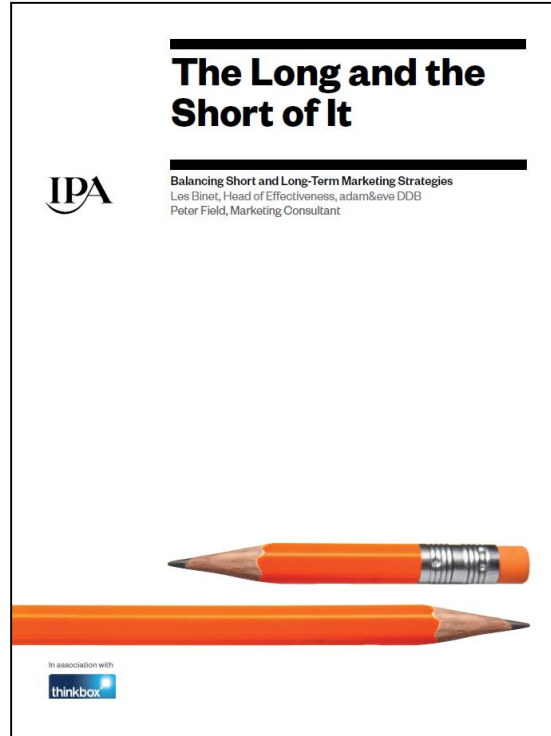
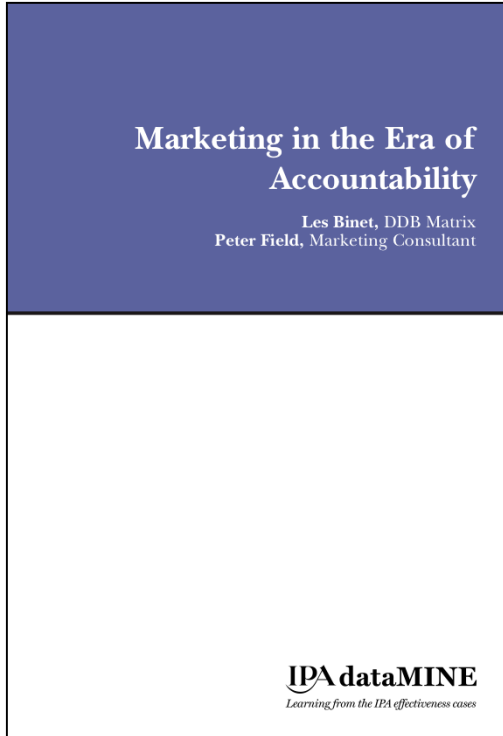


Effectiveness in a changing media landscape

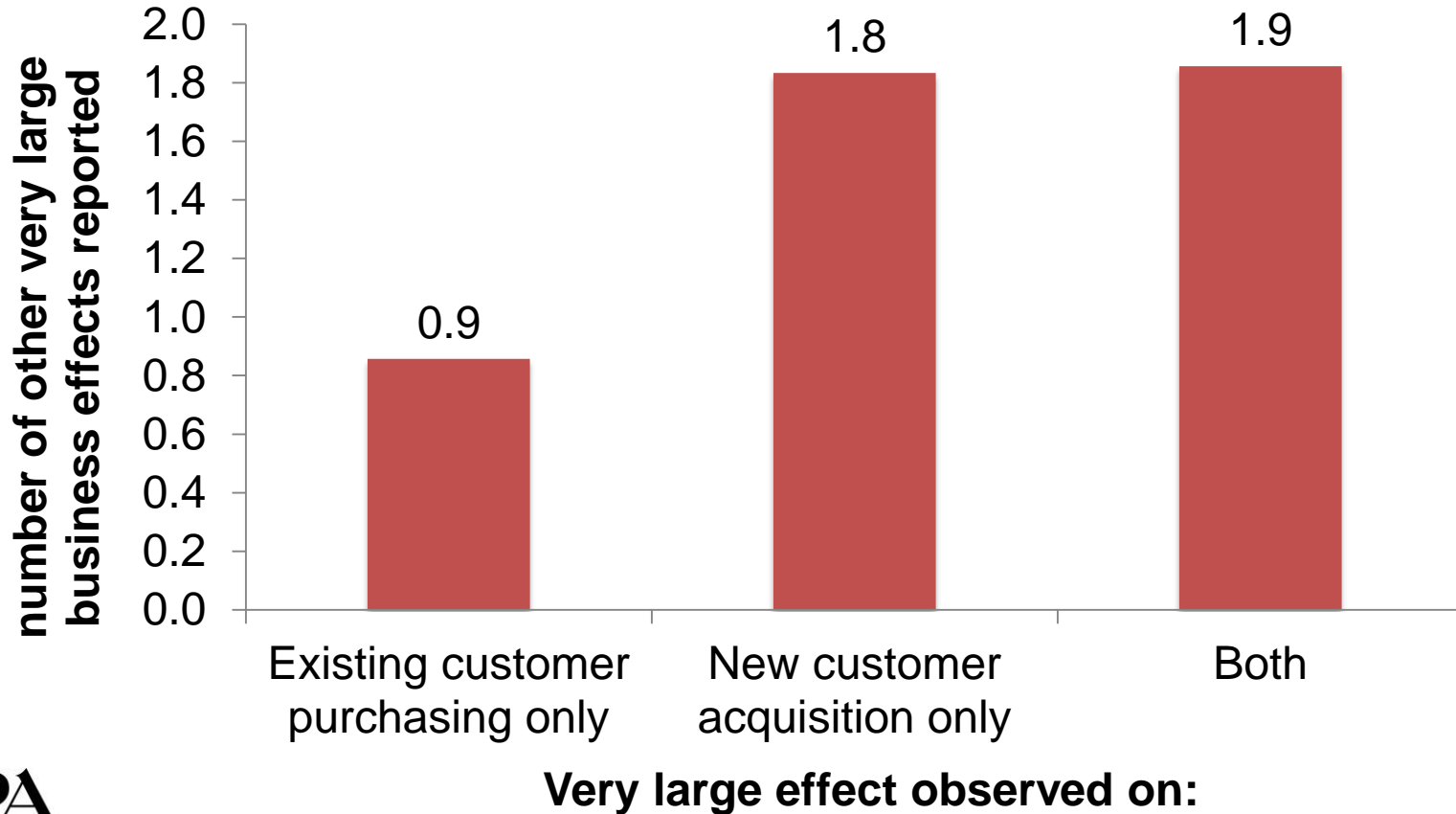
asi 2016 International Television &
Video Conference

Previous research and this

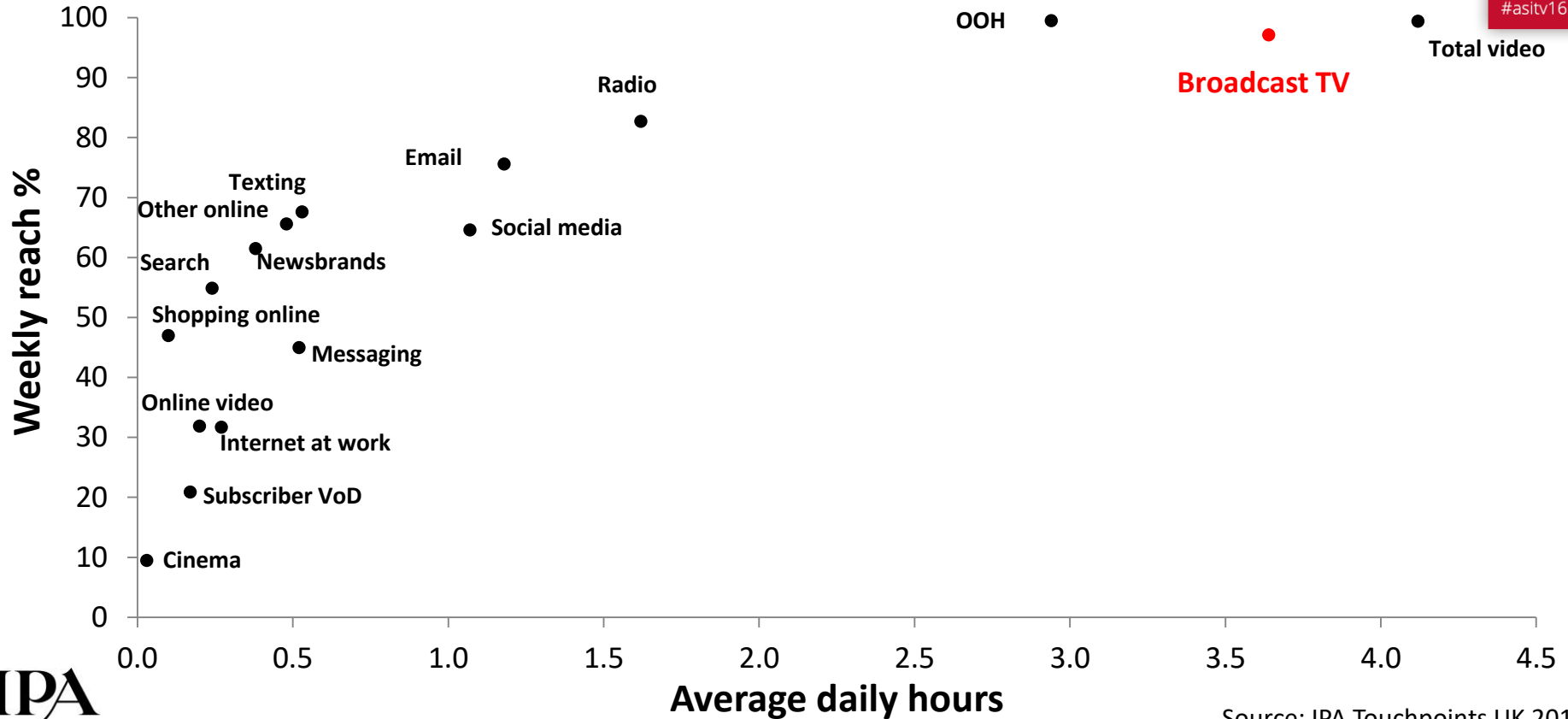


- How has the changing media landscape modified earlier media observations?
- Part 1 of 4
- 500 for profit cases, 120 in 2014/16

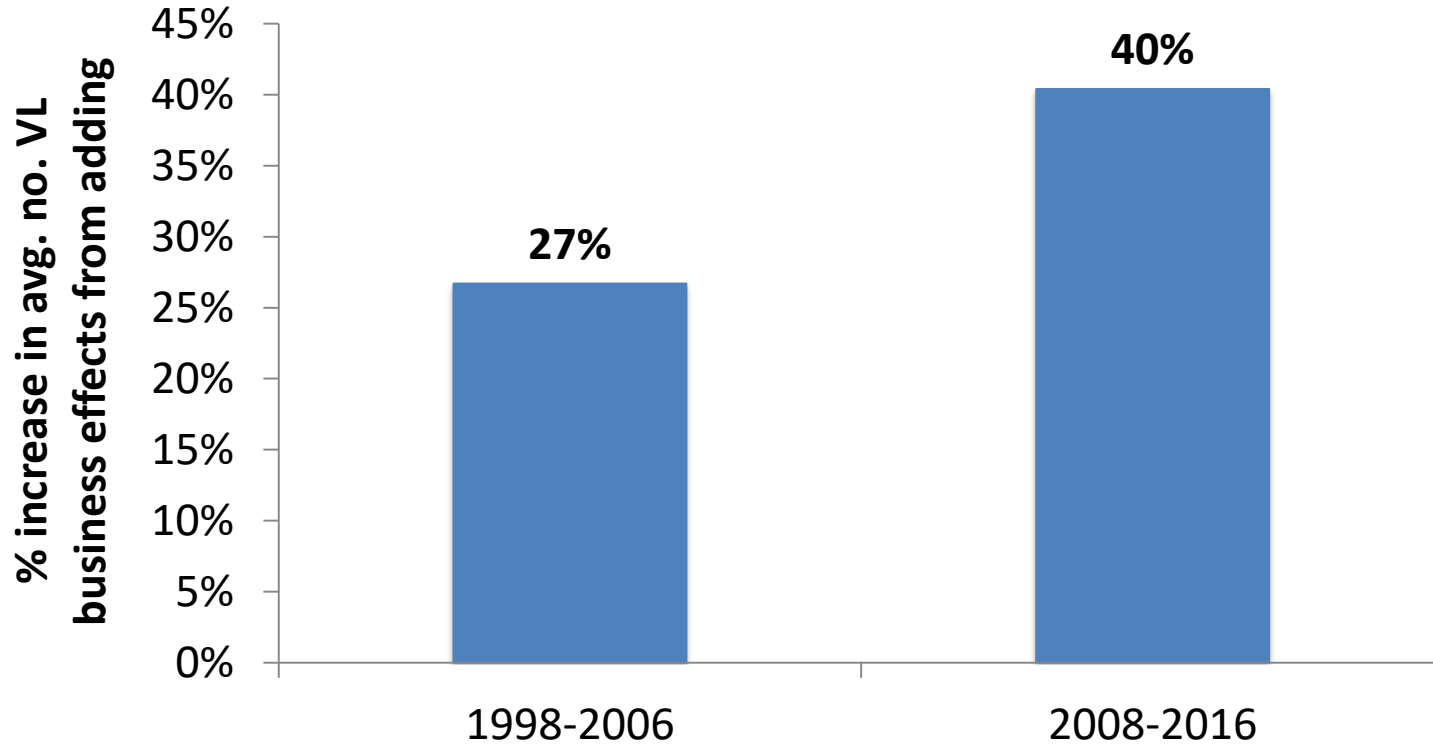
Penetration is still the main driver of success



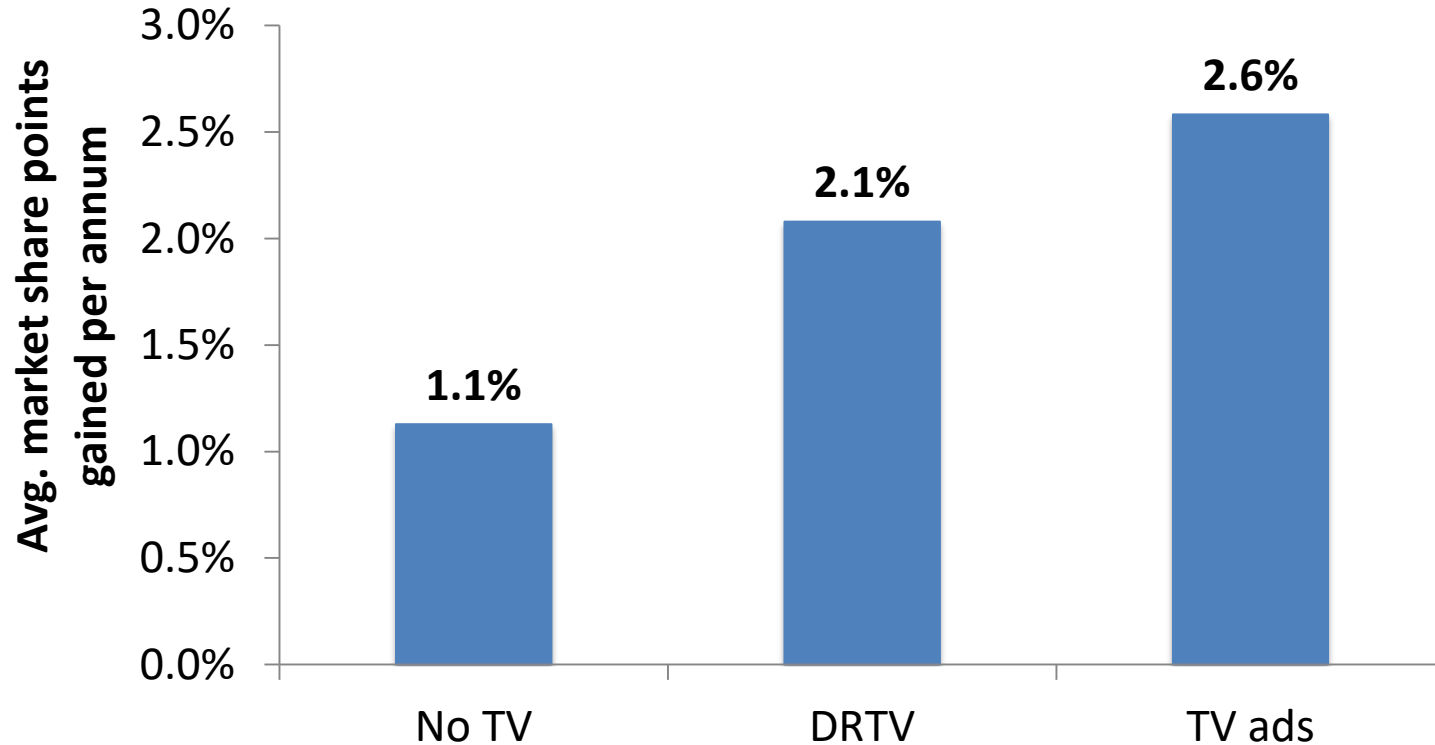
So reach is still vital



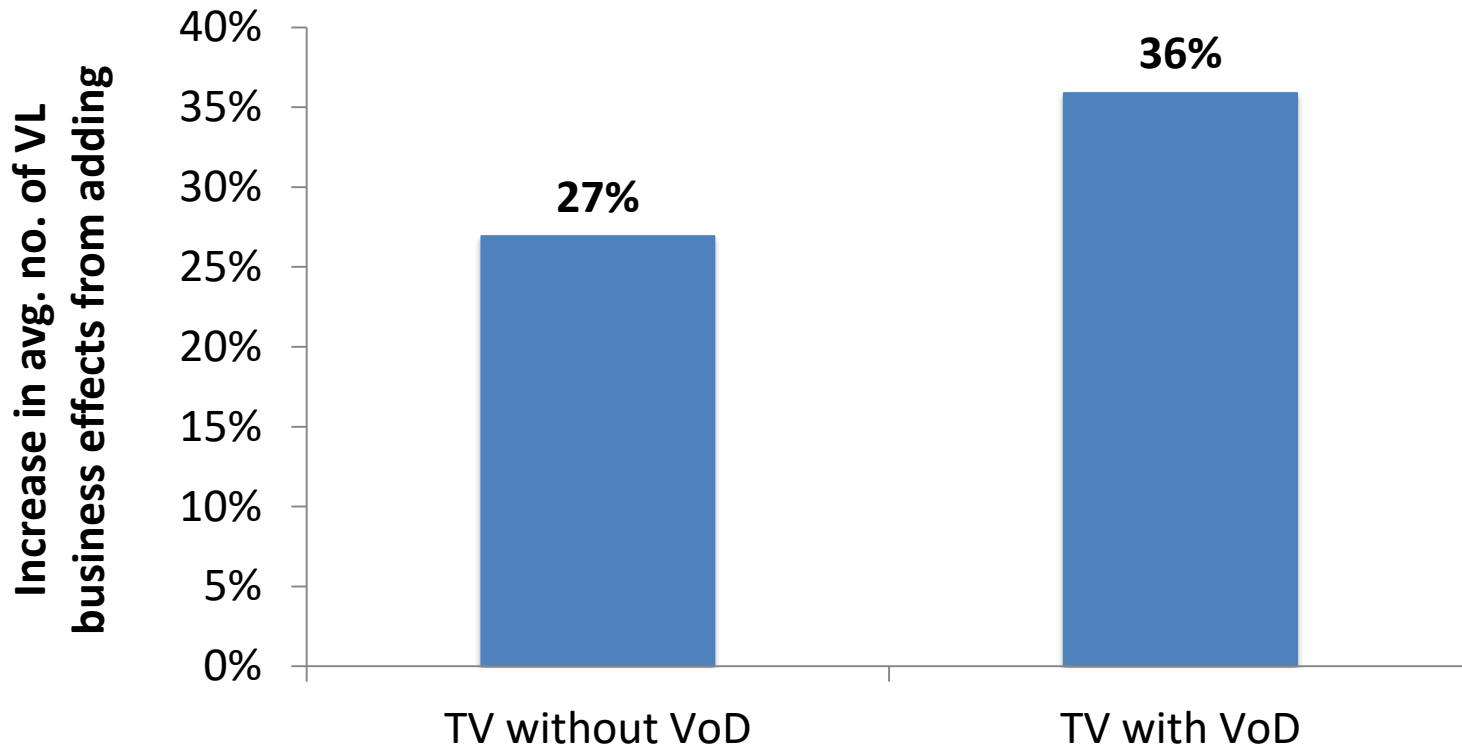
TV has become more effective



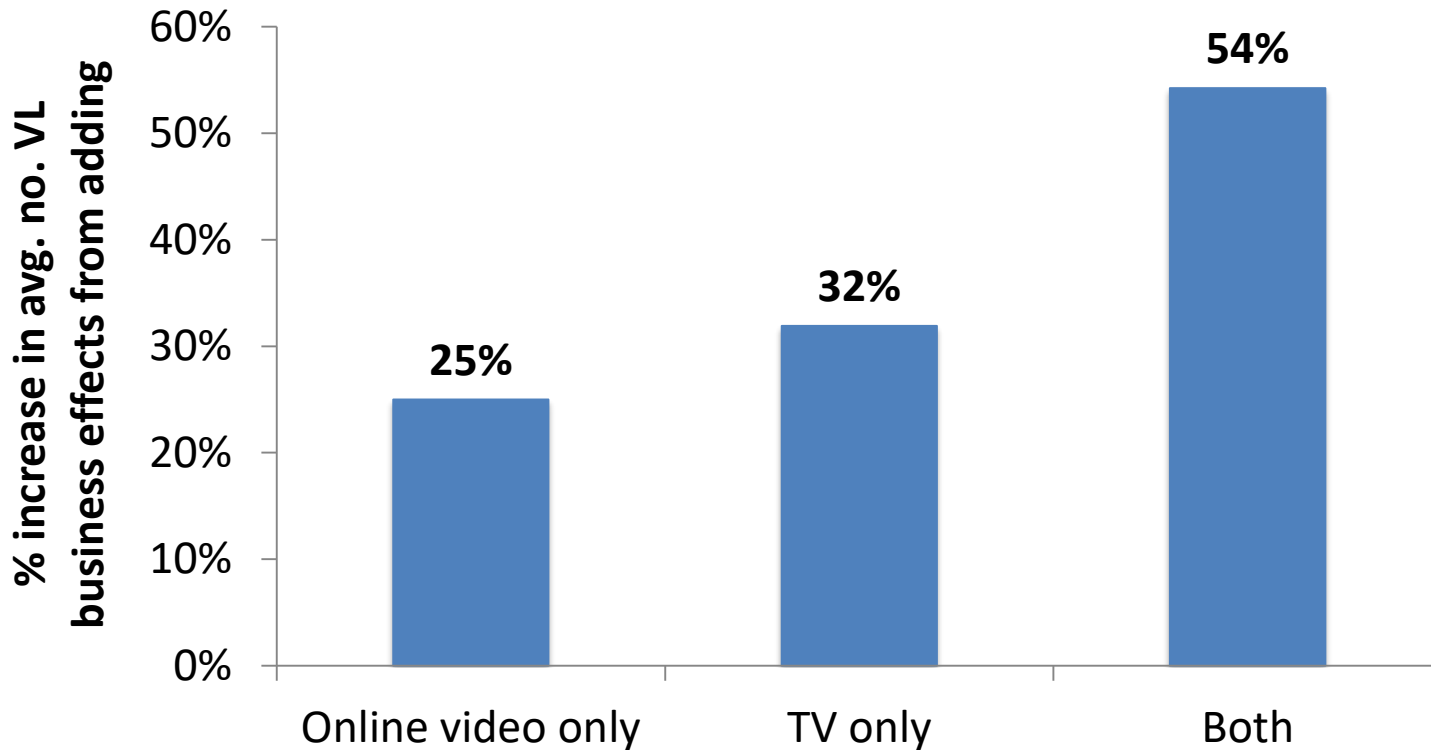
TV is best for market share growth



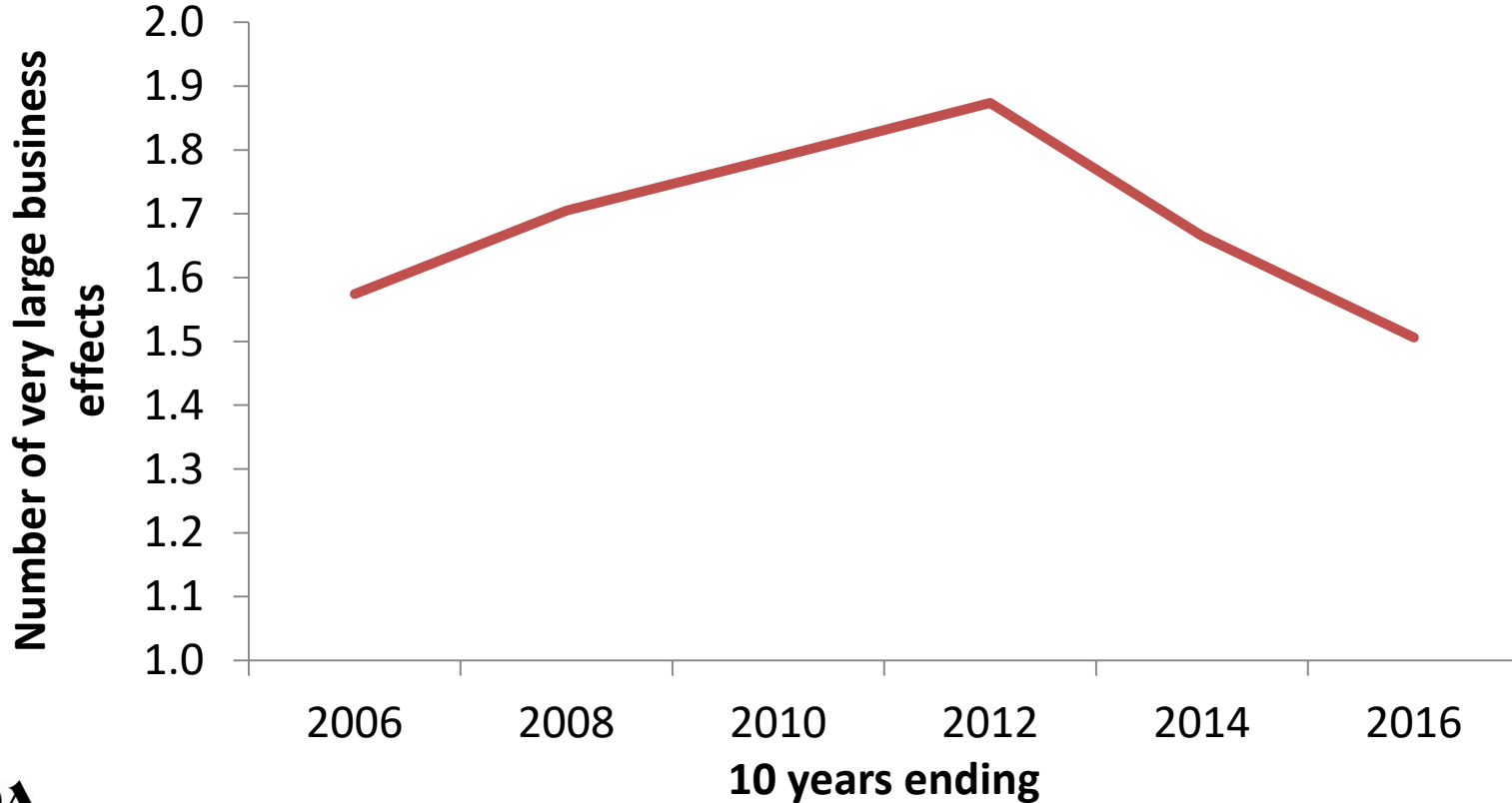
VoD makes TV more effective



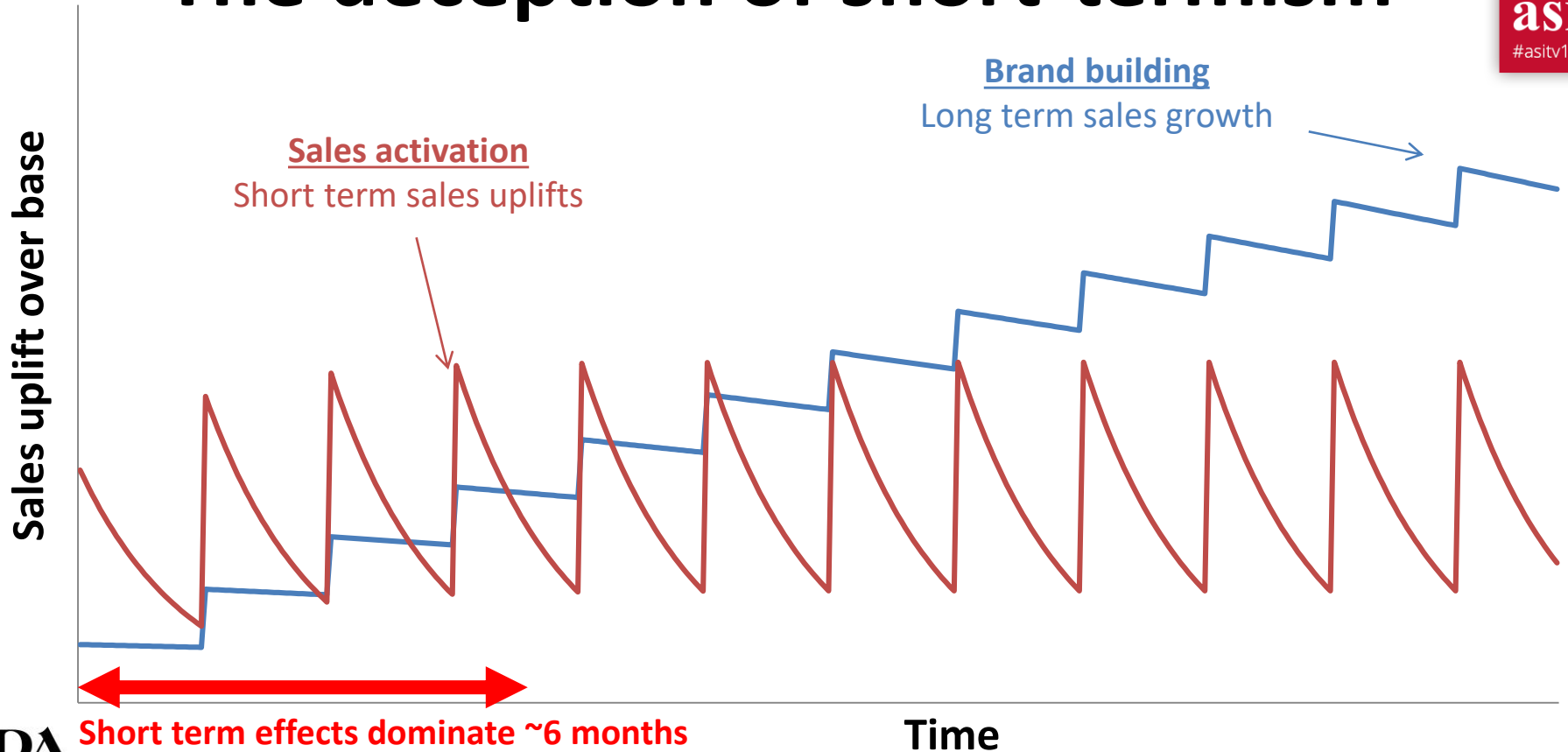
Online video makes TV more effective



Effectiveness has fallen

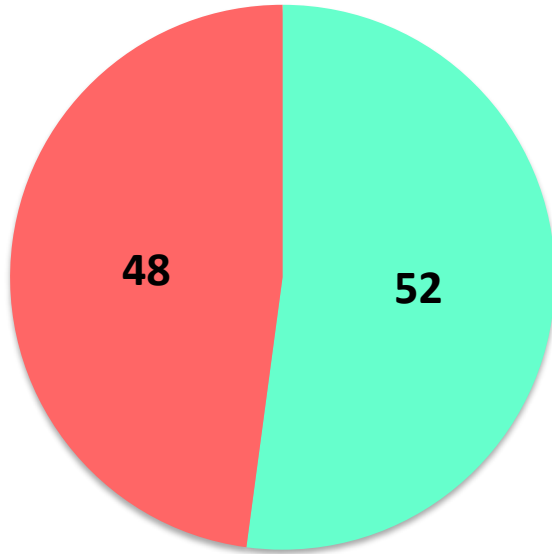


The deception of short-termism



Short-termism in action

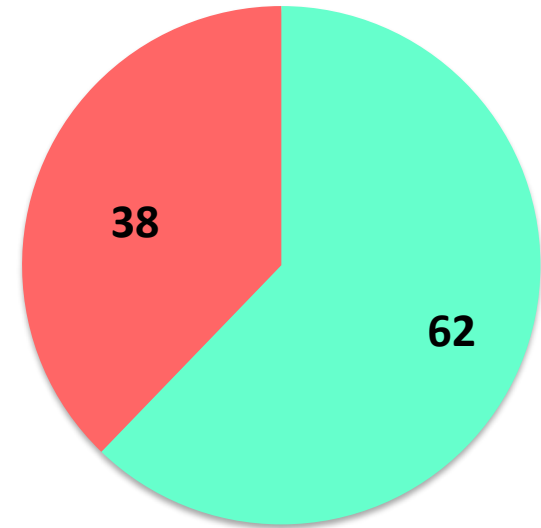
Short-term



■ Channel share for brand-building objectives

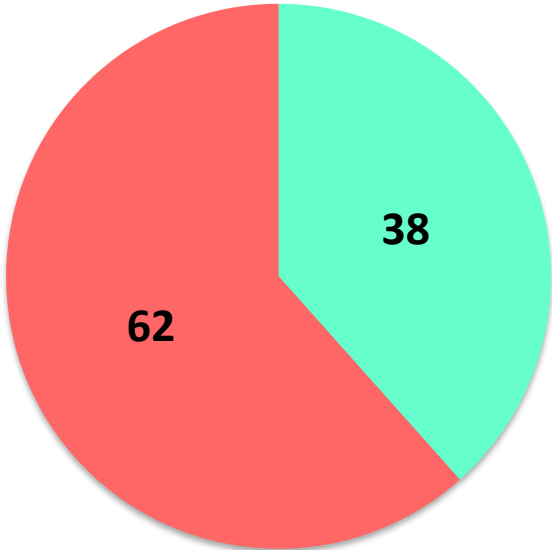
■ Channel share for activation objectives

Long-term

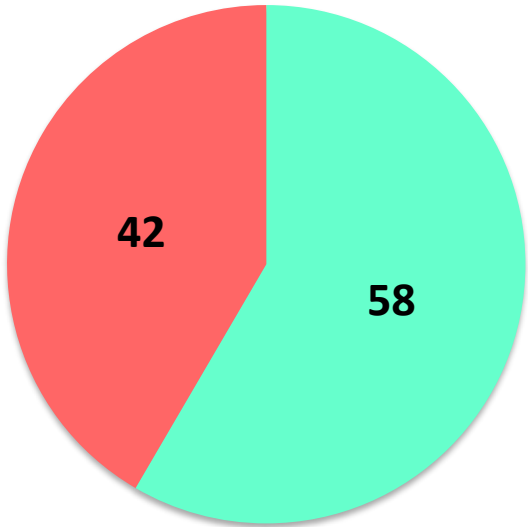


Short-termism in action

Short-term



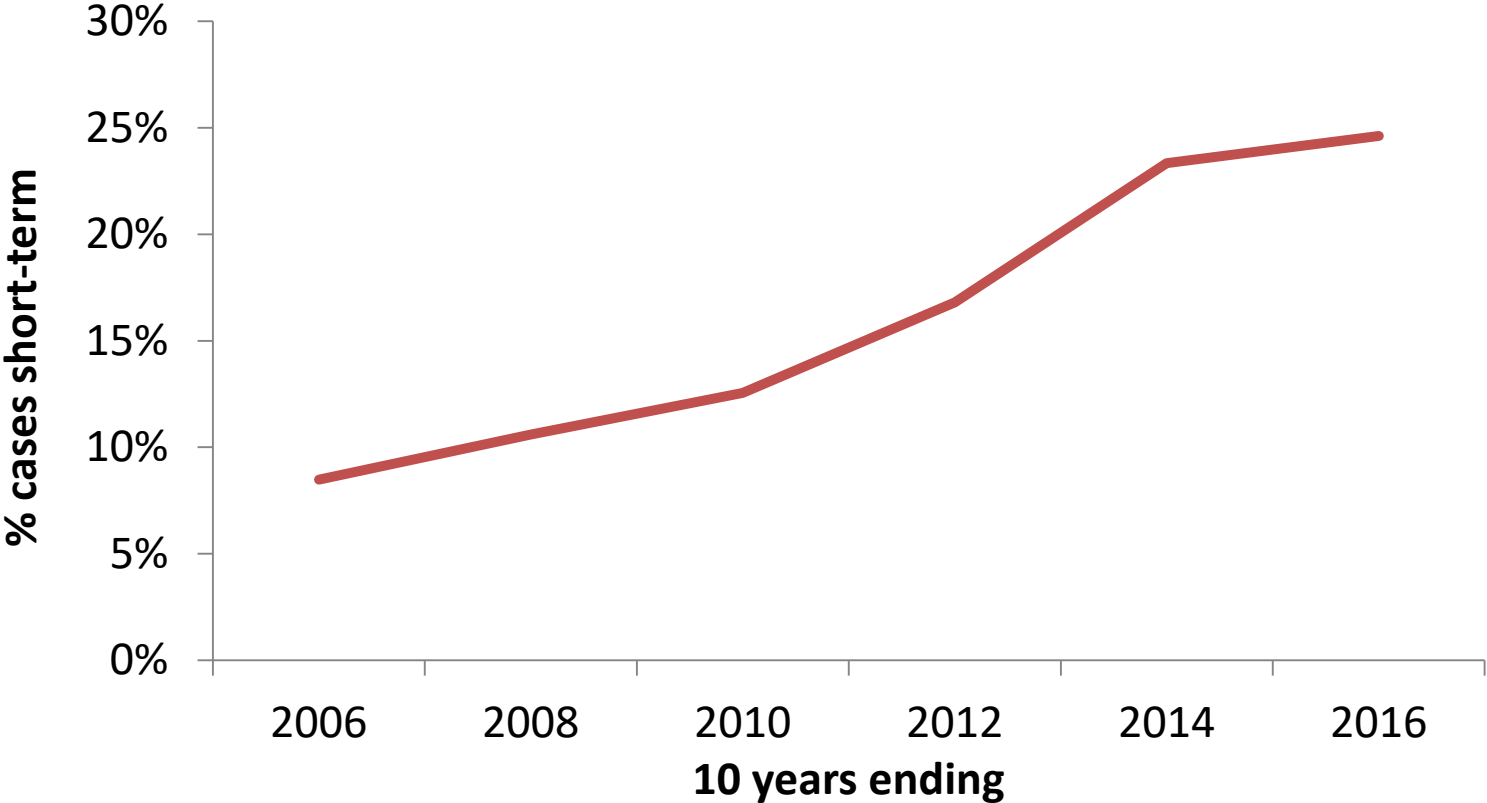
Long-term



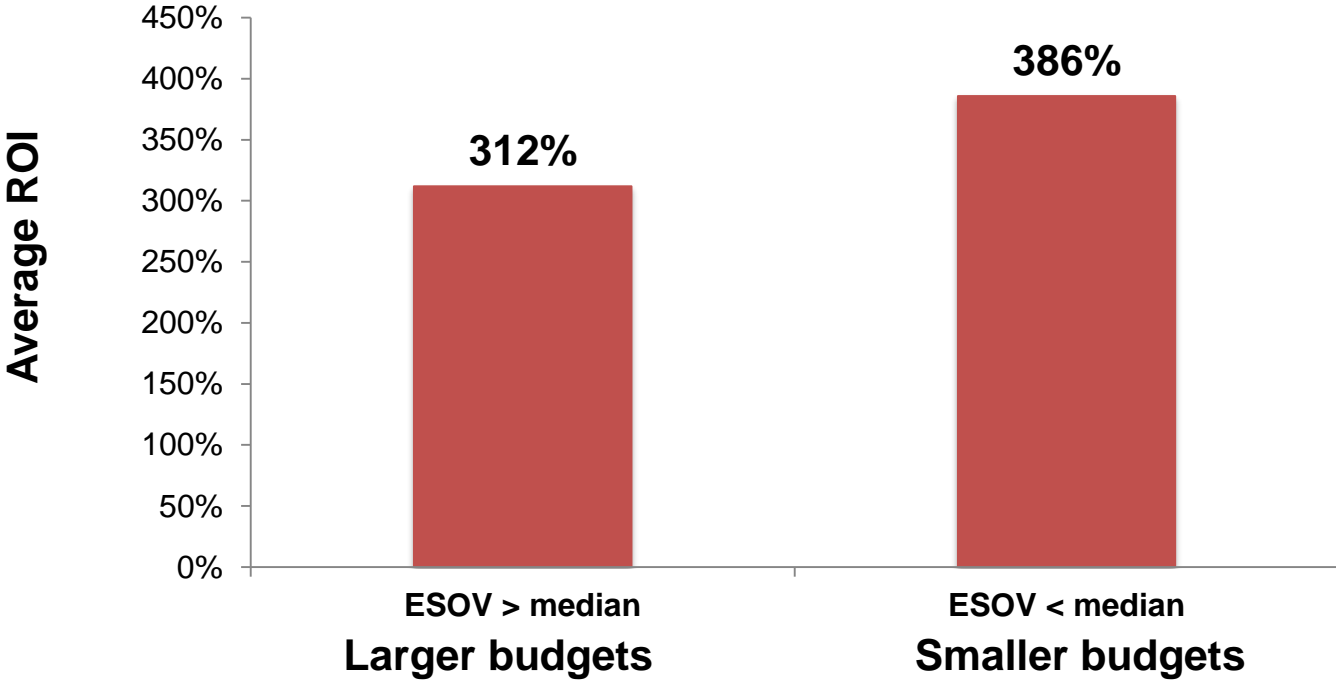
■ Video-based

■ Non-video

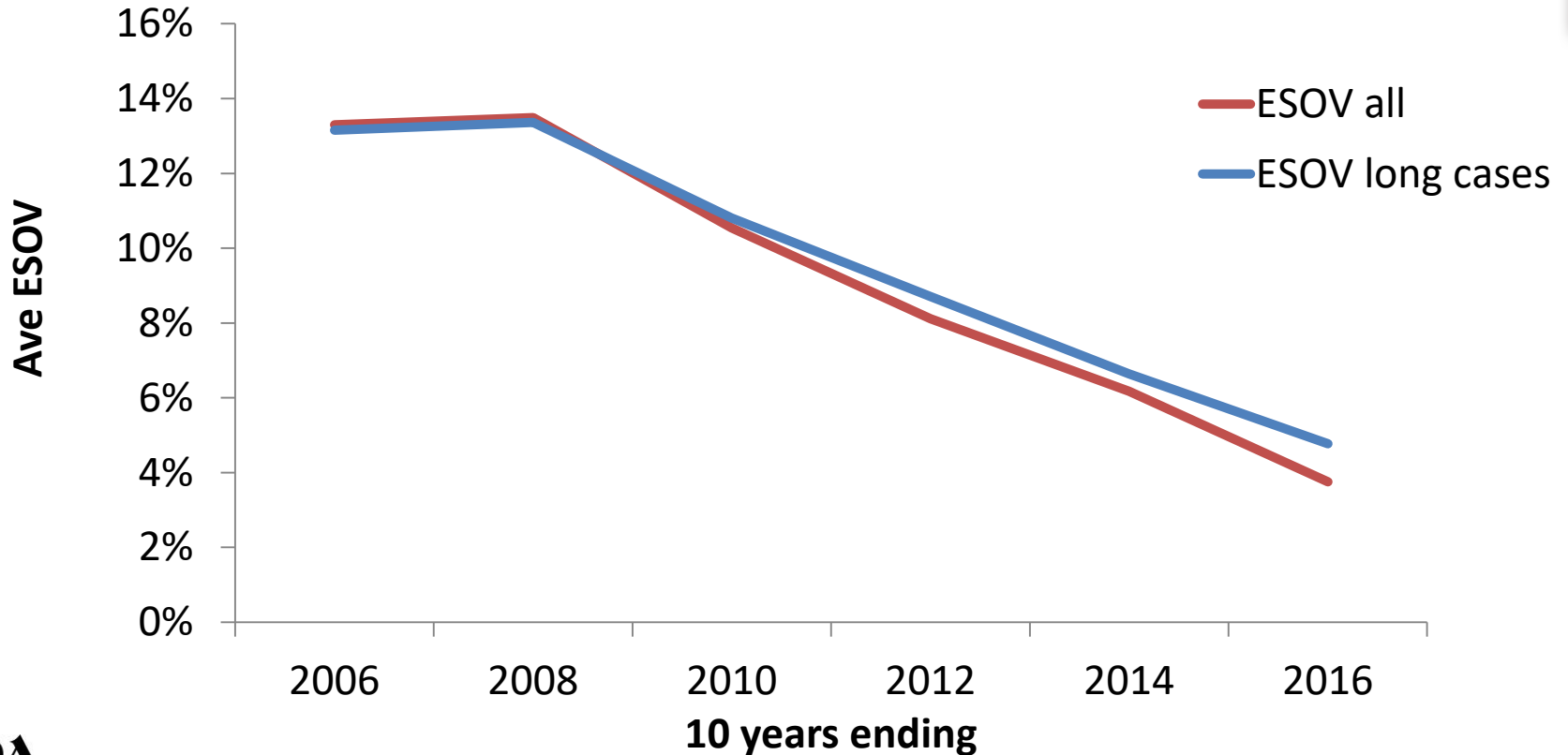
Short-termism has been rising



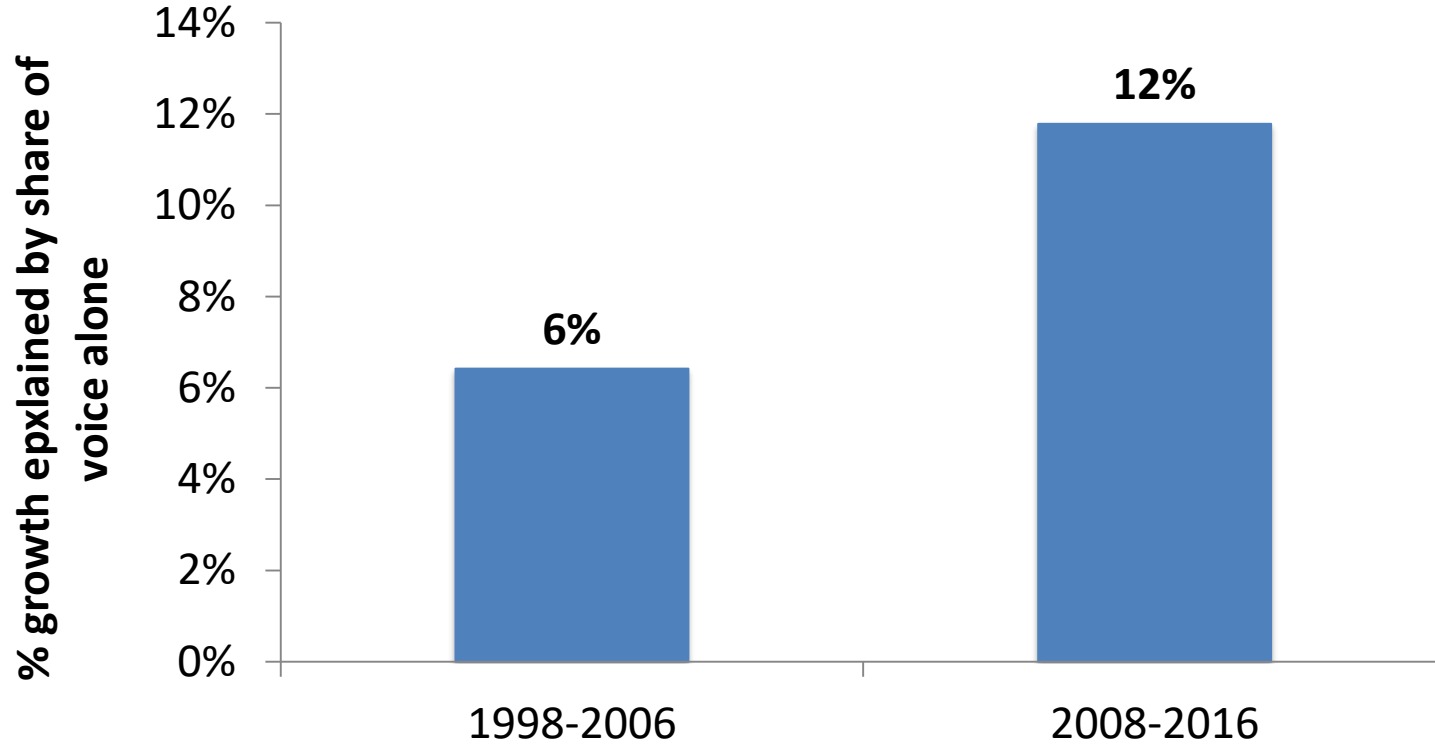
Reducing ESOV boosts ROI



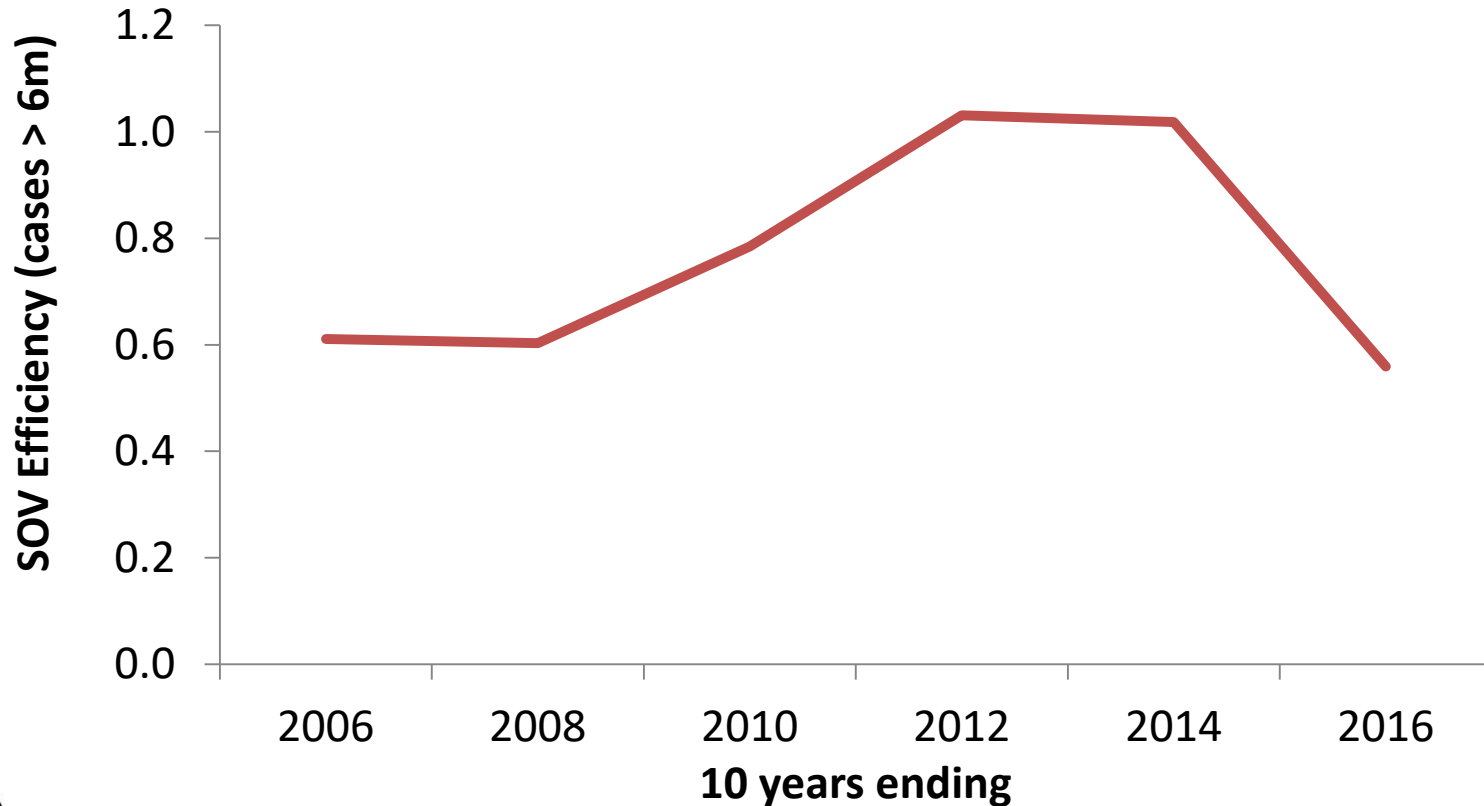
ESOV has been falling



ESOV is getting more important

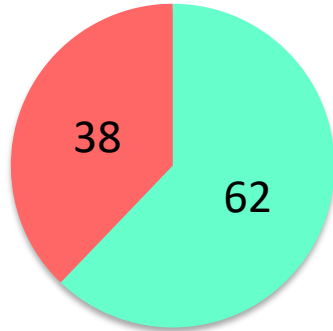


Even long cases have lost efficiency



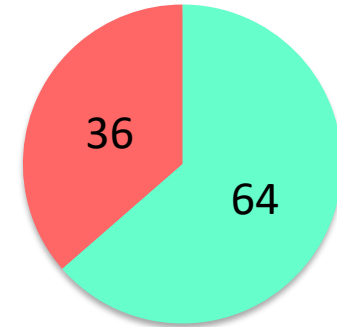
Balancing brand and activation for best success

Very large share growth cases

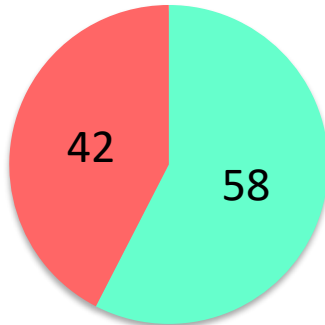


- Channel share for brand-building objectives
- Channel share for activation objectives

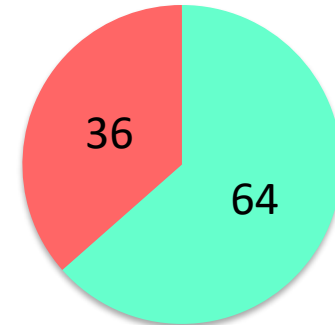
Most efficient cases



Strongest brand-building cases



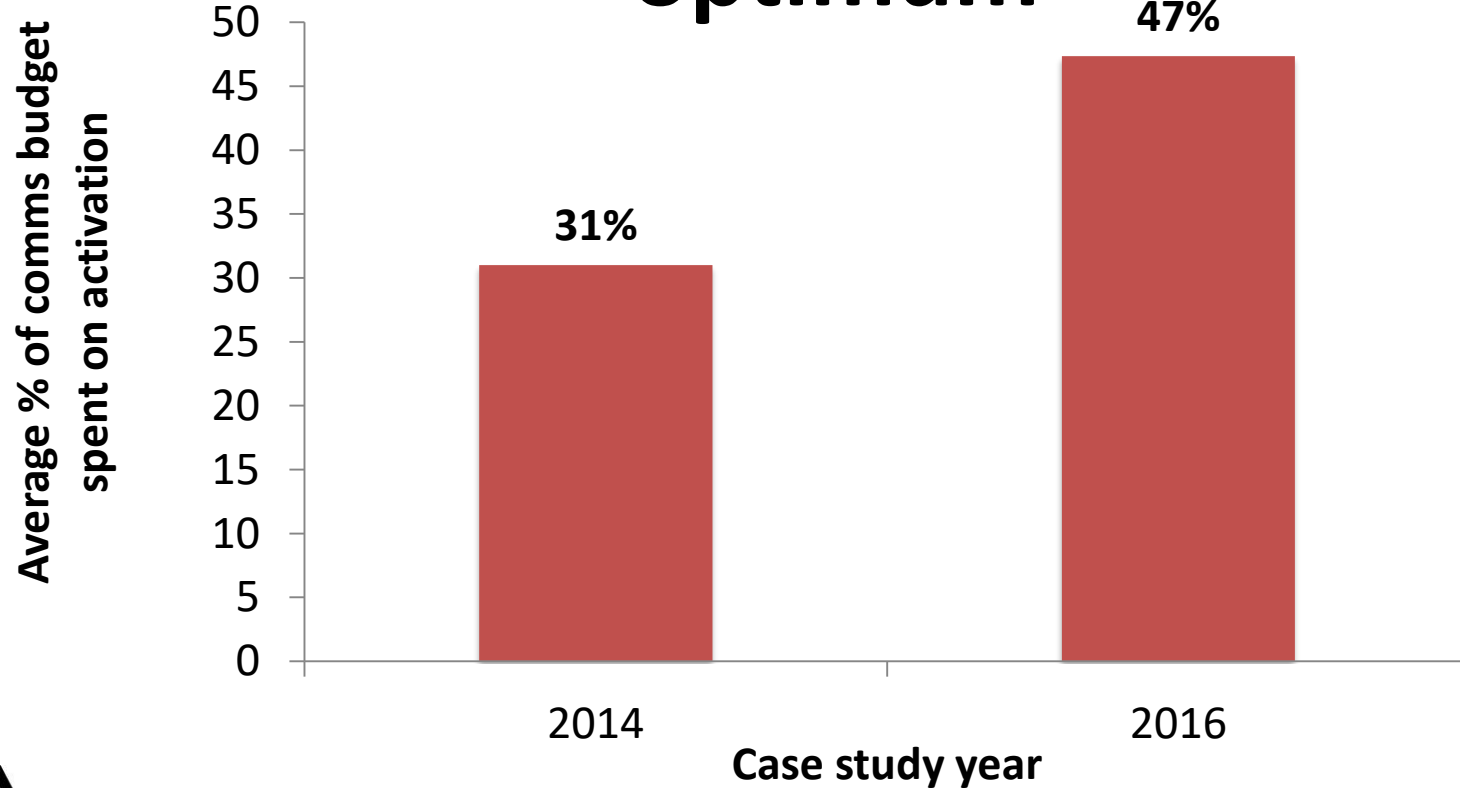
Very large profit growth cases



Base: 2016 cases

Activation levels have exceeded optimum

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Summary

1. Penetration, not loyalty, is still the main driver of brand growth.
2. So broad reach media are still crucial for effectiveness.
3. Share of voice is more important than ever.
4. Video is the most powerful medium for long term success.
5. TV, VoD & online video work together to boost effectiveness.
6. So effectiveness should still be growing across the board - but it isn't.
7. Short-termism and an excessive focus on ROI are partly to blame.
8. They encourage lower share of voice levels, but efficiency has fallen too.
9. They also lead to a focus on activation rather than brand-building.
10. Budget allocations are now activation over-weight, and are sub-optimal.

Conclusions

- Marketers need to return to a more balanced perspective on long vs. short term objectives.
- The activation/brand-building pendulum has swung too far towards activation.
- Dial up brand-building instead of activation, especially with newer channels. Value video over non-video.
- Design campaigns and evaluation for long-term effects
- Monitor and restore ESOV – the link with growth is getting stronger.

Thank you