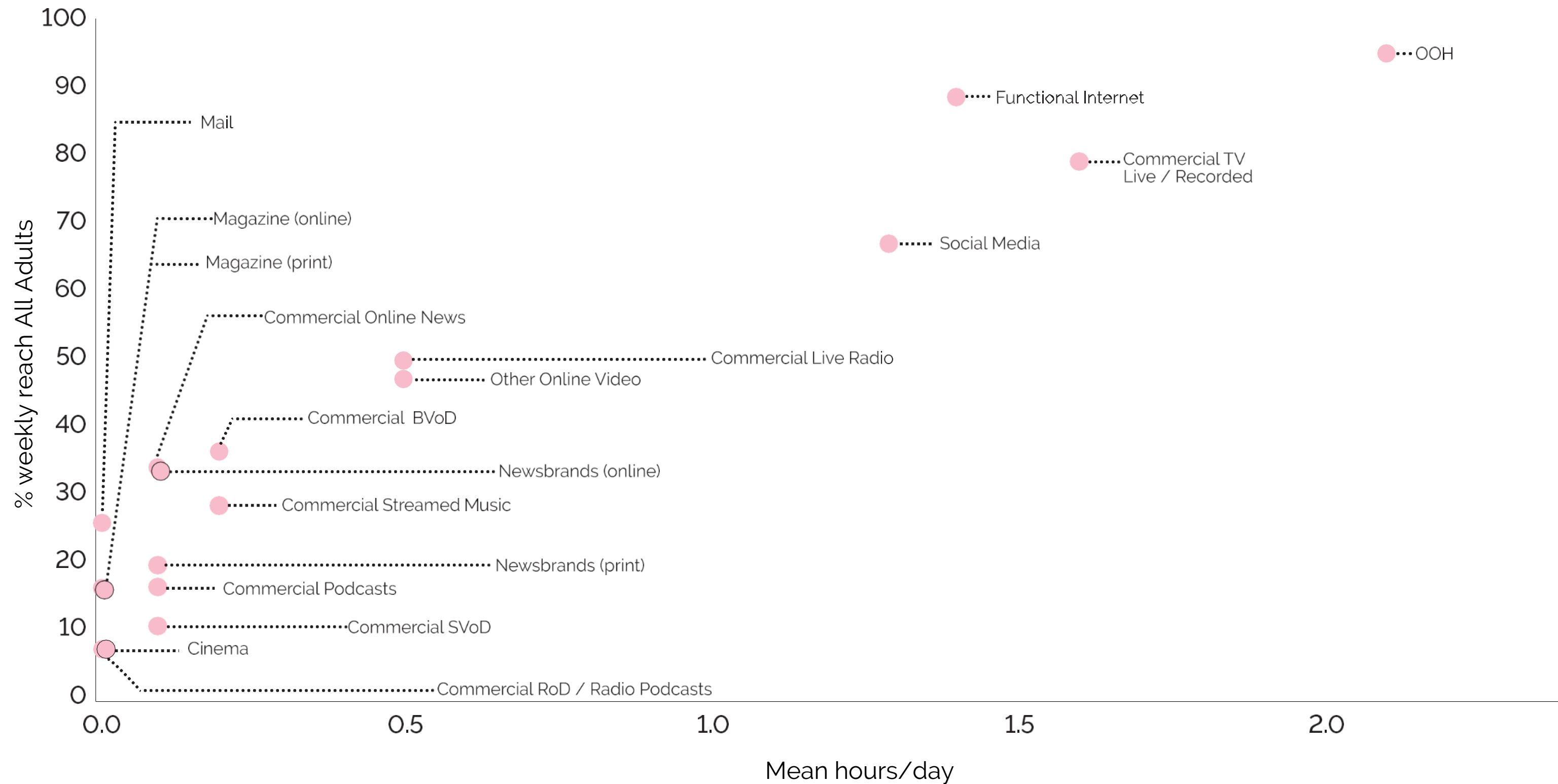


2024 top five properties by weekly reach (All adults)

| Rank | Media     | % Reach |
|------|-----------|---------|
| 1    | ITV/STV   | 51      |
| 2    | Facebook  | 45      |
| 3    | YouTube   | 45      |
| 4    | Channel 4 | 44      |
| 5    | Instagram | 34      |

Source: IPA TouchPoints – Weekly reach of buyable media types for All Adults

# All Adults Every media has a role



Source: IPA TouchPoints – Weekly reach and mean hours per capita per day of buyable media types for All Adults.

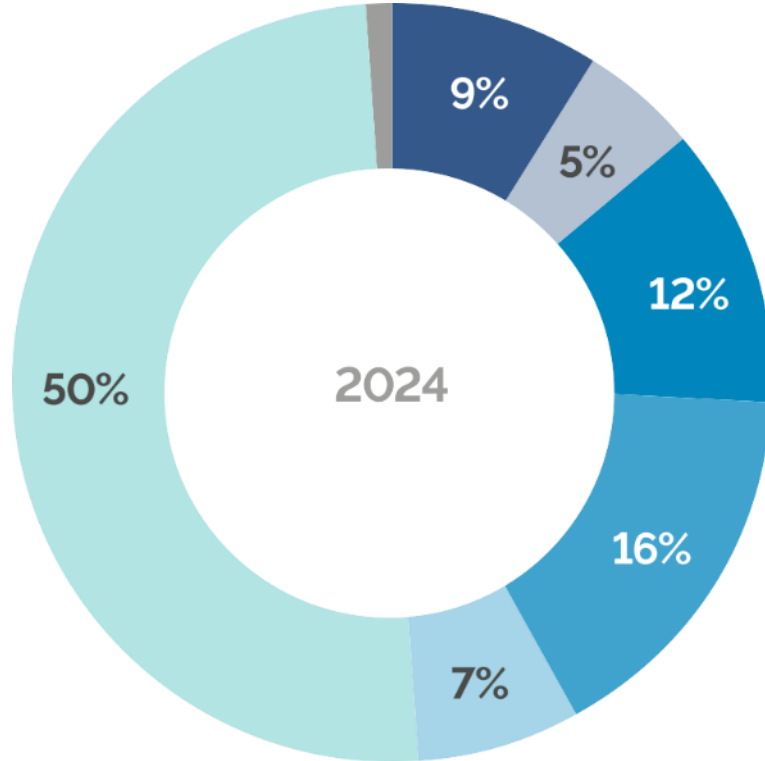
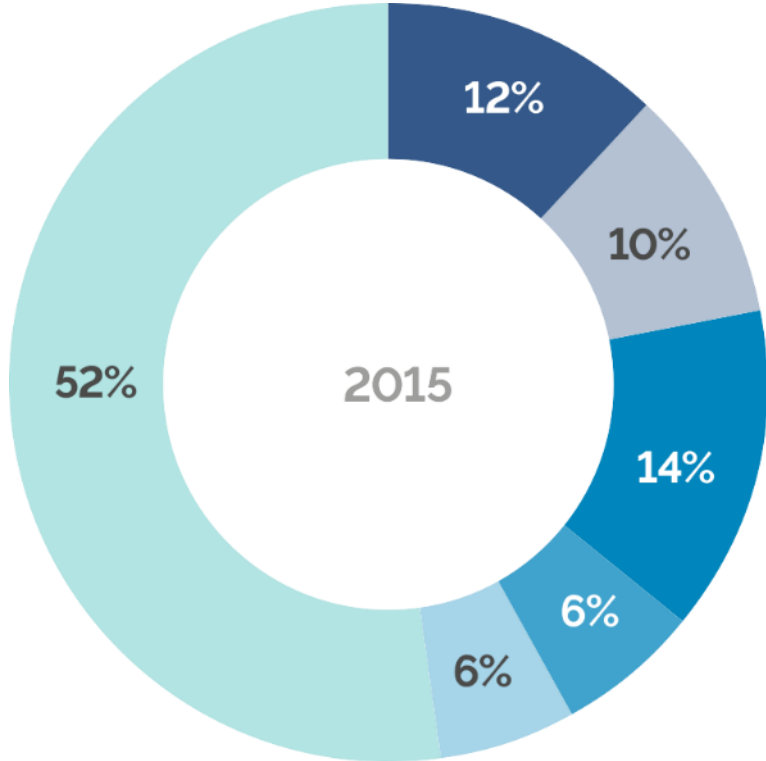
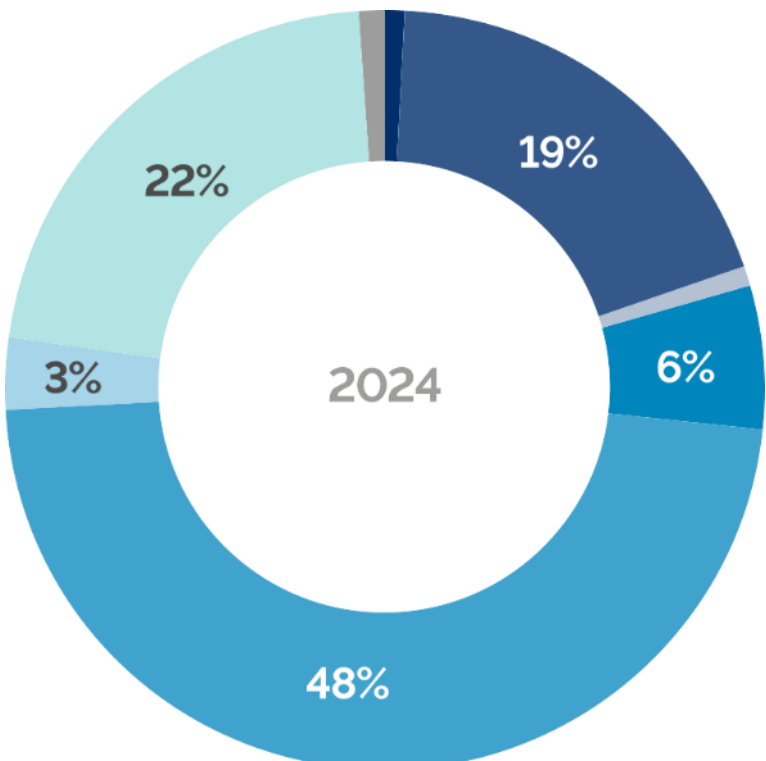
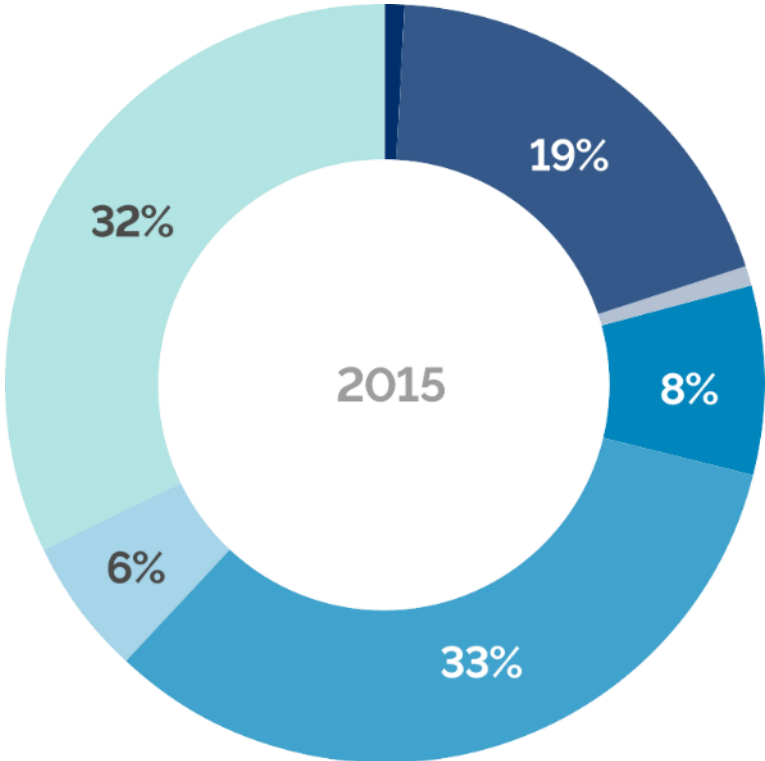


**Small shifts with  
seismic impacts or  
seismic shifts with  
small impacts?**

# Leaving people to their own devices

16-34s

55+



- Console
- Print
- Smartphone
- TV set
- PC/Laptop
- Radio set
- Tablet
- Voice activated

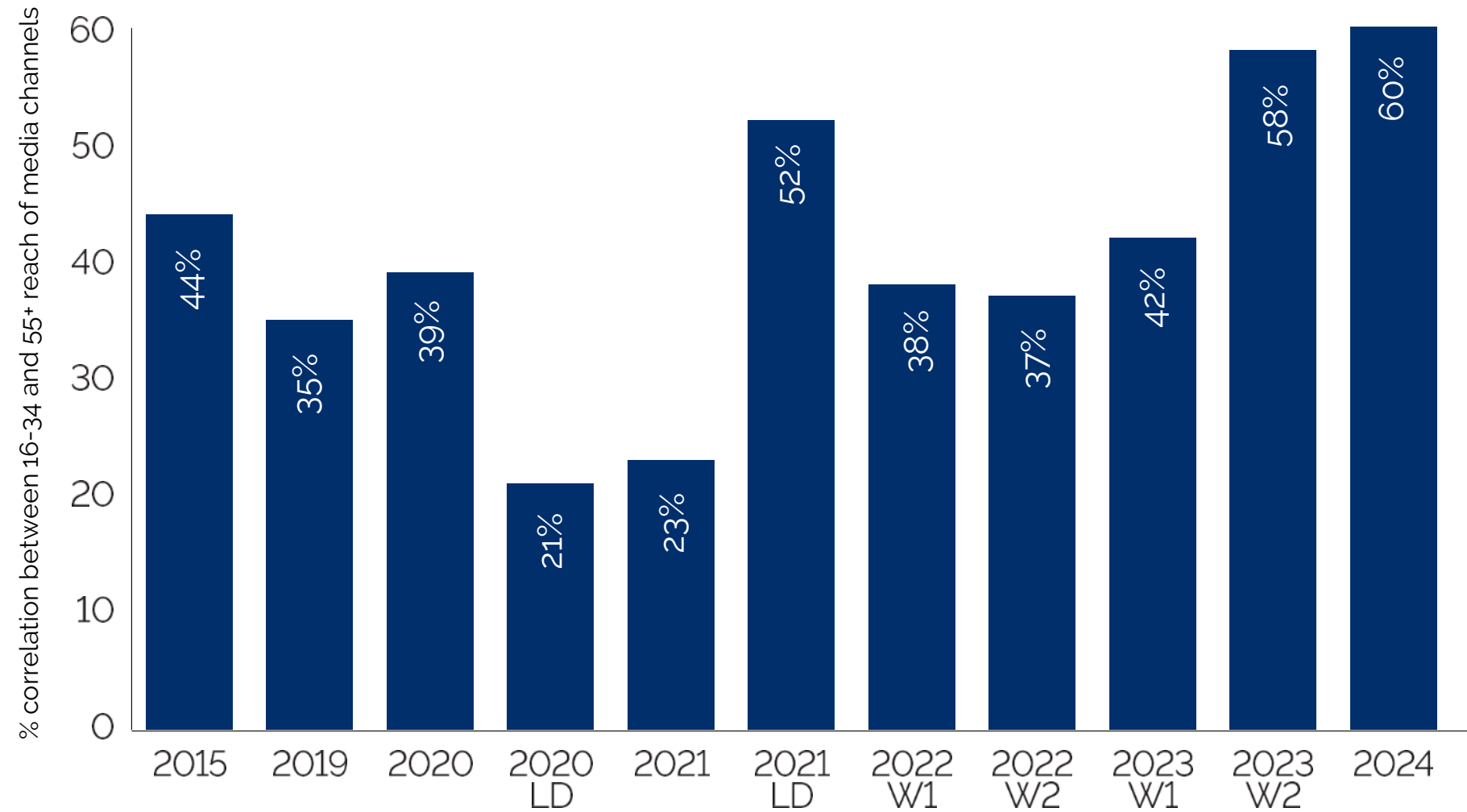
Source: IPA TouchPoints – Share of curated commercial media consumption time by device.



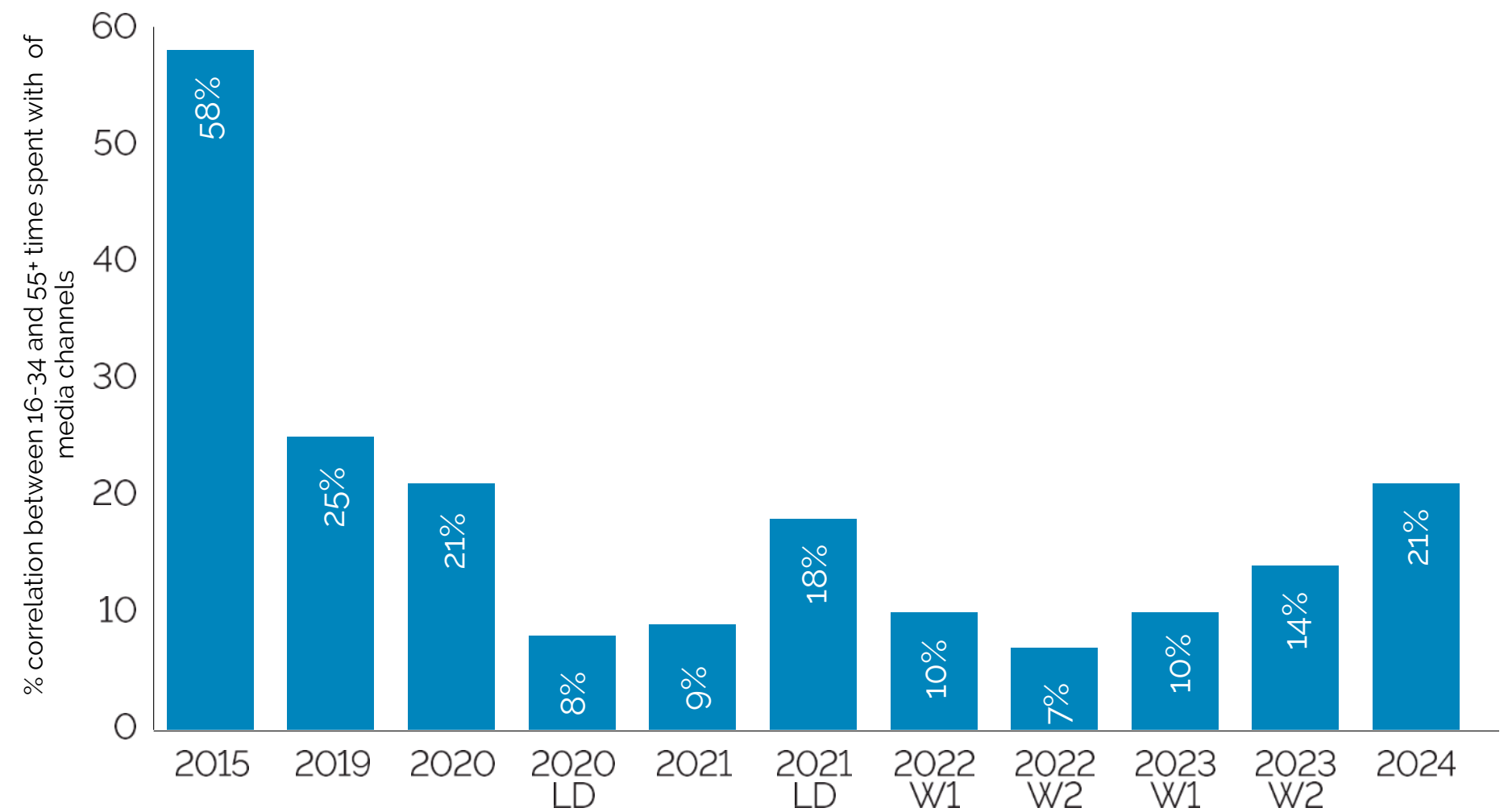
# 16-34 & 55+ are using more of the same platforms...

## ...but not in the same way

Comparing the correlation of the reach of curated commercial media channels between 16-34 and 55+



Comparing the correlation of time spent with curated commercial media channels between 16-34 and 55+

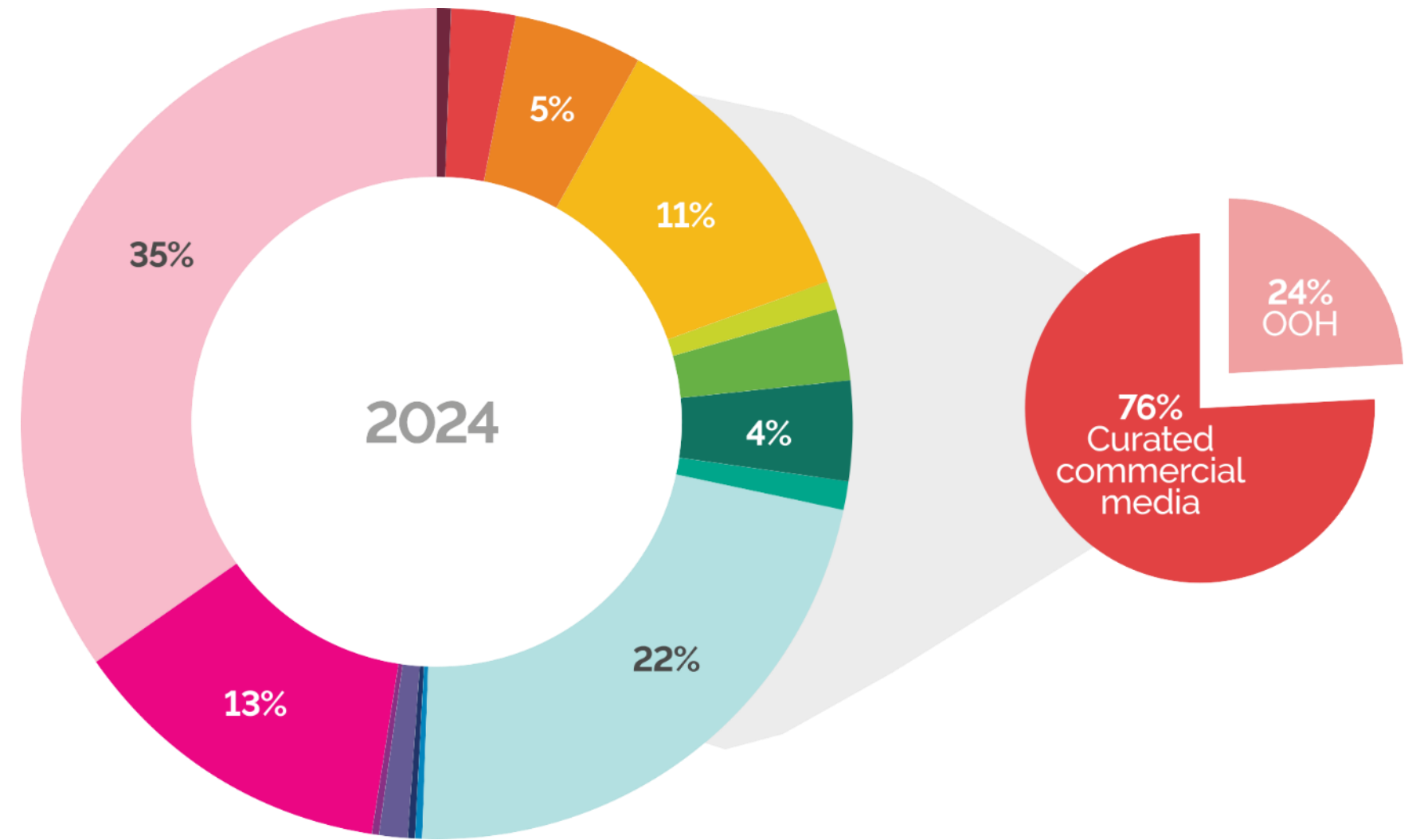
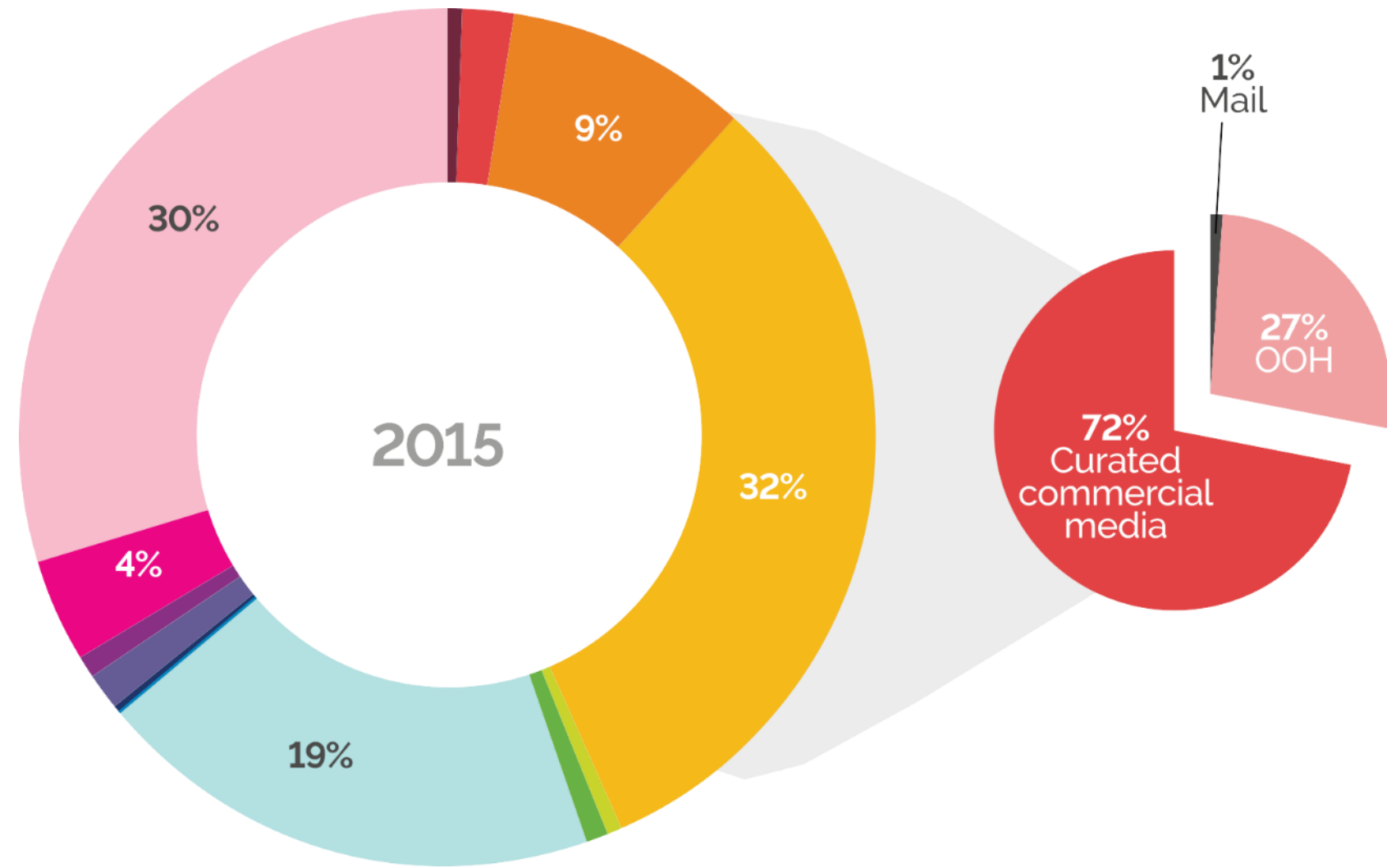


**16-34**

**shifting slowly**



# 16-34 Have we peaked to soon?

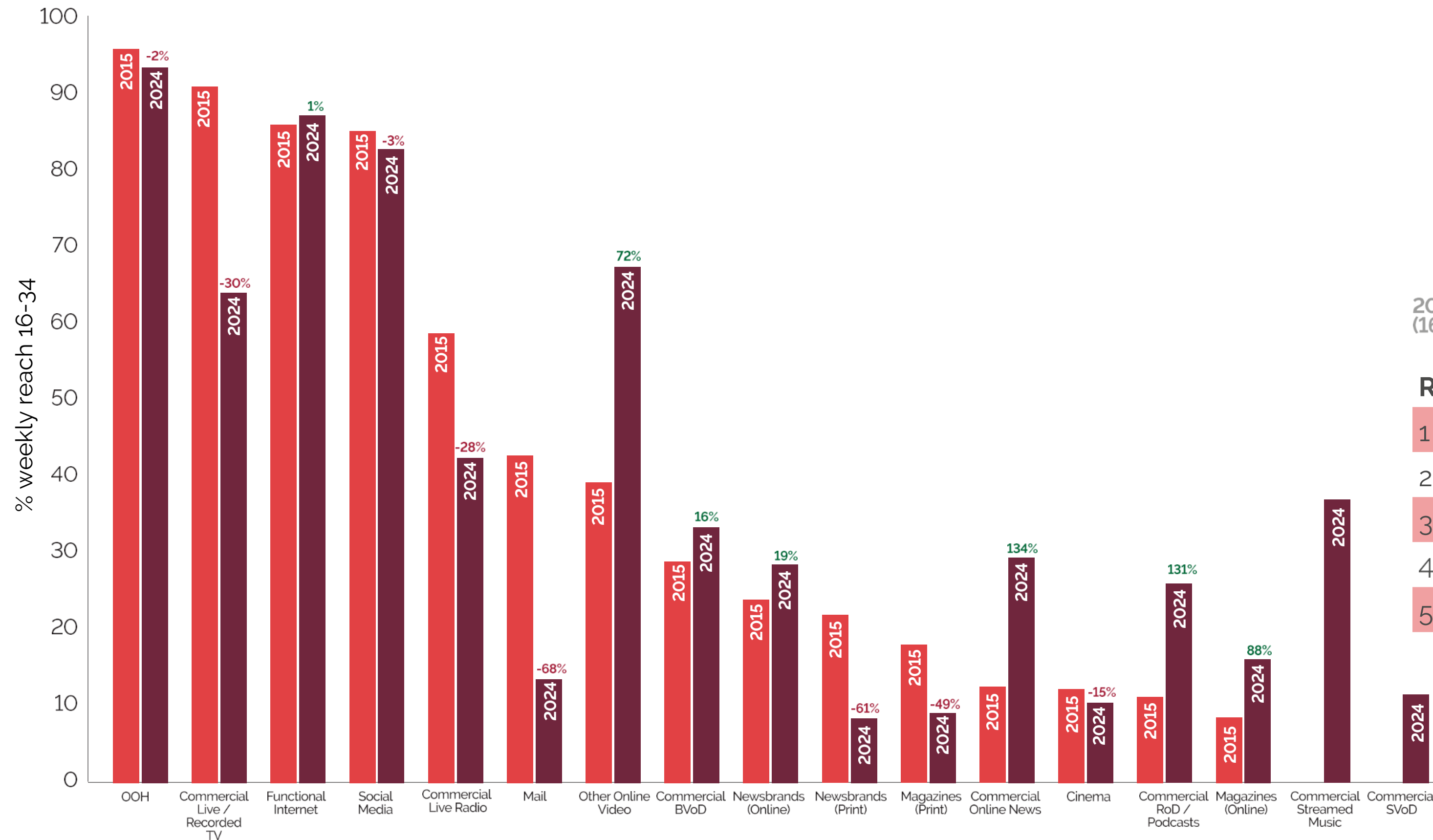


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- Functional Internet
- Magazines (Online)
- Magazines (Print)
- Newsbrands (Online)
- Newsbrands (Print)
- Other Online Video
- Social Media

Source: IPA TouchPoints - Weekly total share of time spent with commercial media for 16-34 broken down by buyable media types.

# 16-34 Social scale is undeniable,

But this isn't Emily in Paris ☹️ and one media won't save the day



Source: IPA TouchPoints - Weekly reach of buyable media types for 16-34.



2024 top five properties by weekly reach (16-34)

| Rank | Media     | % Reach |
|------|-----------|---------|
| 1    | YouTube   | 66      |
| 2    | Instagram | 60      |
| 3    | Facebook  | 49      |
| 4    | TikTok    | 39      |
| 5    | Snapchat  | 32      |



**35-54**

**straightforward  
similarity**

**55+**

**starting seismically**



Only **7%** of people aged **55+** agree that **Advertising helps them make better purchase decisions**

*You don't bring me flowers,  
You don't sing me love songs,  
You hardly talk to me anymore,  
When I come through the door  
at the end of the day*

Barbra Streisand & Neil Diamond, 1978



**55+**

**starting seismically**

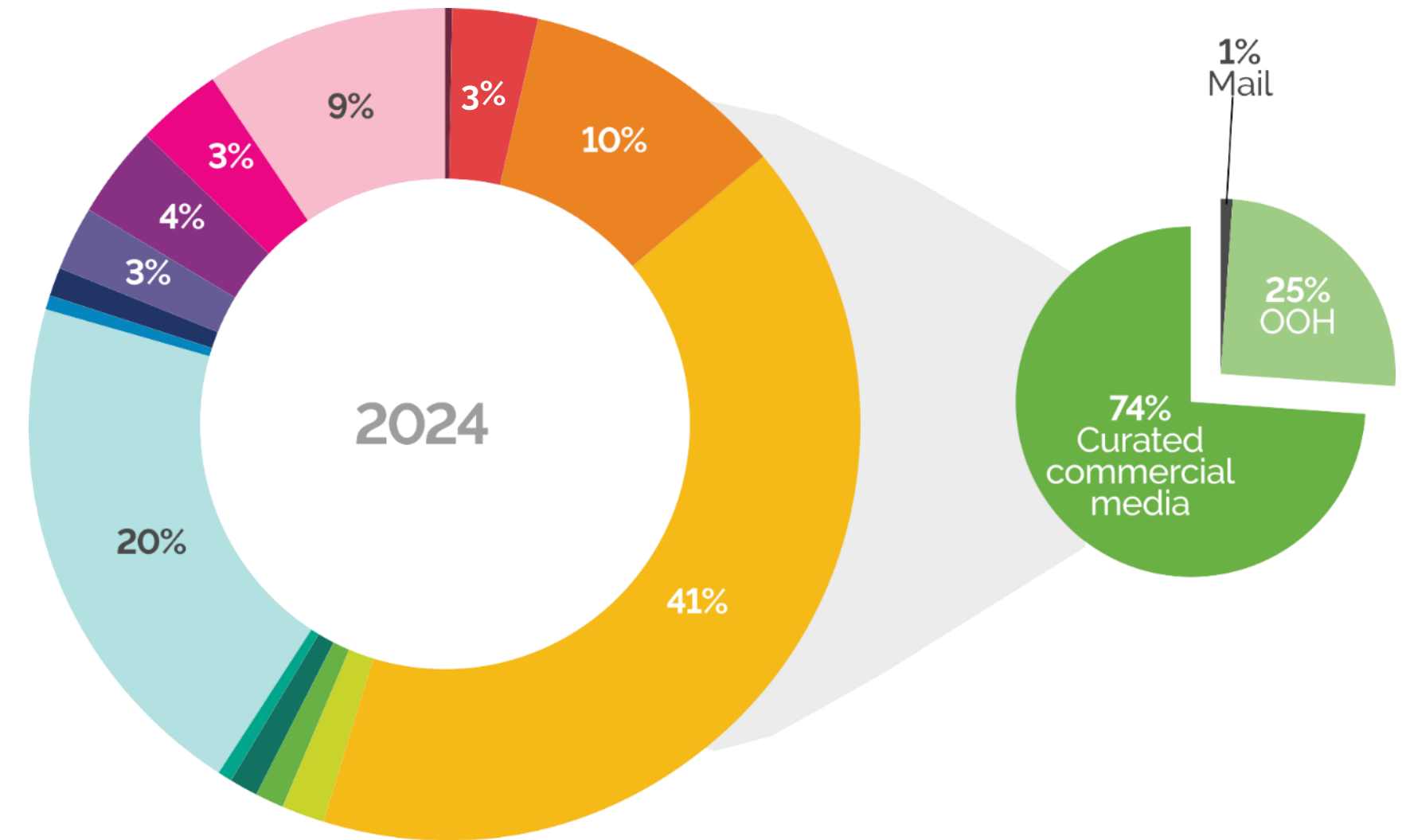
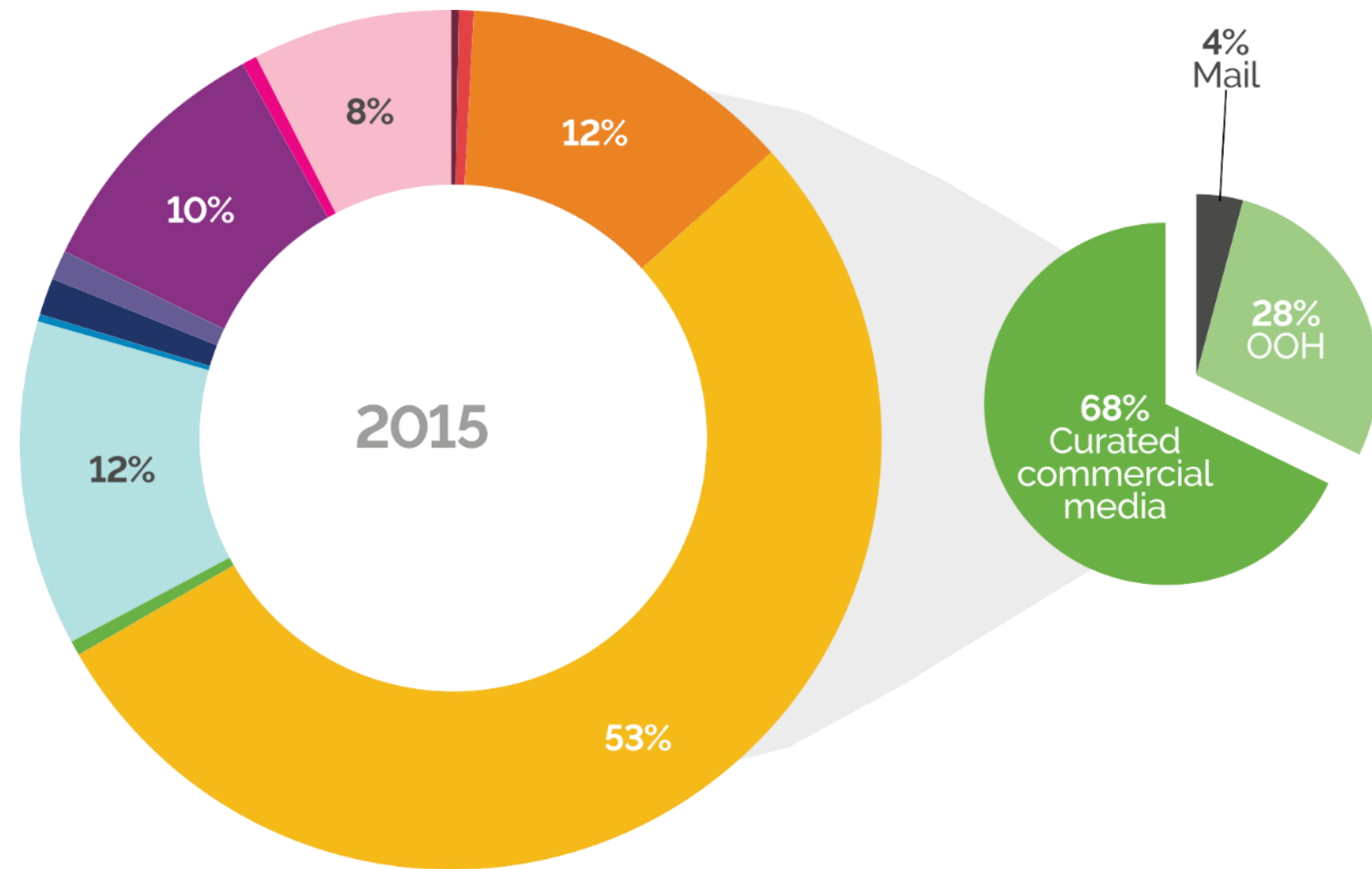
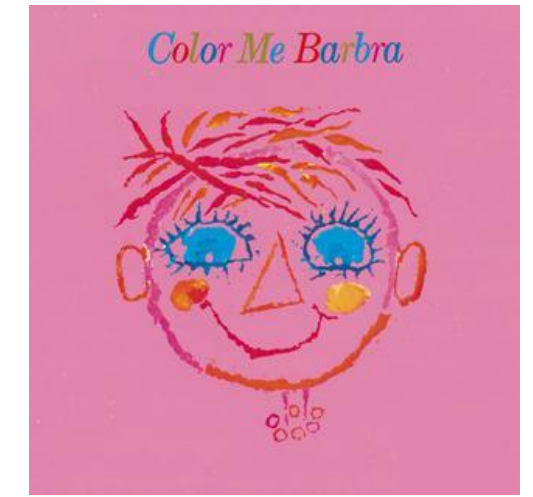


**55+**

**stratospherically**

**Streisand**

# 55+ Well, Color Me Barbra, it's a wheel of opportunity

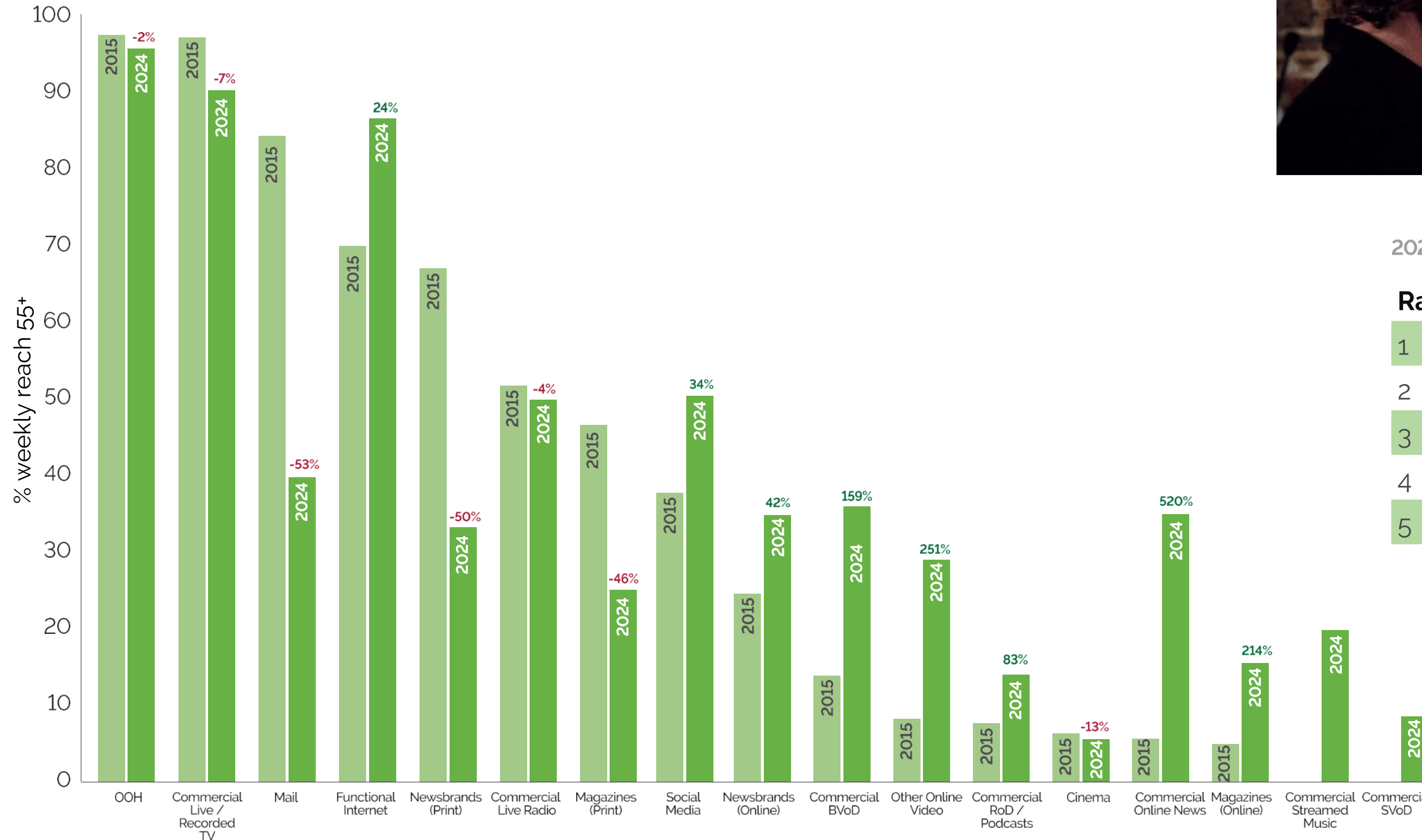


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- Commercial Streamed Music
- Magazines (Print)
- Social Media
- Commercial Live/Recorded TV
- Commercial SVoD
- Newsbrands (Online)

Source: IPA TouchPoints - Weekly total share of time spent with commercial media for 55+ broken down by buyable media types.



# 55+ Ageless and ever evergreen

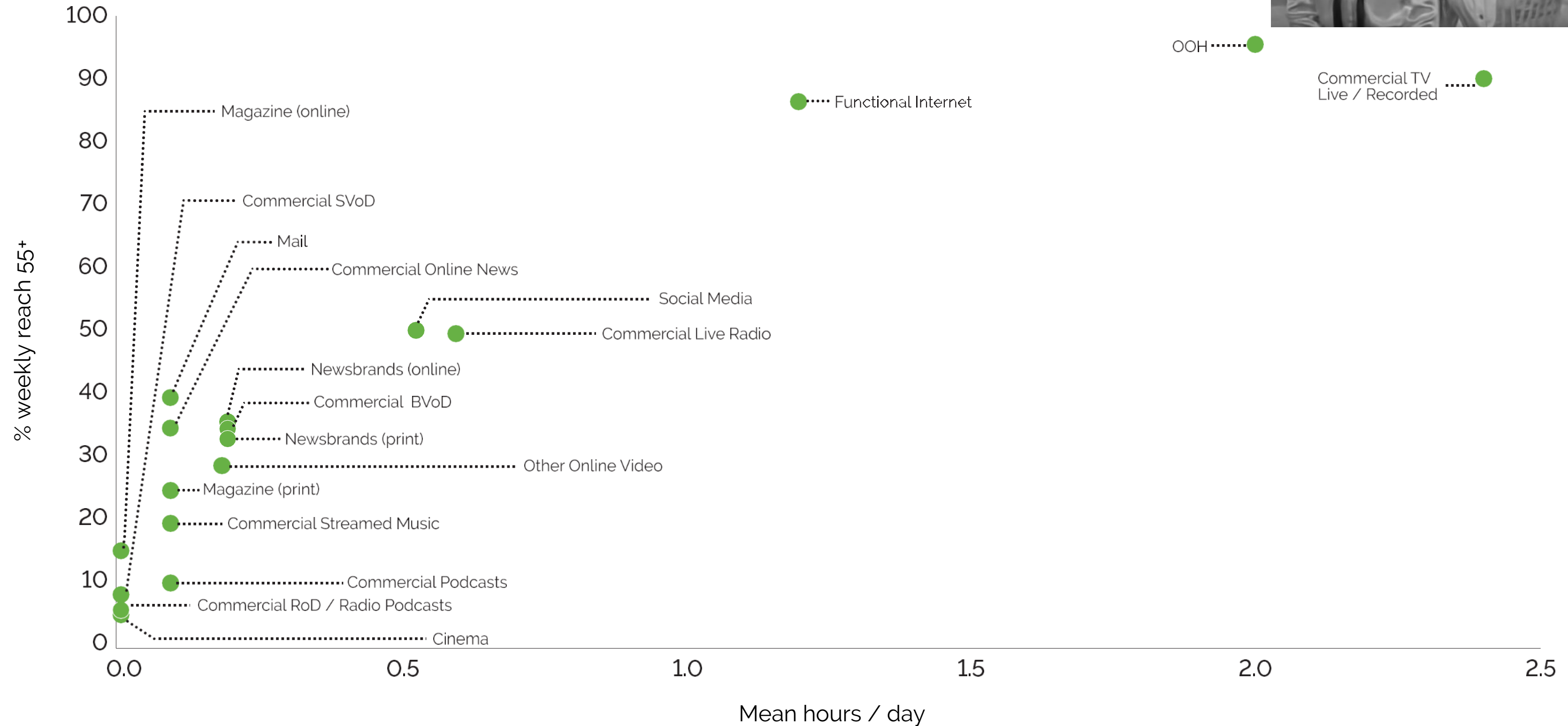


2024 top five properties by weekly reach (55+)

| Rank | Media     | % Reach |
|------|-----------|---------|
| 1    | ITV/STV   | 70      |
| 2    | Channel 4 | 54      |
| 3    | Channel 5 | 43      |
| 4    | Facebook  | 42      |
| 5    | YouTube   | 26      |

Source: IPA TouchPoints - Weekly reach of buyable media types for 55+.

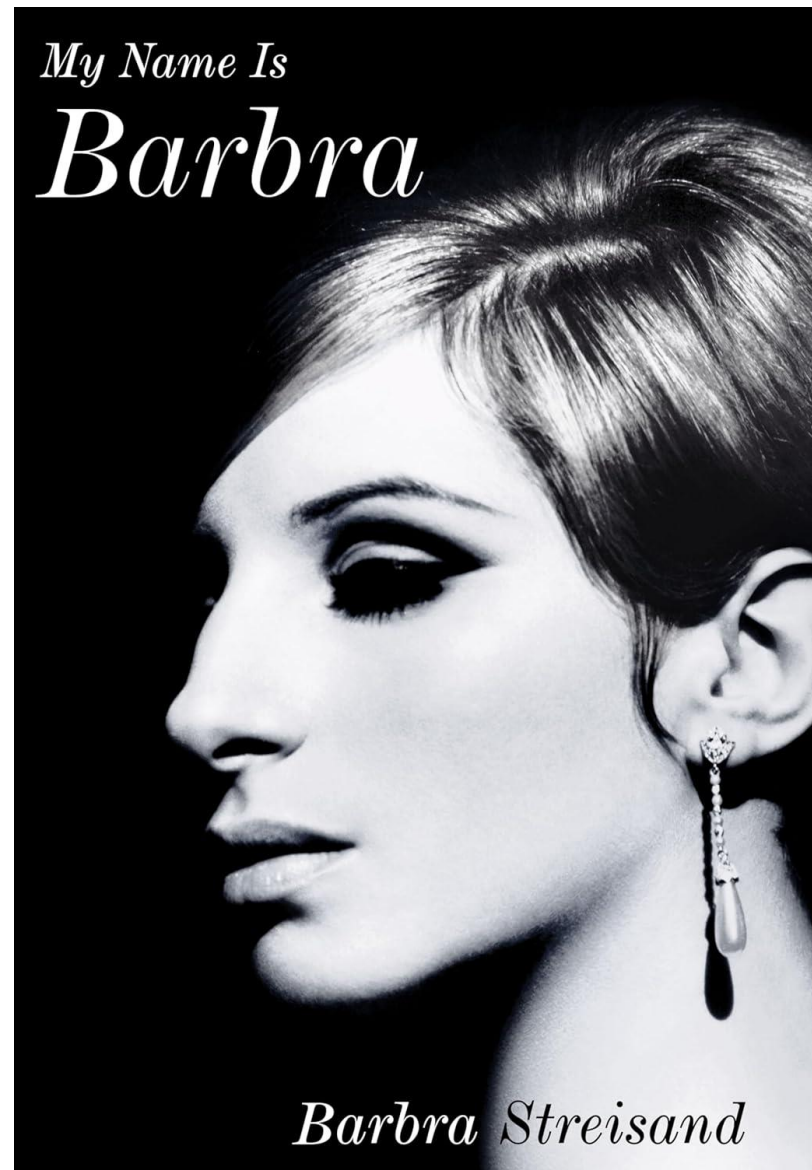
# 55+ Happy Days Are Here Again



Source: IPA TouchPoints – Weekly reach and mean hours per capita per day of buyable media types for 55+.



One book will change your life in 48 hours,  
The other won't, but might make planning easier in 48 minutes



Time to read:  
48 Hours



Time to read:  
48 Minutes

# Thank you

[simon@ipa.co.uk](mailto:simon@ipa.co.uk)

 [Simon Frazier](#)

[ipa.co.uk/makingsense](https://ipa.co.uk/makingsense)



# Creativity in media strategy

## Is measurement a help or a hindrance?

### **Dom Charles**

Managing Director, Audience Intelligence & Marketing Science,  
Wavemaker

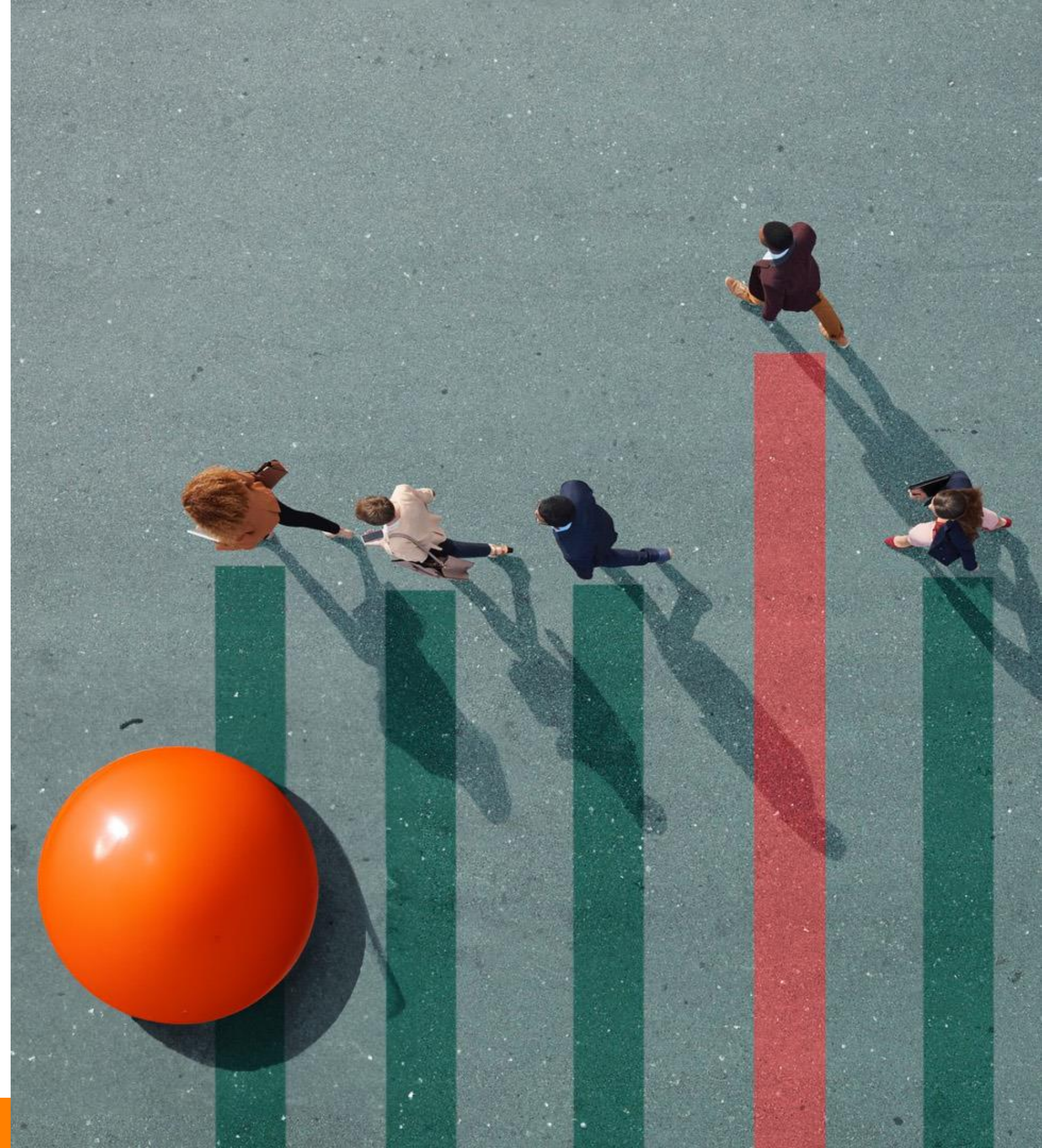
### **Monica Majumdar**

Head of Strategy, Wavemaker



**Wavemaker**

**Creativity & Media:**  
**Is measurement a**  
**help or a**  
**hindrance?**





**Creating** *unrivalled work*  
**that** *moves people* **and has a**  
*positive impact* **in the world**







# We're big proponents of creativity in media



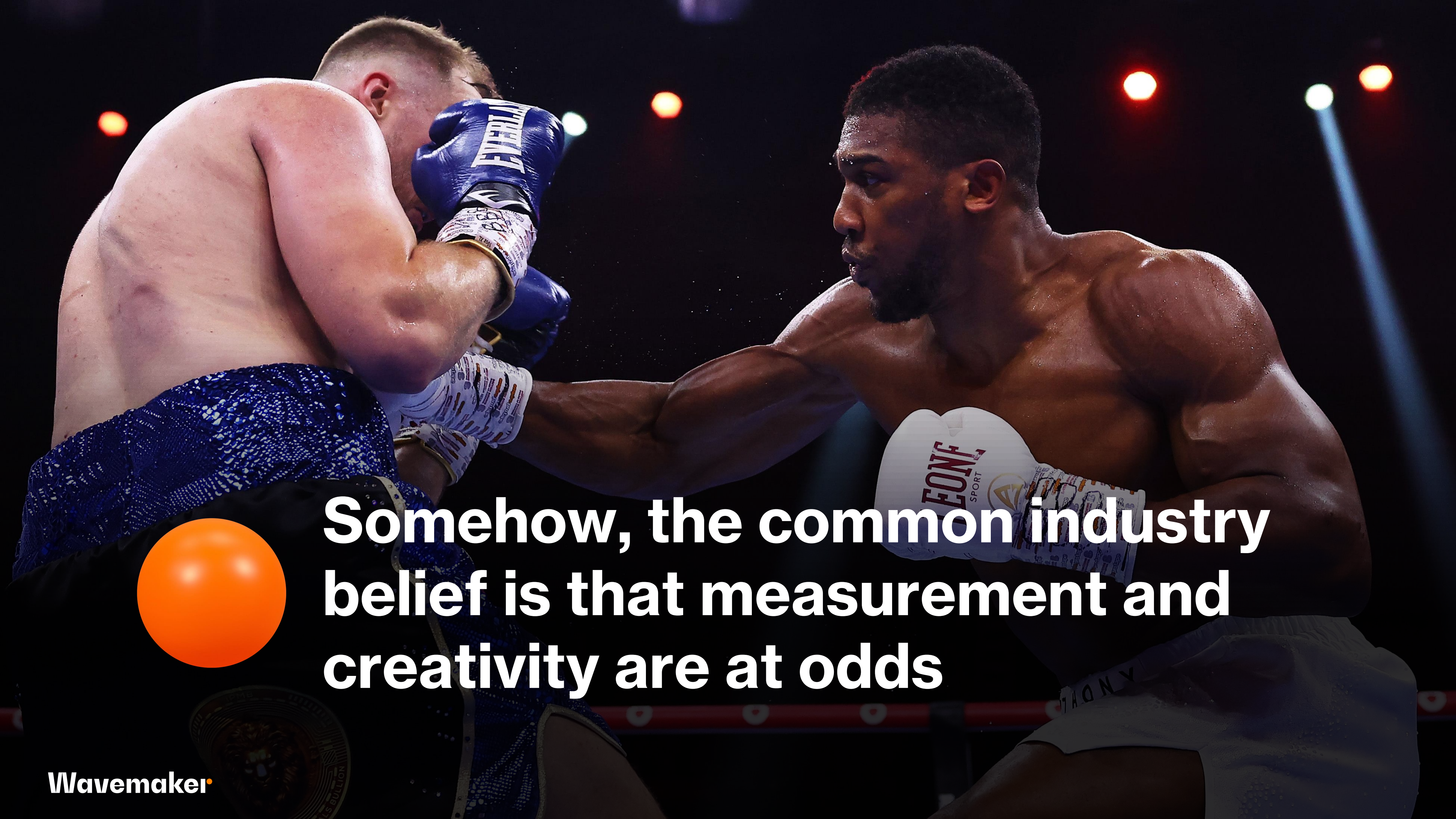


# And committed to measuring effectiveness

**EFFECTIVENESS  
ACCREDITED  
2023-25** 







**Somehow, the common industry belief is that measurement and creativity are at odds**



# The Truth

## 01. Creative media can be highly effective




MERLIN ENTERTAINMENTS

LEGOLAND WINDSOR

LEGOLAND WINDSOR RESORT Sponsors Family Movie

ROI Index  
**227**



Morrisons

Best. Box. Ever. Thanks  
@morrisons 🥰🥰🥰  
@katshoob @magicfm

ROI Index  
**401**



Fruit-tella

TAP HERE TO UNMUTE

Value Sales  
**+16%**

Source: Wavemaker econometric analysis



# The Truth

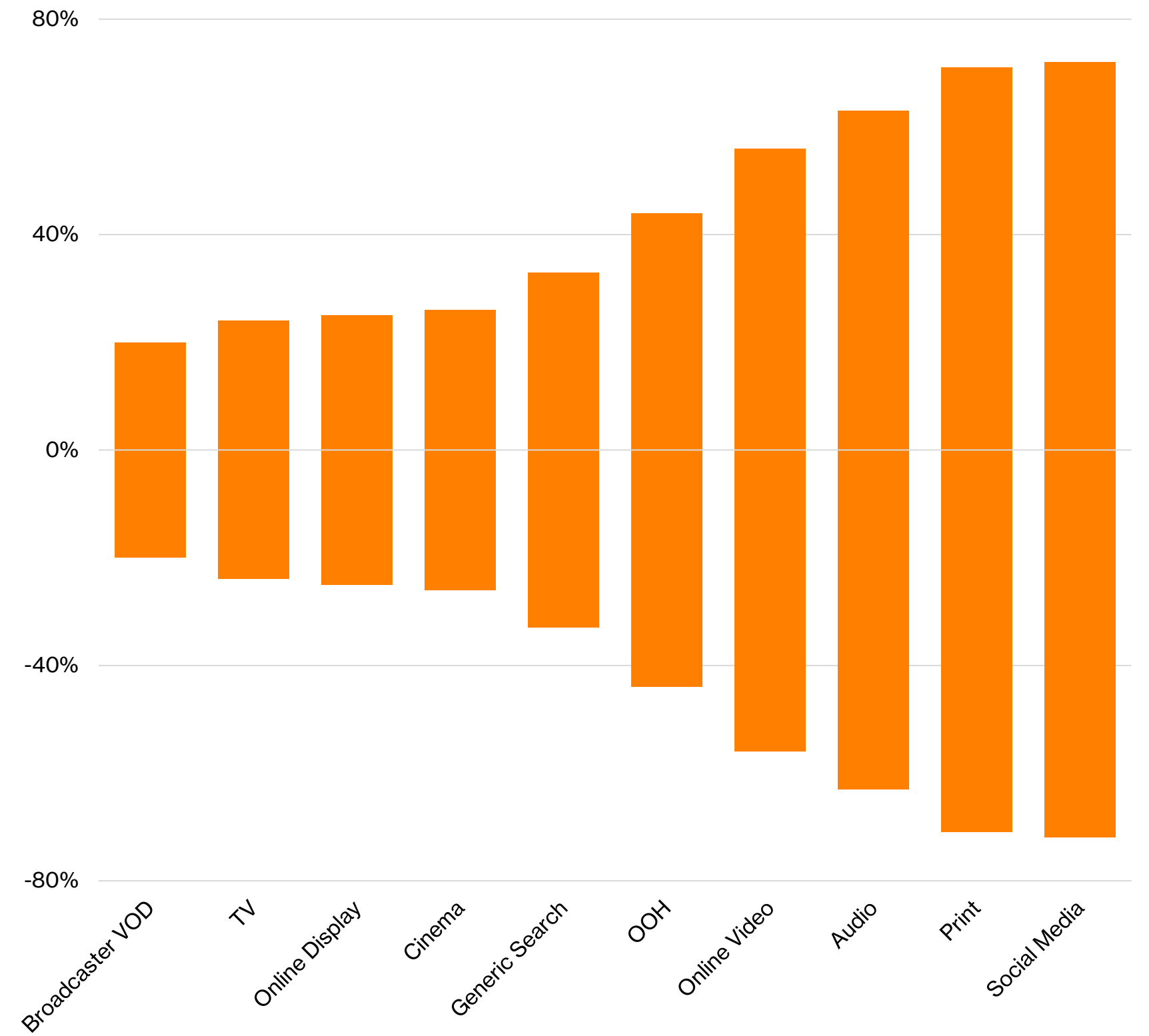
## 02. Not every creative idea is effective



Source: Thinkbox BVOD in Focus 2022

**Wavemaker**

**Spread of Middle 50% of Results Around the Median**





**The Truth**  
**03. Measuring the  
campaign doesn't  
change whether it  
worked or not**





**Our positive  
provocation**

**Measurement doesn't  
kill creativity,  
it accelerates it.**



# De-risk creativity

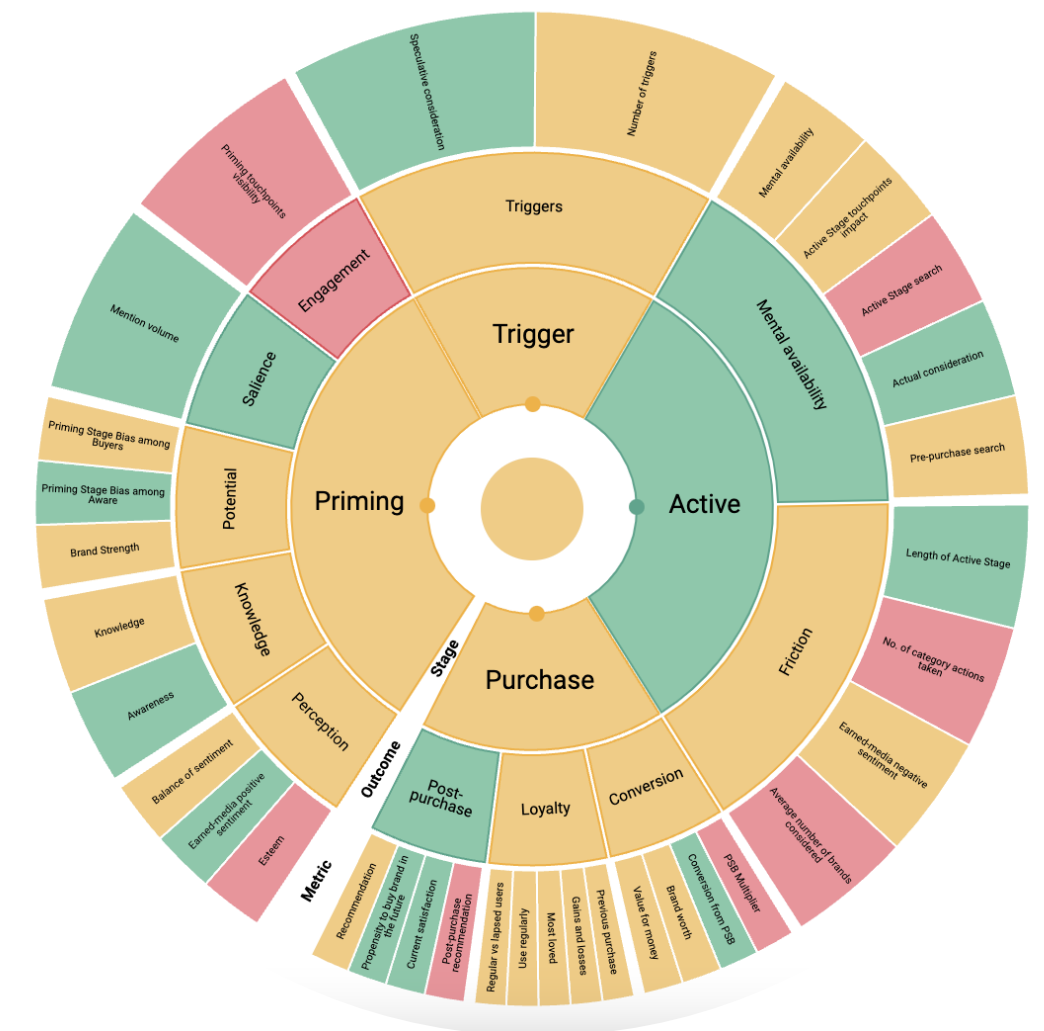
Know your audience



Understand past brand and media performance

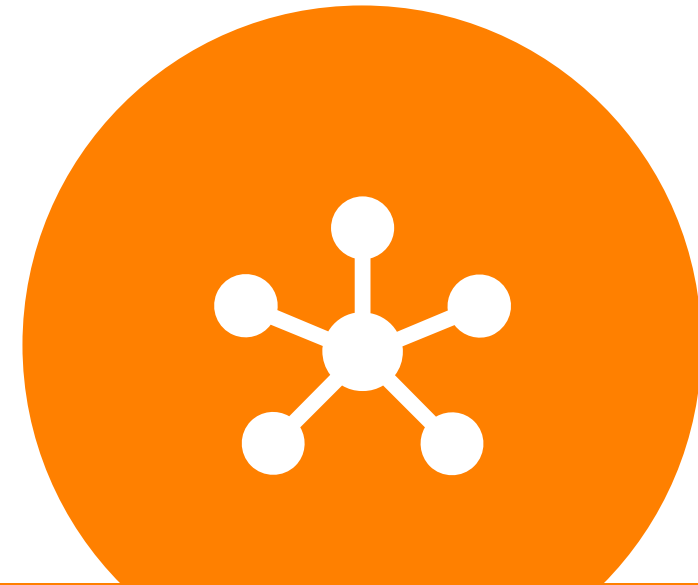


Identify the key levers of growth





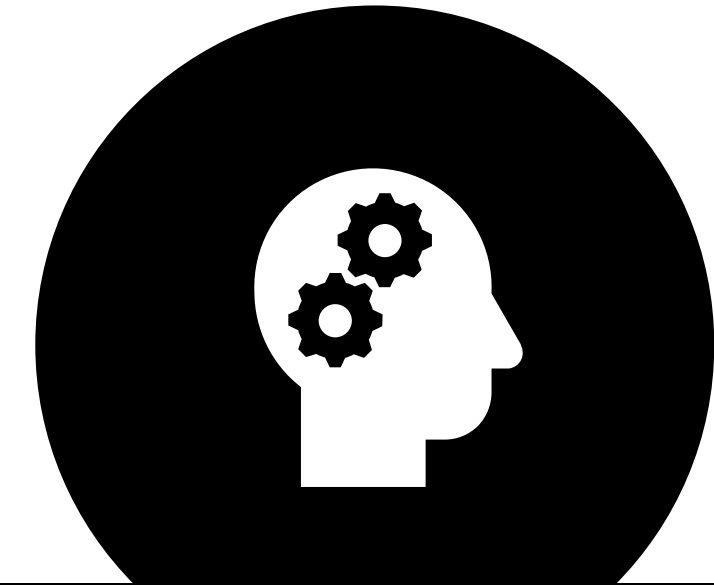
# Broaden what creativity means: it isn't just the ad film



Hack the Channel



Hack the Moment



Hack the Behaviour





# And set yourself up for success with a robust measurement portfolio



**Marketing Mix Modelling is the gold standard**



**Identify the right leading indicators**



**Build in structured testing**



# Three takeaways

**01**

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**Start with the audience**

**02**

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**Think more broadly about creativity**

**03**

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**Set up proper measurement, don't shy away from it**



# Understanding ESG

in a planning and strategy context

**Andy Power**

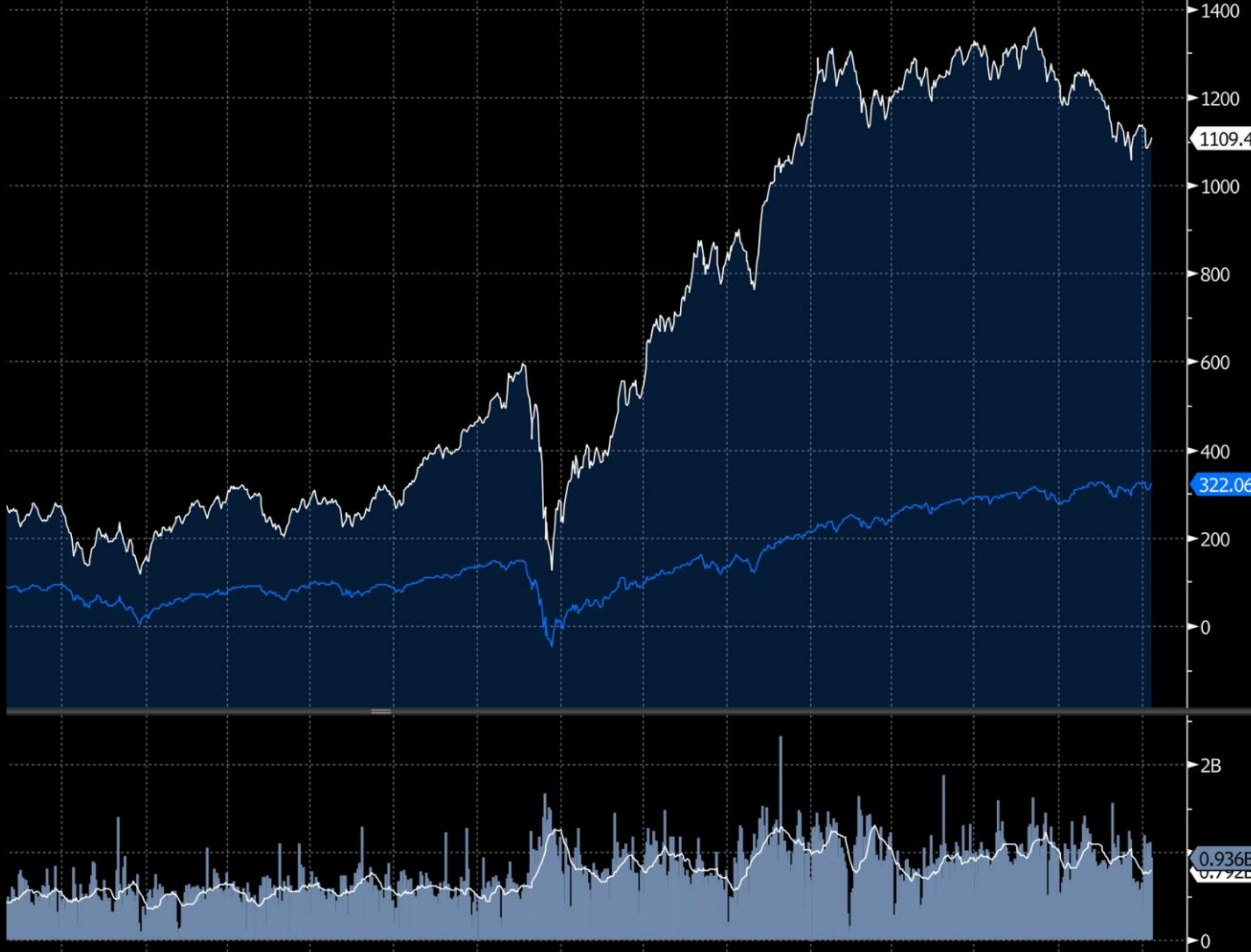
CEO, Legacy

# Responsible investment





**ESG  
business  
out  
performs  
non ESG  
business**



“Brands & investors are prioritising ESG actions..



...this will impact both the messages from companies & creative agencies  
and the **investment directed to media agencies**“



**Billions** at risk  
for the world's  
largest **brands** if  
sustainability  
perceptions are  
not aligned  
with actual **ESG**  
performance





# Sustainability value

| Brand Value (\$) | Sustainability Driver (%) | ESG / Brand Perception Score | ESG / Brand Perception Value |
|------------------|---------------------------|------------------------------|------------------------------|
|------------------|---------------------------|------------------------------|------------------------------|



×



×



=



A positive value indicates that ESG performance exceeds perception



×



×

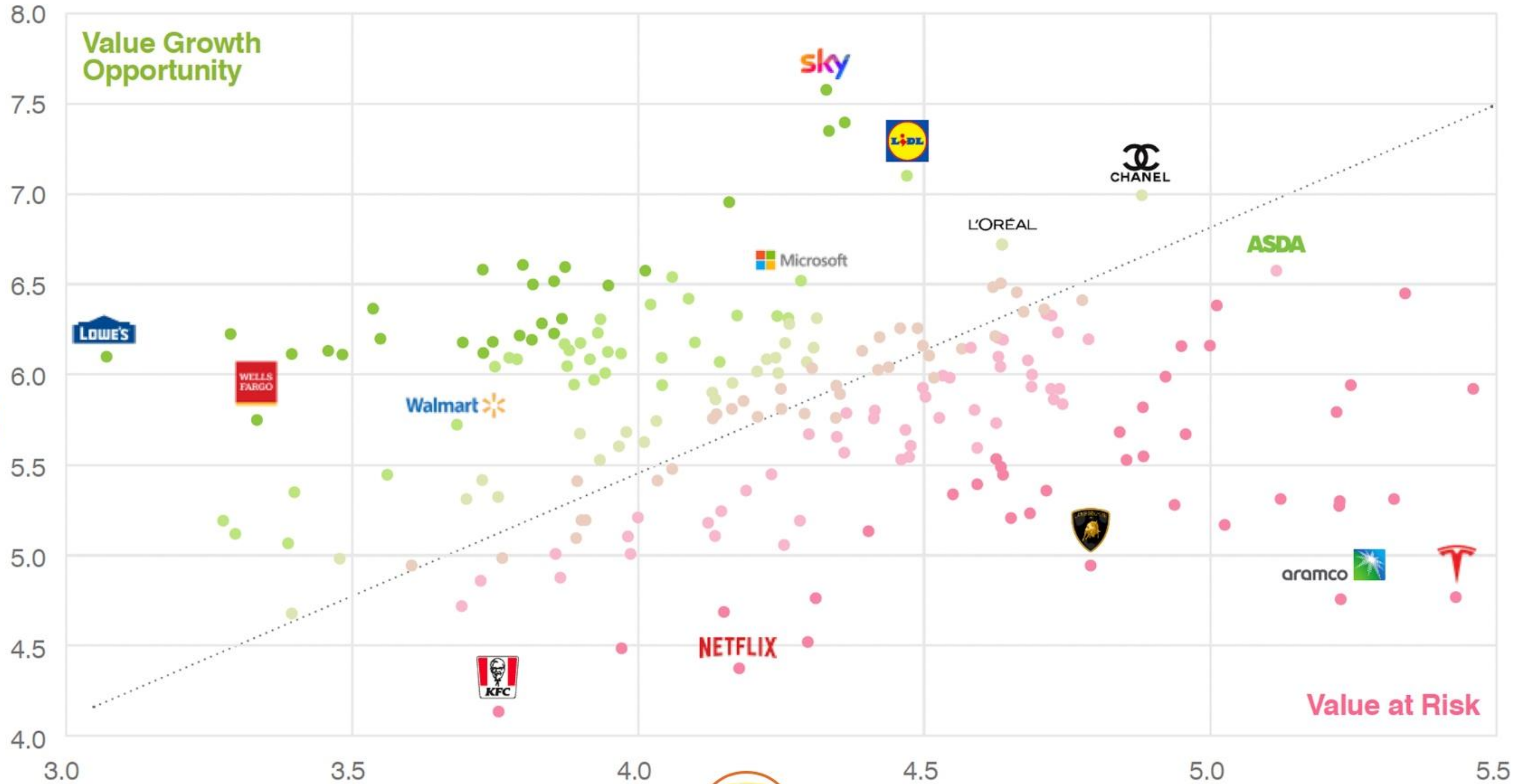


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A negative value indicates that performance lags public perception





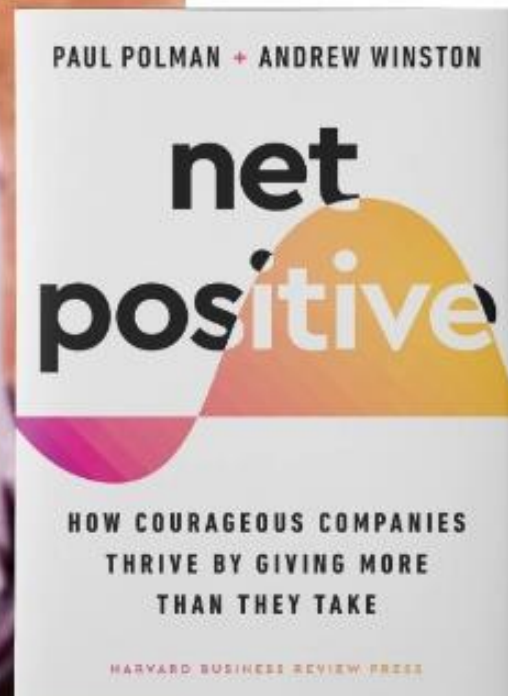
# Social & Governance weakness cost brands billions







*"Investors are flexing their **ESG** muscle. **Brands** are making big commitments, and their **media investments** have a role to play. Companies need **good ESG data** on how their media choices affect the **world!**"*



**Andrew Winston**





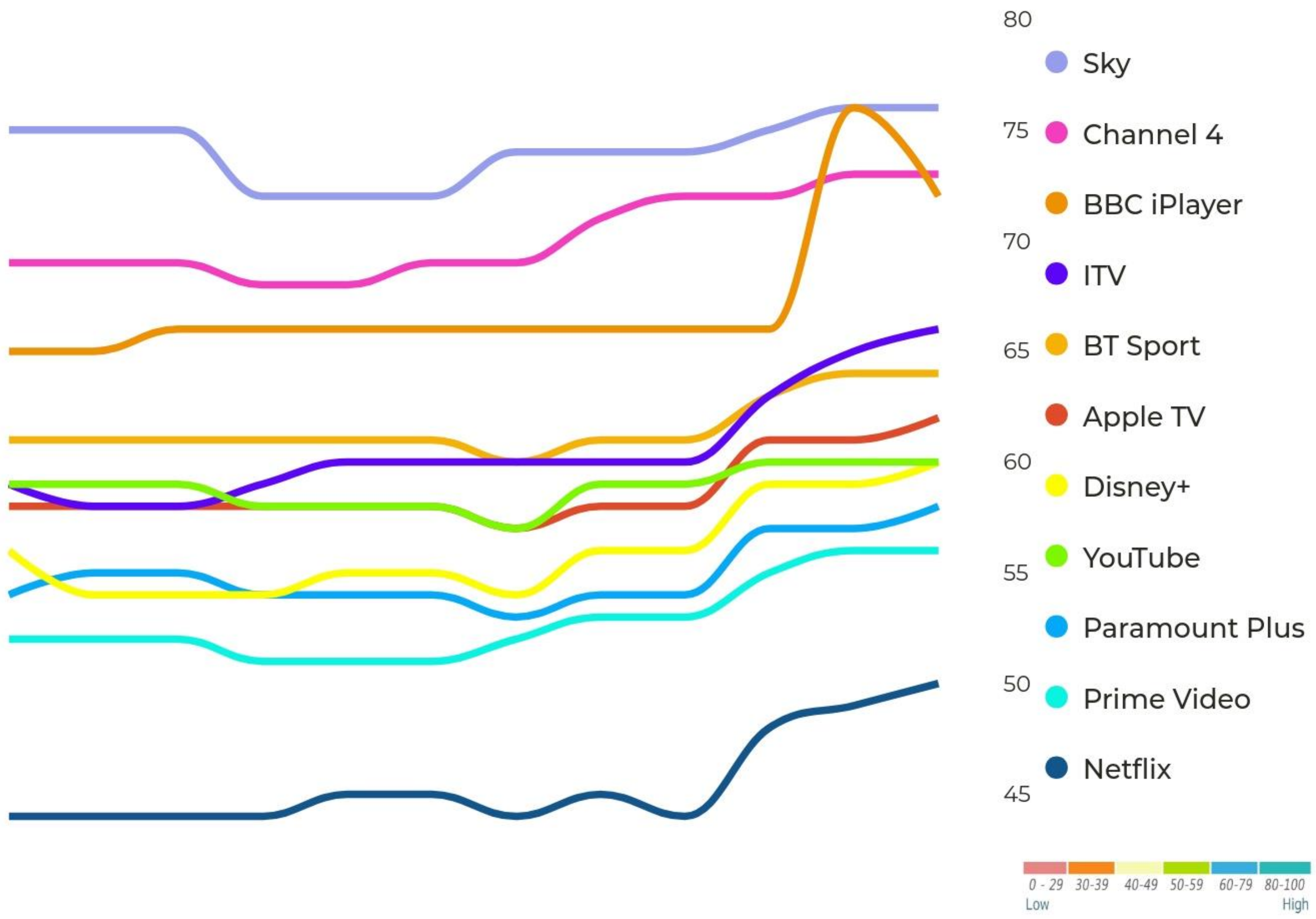
| Overall ESG Rating |                              |                                |                             |
|--------------------|------------------------------|--------------------------------|-----------------------------|
| Categories         | Subcategories                |                                |                             |
| Environment        | Energy & Climate Change      | Environment Policy & Reporting | Resource Management         |
| Community          | Community Dev & Philanthropy | Product                        | Human Rights & Supply chain |
| Employee           | Compensation & Benefits      | Diversity & Labour Law         | Training, Health & Safety   |
| Governance         | Board                        | Leadership Ethics              | Transparency & Reporting    |





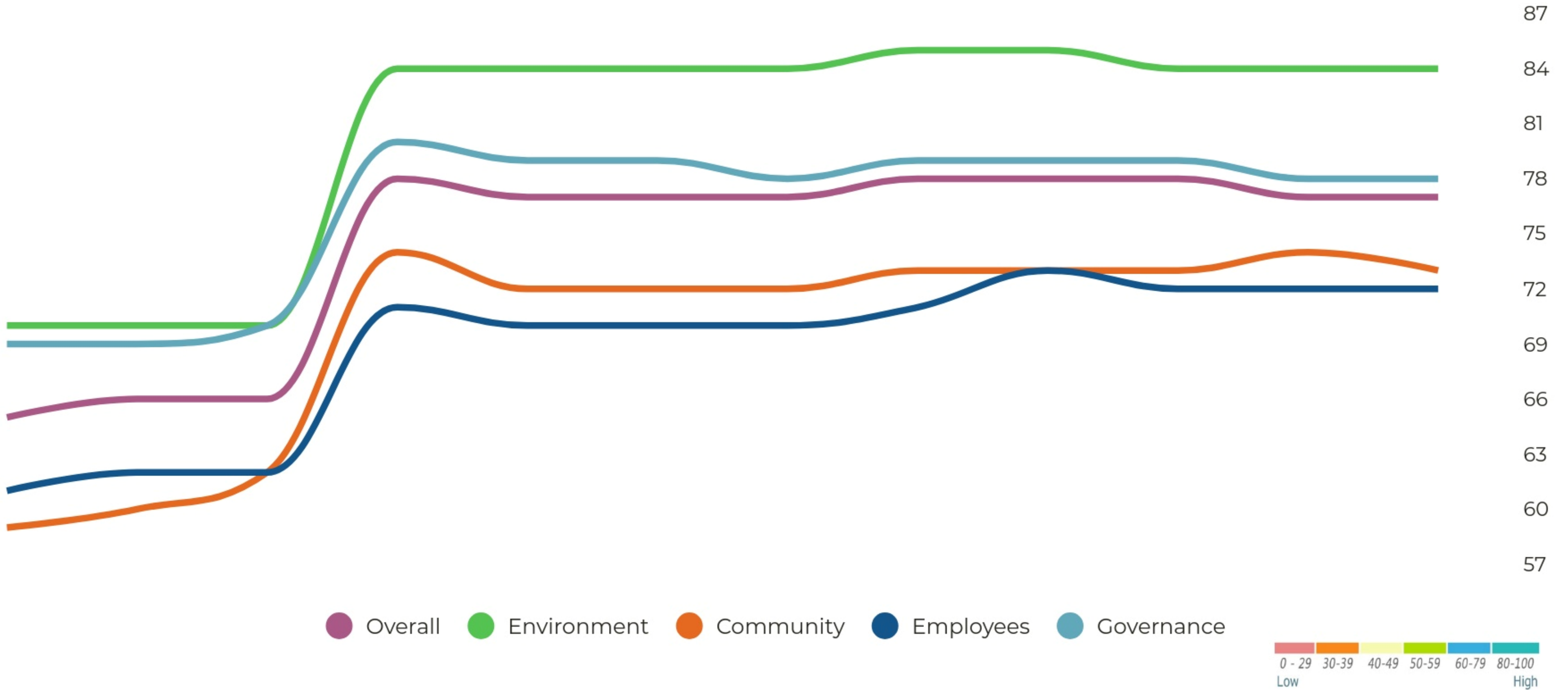


# Overall ESG ratings





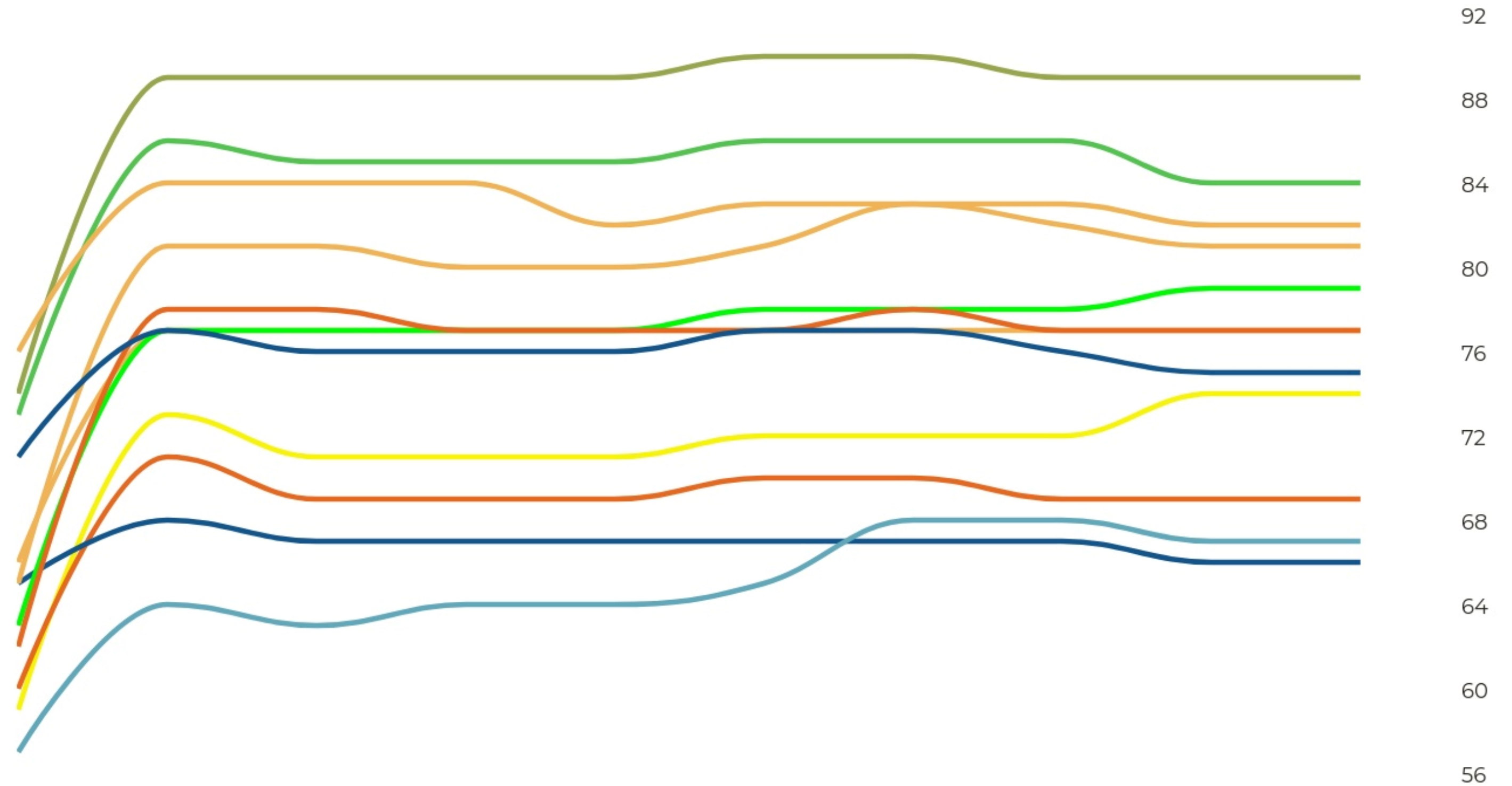
# Deep dive Sky



# Deeper dive Sky

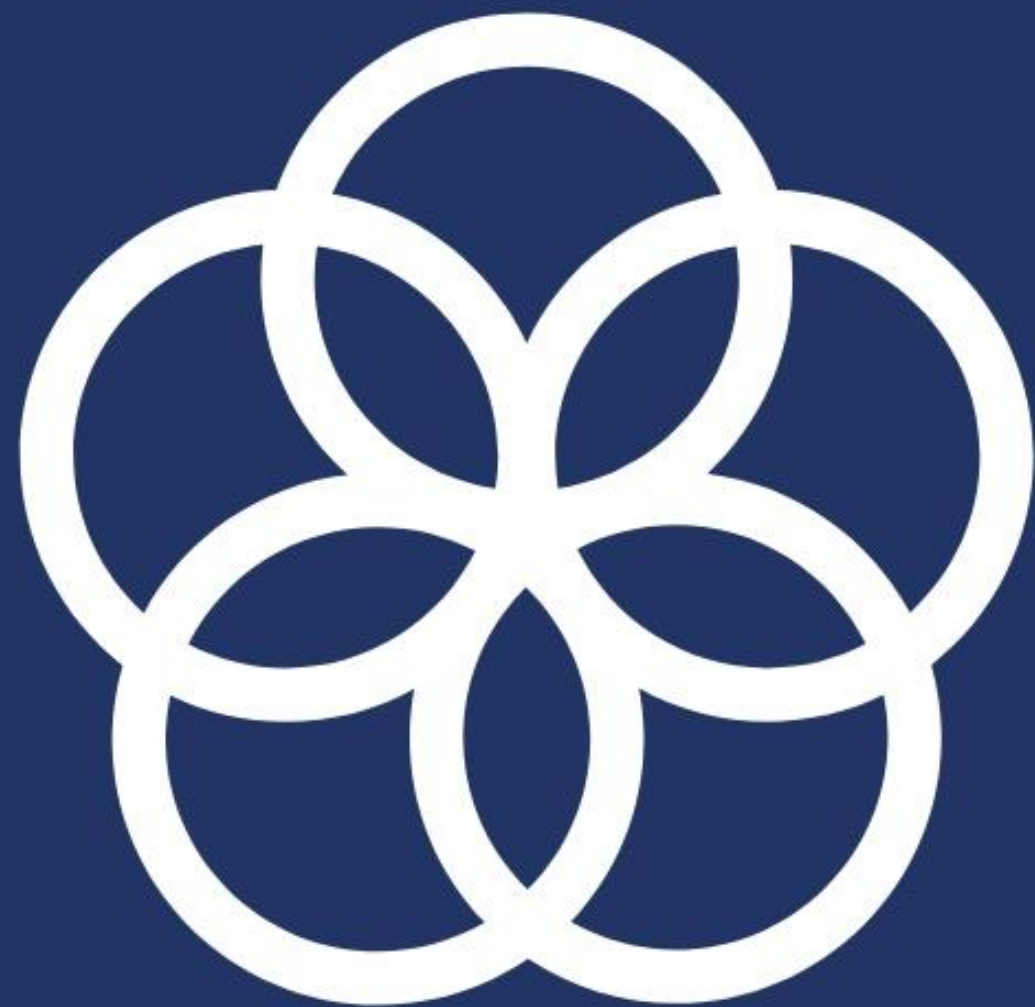
- Product
- Dev & Phil
- Human Rights & Supply Chain
- Comp & Benefits
- Diversity & Labour Rights
- Train, Health & Safety
- Energy & Climate Change
- Environment Policy & Reporting
- Resource Management
- Board

▲ 1/2 ▼





# 17 PARTNERSHIPS FOR THE GOALS



telmar

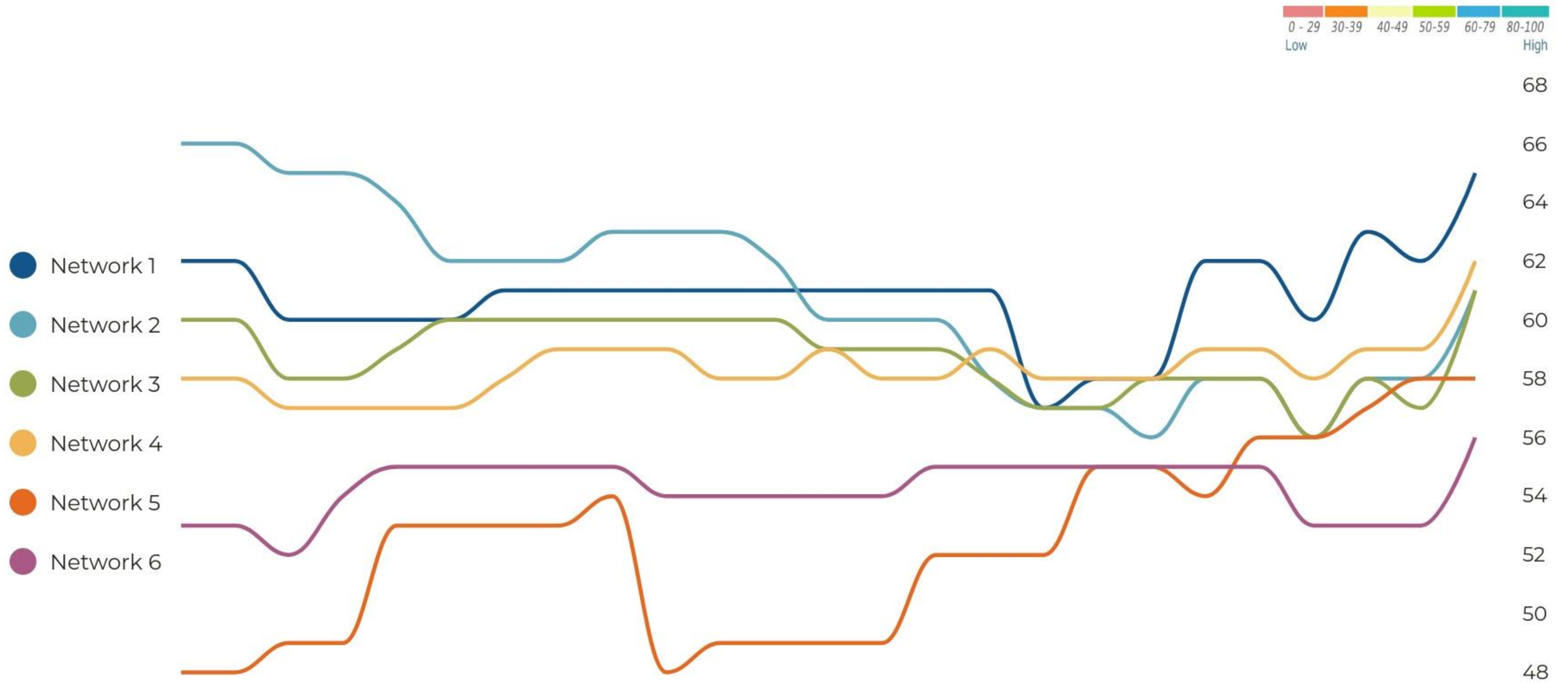
The  
GoodNet



MediaSense®

**WFA** World Federation  
of Advertisers

# Media agency networks





Will you  
change  
your plans  
for  
tomorrow?



# Using category entry points

To change planning and strategy for the better

**Frith Hofmeester**

Strategy Partner, Hearts & Science



# **Using Category Entry Points to change planning and strategy for the better**

---

**Frith Hofmeester – Hearts & Science**

**September 2024**





# THE THEORY

**What are Category Entry points and why should you care about them?**

# THE APPLICATION

**How can you use Category Entry Points to deliver more effective & award-winning work.**





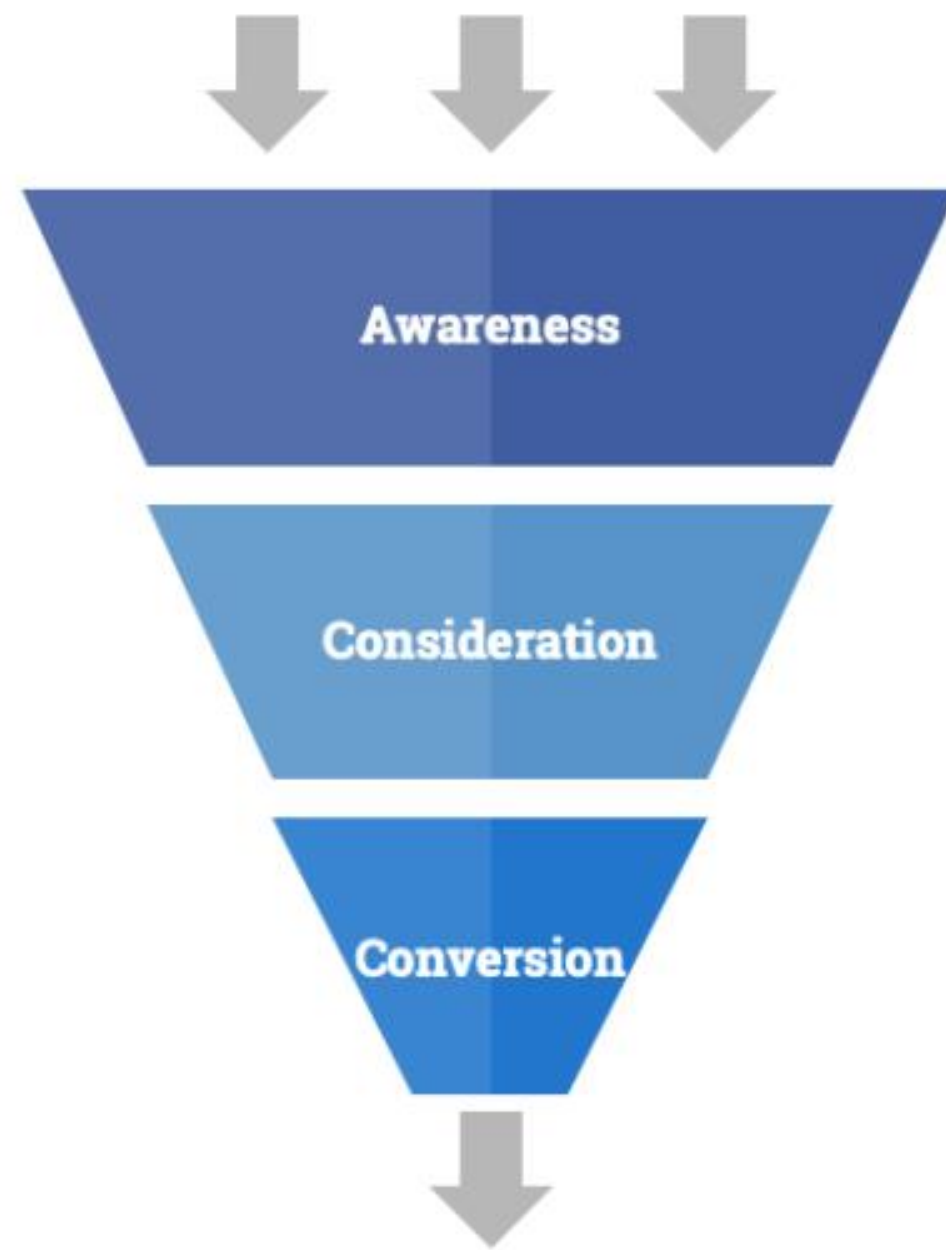
# THE THEORY

**What are Category Entry points and why should you care about them?**

# THE APPLICATION

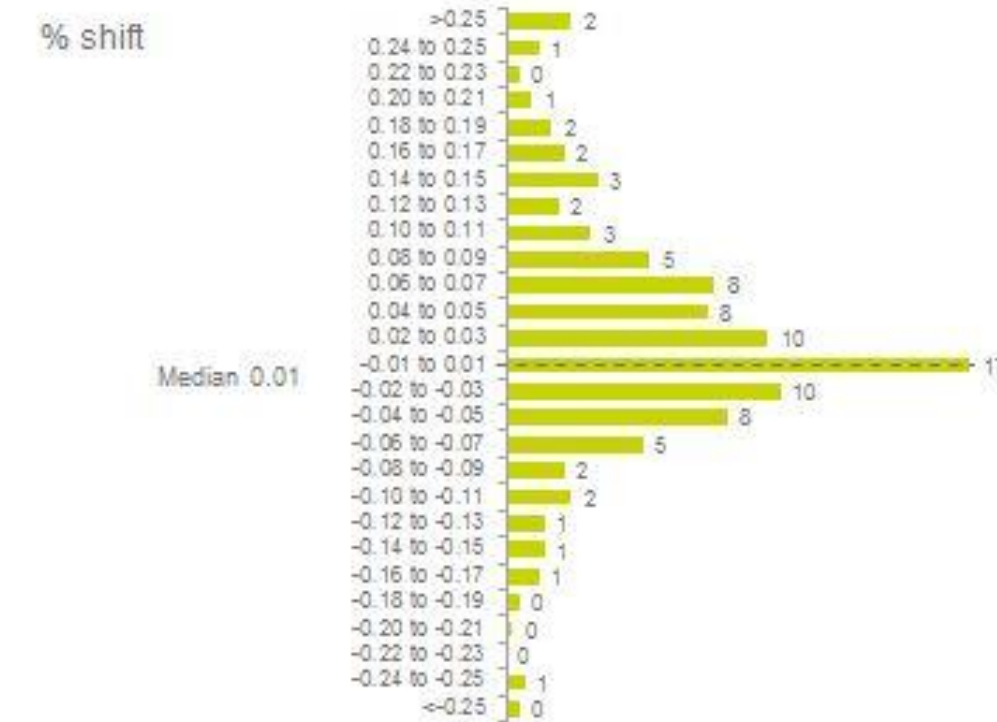
**How can you use Category Entry Points to deliver more effective & award-winning work.**

# Have we spent 100 years getting it wrong?



**An outdated,  
binary model**

**CONSIDERATION MEAN SCORE – Year on year shifts**



Base: Global data (408 brands over period 2014-2015 and 2015-2016)

KANTAR **MILLWARD BROWN**

Source: Trading Database

**A slow-moving metric that's  
hard to reliably measure**

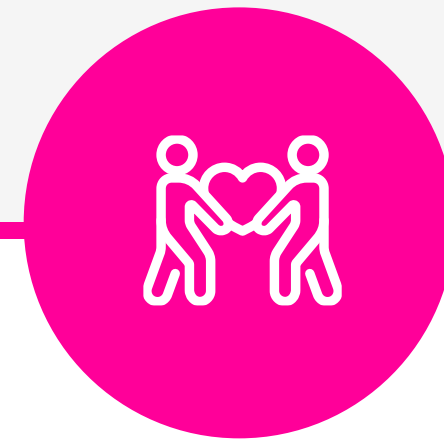


# An alternative view of how brands grow, driven by marketing science



## Mental availability

The probability that a buyer will **notice, recognise and/or think of a brand** in buying situations.

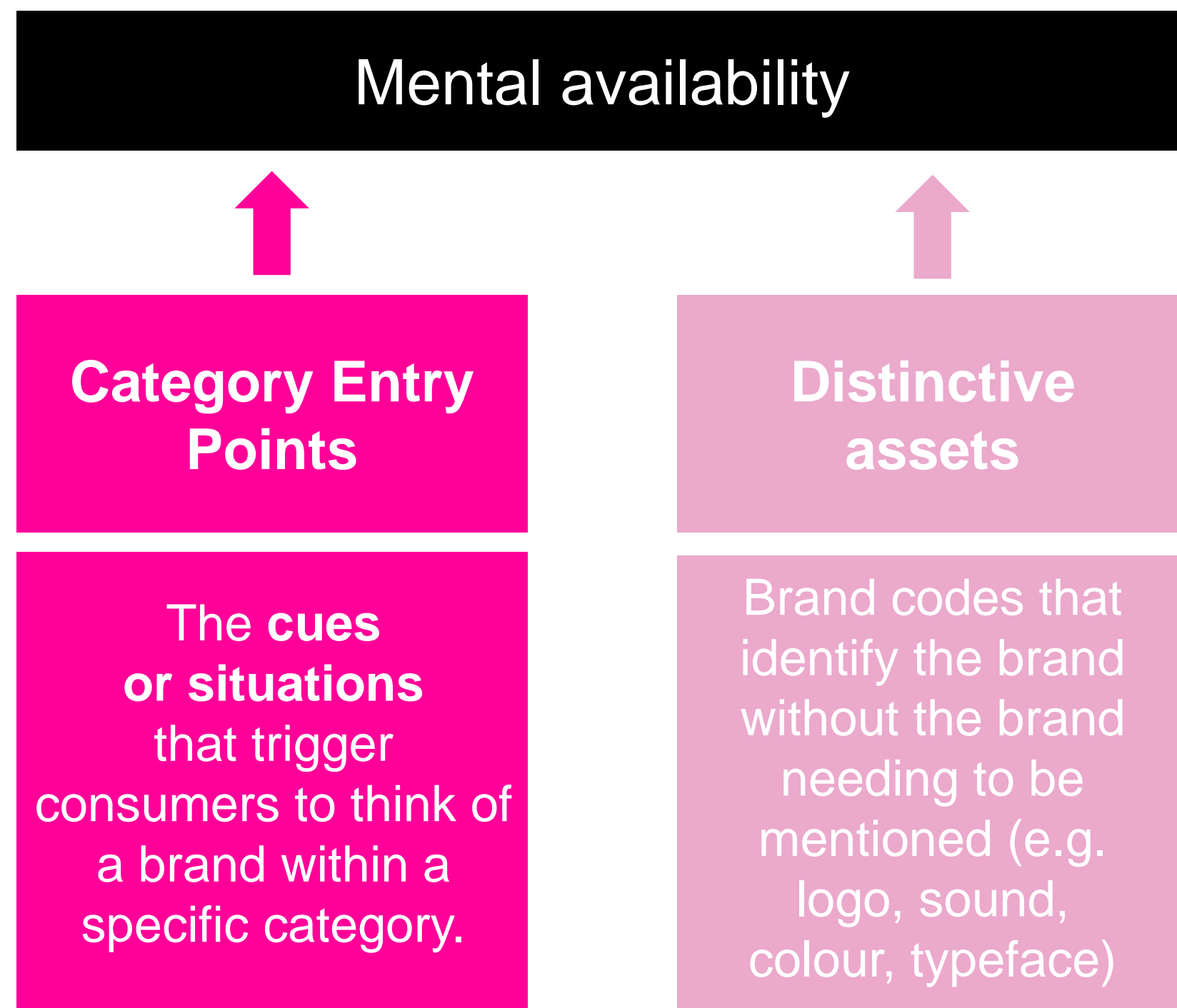


## Physical availability

The ability for a buyer **to find and purchase** a product across three dimensions: presence, prominence and portfolio.

**BRAND GROWTH**

# There are two building blocks of Mental availability





# Category Entry points are both internal and external cues



**Emotion**

*e.g. feeling  
lethargic*

**Motive**

*e.g. need an  
energy boost*

**Timing**

*e.g. weekday  
morning*

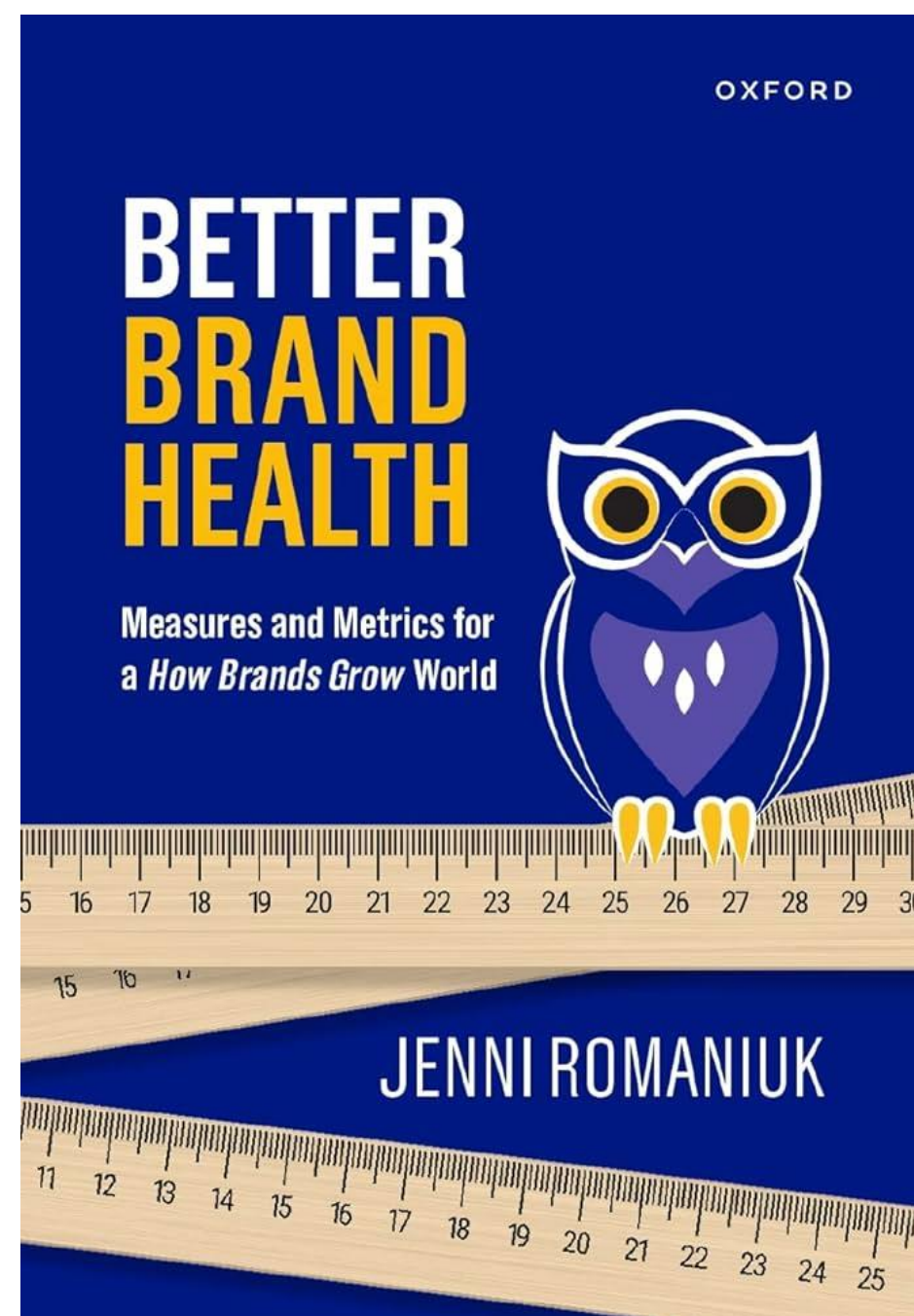
**Location**

*e.g. coffee  
shop, near tube  
station*

**People**

*e.g. meeting a  
friend*

# Category Entry Points are directly linked to commercial growth







# THE THEORY

**What are Category Entry points and why should you care about them?**

# THE APPLICATION

**How can you use Category Entry Points to deliver more effective & award-winning work.**

# Introducing...Category Entry Point led planning



## 1. Identify

CEPs by building on the theory from the Ehrenberg Bass institute



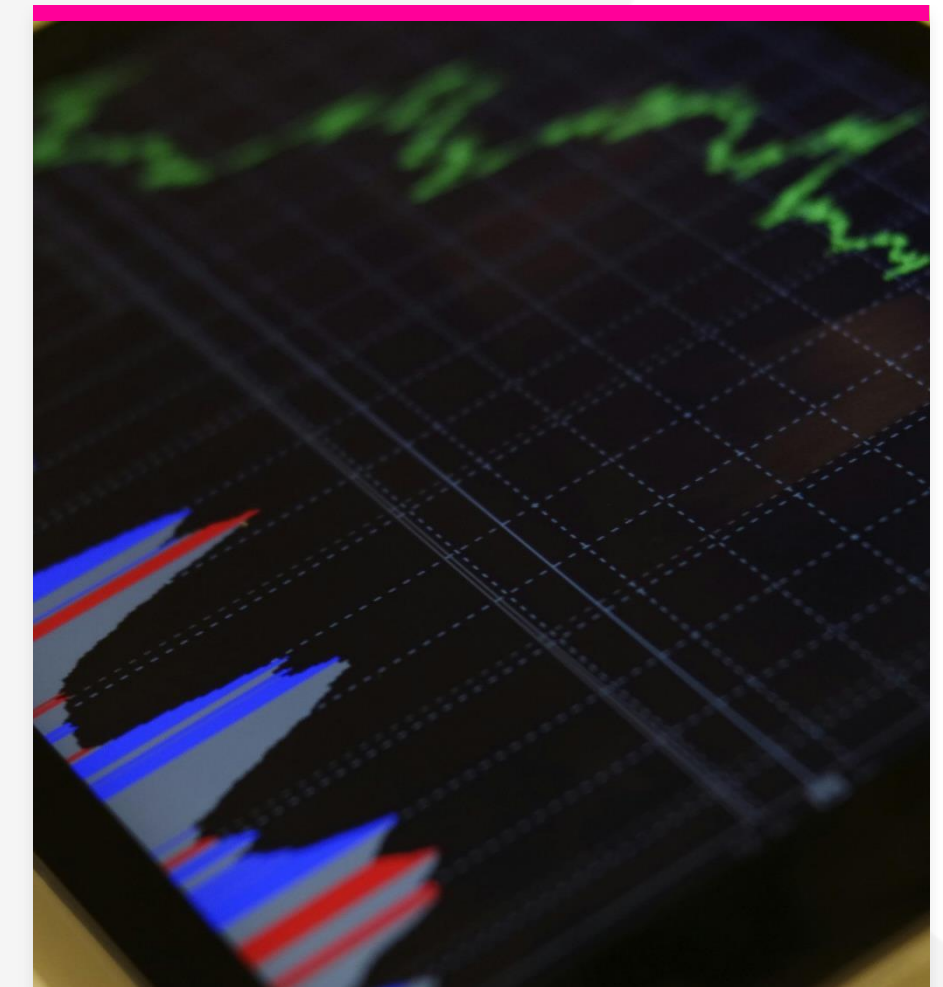
## 2. Prioritise

CEPs based on both importance (size) & distinctiveness (brand linkage)



## 3. Activate

CEPs by leveraging behavioural signals, contextual & moment targeting + relevant messaging



## 4. Track

CEP linkages over time to ascertain the impact of marketing efforts



# CEPs in action on the National Lottery



**CEP: “When there’s a big prize and I don’t want to miss out”**

- First ever sponsor of “Make me Millionaire”
- Special builds that allowed the public to place themselves in the adverts.
- Appointment to view programming & co-viewing experiences.



**CEP: “When daydreaming about the future” + “Entering new life stages”**

- Showing up in food, travel, music & fashion contexts.
- Disrupting mundane moments & repetitive rituals
- Automated contextual targeting around day dreaming + life stage programming with ITVX & Sky



# Five clear benefits to CEP planning

**1. Consideration**

**2. Competitive**

**3. Context**

**4. Content**

**5. Consumer**

*“The approach to Category Entry Points and the tool blew us away and we are already seeing the impact of its application.”*

**Ross Sergeant,  
Global Head of Media, Allwyn**



# Shortlisted for Research Insight



## RESEARCH INSIGHT

### Cracking the consideration code with Category Entry Points

Hearts & Science



Our industry has become obsessed with a century old sales funnel. All too often we focus on the top (brand) and bottom (performance)... but neglect the middle. Category Entry Points Planning instead starts in the middle turning an overlooked research theory from The Ehrenberg Bass Institute into an actionable way of creating new insights that drive mental, competitive and commercial advantage for brands and radically reinvents media planning.

#### 100 years of doing it wrong

The sales funnel celebrated its 100th birthday this year. In the book 'Bond Salesmanship' the common three-part purchase funnel was first described with awareness at the top, consideration in the middle, and conversion at the bottom.

Consideration is a regular advertising KPI on many client briefs. That is no surprise due to the strong relationship between consideration and usage (correlation of 0.79). Yet changes in consideration tend to be very small and slow moving making them hard to robustly quantify... which in turn makes it hard to understand what drives changes in consideration. A global study by Milward Brown across 408 brands found the median YoY shift is only 0.01. And our industry regularly uses proxy metrics like "Buzz" or brand perception metrics like "Brand for me" and hope these are accurate predictors of changes in consideration.

The answer to this enduring challenge has been hiding in plain sight.

Every agency and marketer worth their salt owns a copy of Byron Sharp's How Brands Grow – the most famous marketing text of the past 15 years.

The most overlooked element of the book is the importance of mental availability for brands, which refers to the ease with which a brand comes to mind in buying situations. Specifically, **Category Entry Points (CEPs)**. The cues or situations that trigger consumers to think of a brand within a specific category. These cues can be needs, occasions, places, times, or other contextual factors that prompt a purchasing decision.

Their significance cannot be overstated; CEPs are directly linked to a brand's growth prospects. If a brand doesn't come to mind in a buying situation, it is less likely to be considered by consumers and misses out on potential sales. And it's not unproven – decades of research from The Ehrenberg Institute has proven the business case for pursuing this approach.

The problem was that this research theory was just that, academic theory hidden in a chapter of a book on everyone's bookshelves. So, we set out to turn the most overlooked piece of research theory of the past decade into an actionable insight approach to create competitive advantage for our clients.

#### Turning Category Entry Points (CEPs) theory into actionable advantage

Working directly with The Ehrenberg Bass Institute's marketing scientists we created a multifaceted, proprietary research approach that builds on the theories from the Institute and visualises the insight using a suite of data visualisation tools that enable us to plan in a completely different way.

We call this **Category Entry Point Planning** and we believe it is a radical reinvention of media planning and marketing that enables middle out planning and delivers on the promise of communications planning by orienting everyone around shared language and a common goal.

There were 6 benefits of implementing this new approach:

- 1. Competitive:** By identifying strong and weak CEP linkages that audiences have with brands compared to the rest of their category, we can better design campaigns to build, reinforce or refresh a brand's linkage to that CEP – a step-change vs. previous approaches that use target excess SOV at a channel or category level
- 2. Consideration:** This slow-moving metric can be broken down into CEPs, allowing us to design strategies for both short-term evaluation as well as acting as leading indicators on long-term consideration
- 3. Context:** Applying CEP thinking helps us pinpoint key contexts and media moments so that we can win the moments that matter and enhance effectiveness.
- 4. Content:** By identifying linkages to refresh, build, or strengthen, working with ad agency and media partners to create clearer content briefs and stronger call-to-actions in marketing campaigns.
- 5. Cookieless:** It's future-proofed to enhance performance marketing by providing new levers and tactics for data driven audience planning and activation as well as breathing new life into context planning.
- 6. Consumer:** CEPs make our media plans more consumer-centric as we better understand what moments trigger people to enter a category rather than simply focusing on product or brand tactics

This approach has fundamentally altered how the entire marketing, advertising, media and creative process works for our clients with category entry points playing a central role in decision making and the below case studies demonstrate the impact it is already having.

#### Case study: Relaunching The National Lottery

Category Entry Points are a central tenet of the new strategic approach For The National Lottery both in terms of at a portfolio level but also at a game level. Lotto and Set For Life the first games to be relaunched using CEPS research insights:



Lotto has been making an average of two millionaires a week, for over 30 years. Watching the Lotto results live on TV was once a much-anticipated Saturday night ritual, but the flagship game was now struggling to compete for relevancy and share of wallet.

Our Lotto Category Entry Points research gave us a key insight; that the most critical CEPs for Lotto were linked to a fear of missing out, such as "when there's a big prize and I don't want to miss out" or "when my friends want to play together".

Thus, our media plan needed to foster a feeling of mass participation, ensuring Lotto was seen, shared, and talked about in social circles.

Central to this was Lotto becoming the first ever sponsor of Hearts popular – "Make me a Millionaire" – reinforcing our status as THE UK millionaire maker. Amanda Holden helped build hype, whilst an extensive social campaign sharing winners' stories drove talkability with 4.5 million people entering the draw

Despite reduced retail distribution and a +94% YoY increase in spend from People's Post Code Lottery, weekly sales in the first 9 weeks since launch averaged +5.5% higher than the same time last year, with every single draw in February outperforming the comparable one the year before.



Set For Life with its distinctive promise of a fixed monthly income of £10,000 per month for 30 years had the potential to bring dynamism to the National Lottery portfolio. Yet it was on the brink of disaster with only 8% unprompted awareness and 7% of adults who would consider playing it.

Our Set For Life CEPs research told us people consider Set for Life when "daydreaming about the future" and "entering new life stages"

Thus, central to our media plan was reflecting our audience's passion points by showing up in food, travel, music and fashion contexts and engaging them at critical life moments (like having a baby).

Automated contextual targeting across ITV and Sky enabled us to align with passion points in real time and bespoke intent-based audiences mapped to our CEPs delivered hyper-contextual communications across all digital platforms.

Our groundbreaking contextual CEP targeting exceeded platform engagement benchmarks by 268%.

Weekly sales surged to £6.8 million and YTD sales saw a robust +4.2% increase on average (+£4.8m). What's more we delivered a +7% increase in claimed players by May compared to the previous year.

*"The approach to Category Entry Points and the tool blew us away and we are already seeing the impact of its application."*

Ross Sergeant, Global Head of Media, Allwyn

We believe that we have solved one of the biggest problems facing the industry by turning decades of evidence-based marketing research into a new way of thinking about media planning, cracking the consideration code and in doing so delivering commercial and competitive advantage for our clients.

You're probably reaching for your copy of How Brands Grow now aren't you!

**MediaWeek AWARDS**  
PART OF **campaign**  
**2024 Shortlist**  
Headline Sponsor  
**infinitum**  
ENTERTAINMENT *Making content happen*

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**Thank you**



# Breaking the eggs to make the omelette

Planning and strategy Room 101

## Richard Kirk

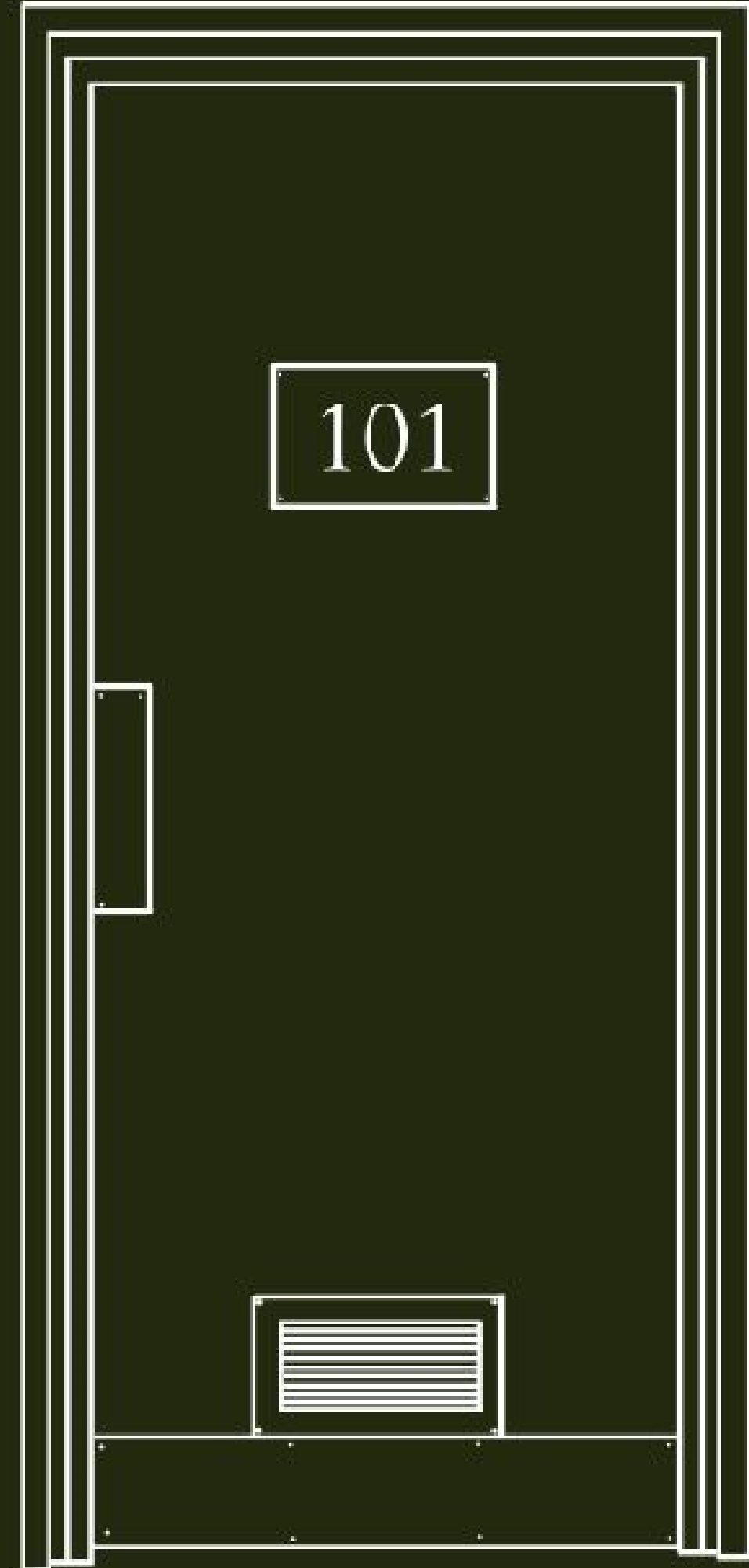
Chief Strategy Officer, EssenceMediacom UK

# Brief

15 minutes

Your own opinions

Create debate on the panel



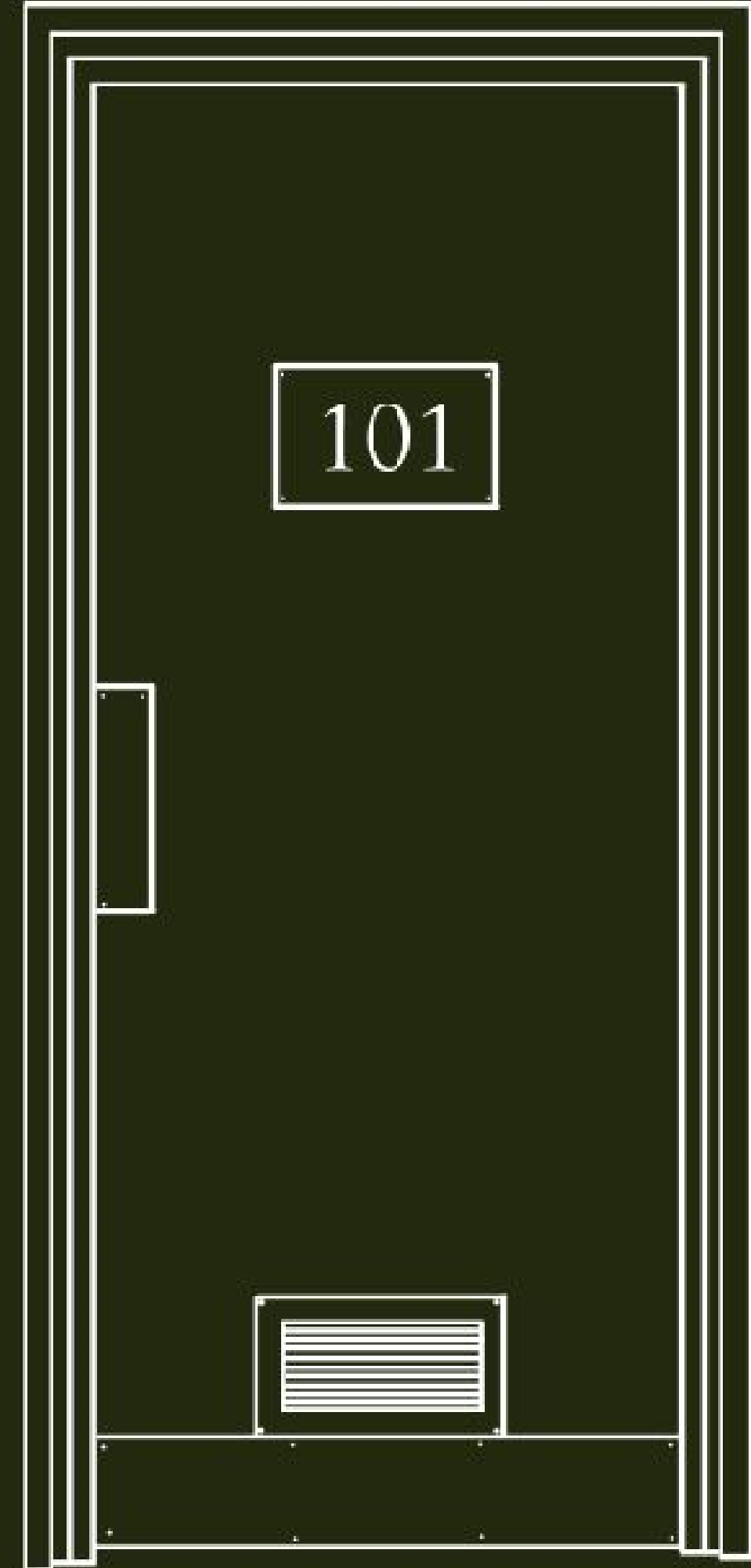


Right person

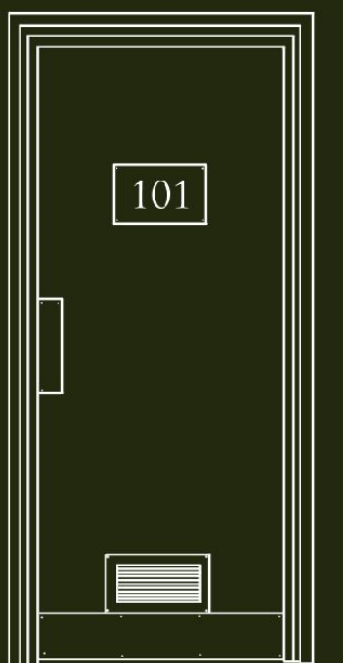
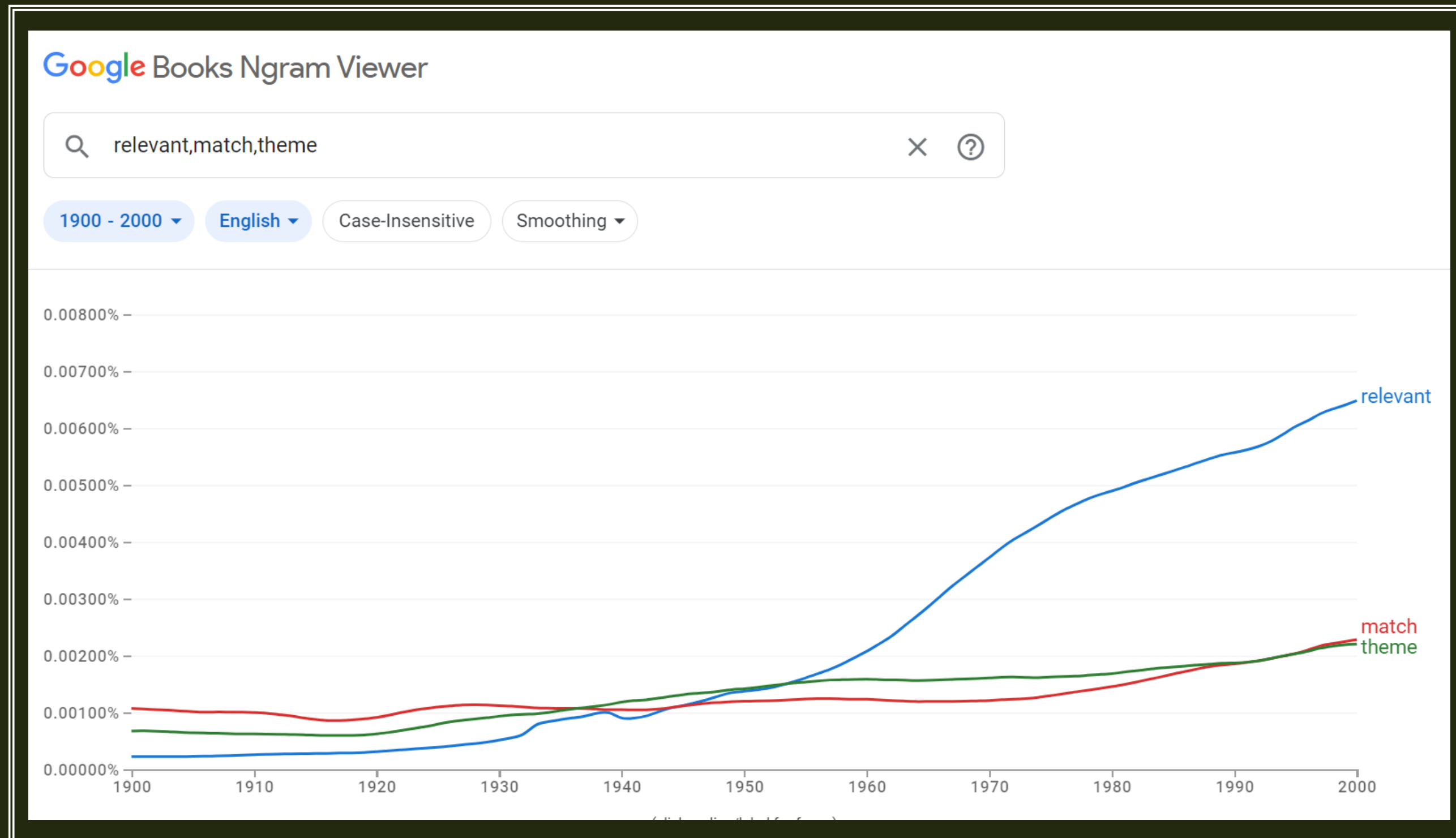
Right time

Right place

The unquestioned dominance of “relevance” in  
media planning

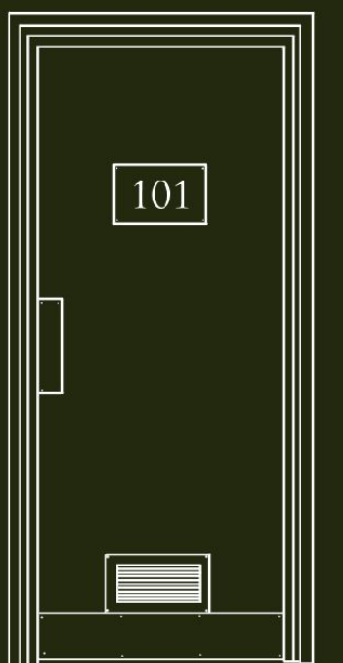


# Computing meant “relevance” had a good 20thC



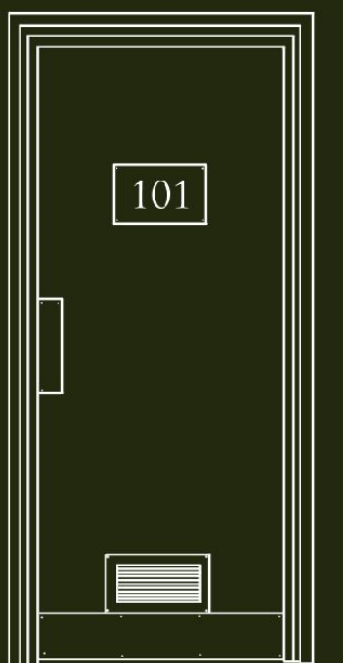


Relevance was/is central to the greatest advertising innovation of our lifetimes



# So relevance became central to how digital advertising worked

- *“help us understand your interests so we can provide you with relevant advertising on other websites including Facebook and Google”*
- *“used by us and those advertising partners to build a profile of your interests and show you relevant adverts on other sites and services”*
- *“If you do not allow these cookies, you will experience less targeted advertising”*

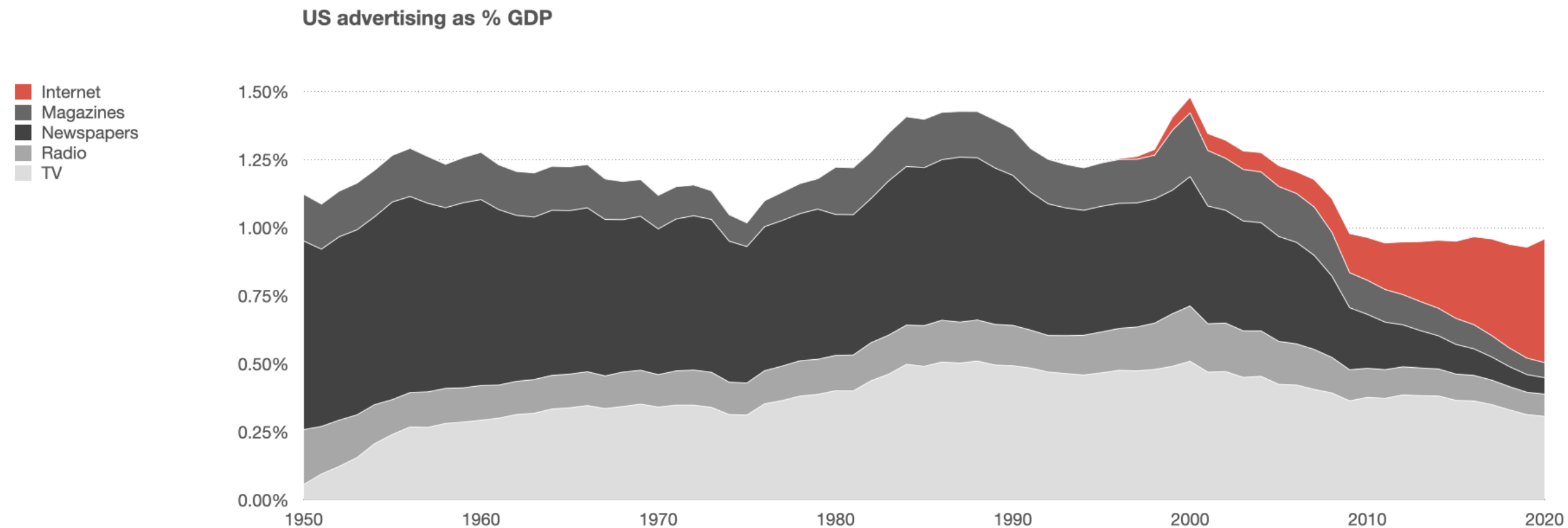




# Digital then began to eat advertising

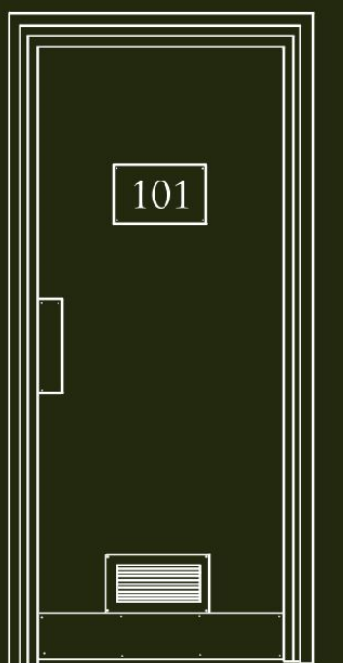
## Waves of change

How many stories does this chart tell, and how many open questions?



Source: McCann, Zenith, BLS, @BenedictEvans

Benedict Evans — March 2022 49



# Modern media moguls espouse relevance



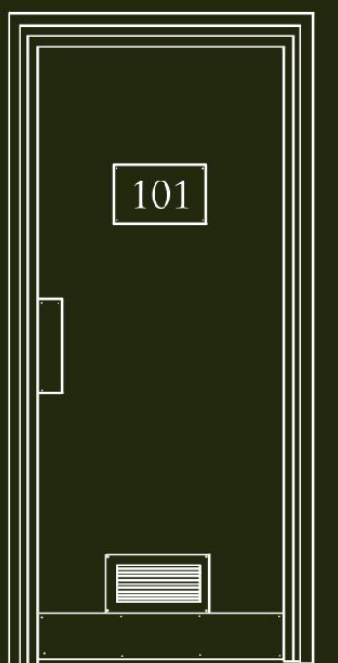
“users want ads to be relevant”



Sees advertising as content, emphasizing the importance of relevance and usefulness to viewers



“Relevancy is the currency that most of these brands are missing”

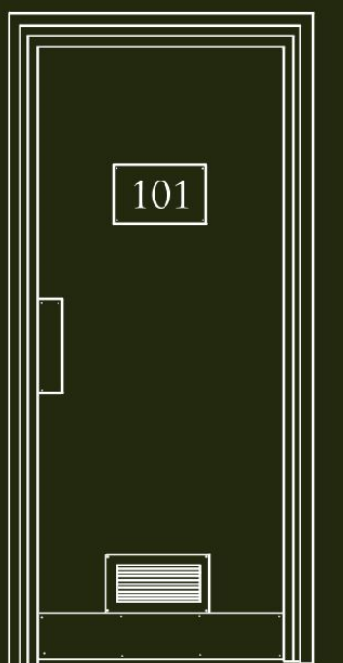




# Relevance has become a cure-all for advertising

From recent reports/papers:

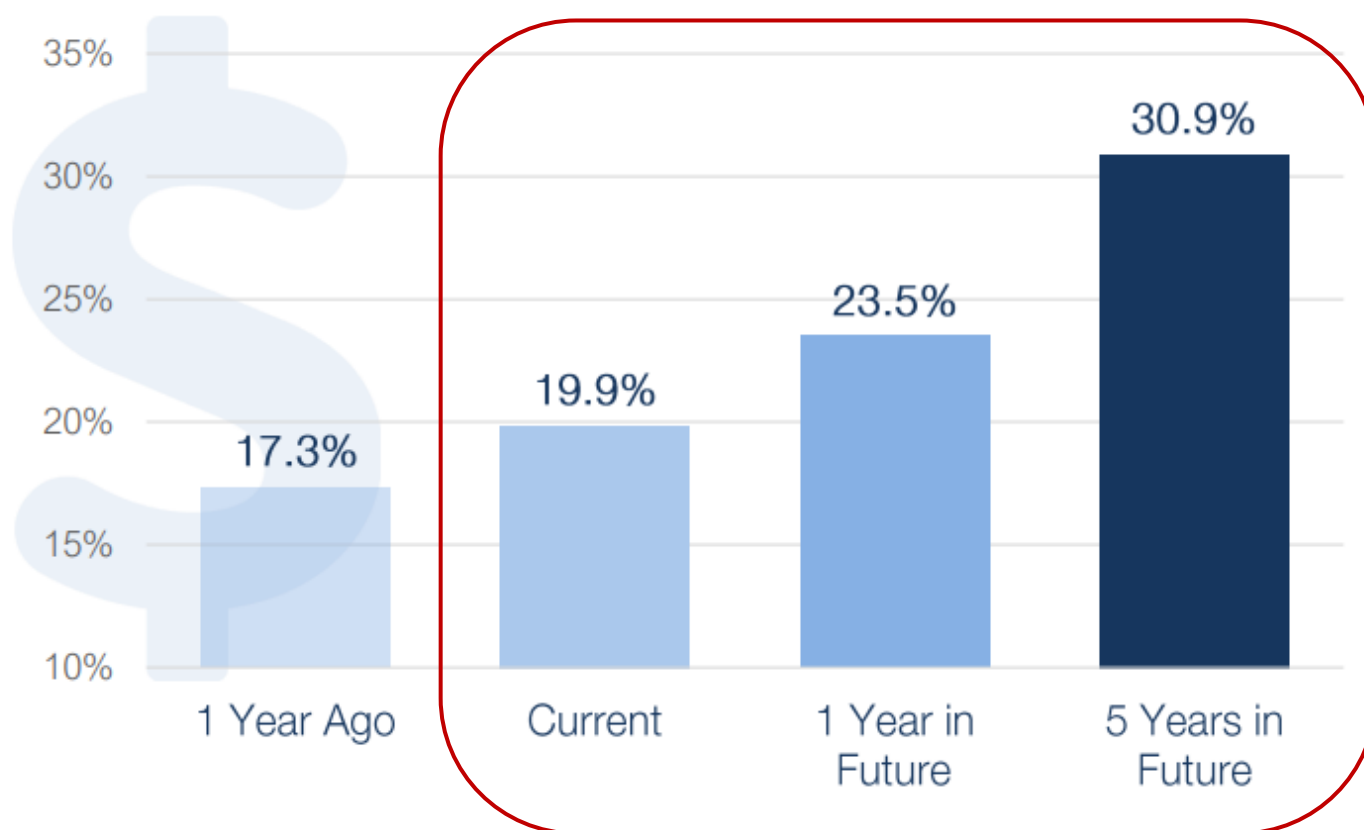
- Relevant ads “convey a sense that the brand values its customers”
- As competition intensifies relevance serves as a critical differentiator, enabling advertisements to cut through the noise
- Relevant ads can help businesses establish meaningful connections with their customers
- Relevant ads are more likely to be perceived as helpful by the user, which increases brand trust and loyalty



# But more relevance = more tech required

## Spending on marketing technology predicted to increase 31% over the next 5 years

What percent of your marketing budget do you spend on marketing technology? Past, present and future predictions

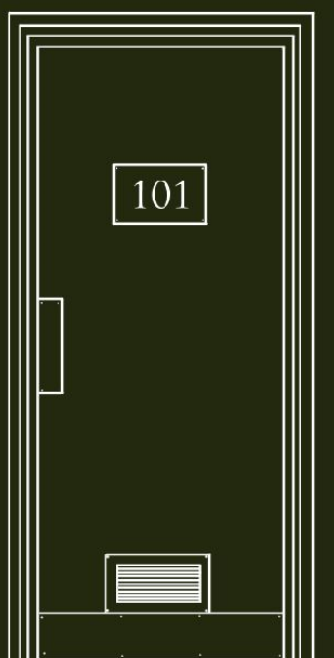


### Economic Sector

|              | 1 Year Ago | Current | 1 Year Future | 5 Years Future |
|--------------|------------|---------|---------------|----------------|
| B2B Product  | 16.5%      | 18.8%   | 22.2%         | 30.0%          |
| B2B Services | 16.6%      | 18.9%   | 23.3%         | 31.9%          |
| B2C Product  | 17.9%      | 20.5%   | 24.1%         | 29.6%          |
| B2C Services | 20.4%      | 23.8%   | 26.7%         | 33.7%          |

### Online Sales

|        | 1 Year Ago | Current | 1 Year Future | 5 Years Future |
|--------|------------|---------|---------------|----------------|
| 0%     | 19.8%      | 21.8%   | 25.1%         | 32.4%          |
| 1-10%  | 13.2%      | 16.4%   | 20.6%         | 28.9%          |
| 11-49% | 16.3%      | 18.1%   | 23.2%         | 30.6%          |
| 50-99% | 23.3%      | 26.1%   | 28.2%         | 35.7%          |
| 100%   | 16.1%      | 19.8%   | 22.0%         | 26.1%          |





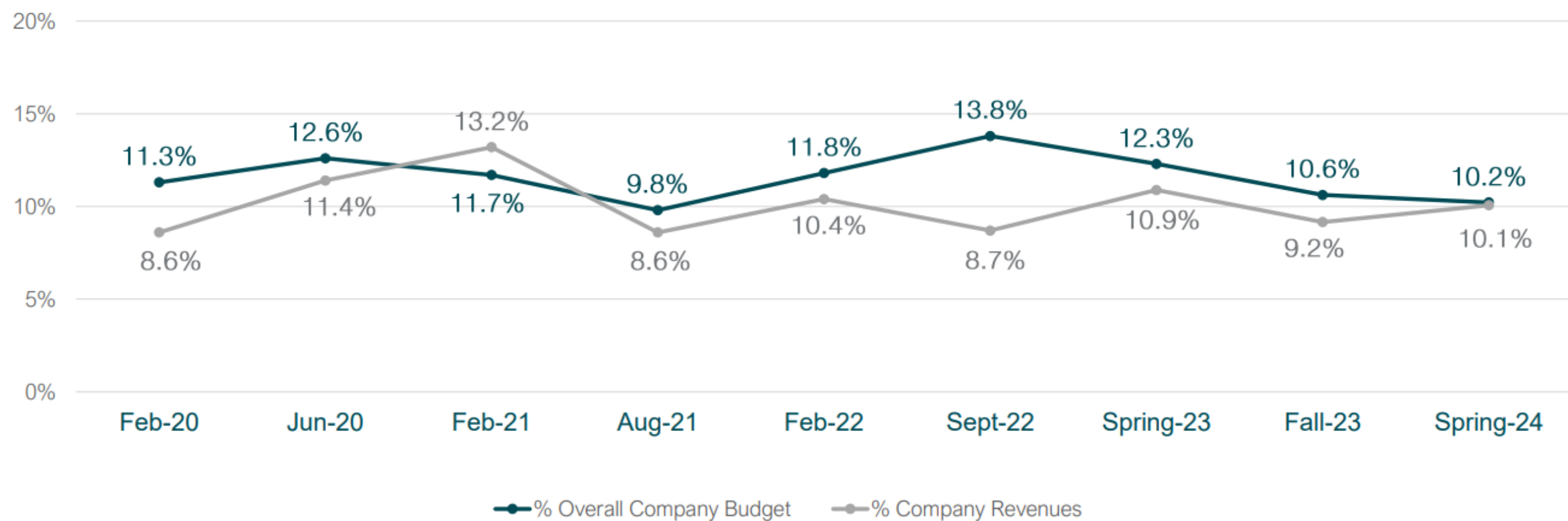
# When budget is down/flat vs rev, growing 2-4% yoy

The CMO Survey<sup>®</sup>

## Marketing budgets over time

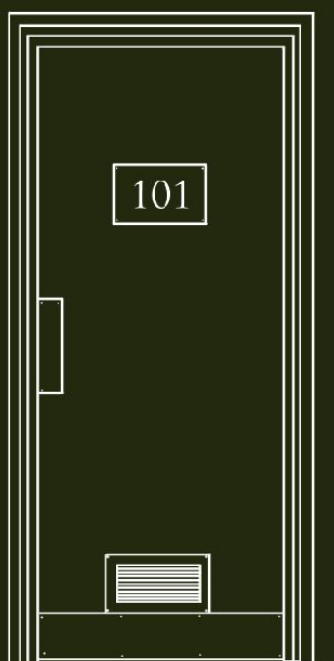
Marketing expenses account for what percent of your company's overall budget?  
Marketing expenses account for what percent of your company's sales revenues?

Firm and industry  
breakouts on next slide



Spring 2024

15

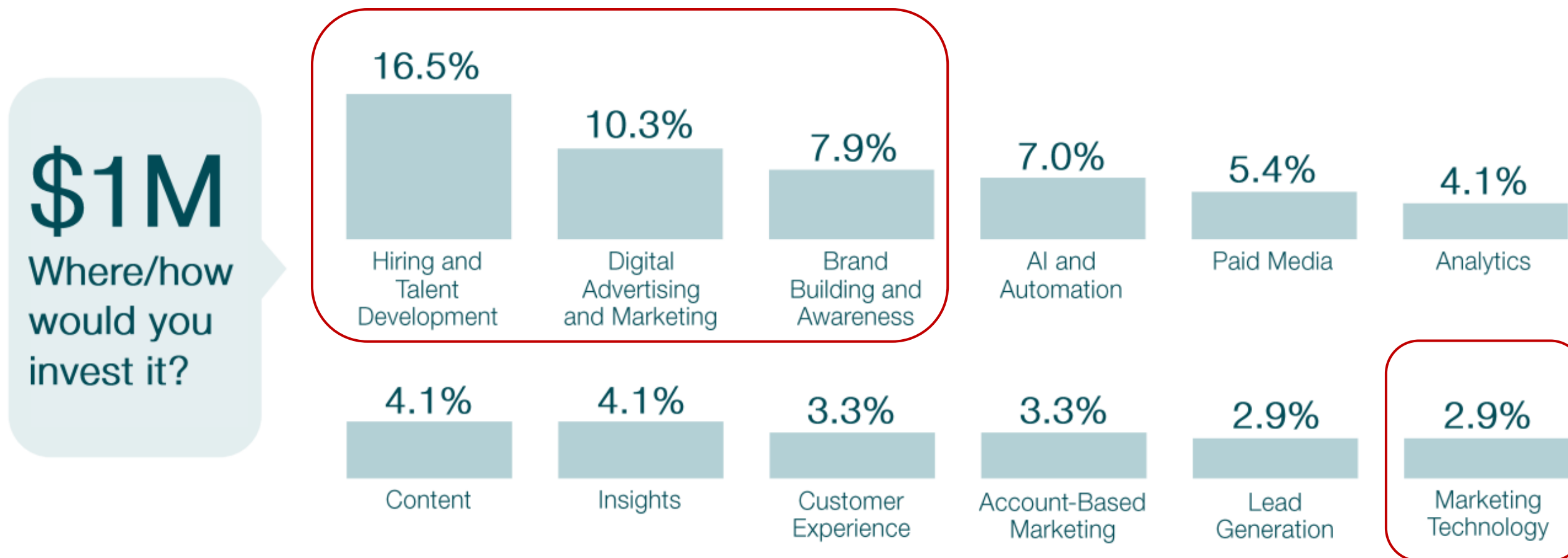


# Relevance is being pursued with little enthusiasm

The CMO Survey<sup>®</sup>

When presented with extra budget, marketing leaders overwhelmingly prioritize boosting and developing their workforce

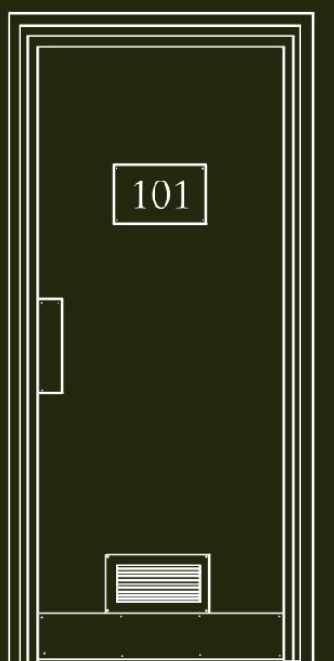
If you had an extra \$1M of budget given to the marketing organization to use any way you wanted, where/how would you invest it? (% of respondents using budget for activity)



Spring 2024

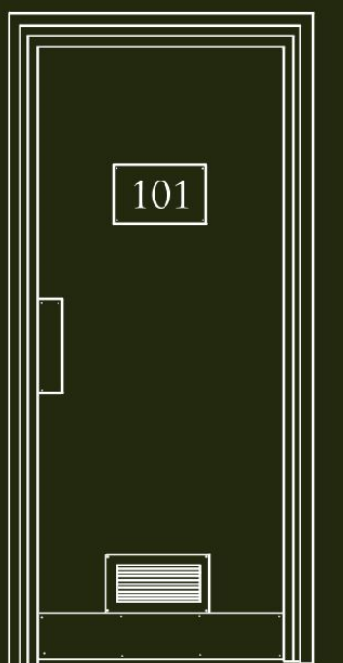
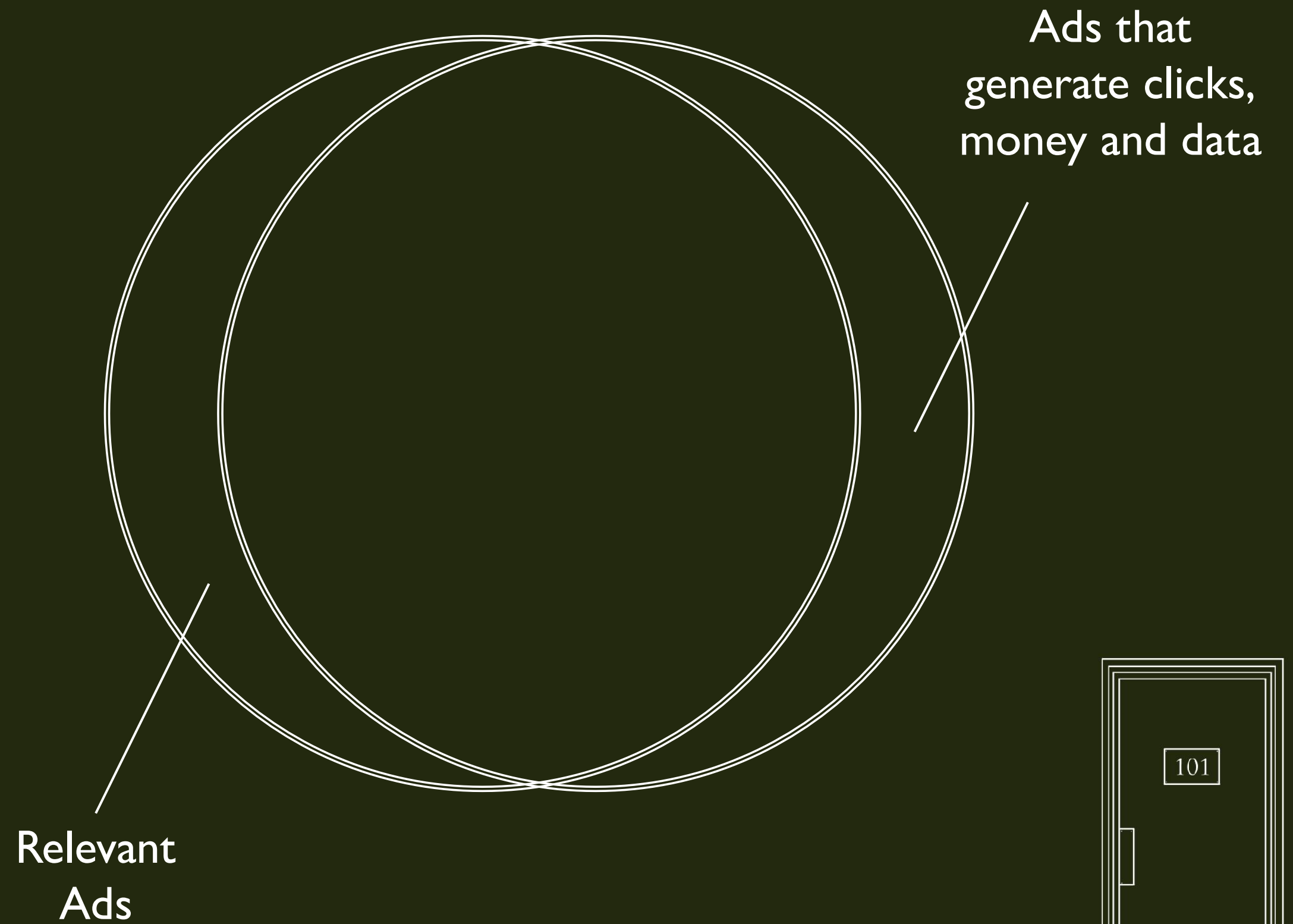
\*The remainder of investments were 2% or less of the sample.

22



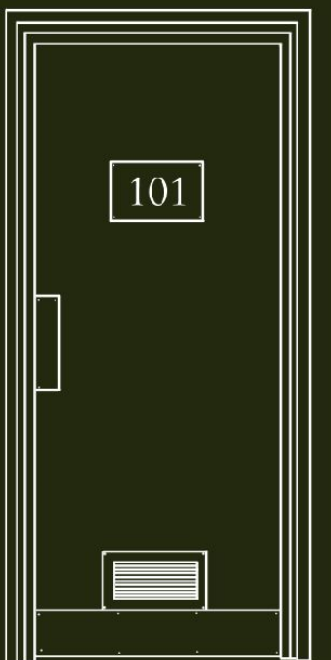


# This is what we've forgotten





# Our own “digital” consumption shows us that what we really value is serendipity





# Fame doesn't come from relevance





# Advertising's response? "Cultural relevance"



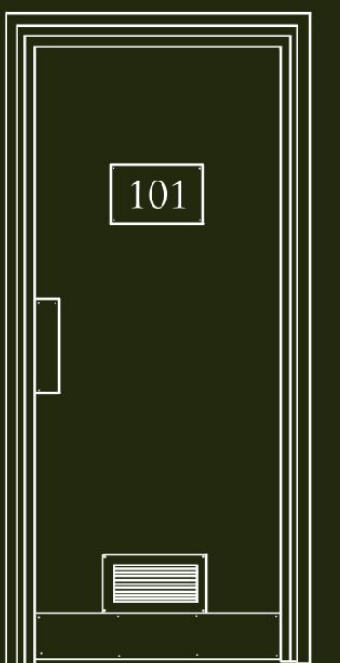


Right person  
Right time  
Right place

Yes, if someone's looking for you

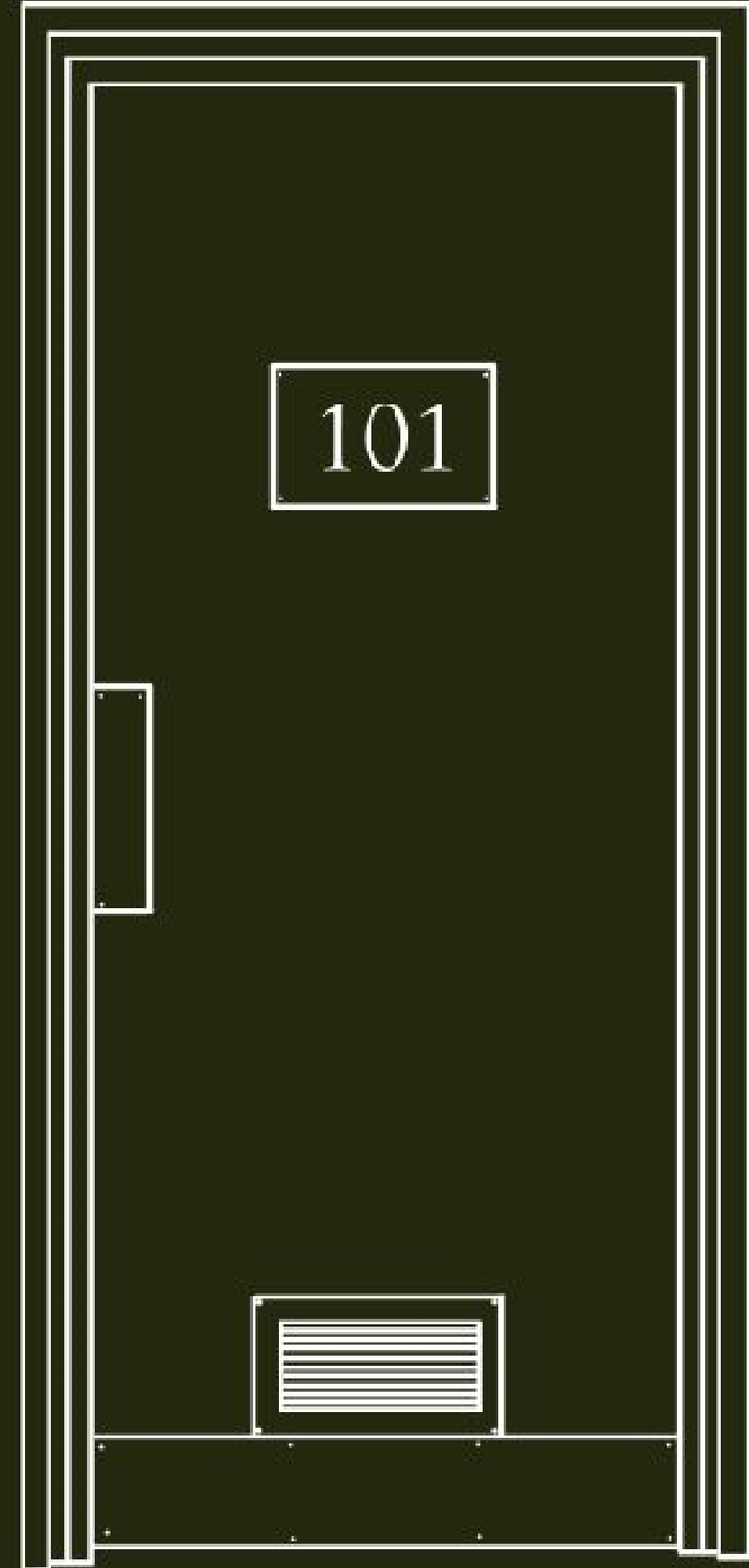
Big audience  
Big moment  
Big reaction

The rest of the time



# Brand Safety

Our view of media quality is backwards



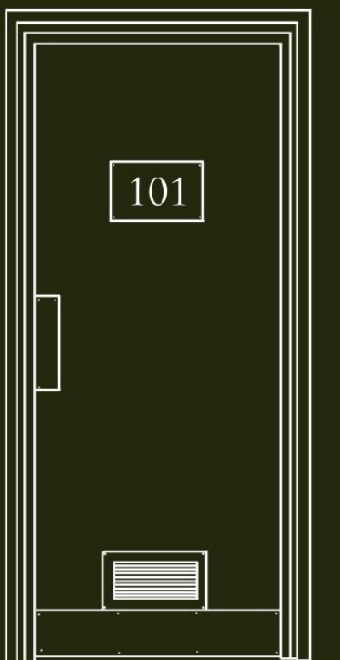


# We think about quality in terms of a floor

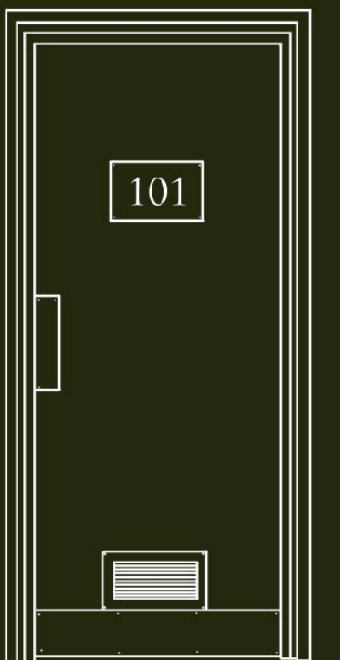
Good quality  
Weigh reach, ROI & cost  
Buy

----- Brand safety threshold

Low quality  
Exclude, ban, bemoan  
(or still buy...)



But media has an x-factor that is additive to a brand, that varies in every impact





*Any further quality evaluation tends to be focussed on media's physical properties*

Viewability

Size / length

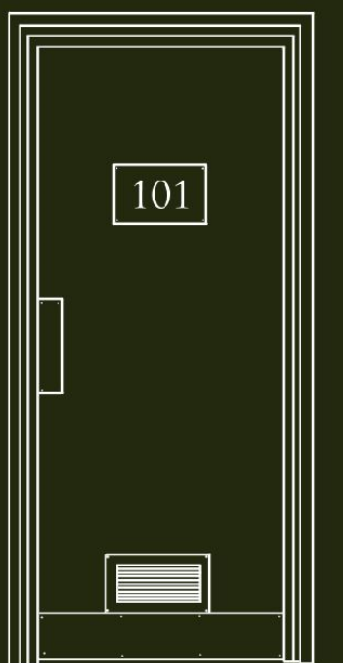
Competitor presence

Dwell time

**Attention**

Wastage / accuracy

Thematic relevance



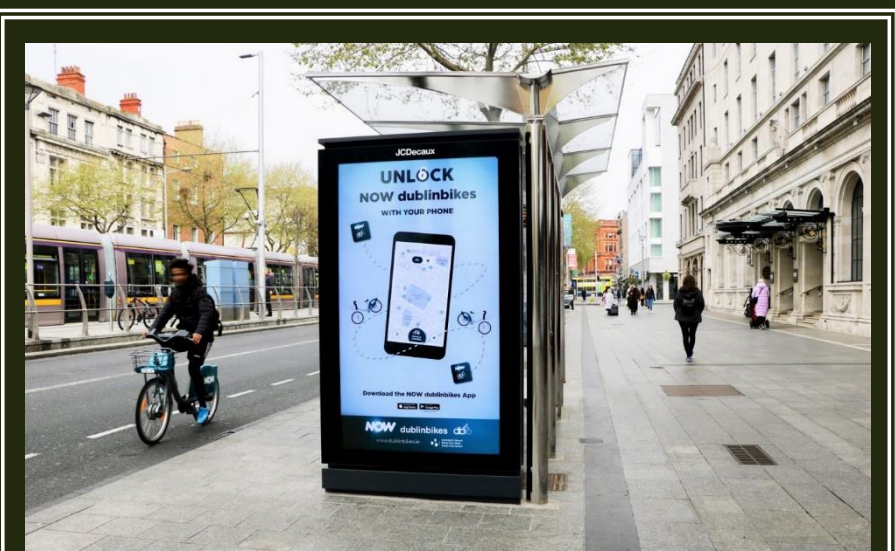
This is a major miss – as the context the ad is placed in is not stable



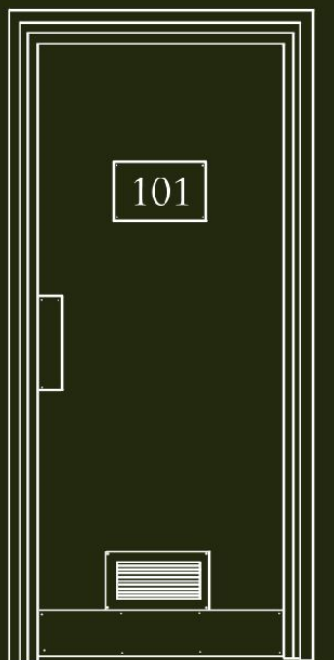
VS



VS



VS





# We must avoid the brand safety + attentive reach loop, or media's social good will wither

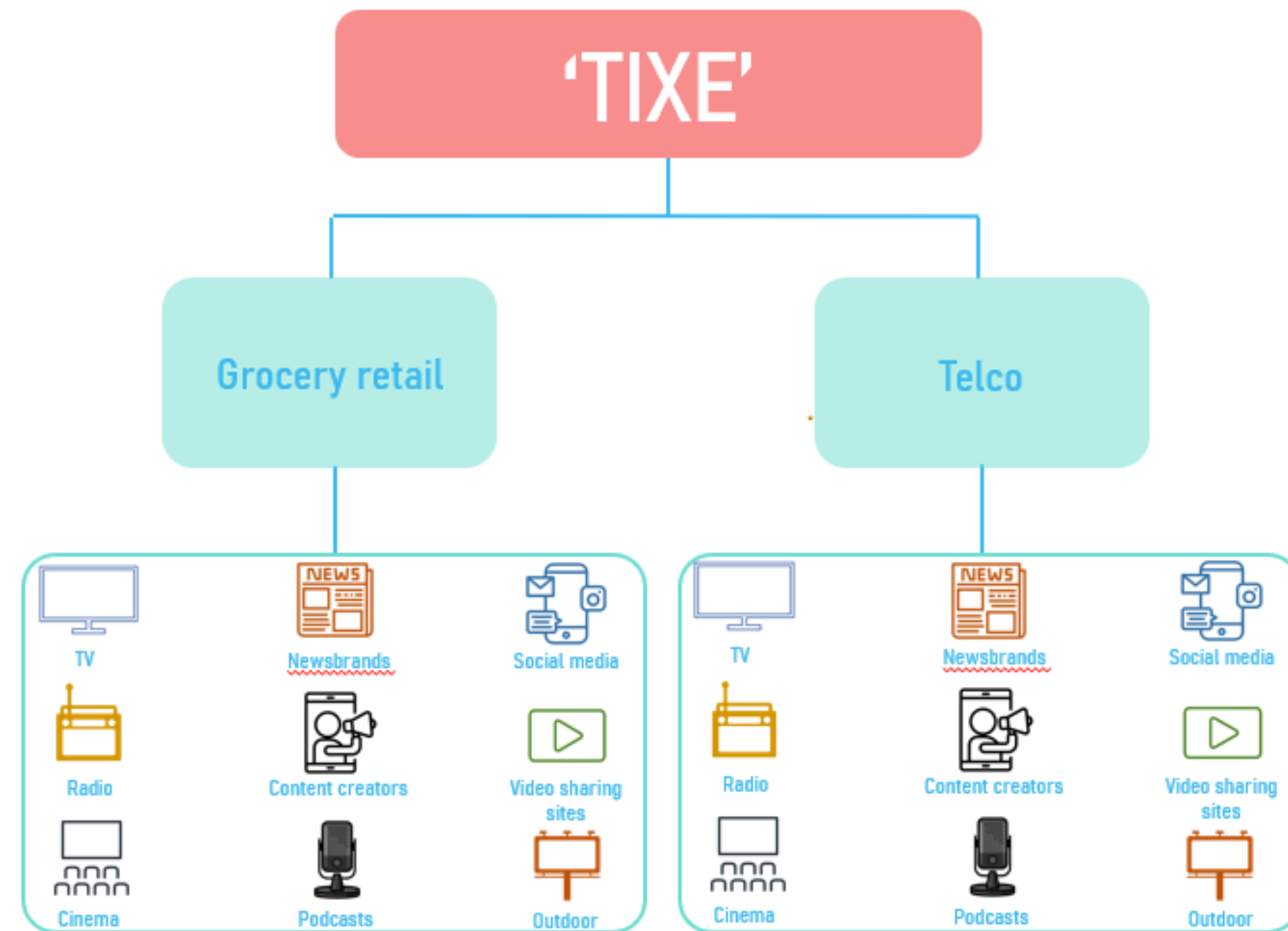


# We have set out to solve this riddle using behavioural science

We created a fictional new brand

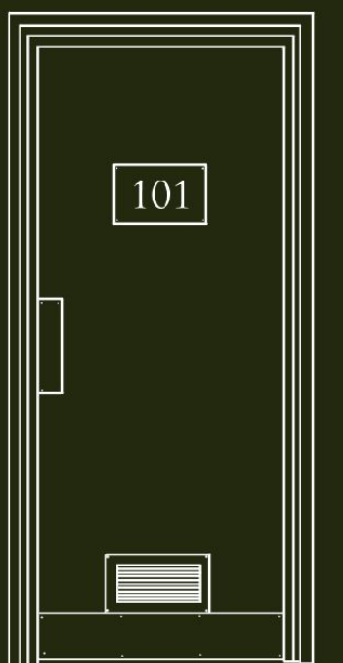
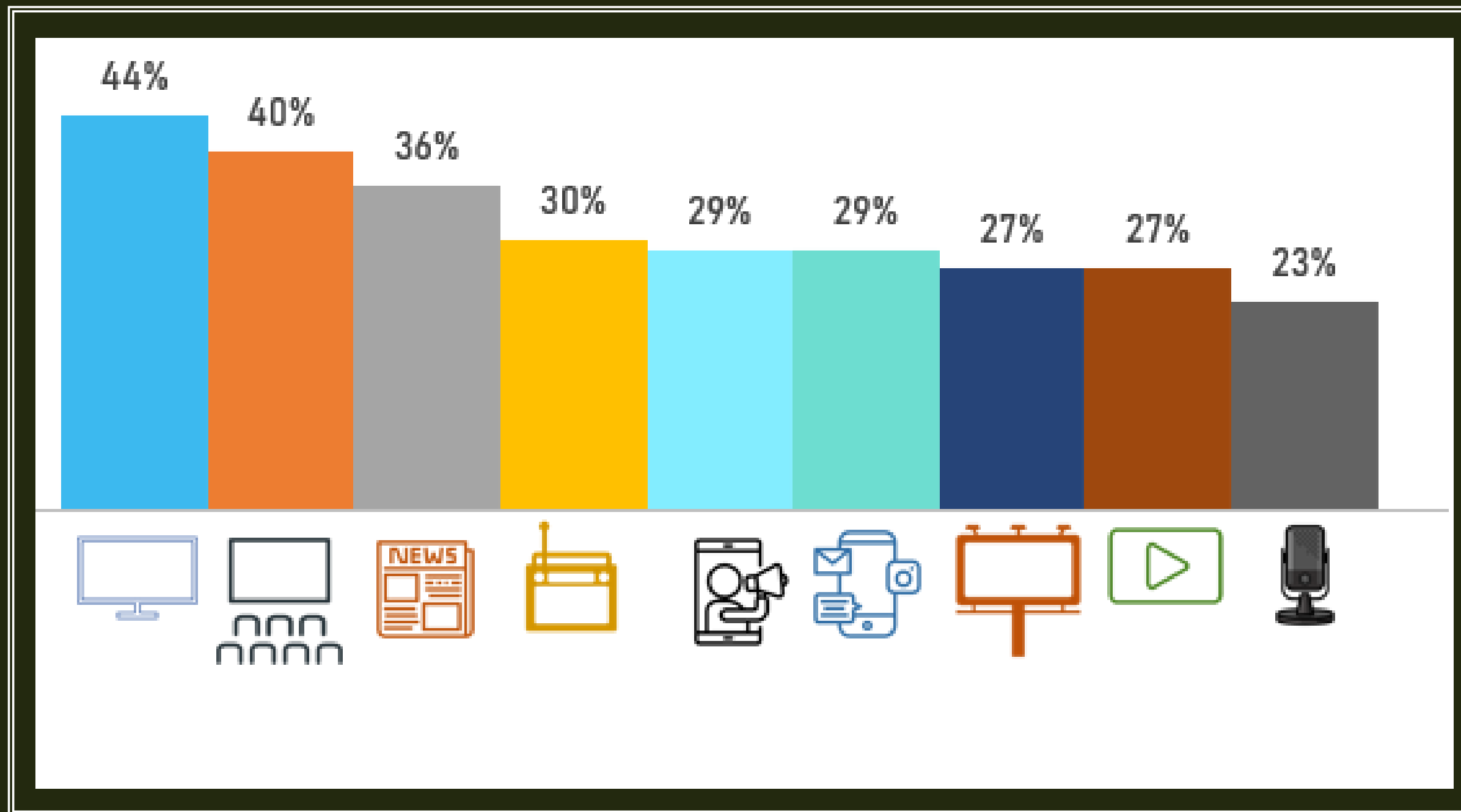
We created product descriptions for 2 categories

9 media descriptions varied across scenarios

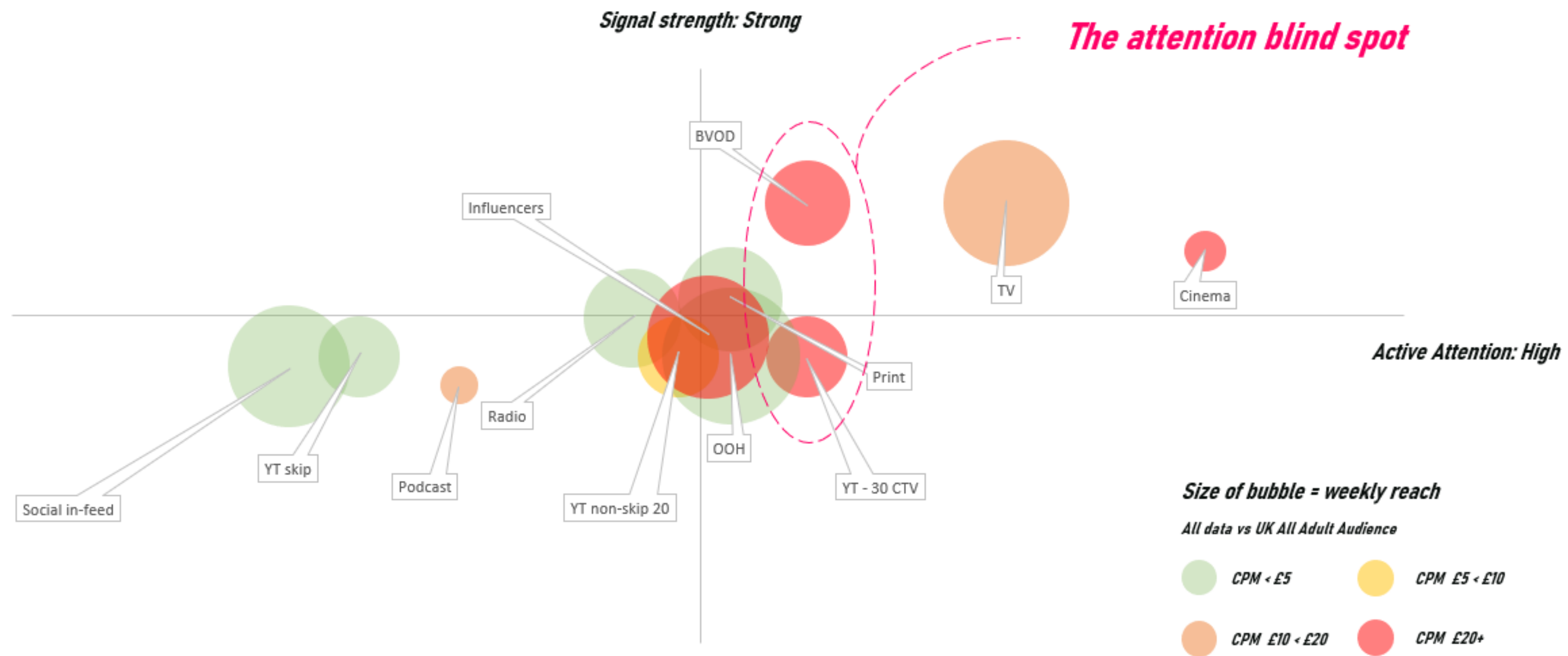




We have found the brand building potential of channels & formats varies significantly



# The first ever view of media price and reach alongside a holistic quality metric

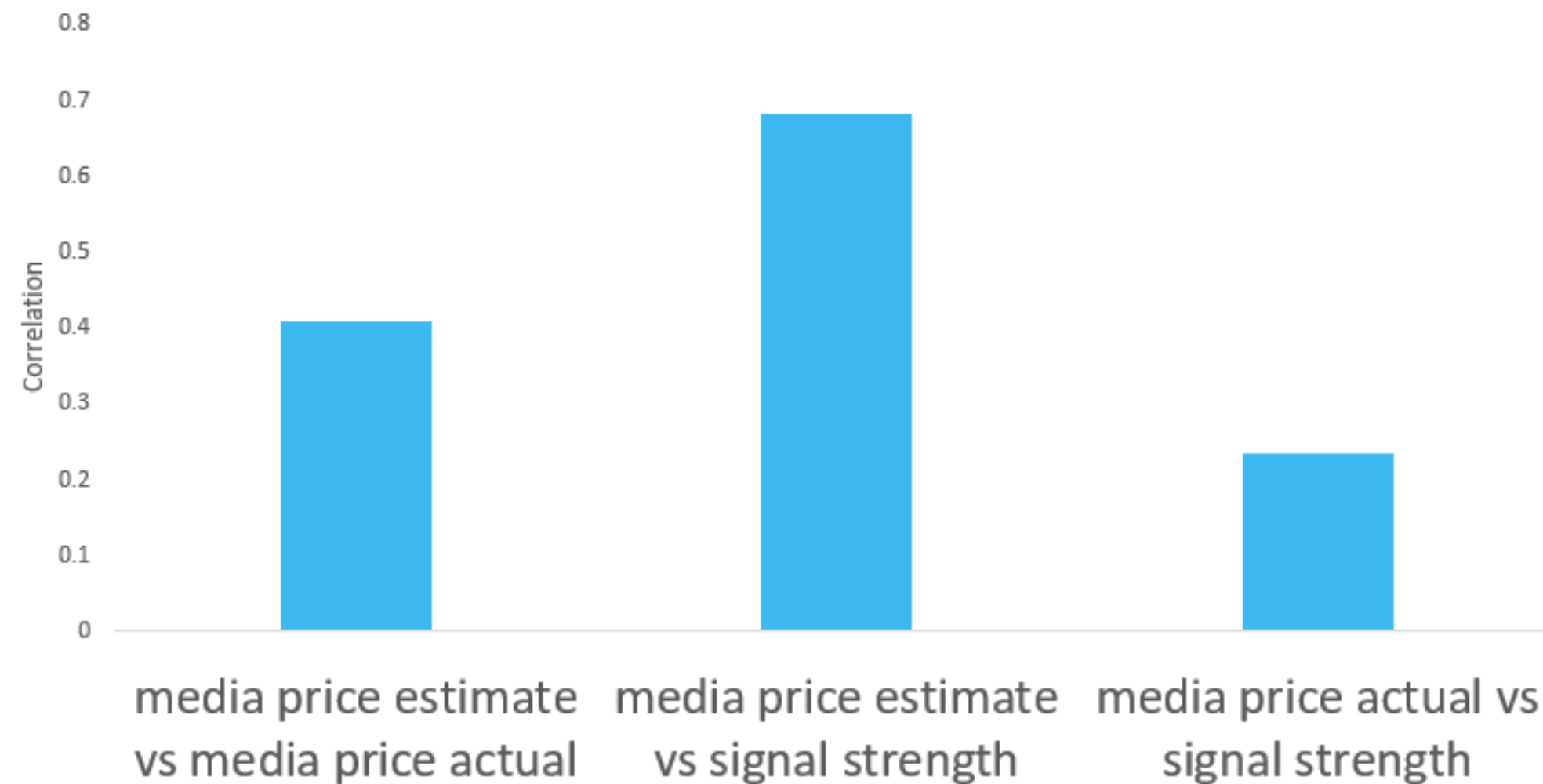


Attention data: Amplified, Lumen :: Signal Strength, Thinkbox, EM  
Bubble Size: PamCo, BARB, UKOM, ROUTE, RAJAR, Ofcom :: Pricing: EM



# People's estimate of media price drives signal strength (brand building potential) for each channel

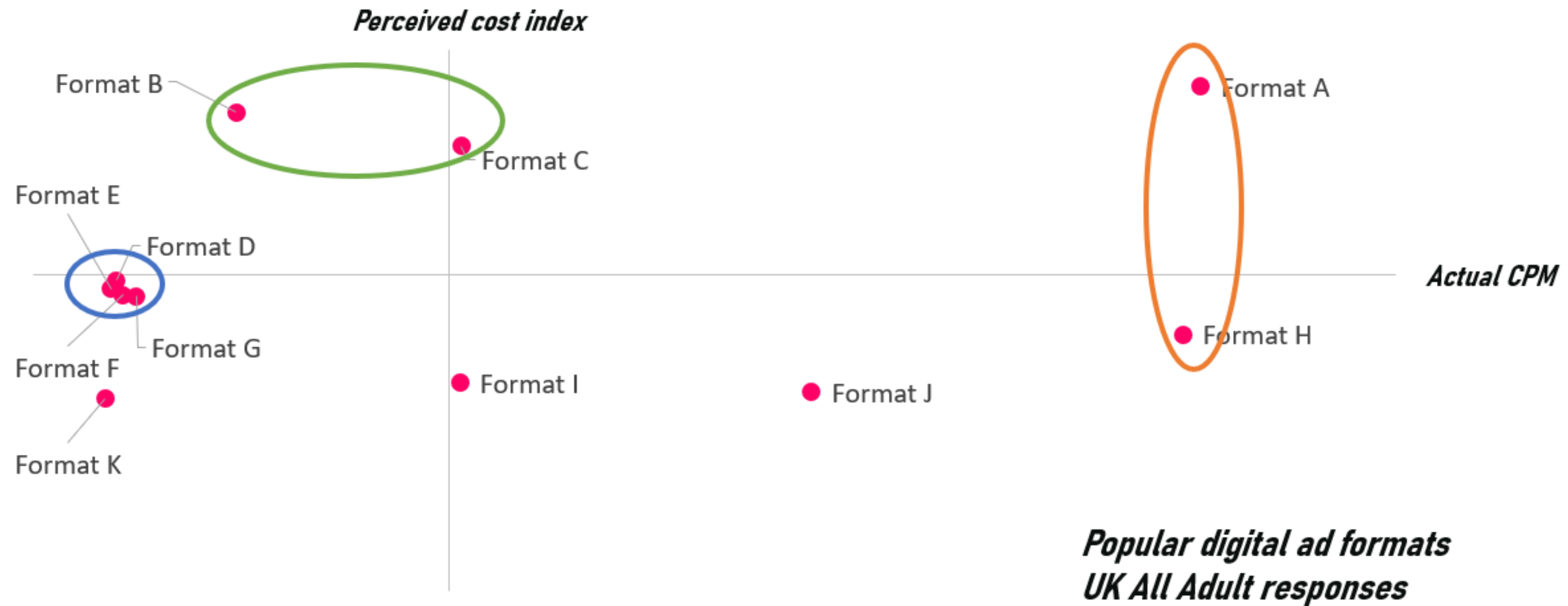
But media pricing is not taking this into account



Experiment 2:  
Which digital formats do  
people believe cost the  
most?

Source: Signalling Success Thinkbox/House51 2020, Signalling Success 2 [EssenceMediacom/Burst Your Bubble 2023](#)  
Base: 2020 c.n=609 per cell, 2023 c.n=308 per cell

# Different formats in the same channel offer very different value propositions in terms of brand building potential





Your brand  
is what it  
advertises  
against

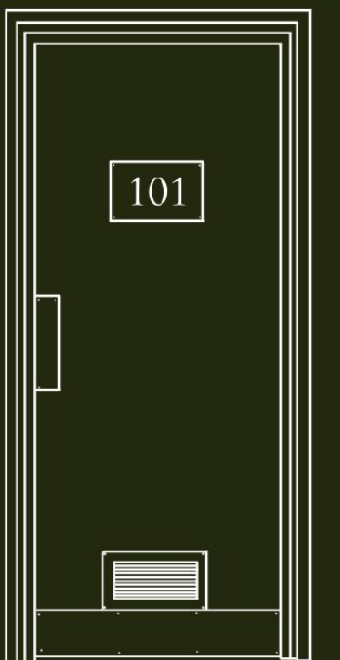
...impact isn't just  
physical, but mental too

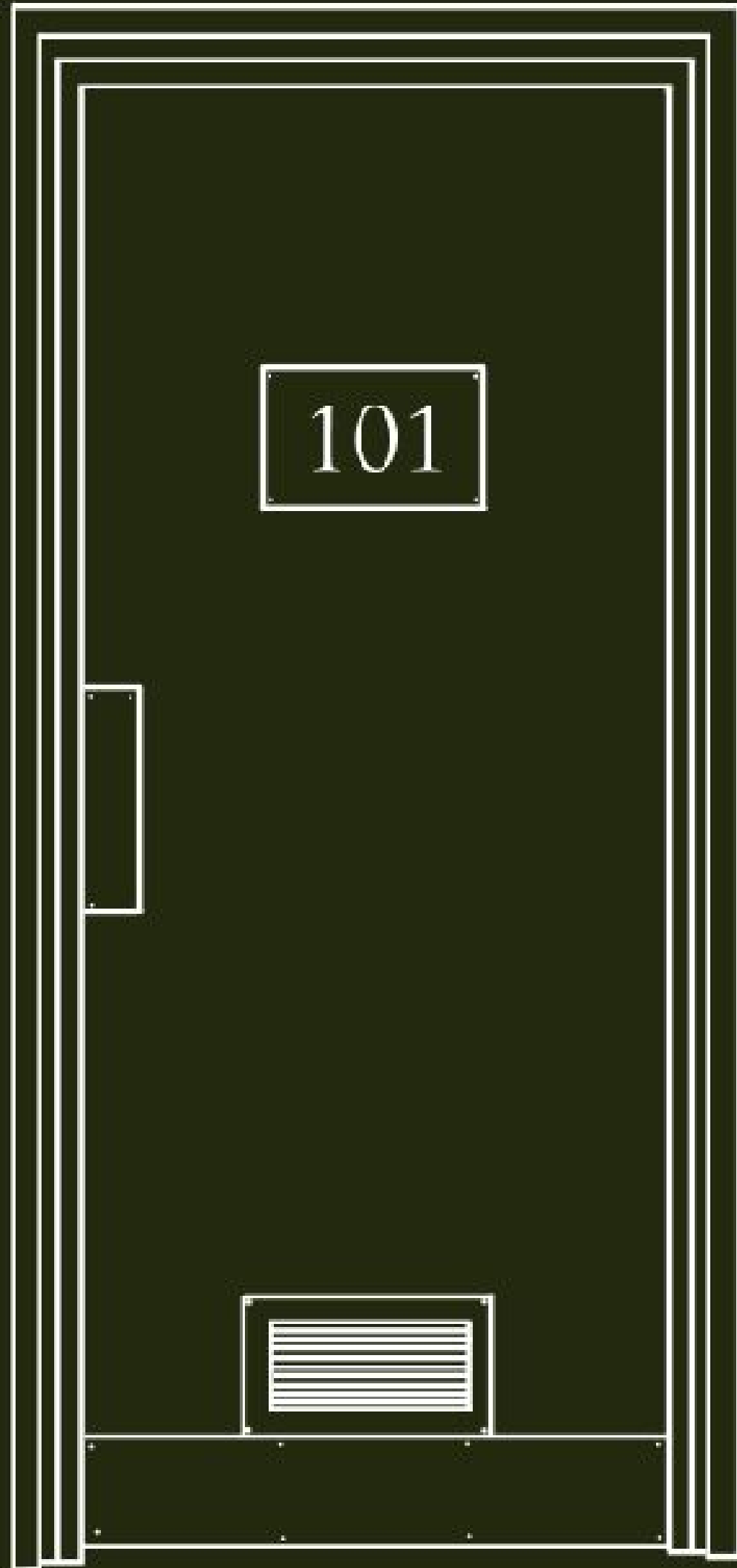
The media  
is a huge  
part of the  
message

...and message  
strength is  
quantifiable

Quality  
shouldn't  
be about a  
floor

...optimise media for  
the *addition* of brand  
building potential







# IPA Media Planning & Strategy Summit **2024**

Facing the Future with Fresh Eyes