

Why TV is at the heart of effectiveness

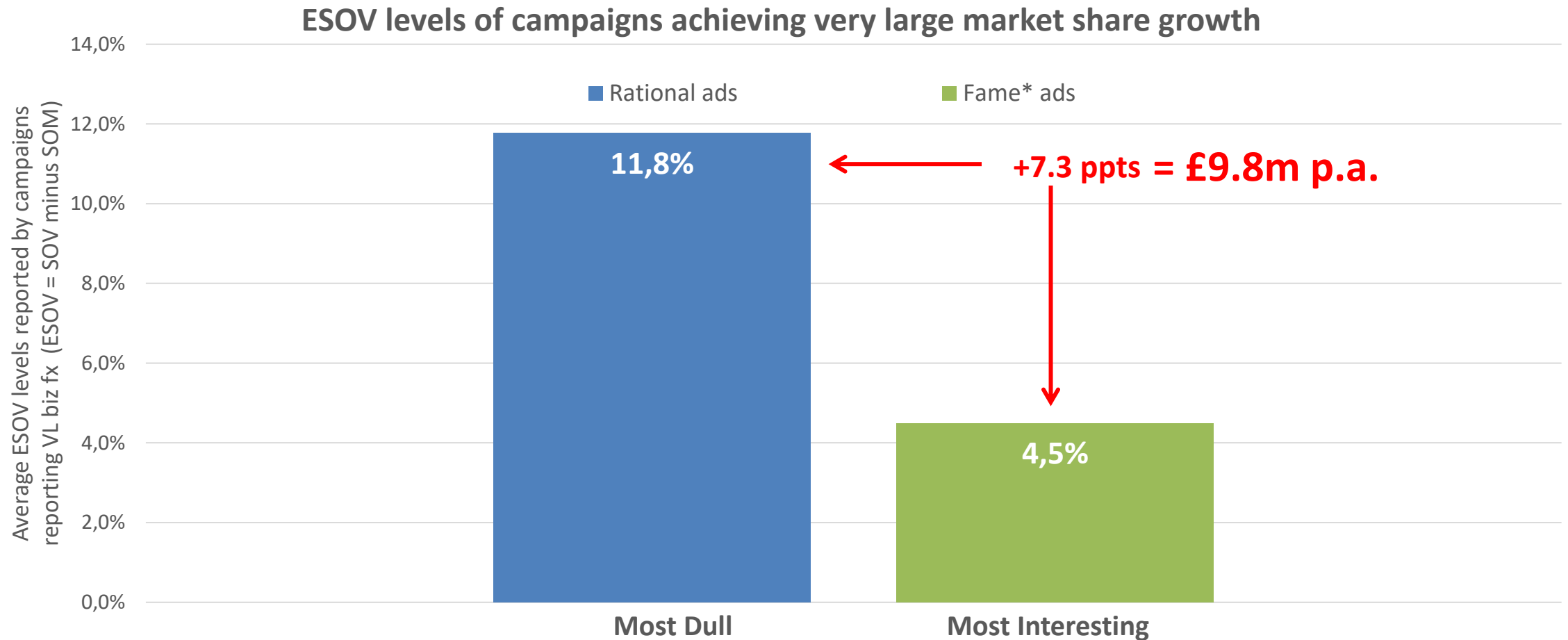
Brands can't afford to be dull

TELEVISION
TAIKA

SCREEN
FORCE
THE MAGIC OF TV

Peter Field
Marketing & Communications Strategy

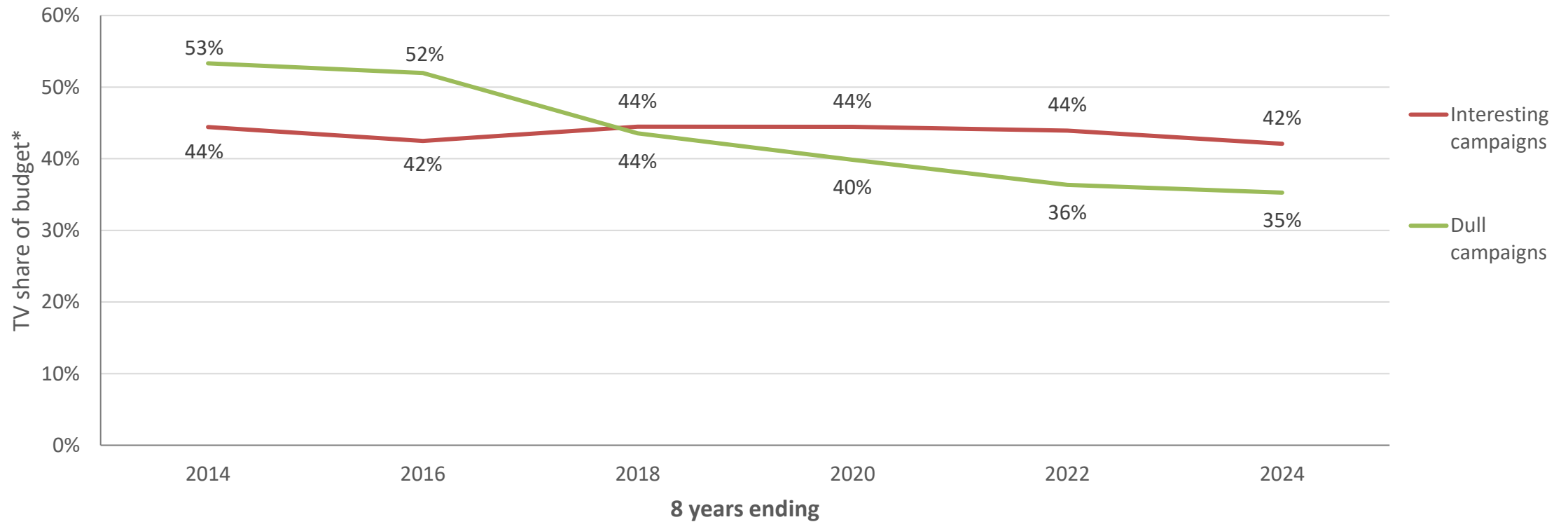
The Cost of Dull



*These are emotional ads that successfully inspire people to share or talk about them

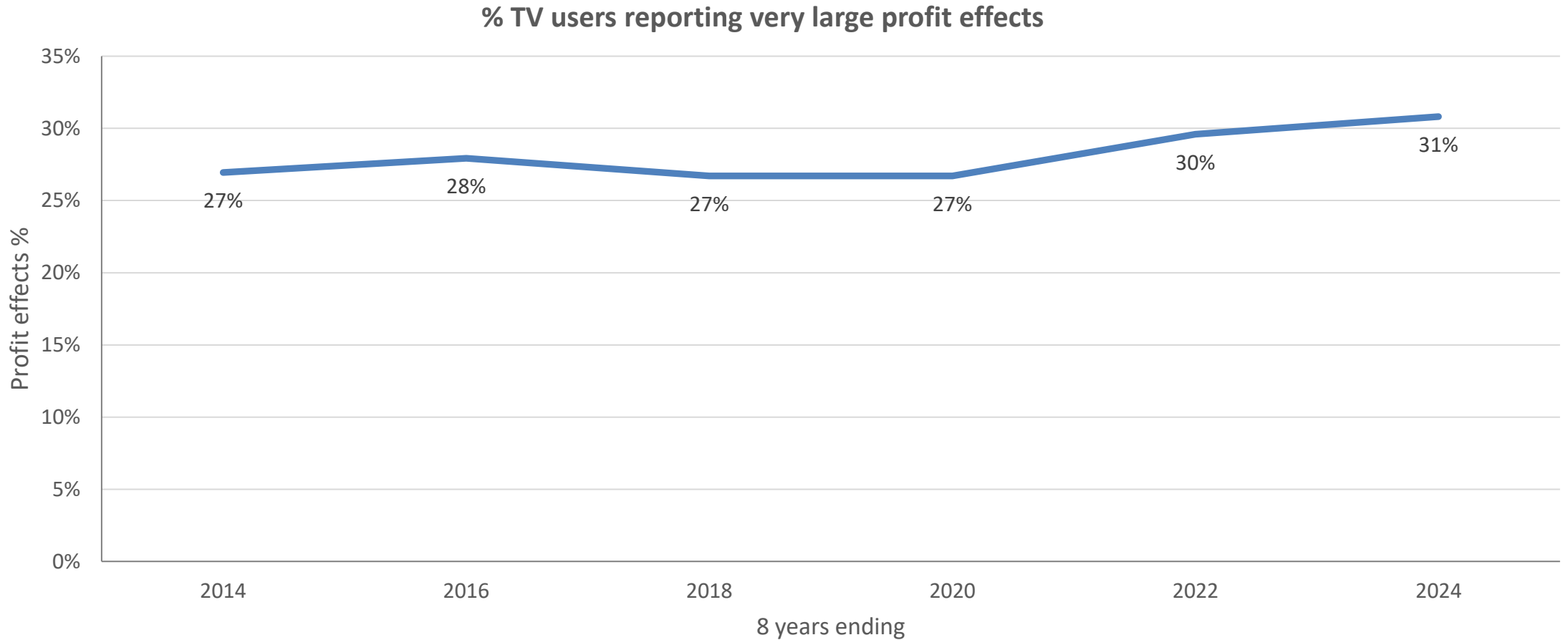
TV's growing anti-dull role

TV share of budget amongst dull vs. interesting IPA cases



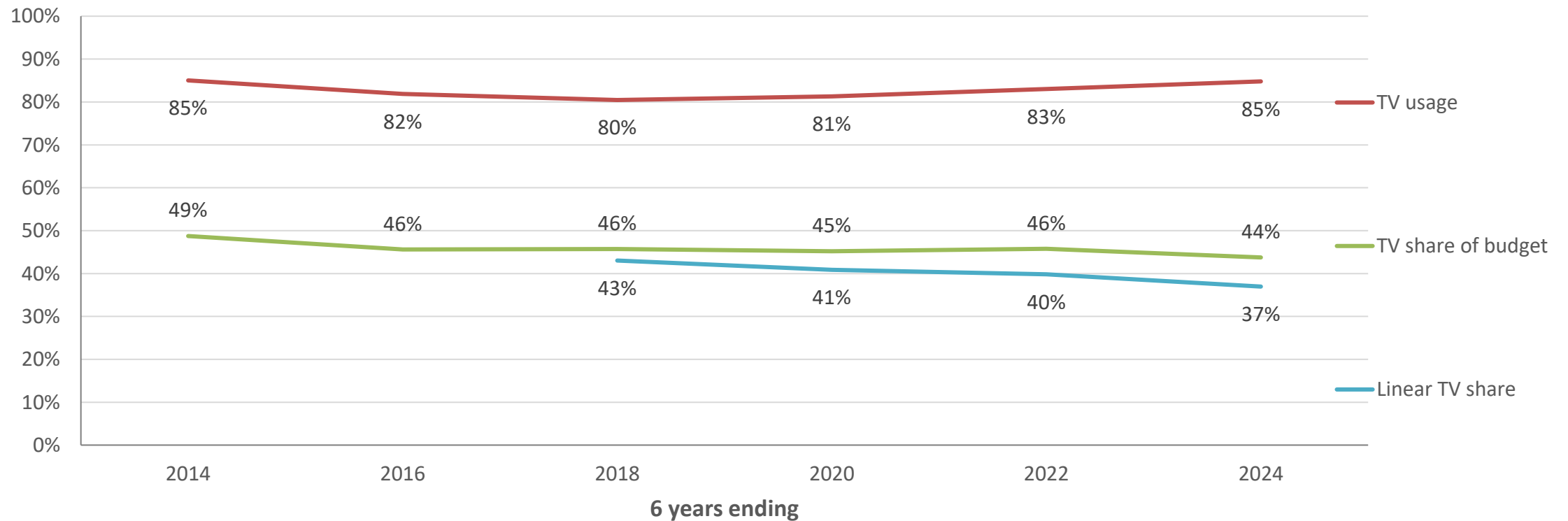
Dull is now as much about media choices as creative choices

TV's impact on profit



TV's enduring role in effectiveness cases

Usage of TV amongst IPA effectiveness cases



Usage of TV amongst effectiveness cases is now rising

TV remains the driving force for brand building

On-demand is essential to continued usage of TV

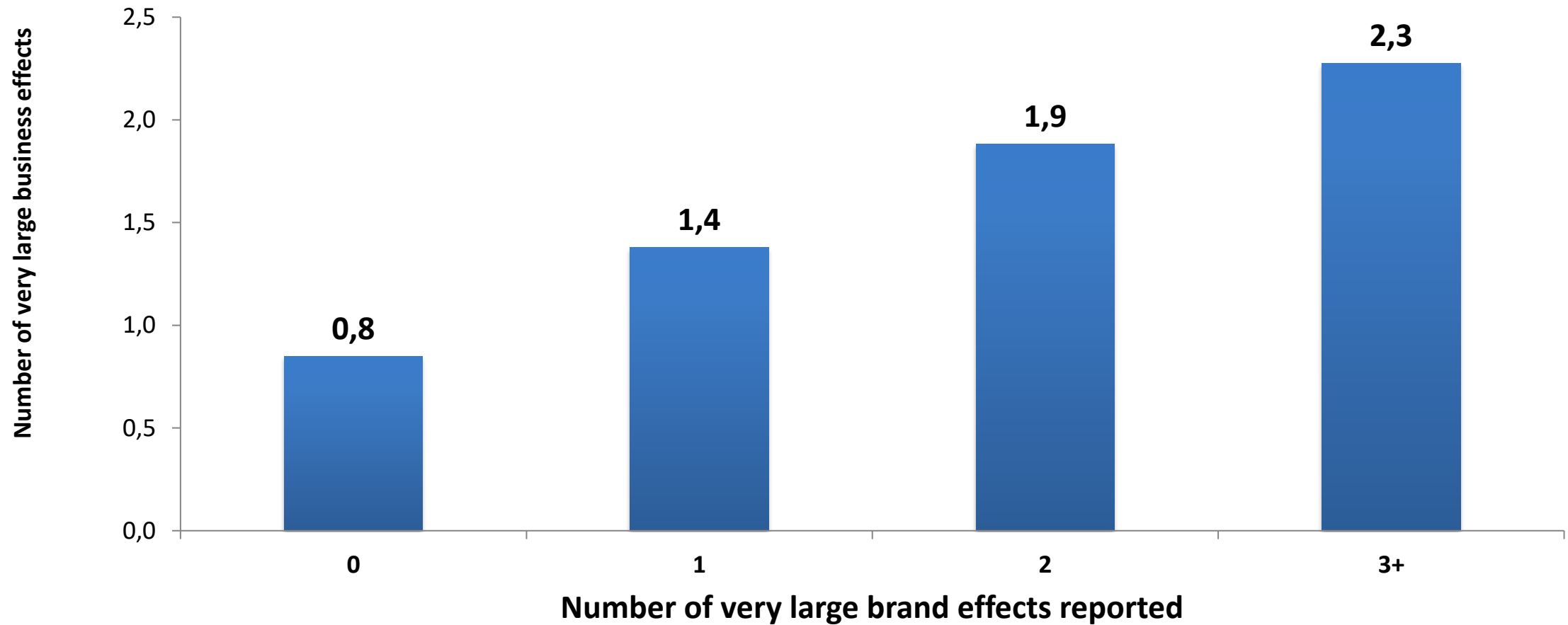
Three TV anti-Dull strengths

1. Attention
2. Emotional clout – driving fame
3. Trust

1. Attention

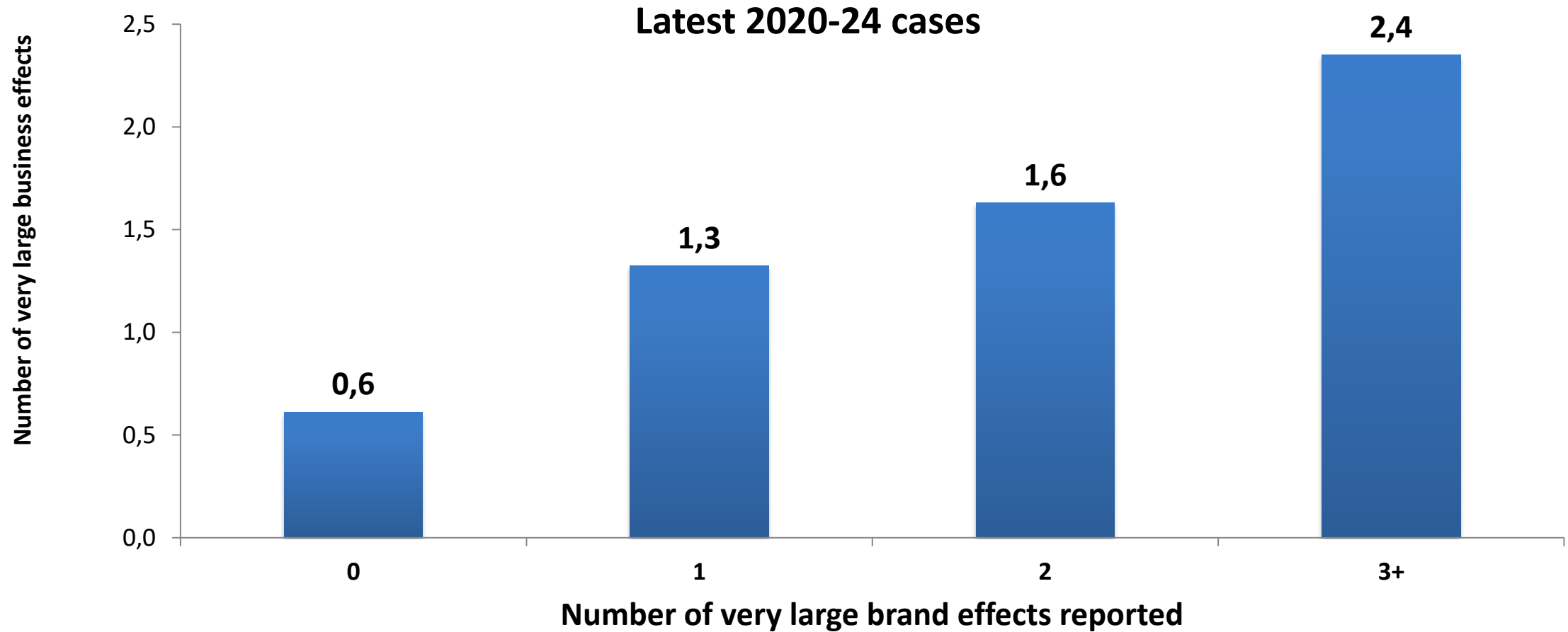
Dull media are less effective

Mental availability drives business success



Source: IPA Databank, 2000-2024 for-profit cases N=620

Mental availability drives business success



Source: IPA Databank, 2020-2024 for-profit cases N=153

Two ways advertising works

Short-term sales activation:
Performance marketing, Price Promotions, DM etc.

Bottom of funnel:

information to nudge the purchase now

Little impact on mental availability

Relies on those buying now for attention ~5%

Short term sales uplifts

Exploits brand building

Exciting new role for connected TV?

Long-term demand growth:
Brand building

Top of funnel:

emotional priming to create interest

Strong impact on mental availability

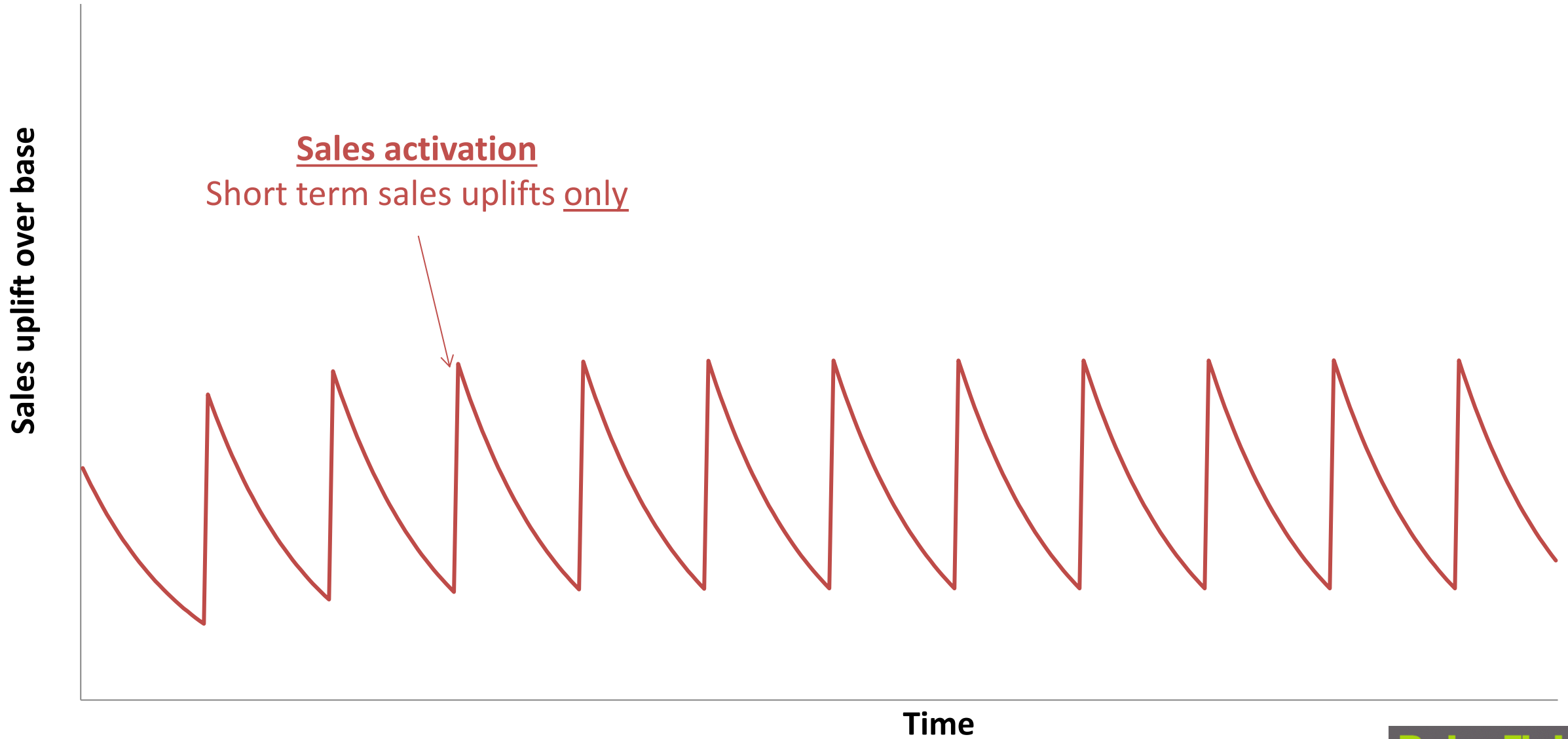
Potential attention of all category buyers: 100%

Long term sales & margin growth

Amplifies sales activation

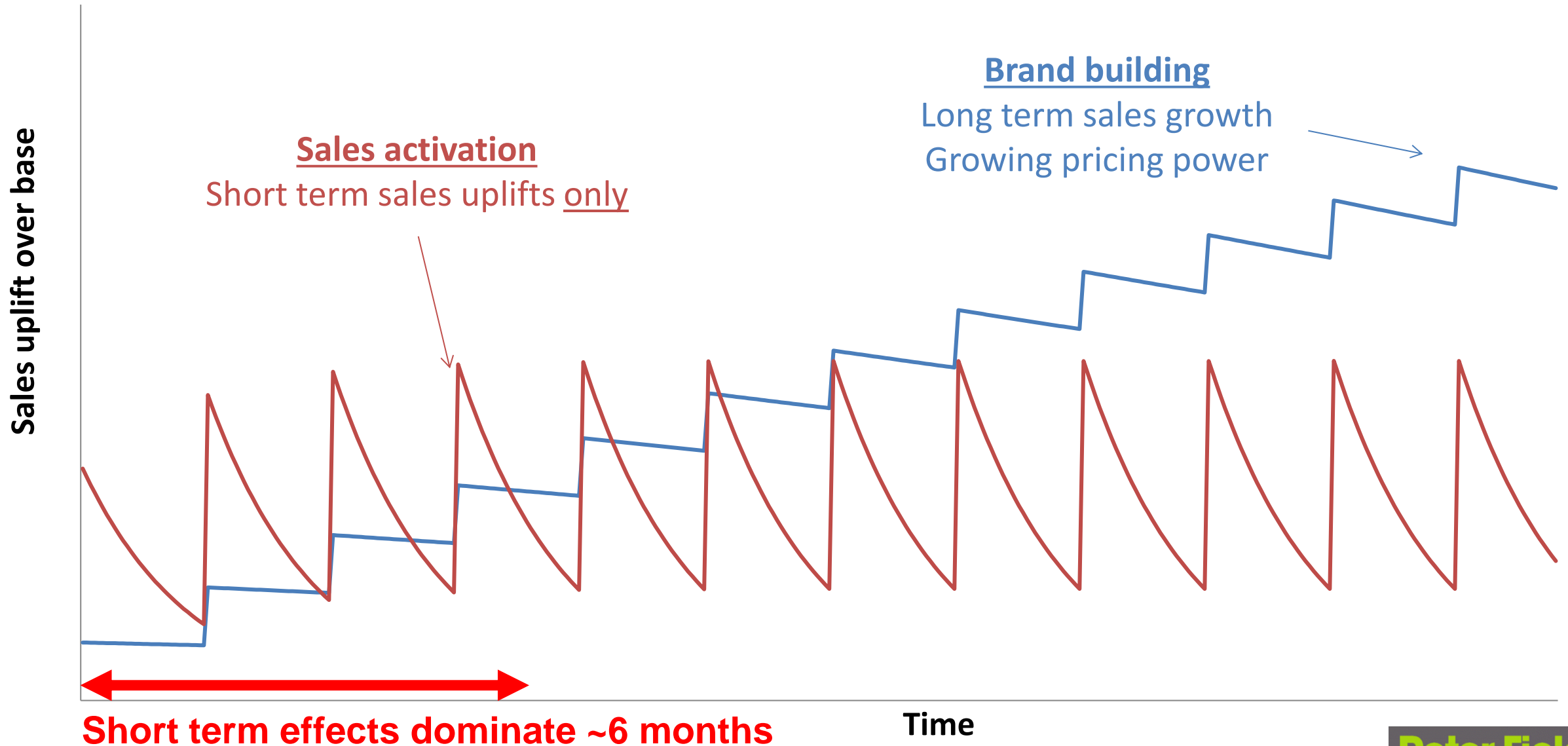
TV has unique top-of-funnel strengths

The Short



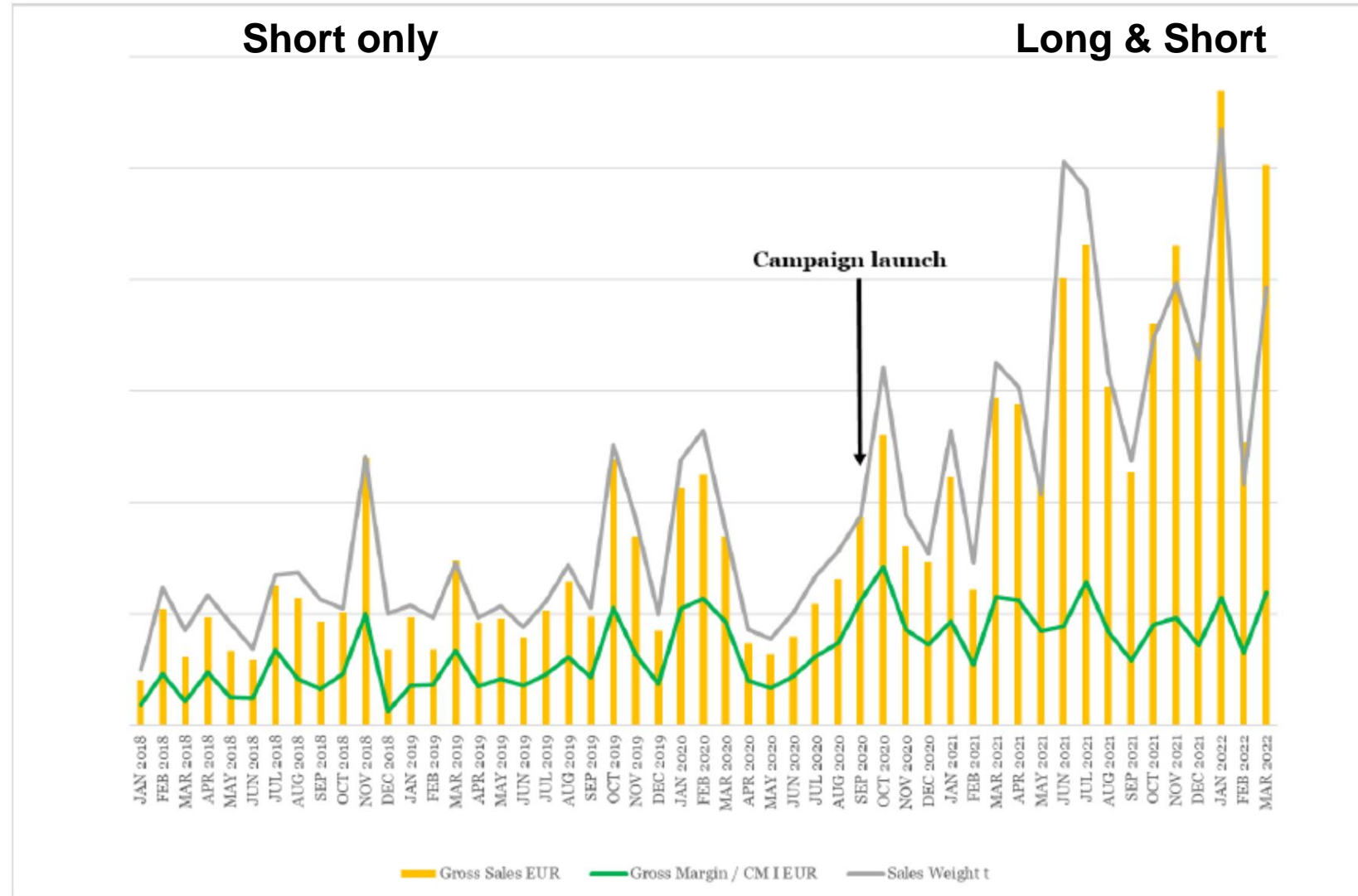
Source: Binet & Field 2013

The Short vs. the Long



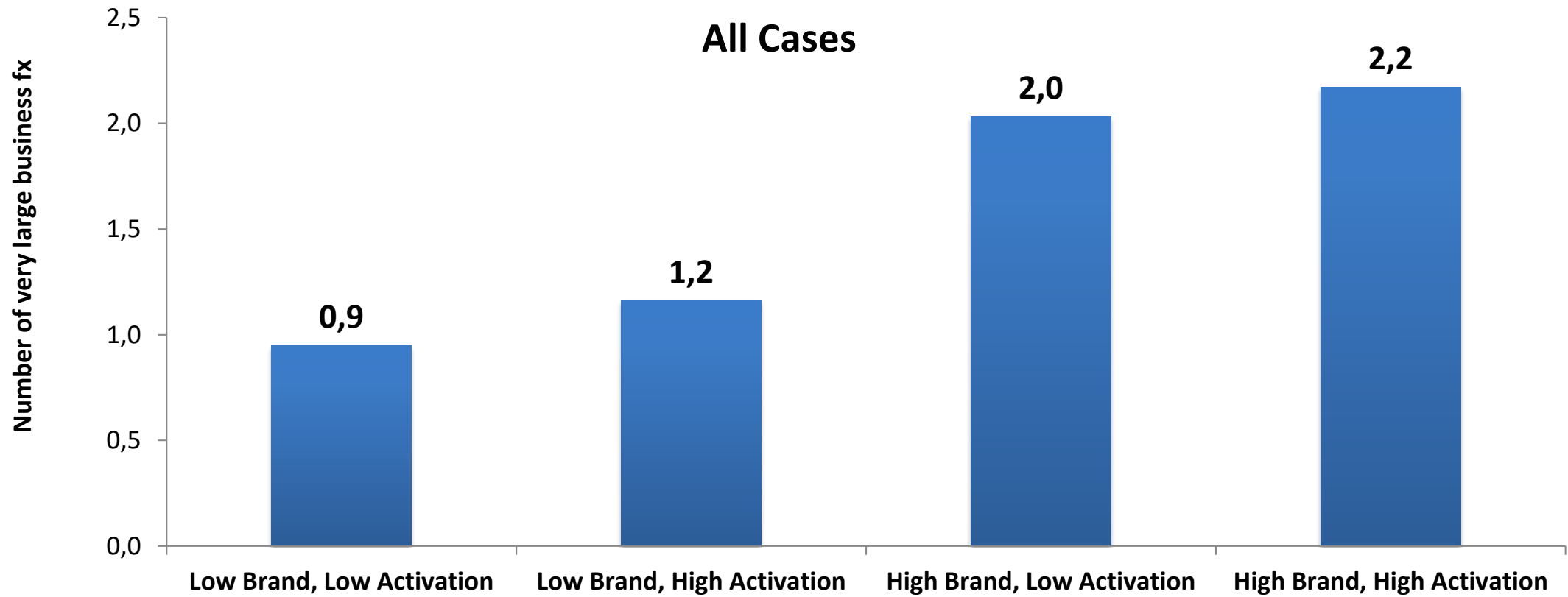
Source: Binet & Field 2013

Long & Short together: Pergraphica



Source: Mondi Pergraphica 2022 IPA case study

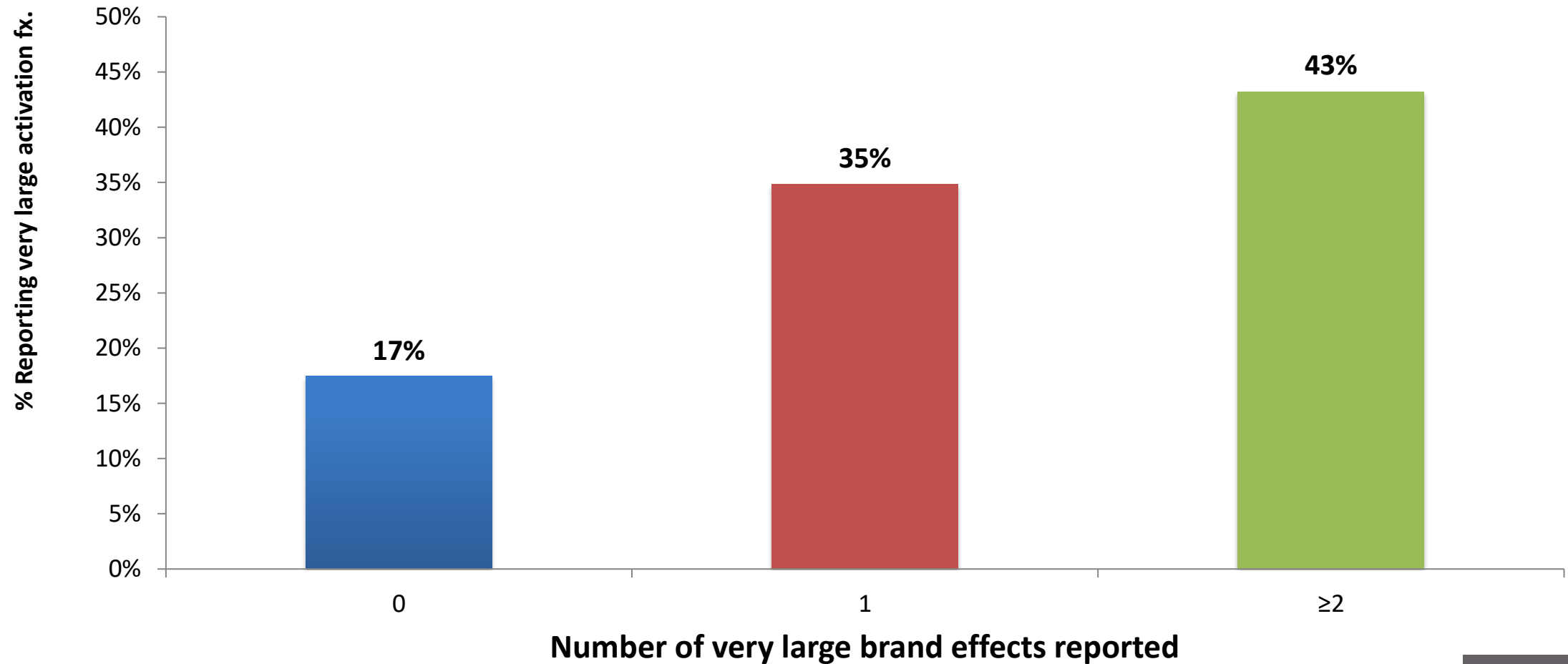
You need brand and activation



Balance of brand and activation effects

Source: IPA Databank, 2000-2024 for-profit cases, based on scale of activation effects and number of brand effects

Mental availability boosts short-term effects



Source: IPA Databank, 2000-2024 for-profit cases

Attention and Mental Availability

Why TV drives mental availability

The challenge of building mental availability in the digital age: latest research from Cannes

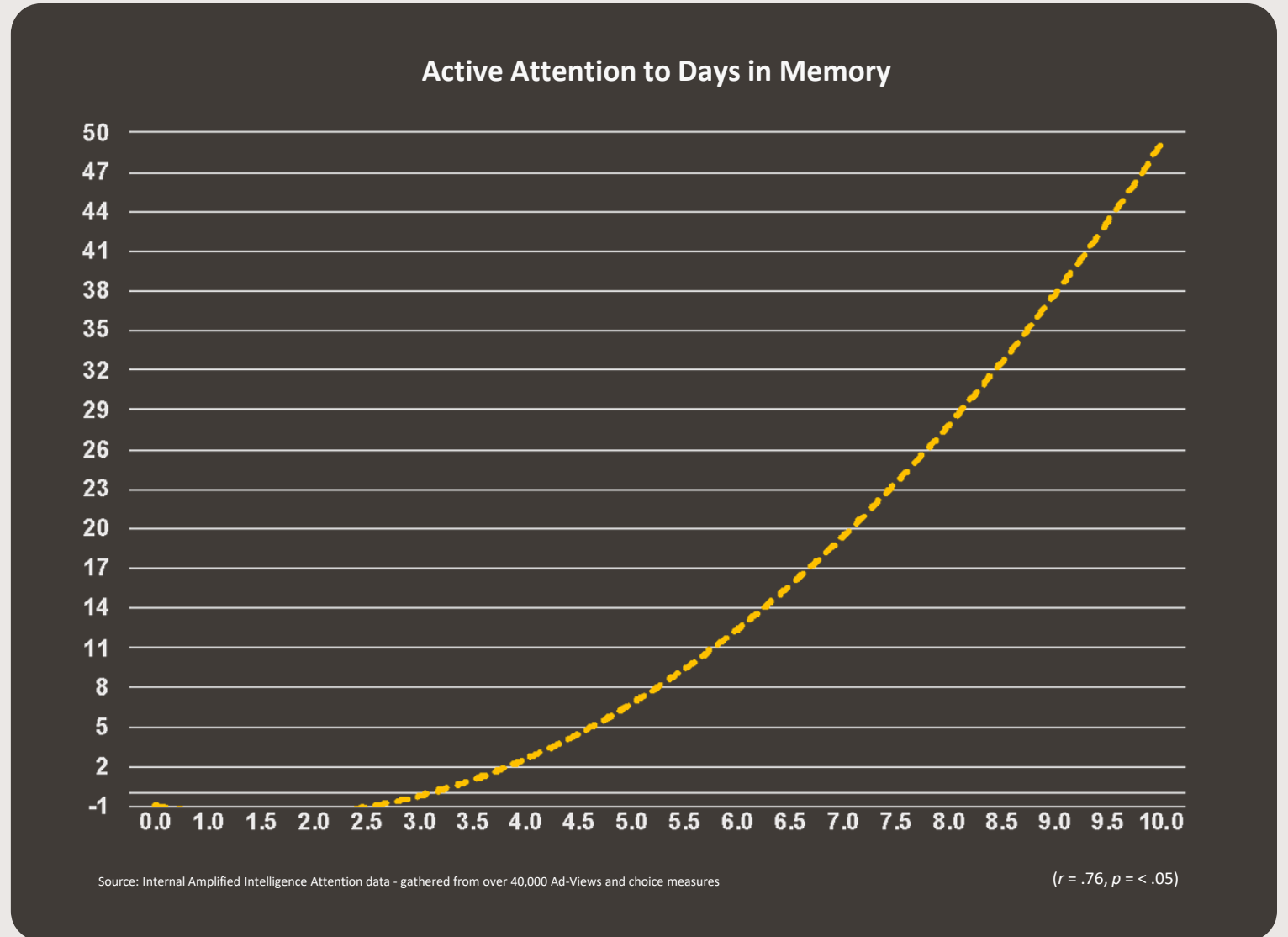
  ROBERT BRITTAIN
CONSULTING  Amplified
Intelligence  System1

The Triple Opportunity of Attention

Advertising
Council
Australia

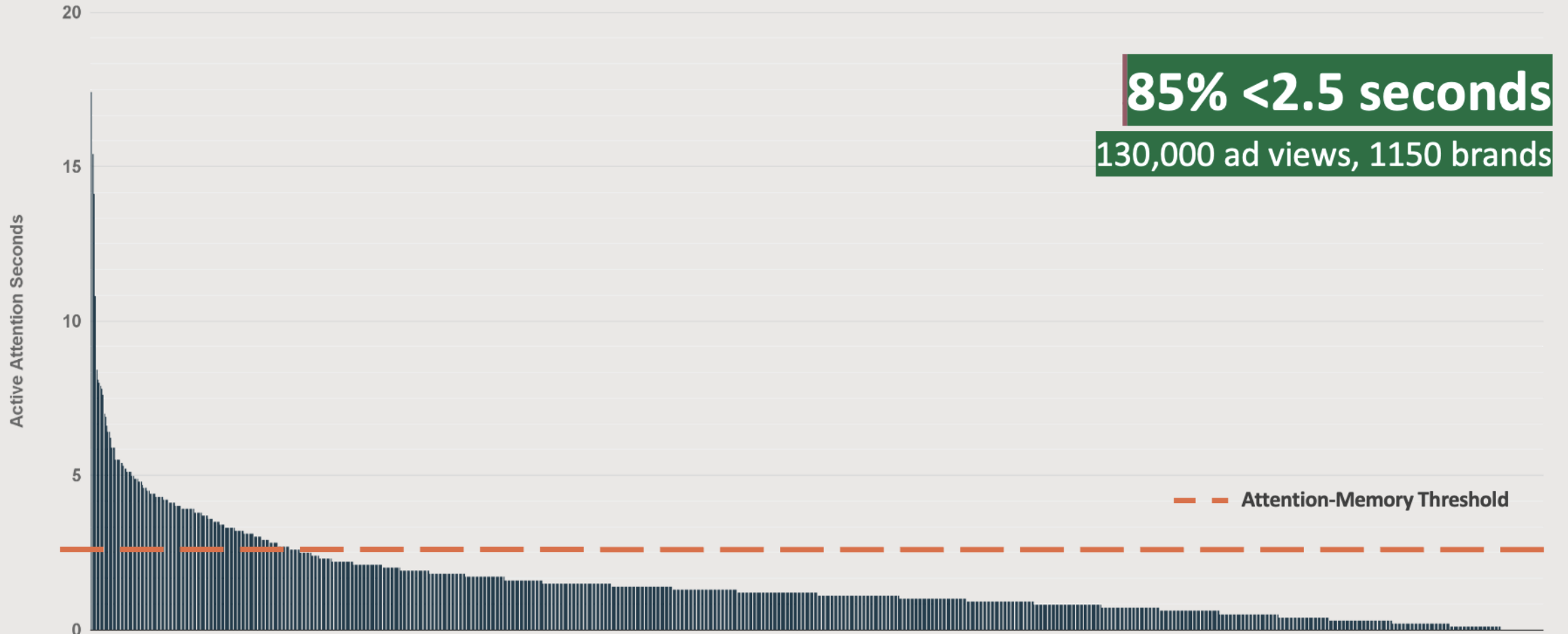
We know memory starts to kick in 2.5 seconds.

Relationship between Active Attention Seconds and Days in Memory.

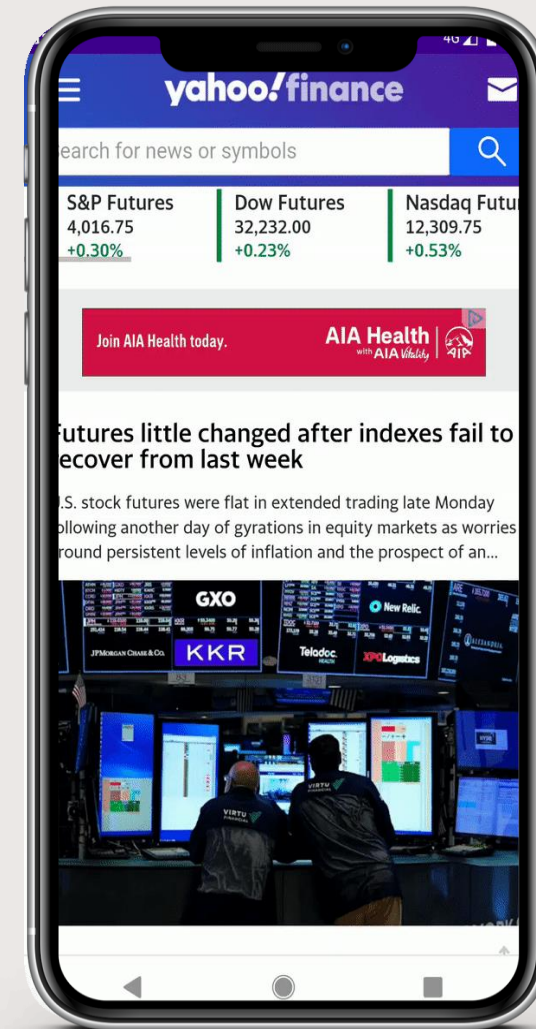


The digital MA building challenge

When ads don't meet the Attention-Memory Threshold of 2.5 seconds, it's hard for MA to grow.



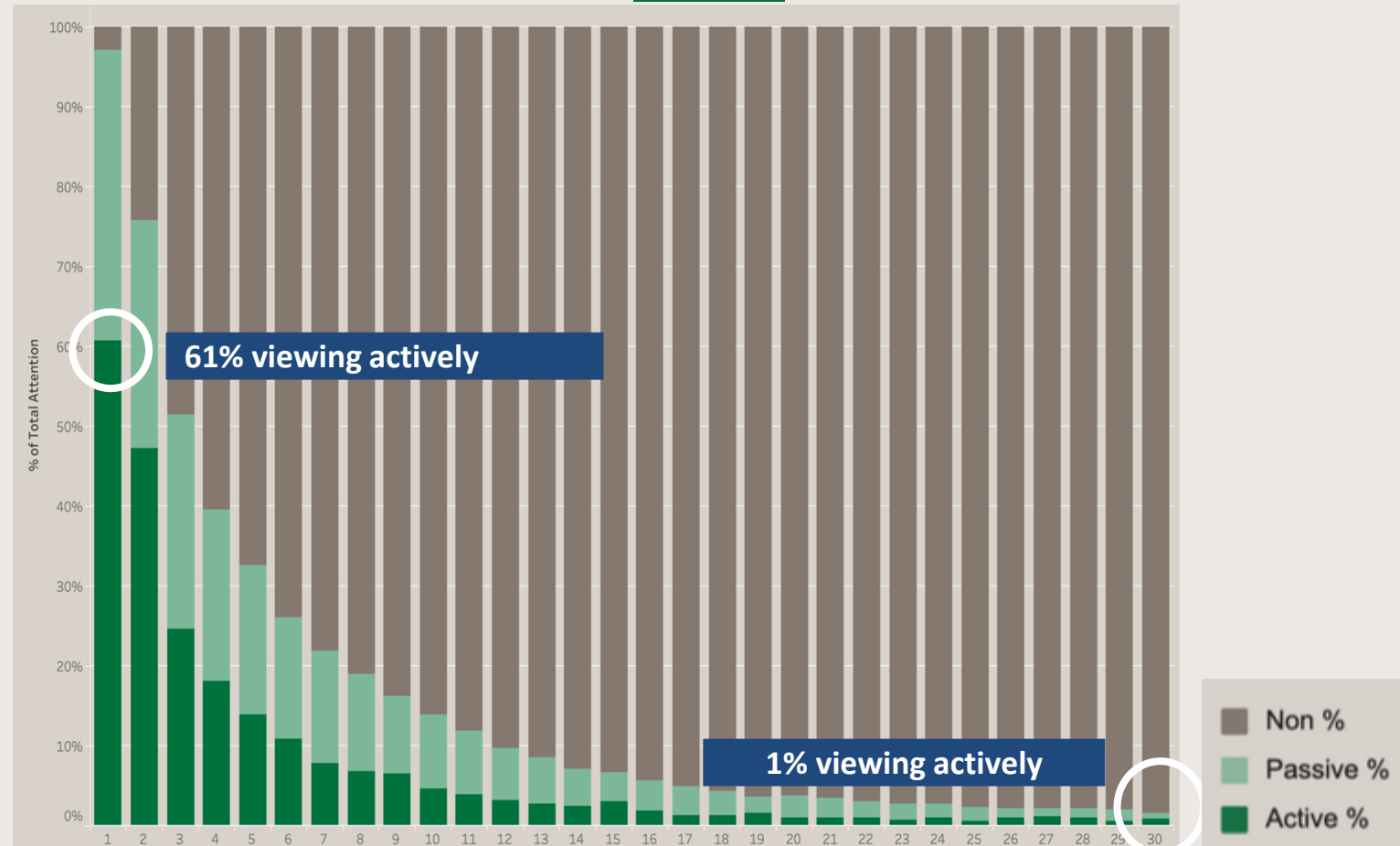
Attention decays **FAST** on some formats



Fast decay looks like this.

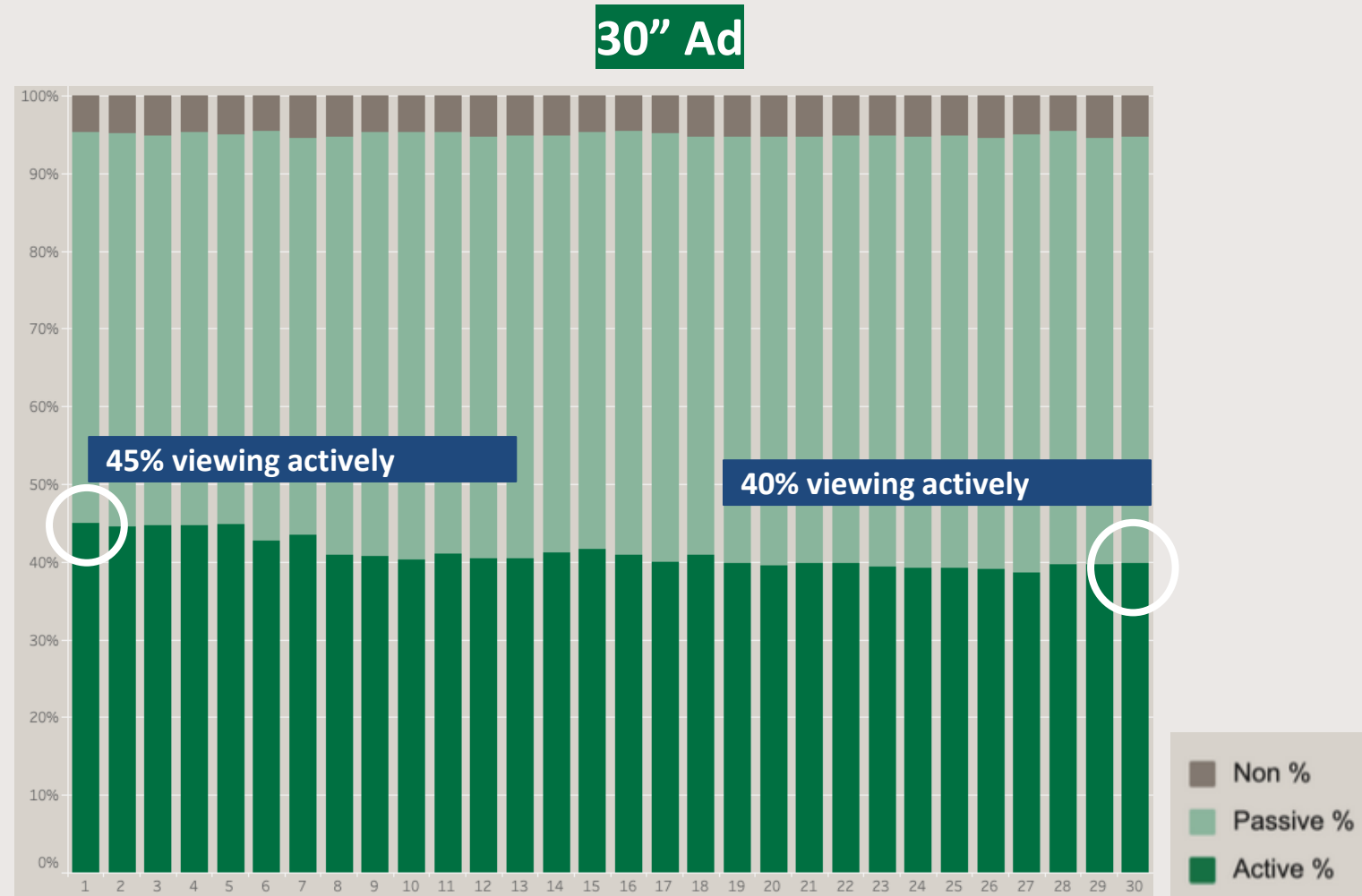
Lots of active attention early, then a then a super fast and steep drop off.

30" Ad



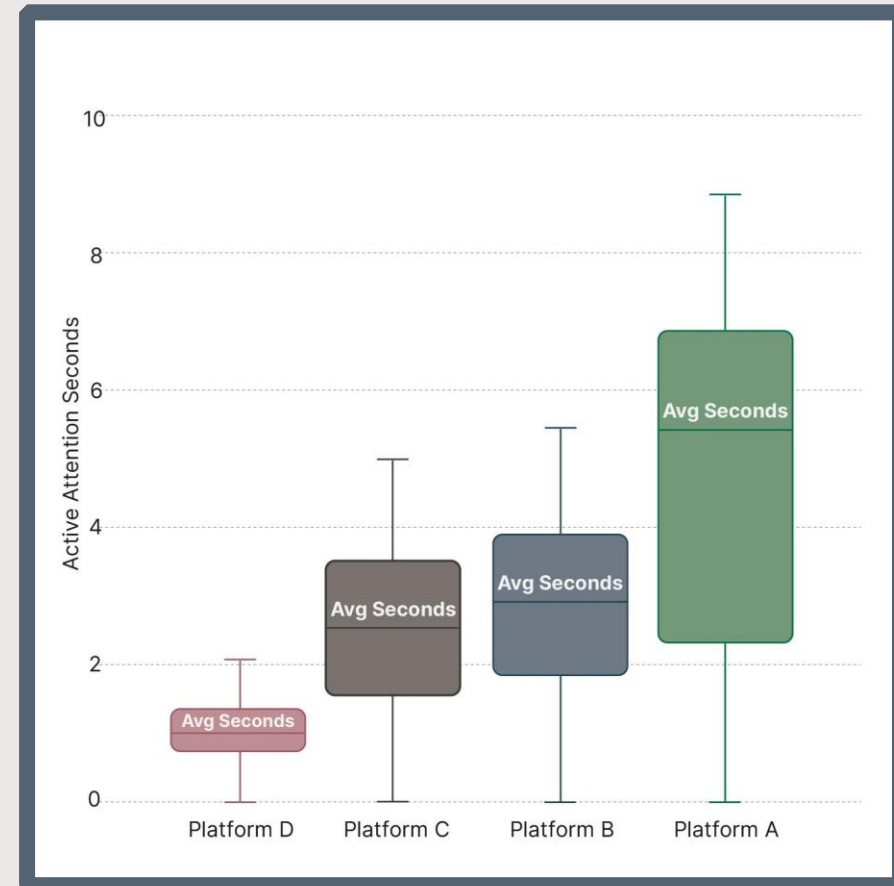
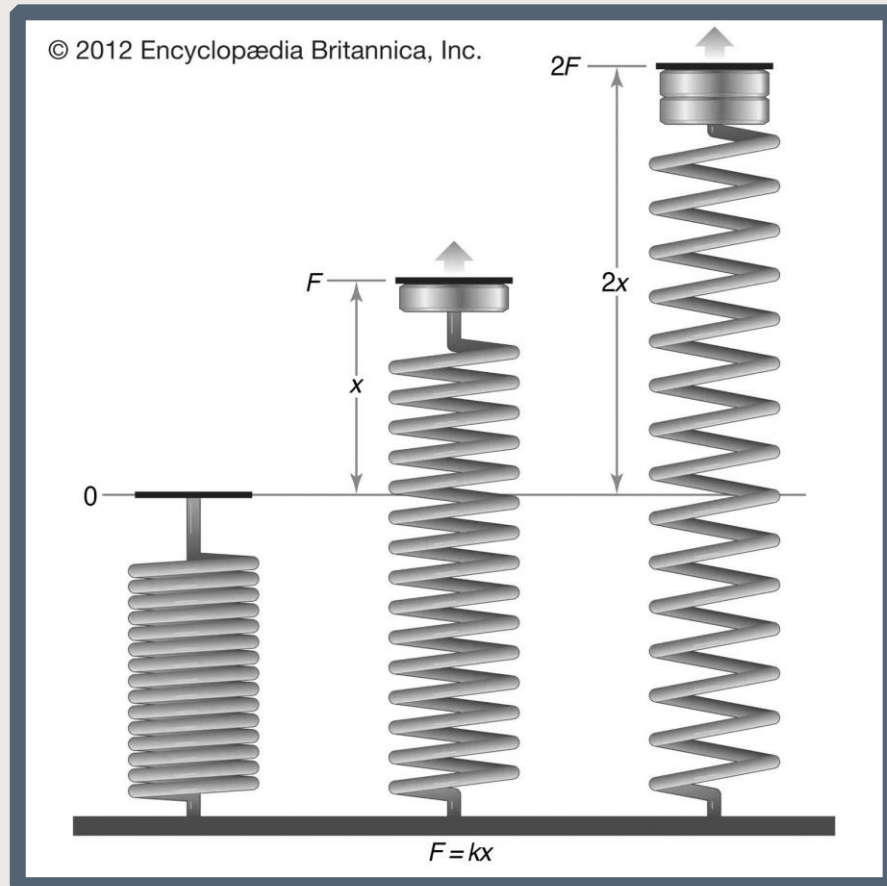
Slow decay looks like this.

Active attention is largely stable across the entire course of the view.

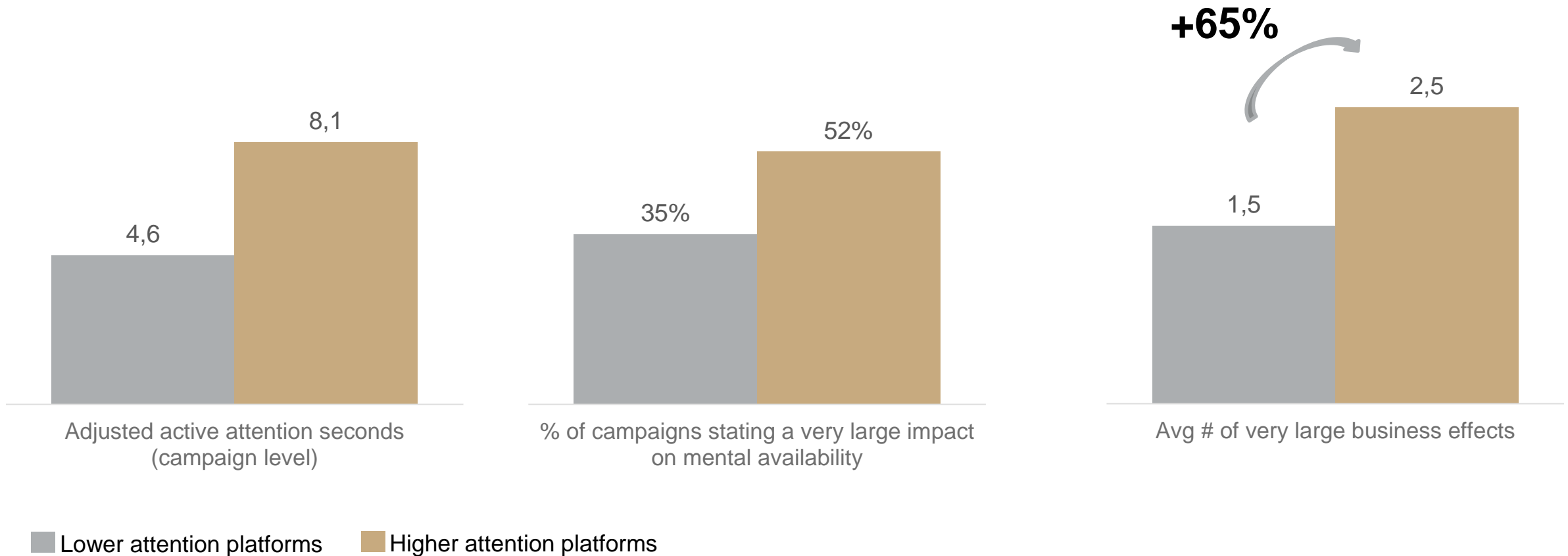


This is why each platform has its own Attention Elasticity

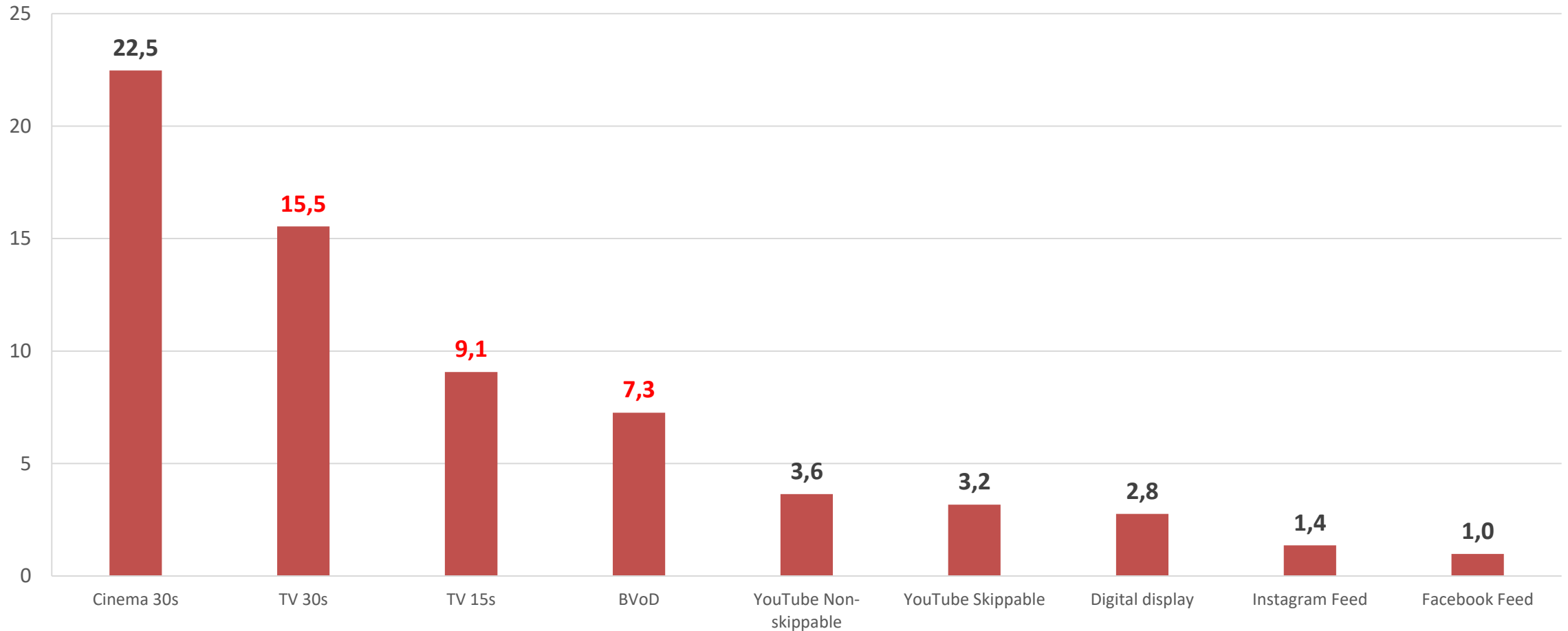
The range of attention seconds possible under the conditions of that platform or format.
Attention elasticity forms the attention opportunity for ad creative.



Investment in higher attention platforms enables creative to work more effectively



Average active attention seconds

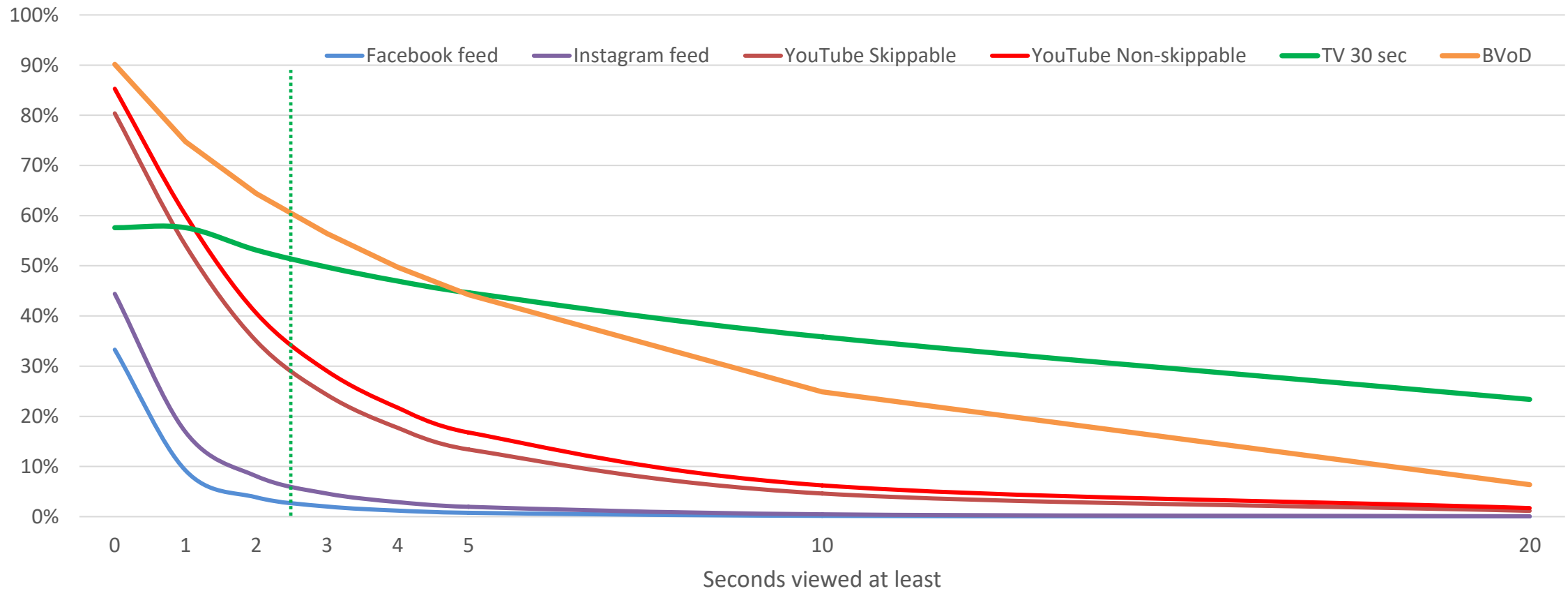


Sources: Attention data from TVision (TV), Lumen (Digital) latest 2024 data



Video media viewing curves

% viewing served ads over time

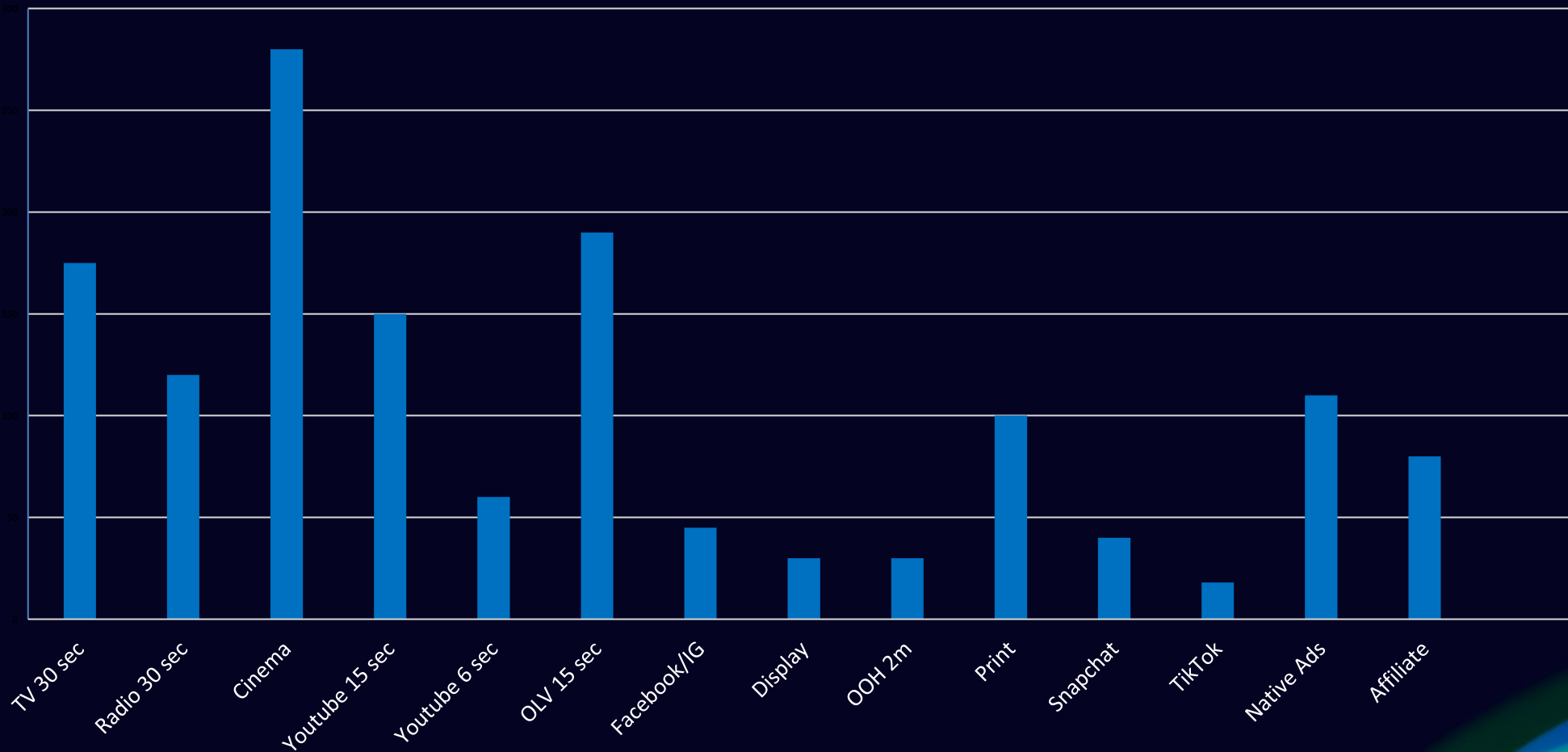


Sources: Attention data from TVision (TV), Lumen (Digital) latest 2024 data



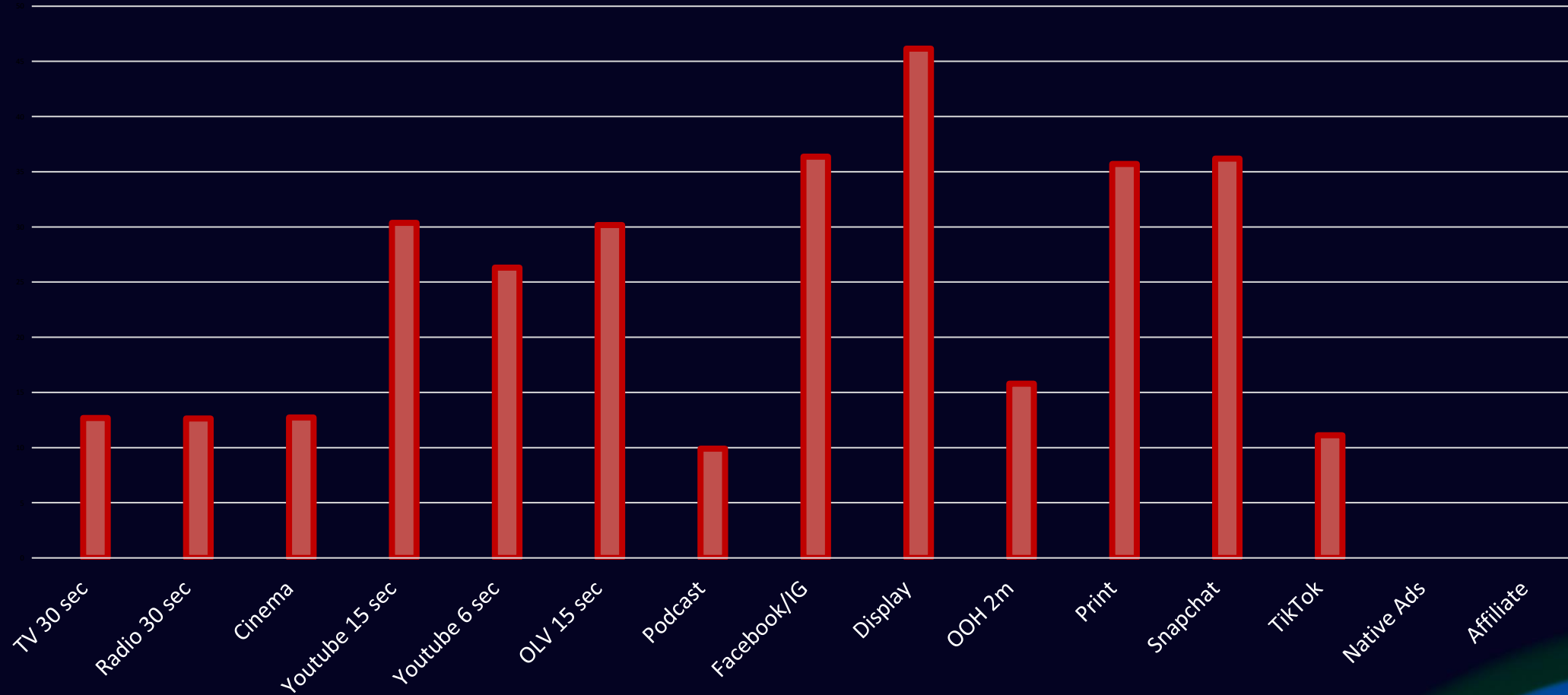
Today's currency does not reflect attention

Impression CPM average

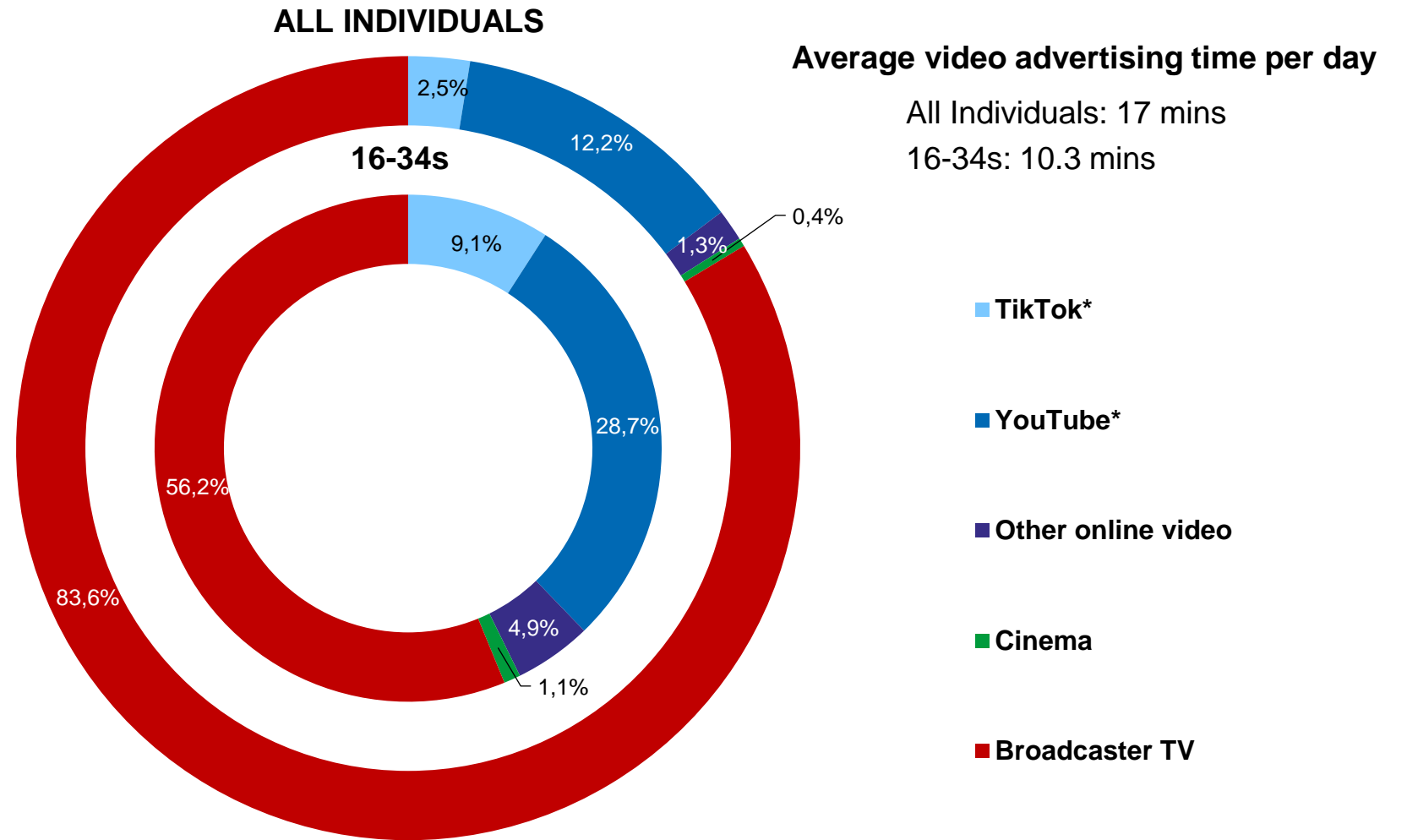


The cost of attention tells a different story

Attention CPM

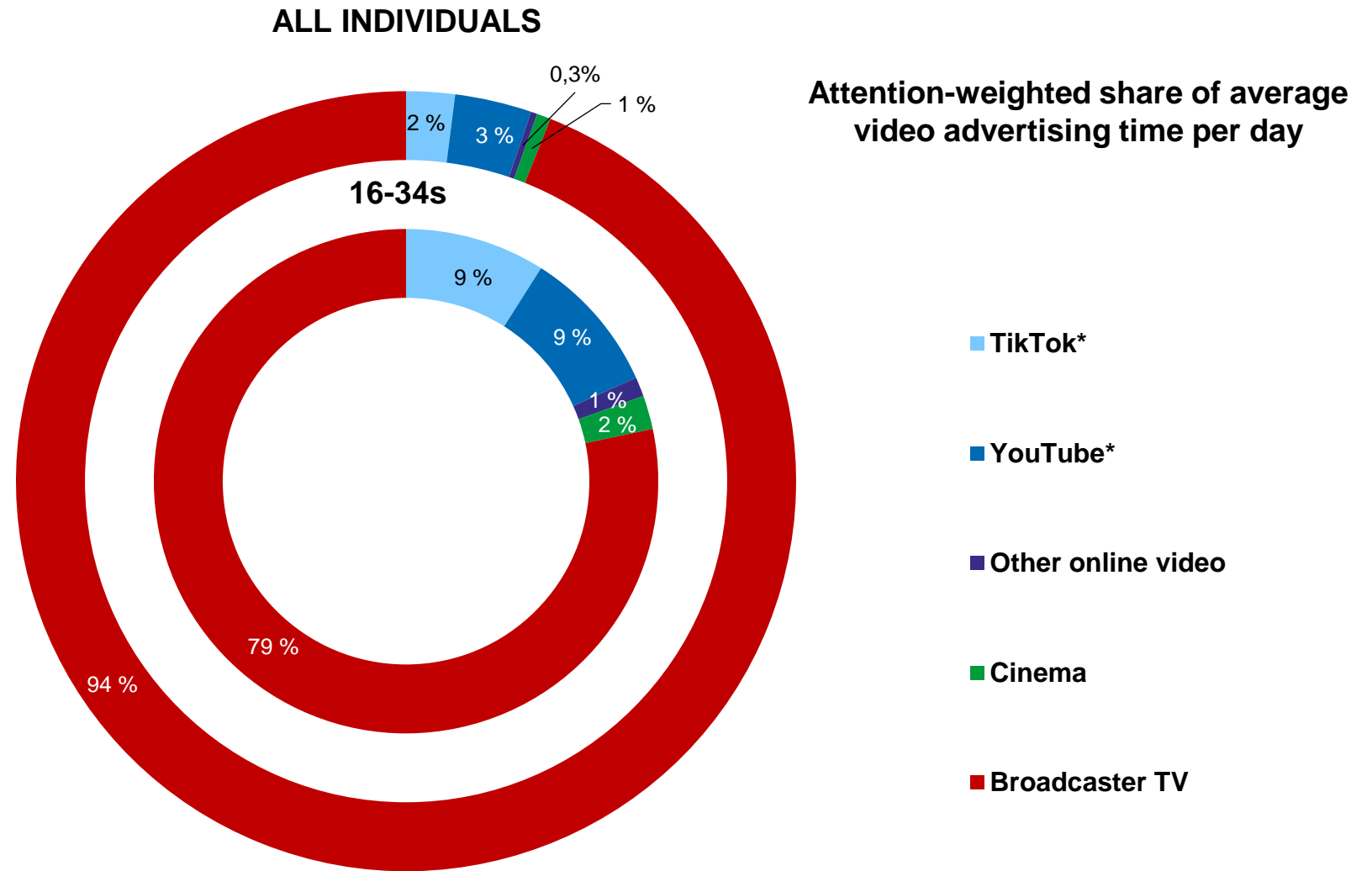


Broadcasters account for over 80% of all video advertising



• Source: 2022, Barb / Broadcaster stream data / IPA TouchPoints 2022 / UK Cinema Association / ViewersLogic to model OOH viewing time * YouTube ad time modelled at 4.1% of content time, TikTok ad time modelled at 3.4% of content time using agency and broadcaster data, Other online modelled at 4% of content time)

But what happens if you (roughly) attention-weight the video advertising time per day?











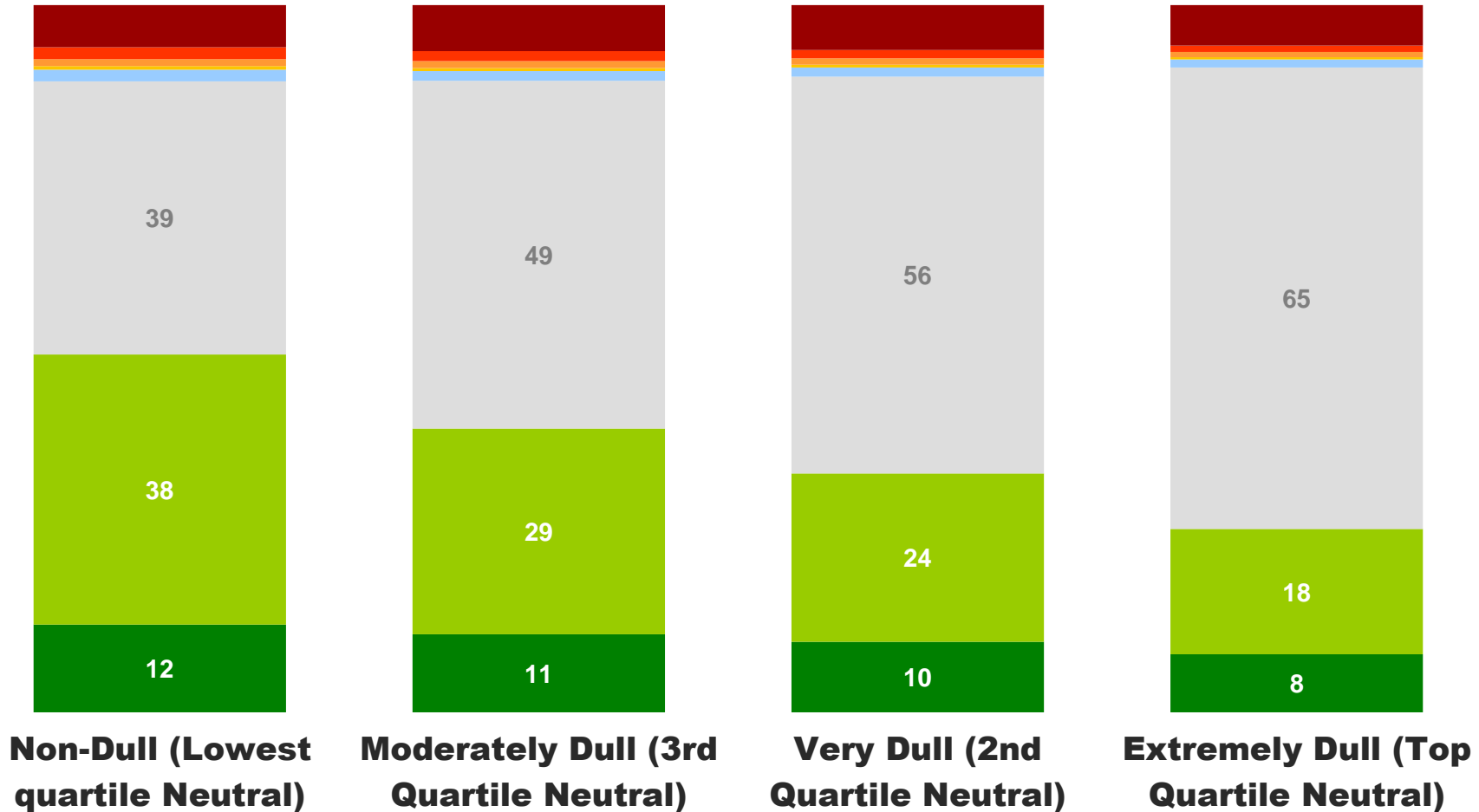
Source: 2022, Barb / Broadcaster stream data / IPA TouchPoints 2022 / UK Cinema Association / ViewersLogic to model OOH viewing time * YouTube ad time modelled at 4.1% of content time, TikTok ad time modelled at 3.4% of content time using agency and broadcaster data, Other online modelled at 4% of content time). Attention weighting using 2023 Dentsu data and 2022 Dentsu / Lumen - Attention Economy study. All audience averages for most popular formats.

2. Emotional clout

Avoiding Dull requires emotional
campaigns and media

Dullness is defined by less Happiness and Surprise and higher Neutrality

-  Contempt
-  Disgust
-  Anger
-  Fear
-  Sadness
-  Neutral
-  Happiness
-  Surprise



Cost of dull:

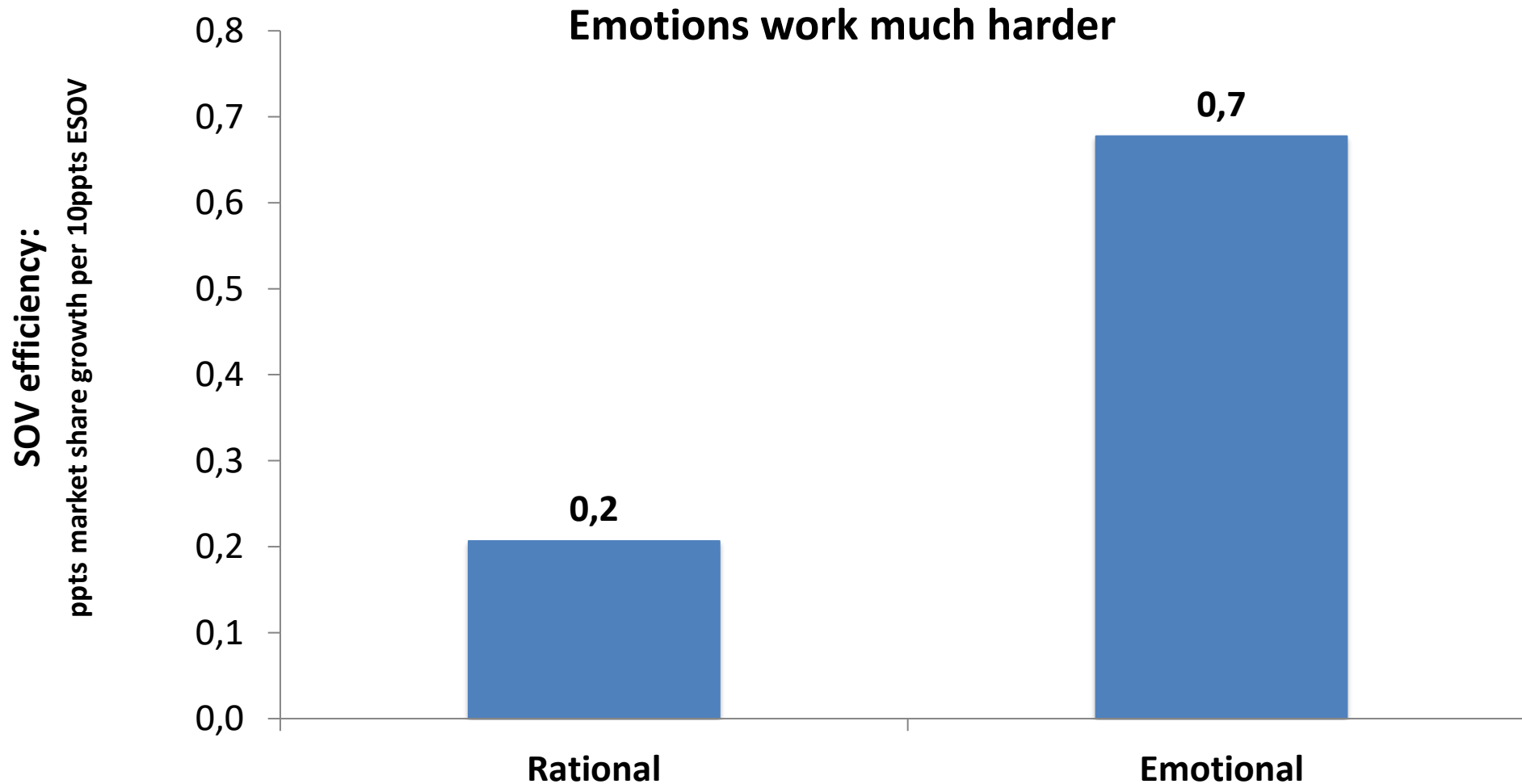
£0bn

£1.5bn

£3.9bn

£8.0bn

Emotional advertising drives effectiveness

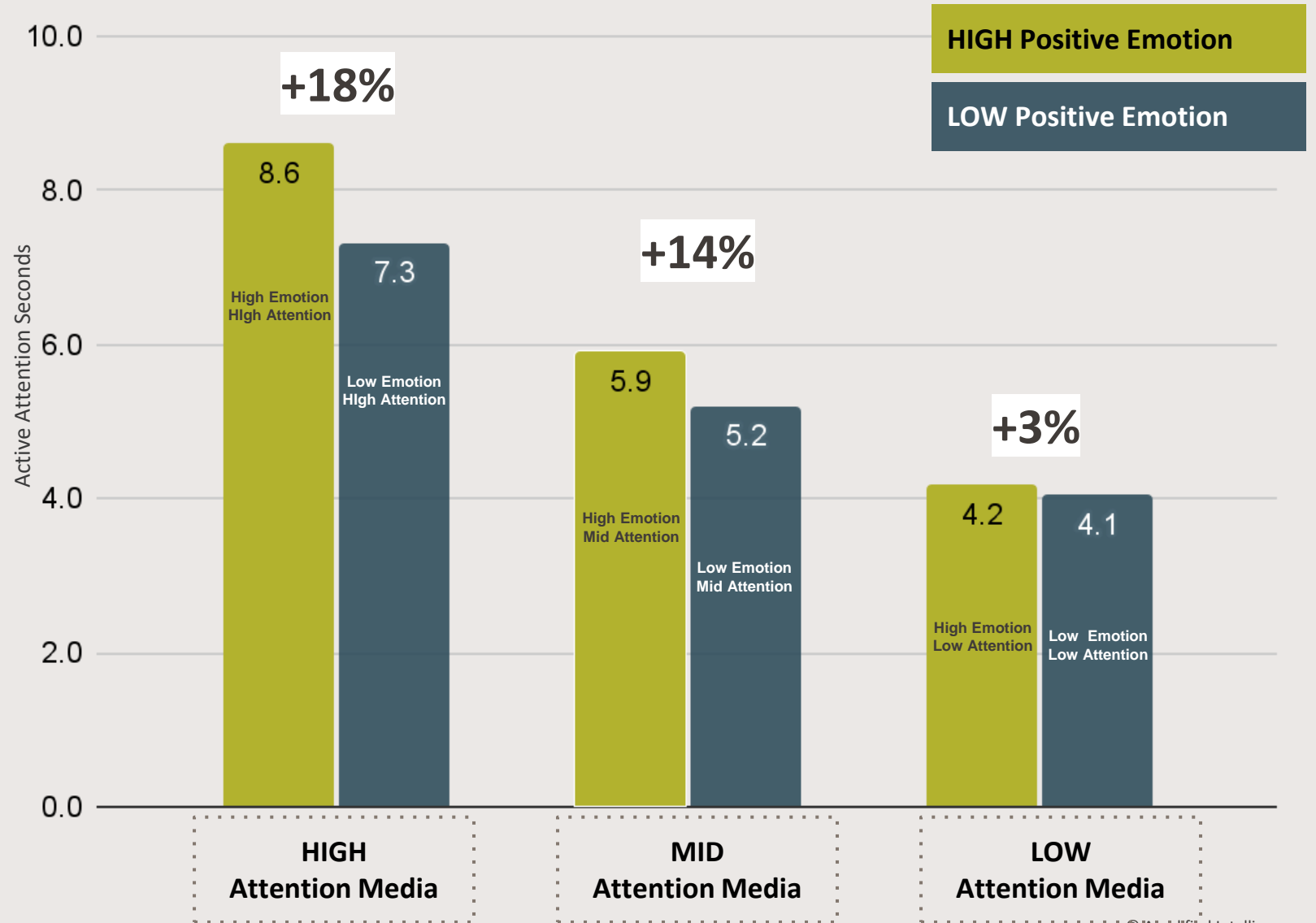


Source: IPA Databank, 1998-2022 cases

The double benefit of high attention media

There is a bigger uplift in attention seconds from low emotion to high emotion, the better the platform.

Impact of Emotional Creative on Attention



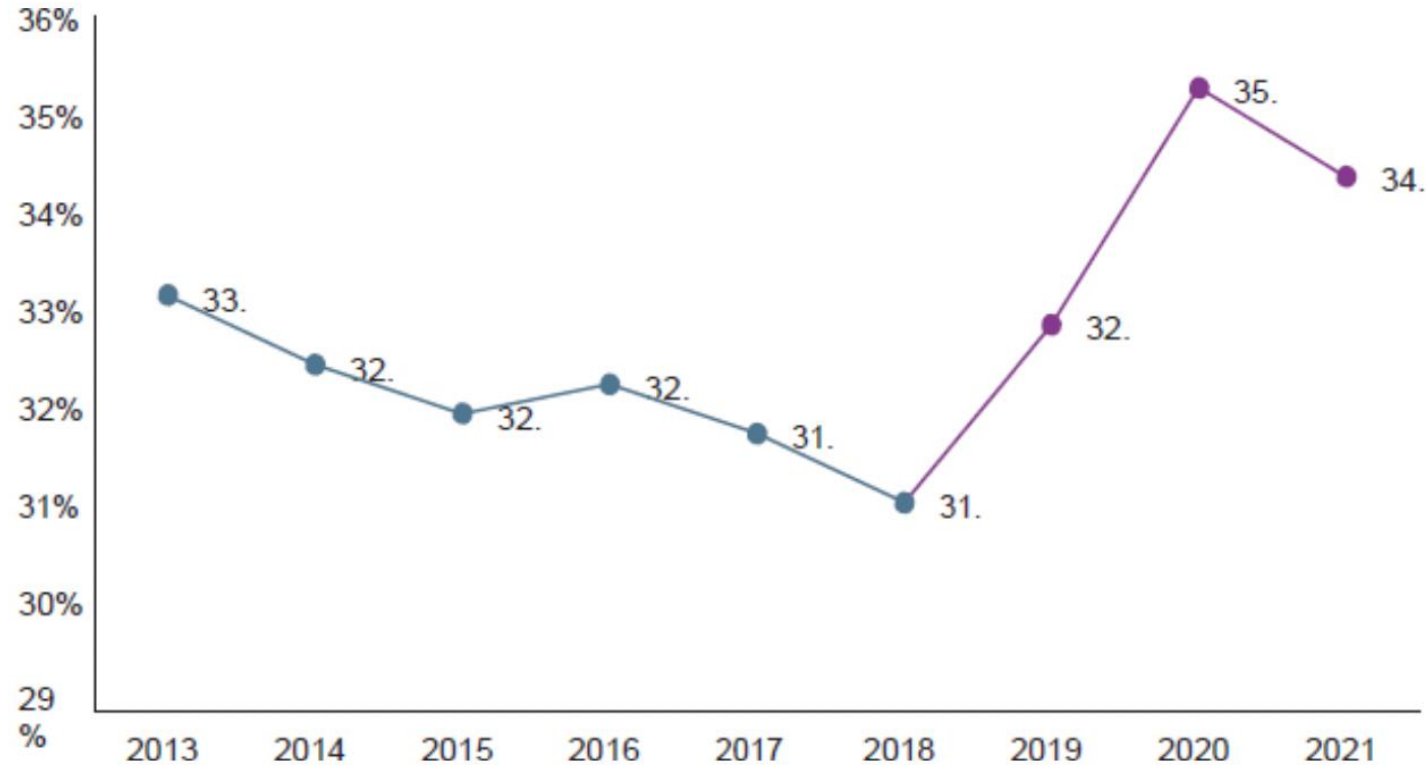
© Amplified Intelligence

Cadbury Dairy Milk – emotions at work



Cadbury Dairy Milk – emotions at work

CDM market share



Source: Nielsen

Twix – all the creative virtues

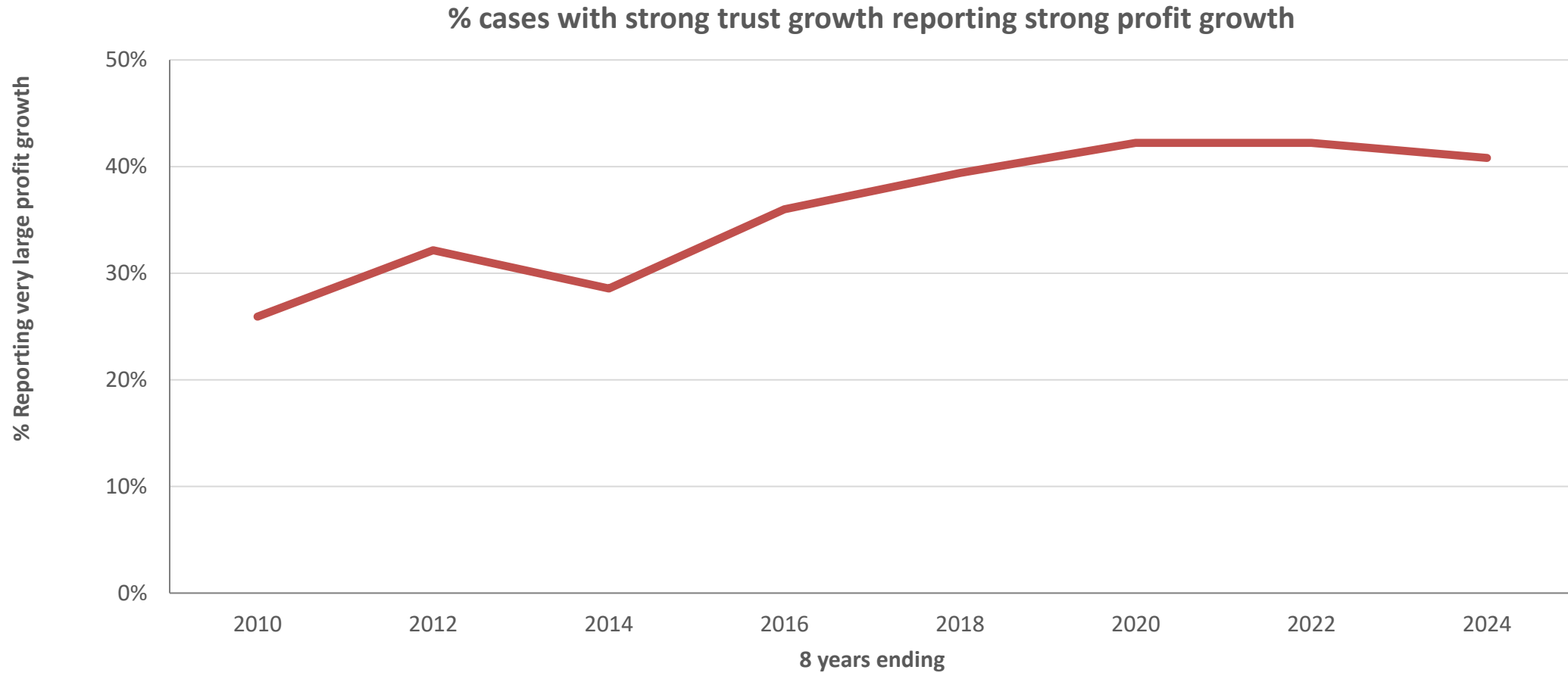


Source: Cannes 2022

3. Trust

Dull is bad for trust

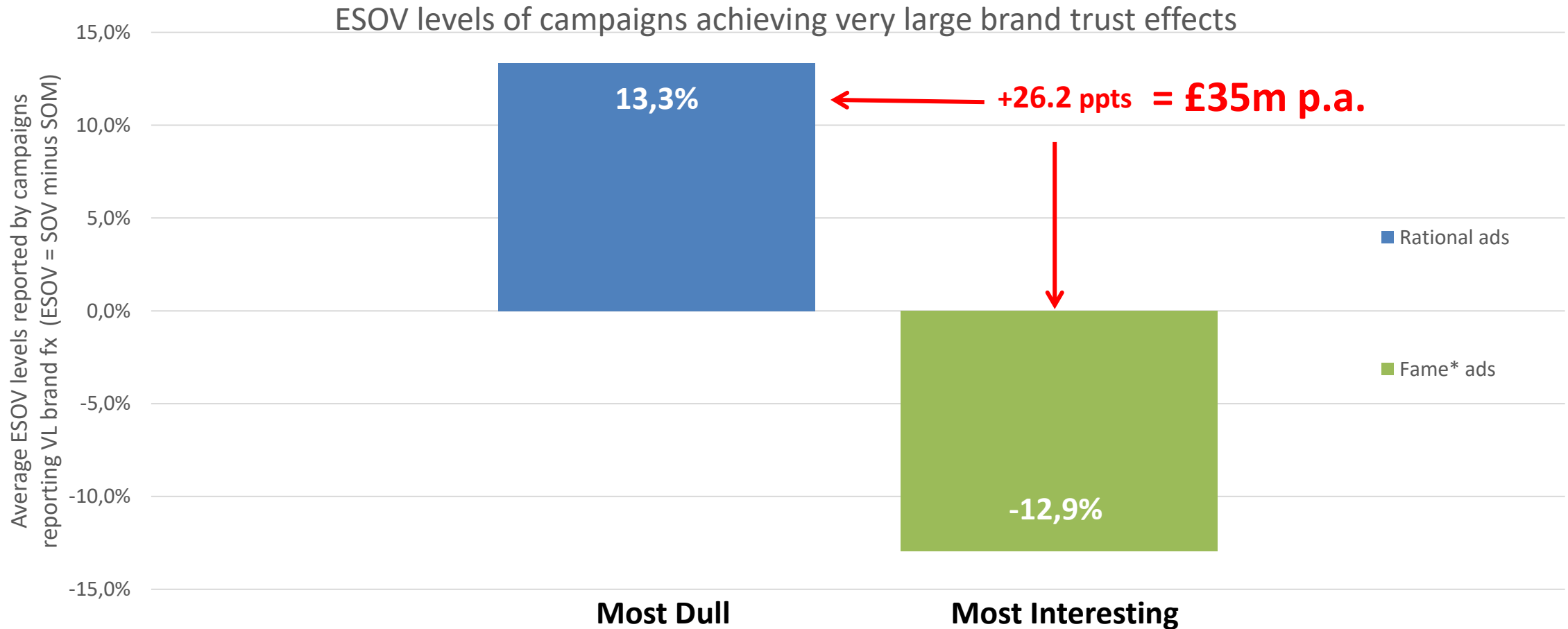
The link between trust and profit has grown especially strongly



Base: IPA Databank 2004-2024 for profit cases reporting very large trust improvements

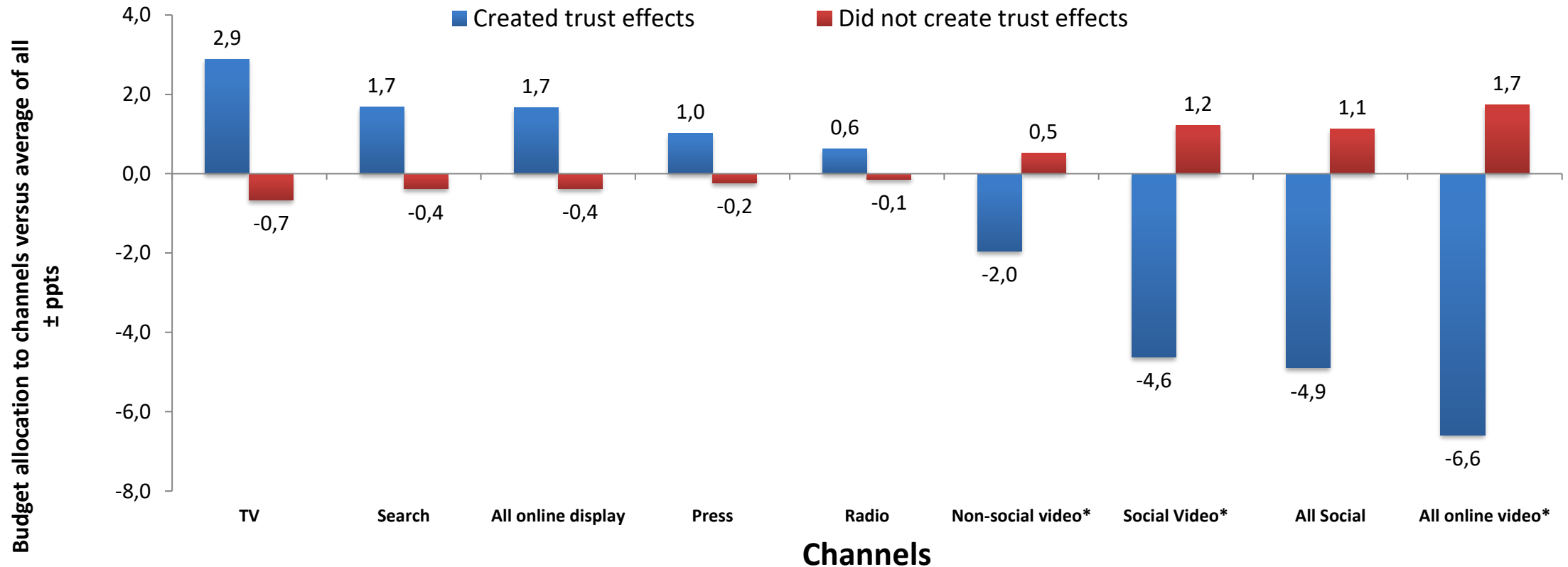
NB: insufficient data prior to 2010

Dull is very bad for building trust



*These are emotional ads that successfully inspire people to share or talk about them

TV is one of the trusted media

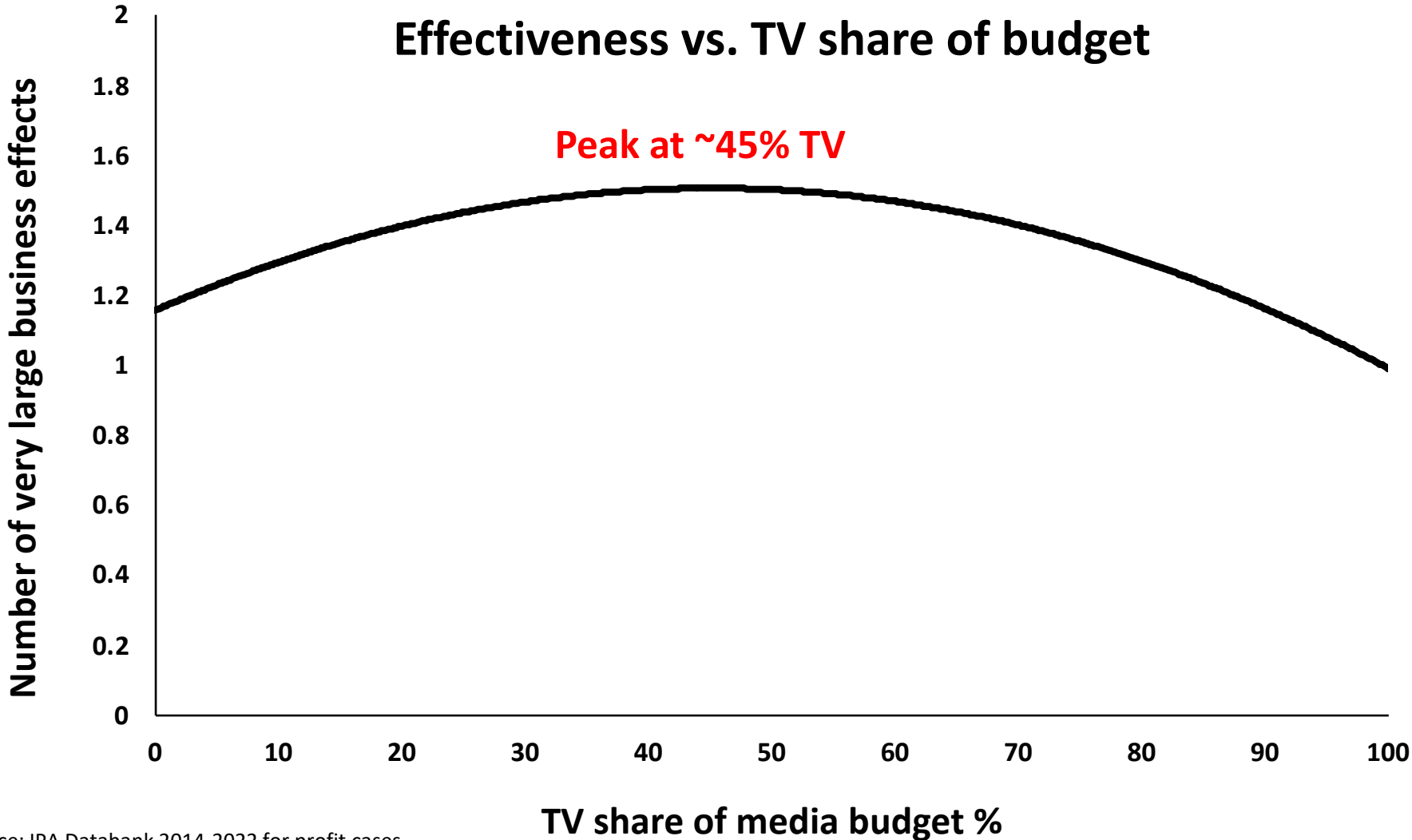


Source: IPA Databank 2014-2022 for profit cases *data available from 2016

Balance - how much TV is good for us?

It seems to depend on our objectives

The most effective campaigns spend 45% of their budget on TV



Source: IPA Databank 2014-2022 for profit cases



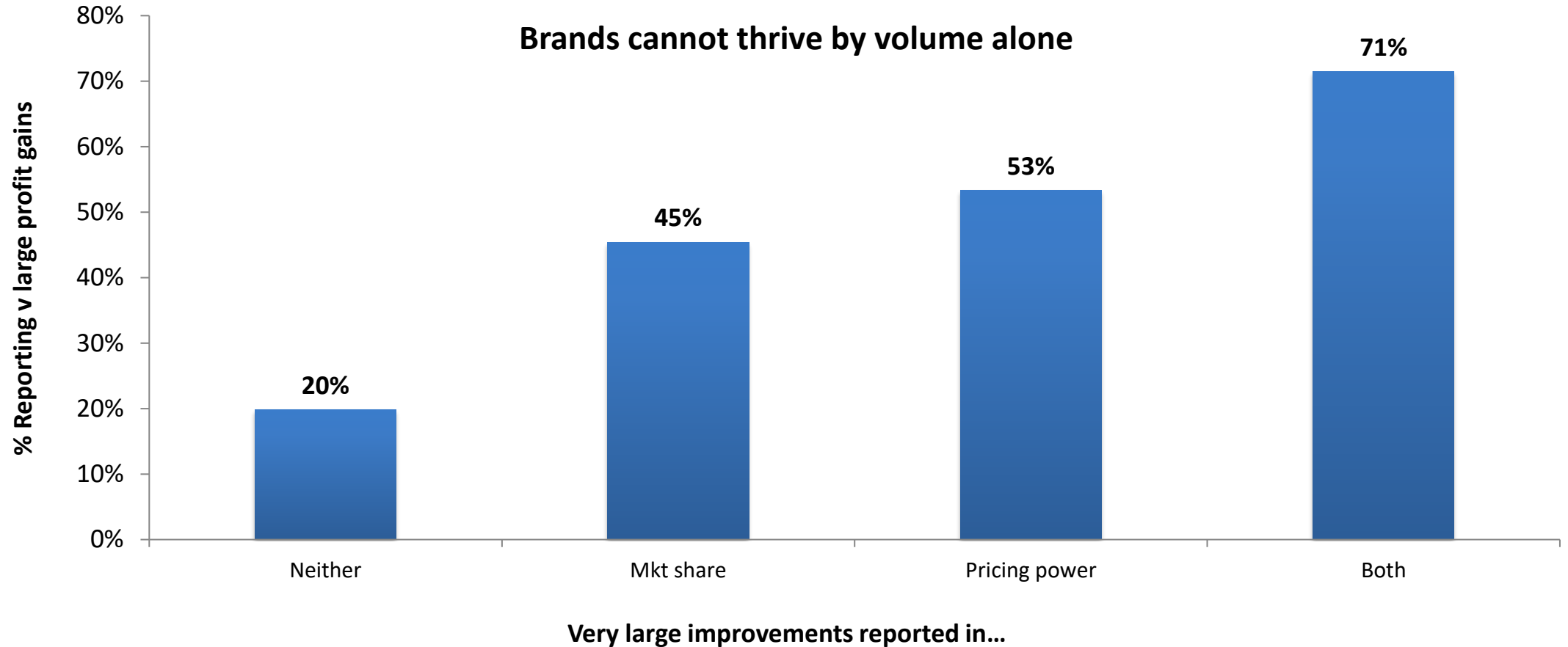
Warren Buffet on pricing



“The single most important decision in evaluating a business is pricing power.”

– Warren Buffet, investor/philanthropist

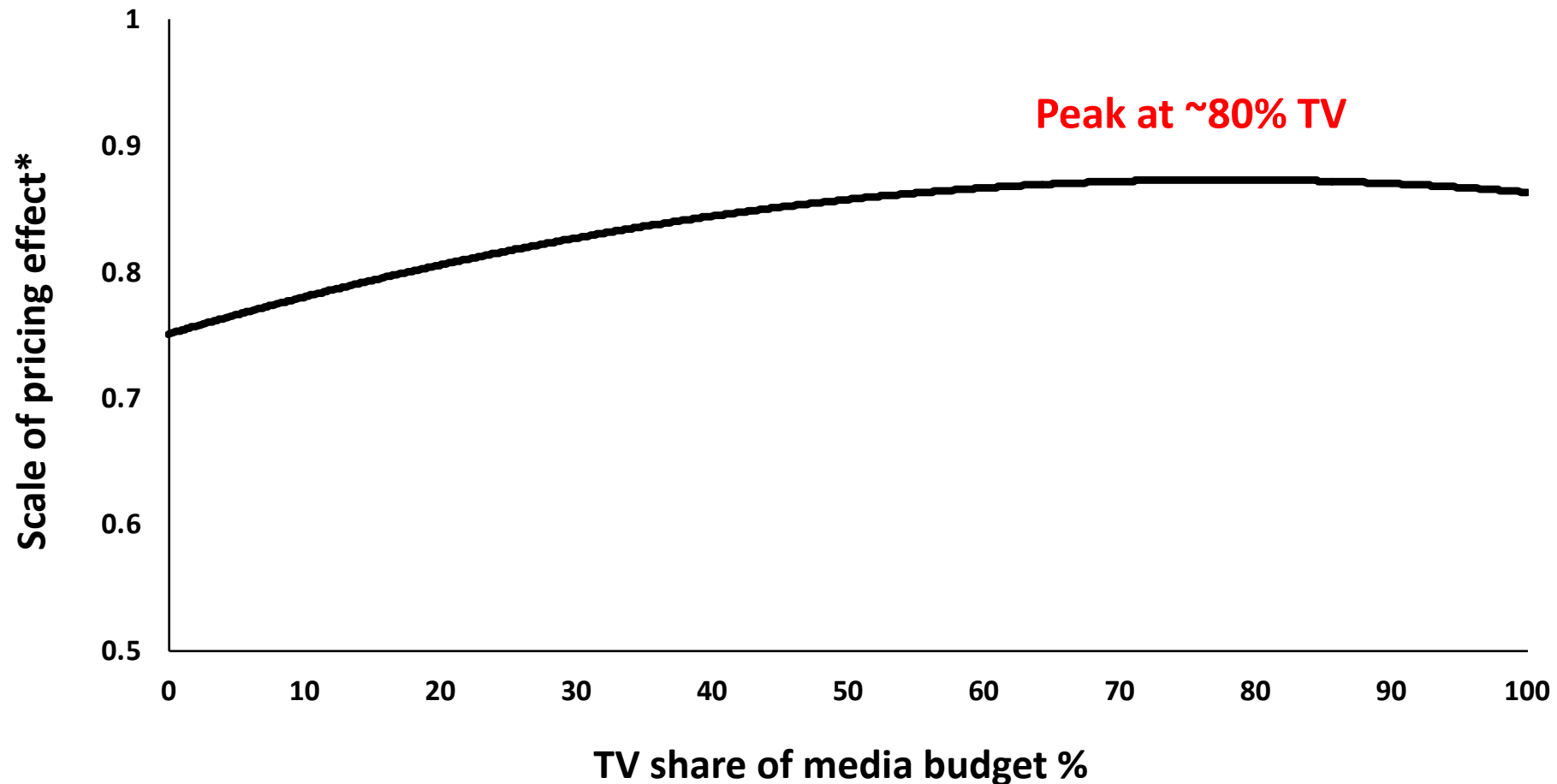
Warren is right (funnily enough)



Source: IPA Databank, 2000-2024 for-profit cases

Pricing power argues for greater TV share

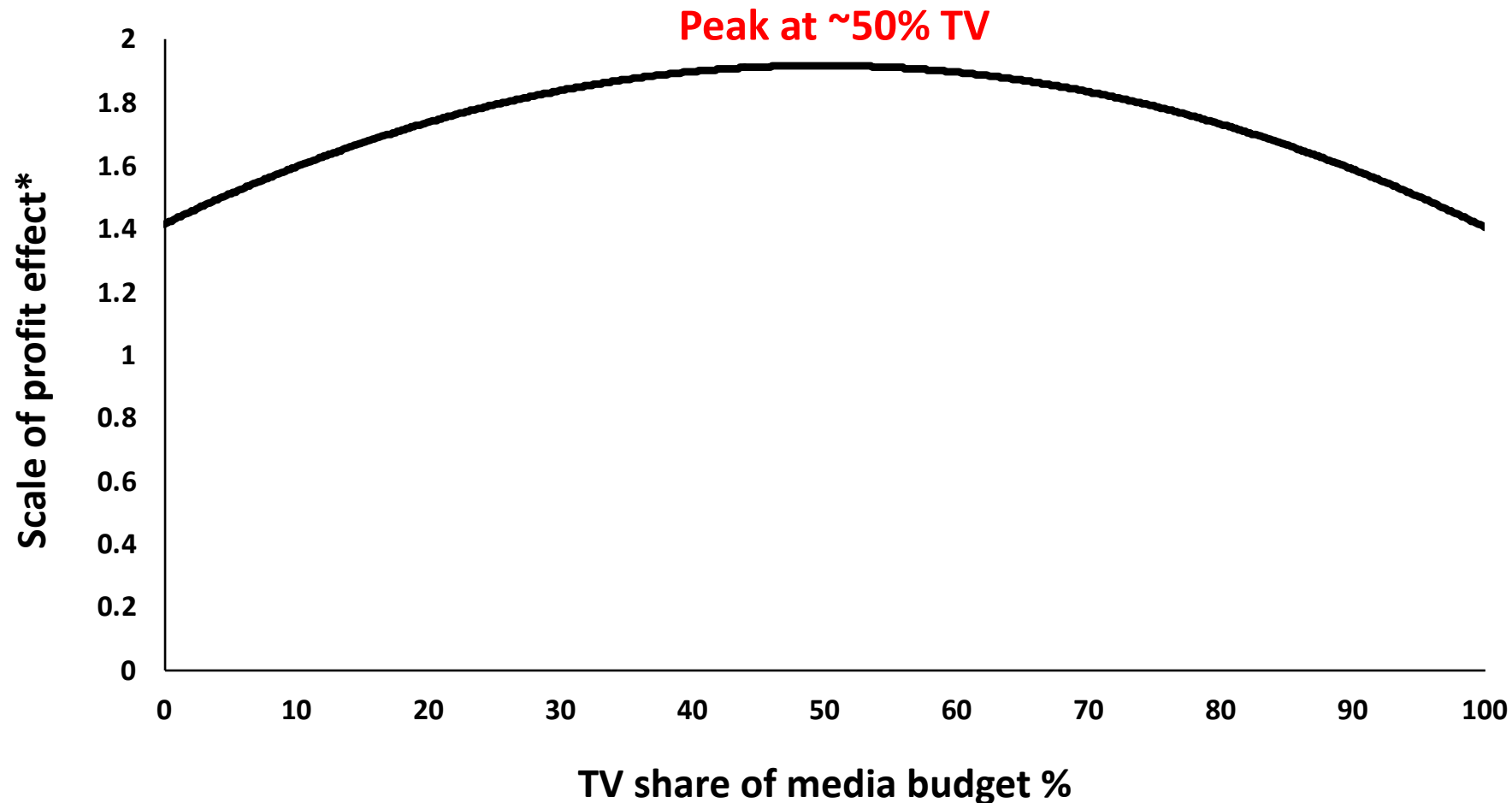
Pricing power growth vs. TV share of budget



Source: IPA Databank 2014-2022 for profit cases *4-point scale

The most profitable campaigns spend 50% of their budget on TV

Profit growth vs. TV share of budget



Source: IPA Databank 2014-2022 for profit cases *4-point scale

Keeping TV at the heart of effectiveness

1. High sustained attention levels for ads to build brands
 - Increasingly on-demand and targetable
 - Not an extension of dull performance marketing
2. An entertaining medium where entertaining ads thrive
 - Maximum benefits of non-dull advertising
3. A safe trustworthy medium where ads are trusted

A unique ability to make great sales, margin and profit growth happen

Thank you