

The Round Up

Thinkbox research summary 2023



thinkbox

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Foreword

From Matt Hill
Research & Planning Director



The white paper on creativity we published in 2023 by Laurence Green – [From Good to Great: Improving the Odds](#) – had at its core a finding that the twin fuels that power creative success in advertising are having a shared mission and optimism.

This way of thinking underpins Thinkbox's research programme. We're here not only to share robust evidence that the industry can use to create more effective work, but also to encourage the optimism that takes good work to great at a time when complexity, endless choice and digital transformation are making the job of marketing ever harder.

Few things are transforming faster than TV. As the trade body for commercial TV, Thinkbox's core job is to stay on top of the changes and complexity so we can provide the insights required to make sense of where we find ourselves today. That way we can help advertisers make better decisions tomorrow.

Rigorous, groundbreaking research underpins all Thinkbox's activity. During the last year, there have been three major Thinkbox research projects:

- [The drivers of profitability](#): Paul Dyson from accelero explored the effectiveness drivers of advertising ROI to provide marketers with evidence that CEOs and CFOs will listen to.
- [Creative Drivers of Effectiveness](#): with creativity the most powerful driver of advertising effectiveness within our control, this study by Neuro-Insight provides guidance on how to make ads that get brands into the memories of their customers.
- [Earning Attention](#): building on our white paper in 2022 – 'Giving attention a little attention' – we put attention back in the spotlight to explore how TV ads compete for attention in our lives, and to delve into the roles audio and visual signals play in gaining and keeping attention.

In the coming pages you'll read about them and discover what we learned – plus we've picked some of the best research studies from the last year by others that we'd encourage you to read.

I hope you find this compilation practical and insightful. If you have any questions, or want us to come in and go through the research in more detail with you or your team, [just let us know](#).

The drivers of profitability

What drives advertising profitability? What factors give the maximum marketing benefit? How can you work out where to allocate resource? We commissioned Paul Dyson from accelero to explore the effectiveness drivers of advertising ROI to provide marketers with evidence that CEOs and CFOs would listen to.

Dreamland, Sky



Key findings

- Creativity is the single biggest driver of advertising profitability that marketers have control over.
- Brand size has the most influence, but marketers have little short-term control over it.
- The majority of profitability drivers belong to the world of media planning and strategy.
- Don't prioritise cost over value. Having a killer creative strategy alongside a well-constructed and optimised media plan is by far the most effective route to profitable growth.

Background

In 2014, Paul Dyson, founder of the econometric consultancy Data2Decisions, conducted an analysis which revealed the drivers of profitability (itself an update of work done in 2006). That analysis identified and ranked the ROI multiplier effects of various different advertising considerations.

What emerged from the analysis was that creative execution was by far the single most important element of advertising under a marketer's direct control in terms of ROI. Behind it were a host of different media planning and strategy factors that were all vital to success too. But creativity shone out.

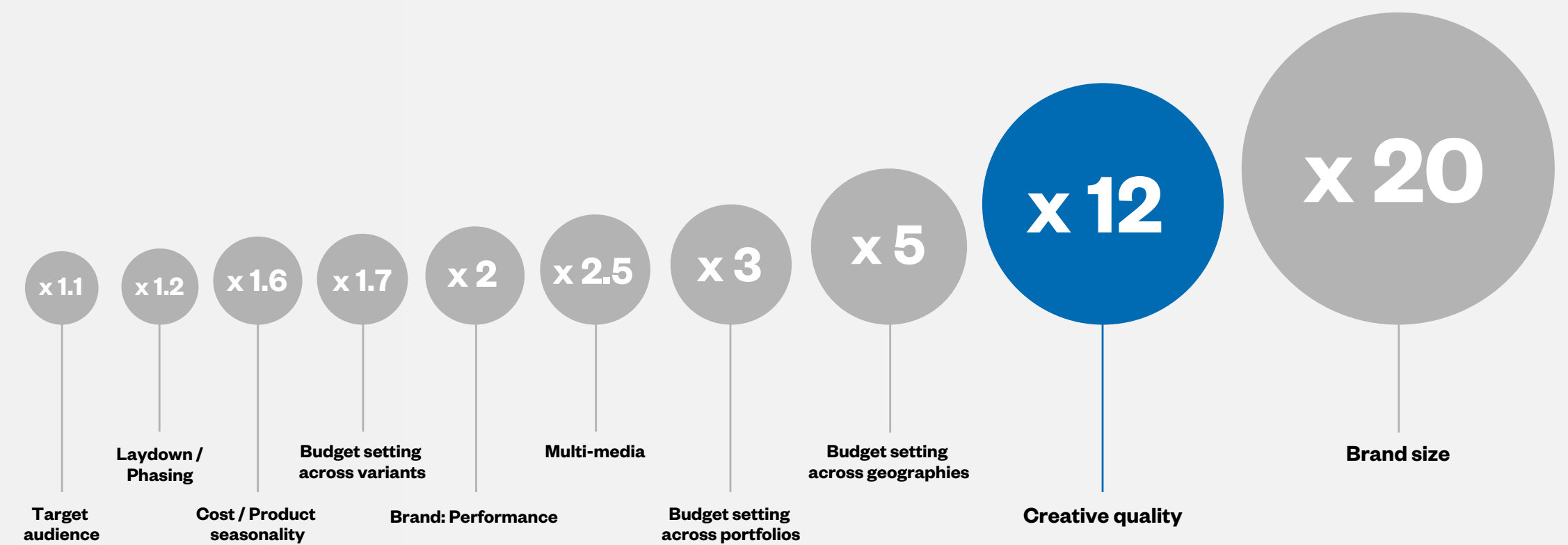
As the media landscape has transformed since 2014, Thinkbox commissioned Paul Dyson (now co-founder of accelero) to revisit his analysis to uncover if and how things have changed since 2014.



Archie, ITV

Creativity is the biggest advertising profitability multiplier within our control

Potential multipliers of advertising profitability - (2023)



Source: The Drivers of Profitability, 2023, Paul Dyson - accelero, ROI multiplier = area of the circle

Factors influencing ROI

Category

The chart below demonstrates that there is a big difference between the average ROI achieved across different categories and that this broadly correlates to business size.

For example, retailers are much bigger businesses than individual FMCG brands. Retailers averaged a business size of just over £11bn whilst FMCG brands average around the £100m mark.

This affects ROI because of business characteristics such as penetration, average revenue per customer, and purchase frequency. Take Fairy Liquid and Tesco, for example. Fairy might have a similar penetration to Tesco, but it's going to be relatively tiny in terms of average revenue per customer and purchase frequency. Yet, because the unit cost of advertising is going to be broadly similar for both brands, the potential of advertising to deliver ROI is going to be much higher for the bigger business.

accelero found that the potential ROI multiplier generated by simply being a (very) big business is x 20.

Budget

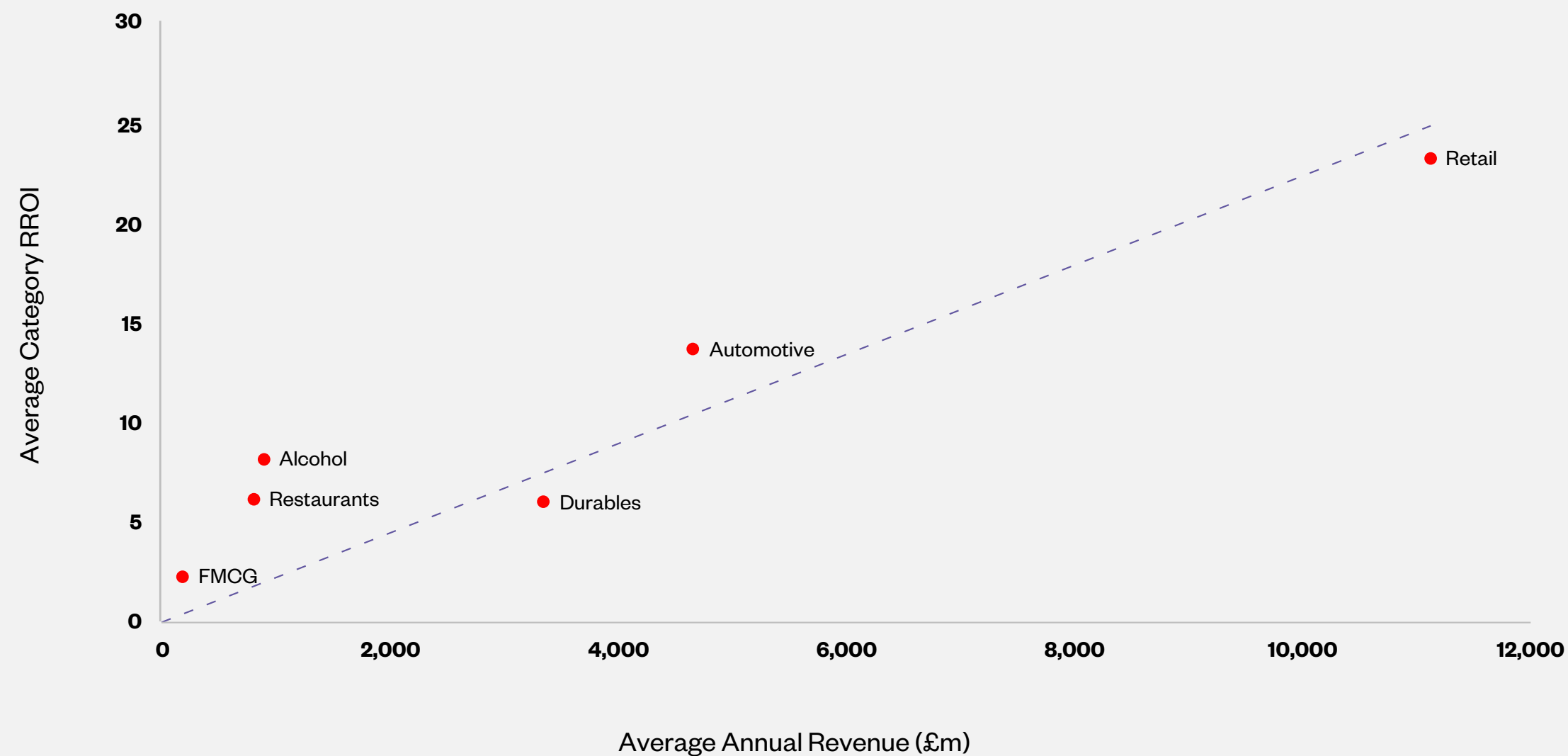
Each extra pound you invest in advertising generates slightly less than the one before. So, as spend increases, the ROI ratio starts to decrease. Logic suggests then that the best way to maximise ROI is to spend as little as possible (because the ROI ratio would get bigger and bigger with less and less spend).

That's why ROI isn't necessarily a good measure to prioritise; you deliver a high multiplier on your investment at the expense of making high profit. The way to maximise profit is to maximise advertising investment, capping spend once diminishing returns suggest that the next pound is better saved or invested in a more profitable activity.

Using the Media Mix Navigator (based on econometric data from £2.2bn of media investment across 52 WPP brands), together with accelero's own optimiser, accelero looked at what happens to ROI with different budgets for different brands with different business sizes.

In the table below, you can see that, on average, ROI roughly halves when comparing a very low spend with a very high budget. For an automotive brand with an annual revenue of £2bn, at a very low budget (1-2% of turnover) you might expect something in the 17 to 20 ROI range. But at a really high spend of 10% of sales you'd be achieving something like an ROI of 9.

Brand size is a key driver of category ROI



Interaction of budget and brand size impact ROI performance

Expected ROI performance by brand size and budget level

		Brand Size						
		£50m	£100m	£200m	£300m	£500m	£1,000m	£2,000m
Budget (% of sales)	1%	0.6	1.3	2.7	3.9	6.2	11.7	20.0
	2%	0.6	1.2	2.4	3.4	5.5	10.0	16.7
	3%	0.5	1.1	2.2	3.2	5.0	9.0	14.7
	4%	0.5	1.0	2.1	3.0	4.7	8.3	13.3
	5%	0.5	1.0	2.0	2.9	4.4	7.8	12.2
	10%	0.4	0.9	1.7	2.4	3.6	6.1	8.9

Source: The Drivers of Profitability, 2023, Paul Dyson – accelero, based on 2,500 UK ROIs across 4 key studies



Source: The Drivers of Profitability, 2023, Paul Dyson – accelero



Creativity

Given the big influence of brand size and budget on the potential ROI a campaign can achieve, the simplest way to isolate creative impact is to focus specifically on the performance of a single brand. This means factors such as product category, brand size, distribution, competitive environment and, normally, budget are held static. As a result, the variation in ROI performance across a number of campaigns can be explained by the performance of the different creative executions used.

The charts below compare the performance of different creative executions within a single campaign for Aldi and Guinness. There's significant variation.

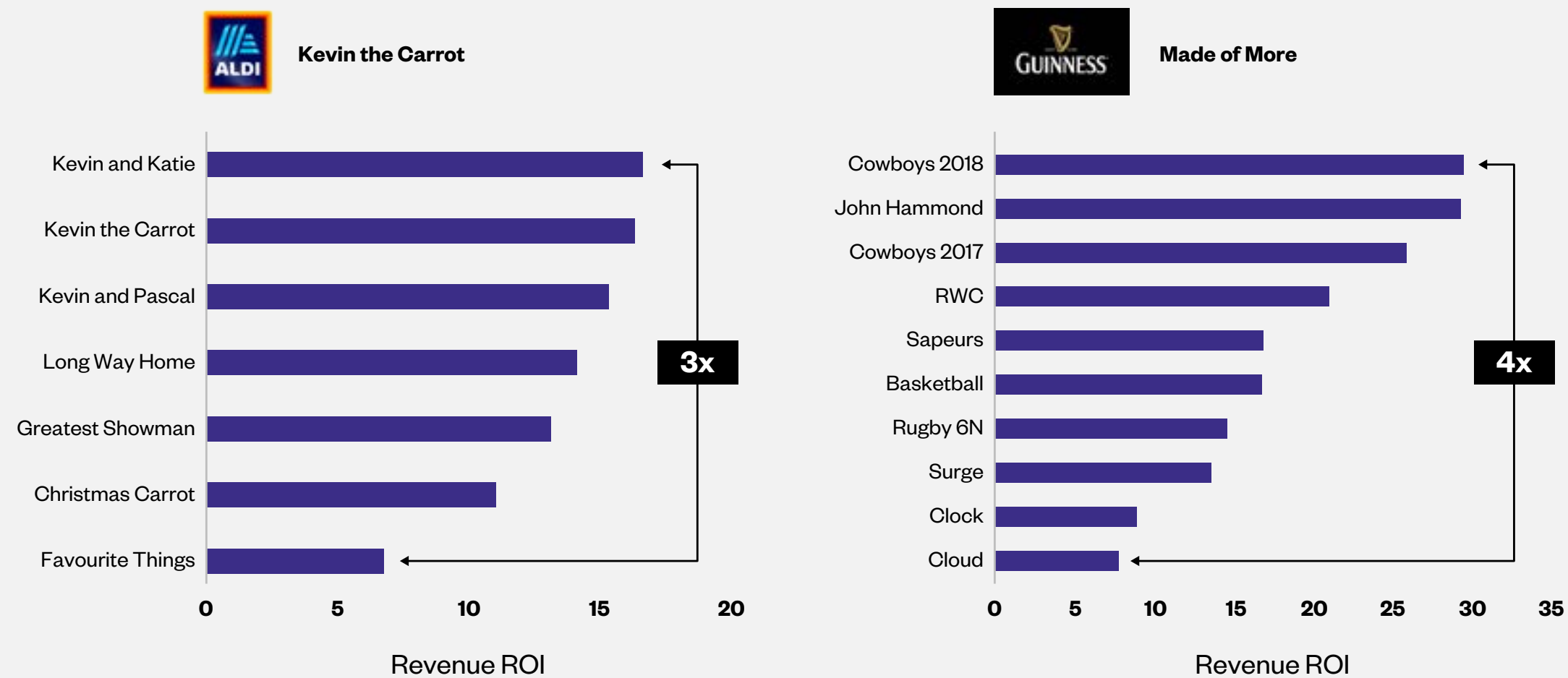
Aldi's 2017 'Kevin and Katie (Carrot)' has a three-fold multiplier in ROI performance compared to 2015's 'Favourite Things'.

Both were Christmas campaigns and both had a similar investment in TV.

It is the same story for Guinness. 2012's 'Cloud' campaign has a much lower ROI than 2018's 'Cowboys', yet the TV campaigns were also near identical in their weight.

So this is not a win for efficiency, with a smaller budget delivering a higher ROI than a big budget. This is a pure creative effect, and a similar pattern was seen across accelero's database. Overall accelero found that the potential creative ROI multiplier is 12 (the same as in the 2014 study). Whilst it's the second biggest driver of profitability, it's the biggest driver within control, as marketers have little short-term influence over the size of the brand they are working with.

Creative executions deliver a range of ROI (IPA Awards)



Source: The Drivers of Profitability, 2023, Paul Dyson – accelero



The Lionesses: A League of Their Own Special, Sky

Budget Setting

In past analysis, Paul Dyson broke out budget setting into three areas: geography, across portfolios, and across variants. Again he found them all to have the potential to deliver a big difference in the potential ROI.

Budgets setting by geography: Some countries are simply more profitable than others. Media prices vary by geography, as do distribution channels, profit margins and product consideration. Brand size can also vary significantly. Allocating budgets across geographies in the optimum way can increase media profitability by up to a factor of 5. Many businesses are not structured to set global budgets centrally but the opportunity here makes it worth exploring.

Budgets setting across portfolios: Different brands within a given portfolio will have a different potential for ROI. As seen earlier, bigger brands deliver a higher ROI simply because they have wider distribution or awareness, so prioritising bigger brands in a portfolio will lead to a higher ROI for your budget – a x3 multiplier on ROI.

Budgets setting across variants: As above, but for brand variants rather than different brands within a portfolio. Here Dyson identified a multiplier as high as x1.7.



Creativity is the biggest ROI multiplier within our control.”

Paul Dyson, accelero, June 2023



Rob & Romesh Vs, Sky

Media Multipliers

Media planning and strategy are a vital part of any campaign's performance. Unlike 'creative', which is difficult to break down into constituent parts, accelero could separate out some aspects of the media side of advertising and their potential to deliver ROI multipliers when fully optimised...

Multimedia: It's well documented that campaigns using more than one media channel benefit from media multiplier effects – the evidence accelero found is no different, suggesting that simply by using a multimedia strategy, there's a potential ROI multiplier of 2.5.

Cost/Product seasonality: Most businesses have seasonal peaks and troughs (think holiday booking in Q1), and media too have seasonal peaks and troughs in price (the run up to Christmas, is a typically high-demand period and in supply/demand-based markets (like TV) advertising is therefore more expensive).

accelero found that optimising for both media cost seasonality and the seasonality of your business could lead to a 1.6 ROI multiplier. This is low because the opportunity is limited – sales and cost seasonality may only vary by a small amount, and favourable conditions may not align (high seasonal sales with low seasonal costs). However, a 60% improvement in media payback is well worth having!

Laydown/Phasing: Econometric modelling has provided strong evidence for a carry over effect of advertising which is referred to as 'ad stock'. This is particularly prevalent in AV advertising due to its ability to drive more memorable advertising. By using 'ad stock' effectively it's possible to elongate campaigns through clever flighting patterns, such as week on, week off advertising, or buying in cheaper months to enable ad stock to flow through into more expensive media periods. This can lead to ROI multipliers of up to 1.2.

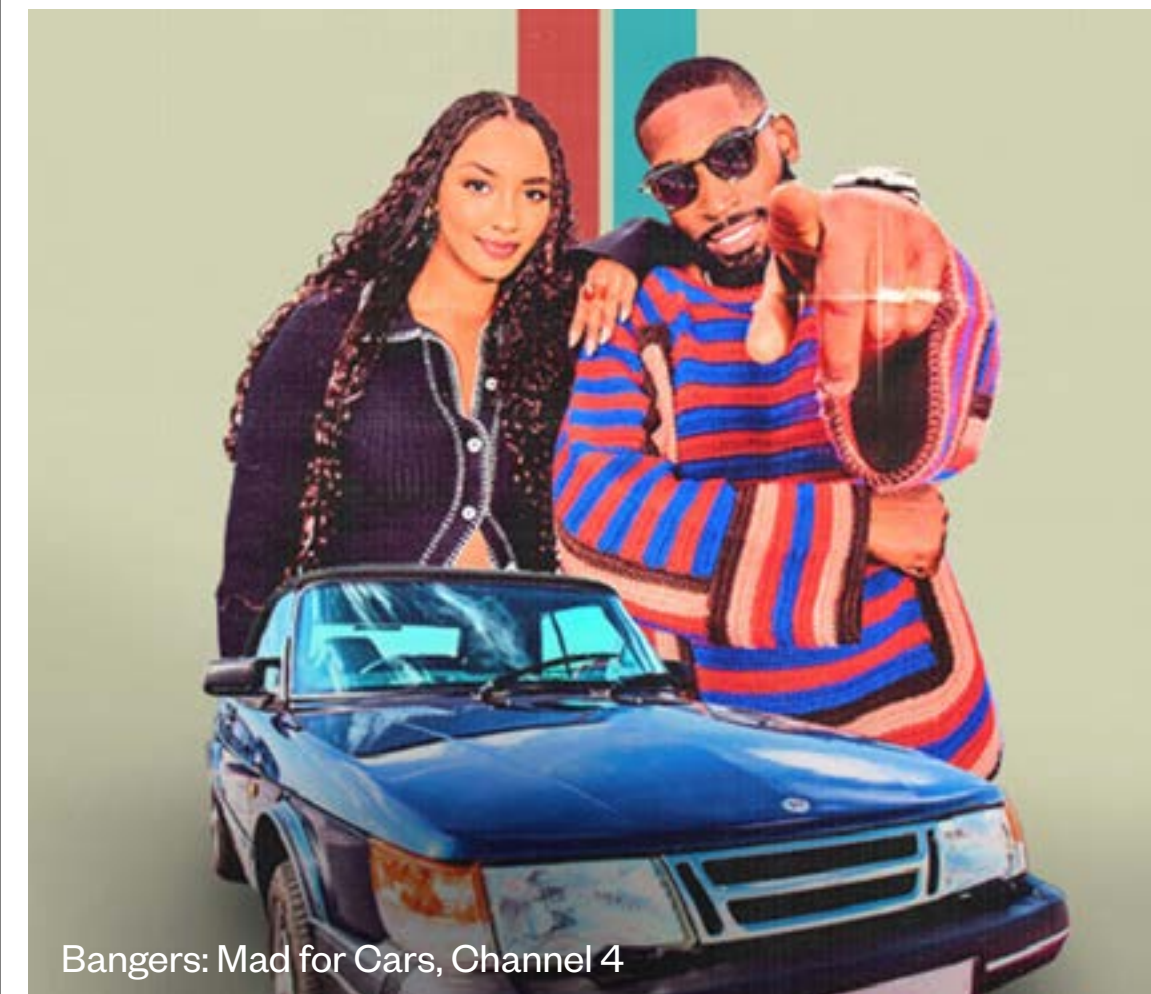
Target audience: Much media planning is focused on optimising the audiences that are bought to find the most cost-effective way of reaching the customers who are most likely to buy your product. As this is such an established practice, the ROI data suggests that opportunities are limited and will only deliver a marginal gain of a 1.1 ROI multiplier.

Brand vs. Performance: Binet & Field have long talked about how important it is to get the balance between brand and performance (or activation as they refer to it) right. accelero's study found that getting the mix right could increase ROI by x2.0.

↓ [Download all of the charts from this section here](#)

Methodology

This time, rather than relying on one database from one agency, accelero looked at the consensus of opinion around the drivers of advertising profitability across many different businesses, using publicly available case histories, industry reports and academic papers. Searching through hundreds of studies, accelero collated 28,000 global campaigns, providing a very robust sample from which to unpick the marketing variables that most influence ROI.



Bangers: Mad for Cars, Channel 4

Creative Drivers of Effectiveness

At its best, advertising is a welcome guest in our lives. Creativity is the gift that earns its welcome. With creativity the most powerful driver of advertising effectiveness within our control (see page 3), this study by Neuro-Insight is designed to provide some pointers on how to make TV ads that get brands into the memories of their customers.

Key findings

- Showcase your product, don't shout about it.
- People are paramount, it's important to focus on human interaction.
- Give audio a clear role.
- Brand assets can be impactful.
- Impact is in the timing, both for ad duration and final branding.

Background

As with 'Drivers of Profitability' (p.3), 'Creative Drivers of Effectiveness' is an update on a previous study from 2016. With the world seeing such major change in recent years (the pandemic, Ukraine war and Brexit for example), we recommissioned Neuro-Insight to update this valuable piece of research. The context of the world we experience hugely impacts the way we consume and respond to stories, media, and therefore advertising.

It's important to note that creativity and the making of ads and narratives does not have a perfect formula. But if science can help decipher just a small part of the magic we can identify those instances where a few changes in the edit could boost the memorability of an ad.

Hullraisers, Channel 4



David Mitchell's Outsiders, Dave

The analysis revealed five key creative factors that statistically can make a difference to the impact of TV ads on our brains:

Showcase your product, don't shout

Our brain has a kind of 'ad blocker' which develops during adolescence, a consequence of an evolutionary mechanism that enables us to avoid danger. So, if we feel as though we are being overtly advertised to, this 'ad blocker' fires up, making the ad less memorable.

A way to avoid this 'blocker' is to weave the product into the narrative. Neuro-Insight found that doing this elicits more peaks of memory and personal relevance throughout an ad. This gives a brand more opportunity to get into the audience's memory as there are 1.4x more peaks of strong brain response during ads that weave the product into a narrative compared with those that have an overt focus on the product.



David Holmes: The Boy Who Lived, Sky

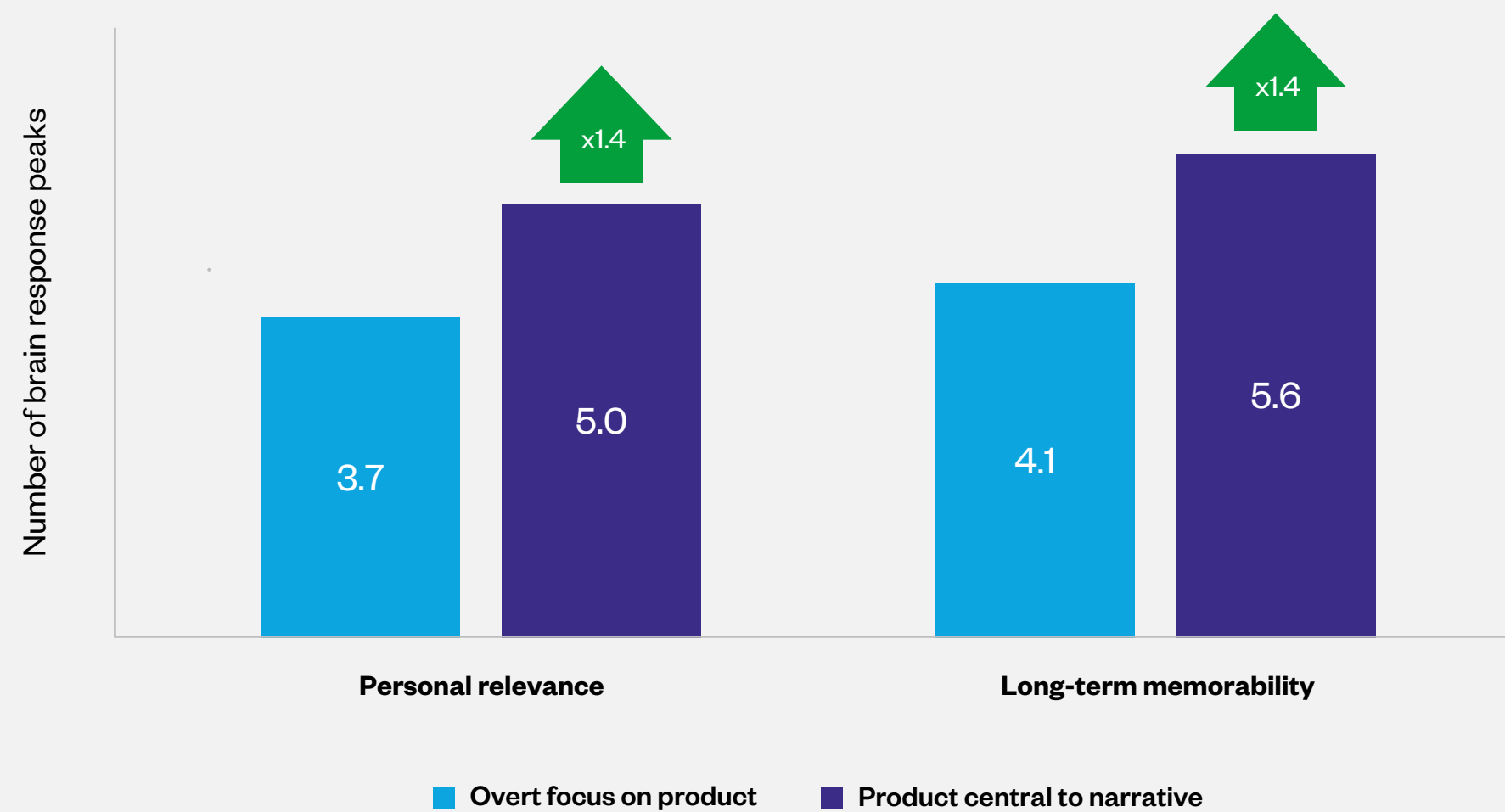
People are paramount

Humans are dominated by their emotions and a need to connect with others. Neuro-Insight found that ads with people present deliver more impact – reinforcing findings from the first iteration of this study. **Ads featuring people were 15% more relevant to the audience and drove 24% higher levels of memory encoding at final branding in comparison to ads with no people.**

However, not all onscreen characters work the same. The analysis showed that the audience do not relate to the narrative as much when children are the focus. Seeing children appear briefly or as more secondary characters was significantly more impactful.

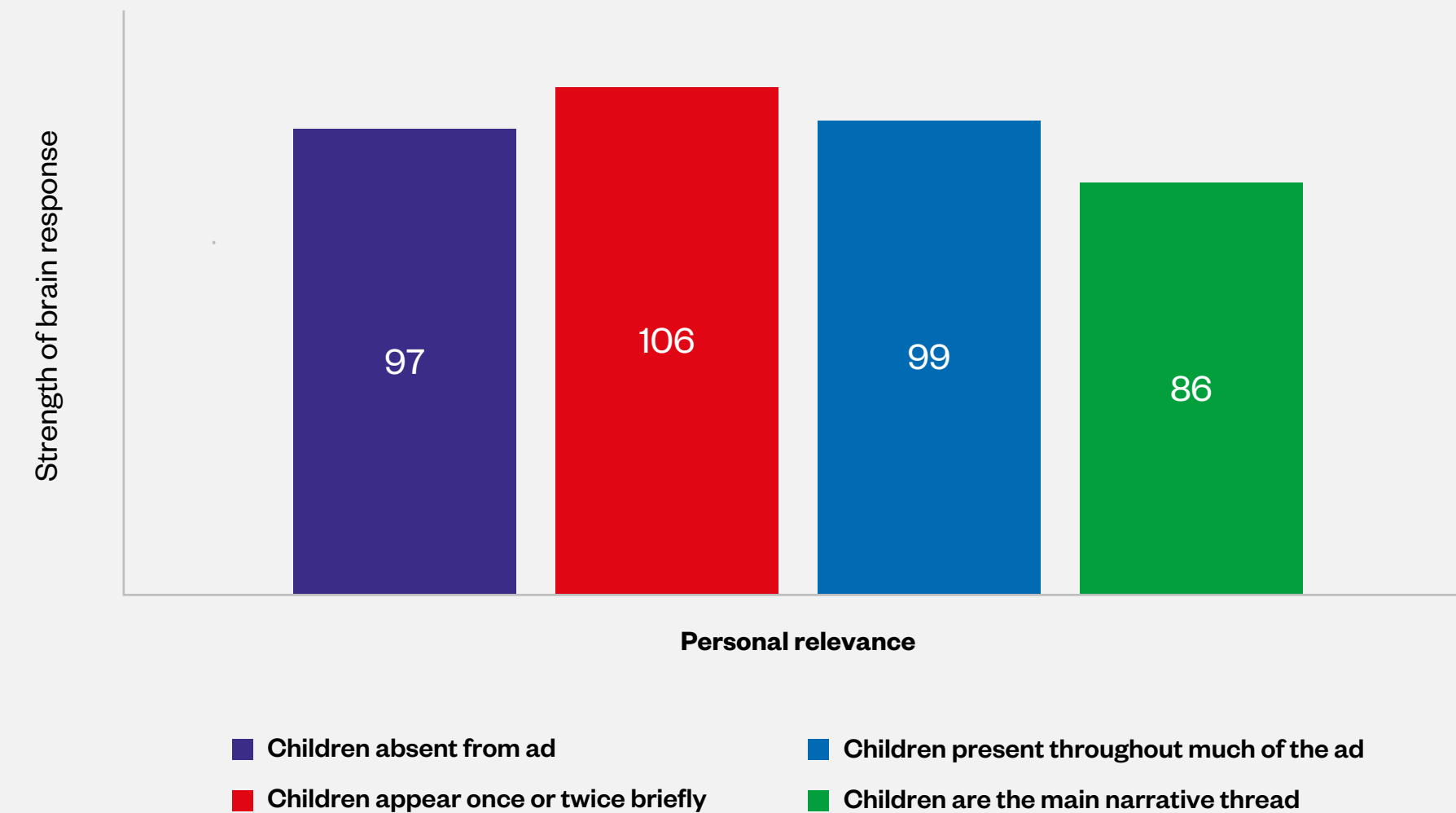
It is important to remember that children are not relevant to all audiences – a proportion of people will not have a strong link with a child in their lives and therefore seeing children within advertising is less relevant to them.

Weave your product into the narrative



Source: Creative Drivers of Effectiveness, 2023, Neuro-Insight / Thinkbox

Children in advertising



Source: Creative Drivers of Effectiveness, 2023, Neuro-Insight / Thinkbox

Give audio a clear role

There are brands that have thrived on their soundtracks. We all know that music can be a hugely powerful tool and set the mood and tone of an ad. Given that hearing is an always-on sense, utilising audio to its full extent is important.

When categorising the use of music into different levels – no music, passive/background music, music prominent and music driving the ad – Neuro-Insight found that ads which used music to drive the action elicited significantly more peaks of memory and emotional impact throughout the ad compared with not using music or using a passive background track.

Utilise your brand assets

A great creative knows how to tell a good story. For advertising, the brand should be intrinsic to the story of an ad, not incidental to it, with brand cues interspersed throughout the narrative.

The analysis discovered that integrating brand colours, for example, drove strong emotional impact (+9%). The brain works by association, so if a brand has been seen or alluded to during an ad, it will elicit a stronger response at the final brand sign-off. Utilising brand assets is a subtle way to weave branding into the narrative your audience is trying to connect with. As a result, when the switch to final branding is made, it feels cohesive and more congruent with the preceding narrative.

Impact is in the timing

Neuro-Insight explored whether the length of an ad influenced its impact. They found that ads under 30 seconds often fail to create a strong connection with the audience and develop a compelling narrative, causing the audience to be less involved emotionally and less likely to make memories. Ads over 30 seconds were still memorable but lost their emotional impact slightly – emotion is driven by pace and developing excitement but after 30 seconds these mechanisms can start to lose their strength.

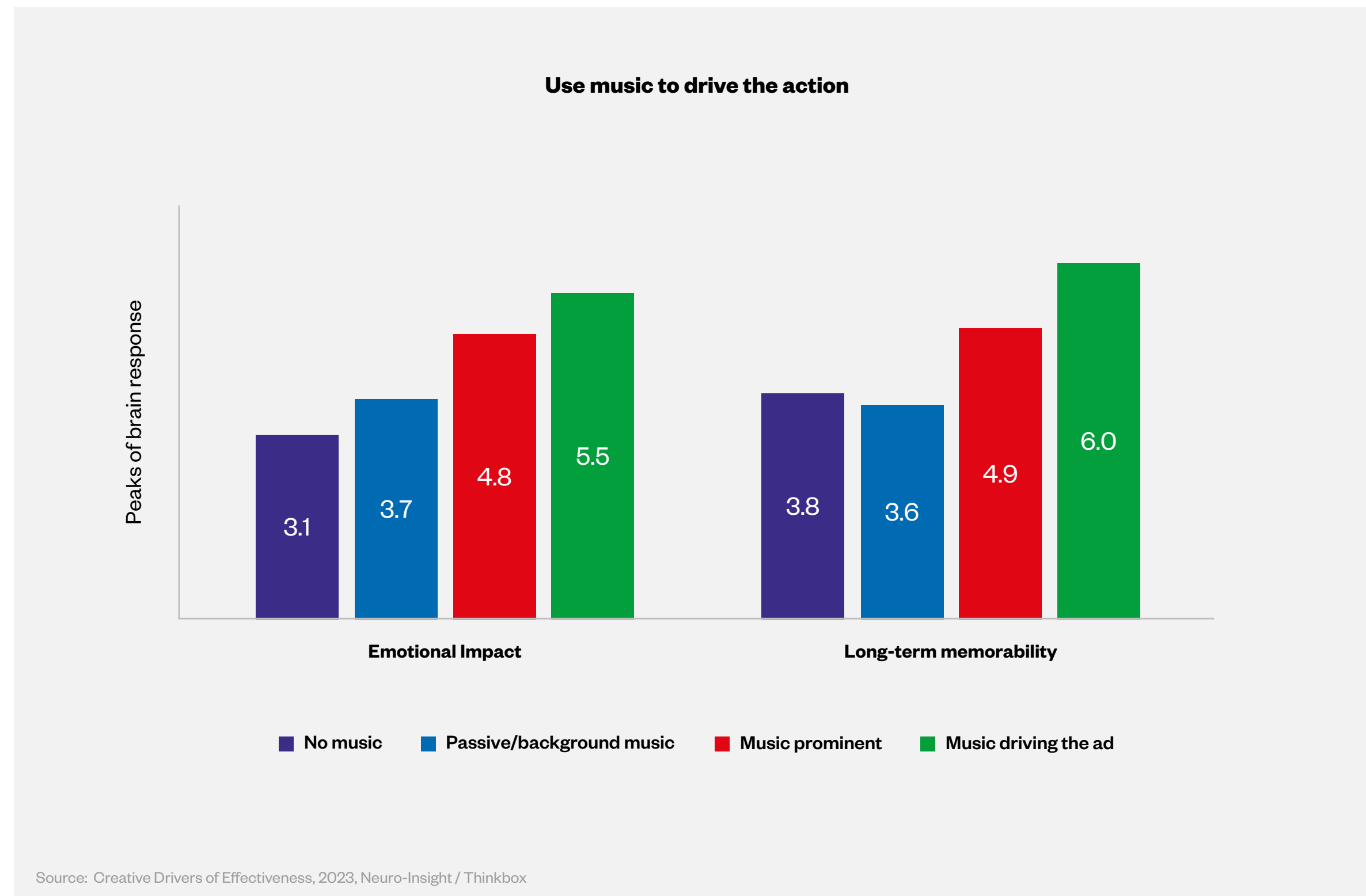
As a result, the findings suggest that 30 seconds seems to be the optimal time to develop a narrative and build a strong connection with your audience and therefore deliver the greatest impact.

The timing of end branding is also hugely important. The brain processes information in chunks. When it takes a moment to process what it's just seen, this is known as 'conceptual closure'. Conceptual closure is a pattern of brain activity that occurs when a sequence of events apparently comes

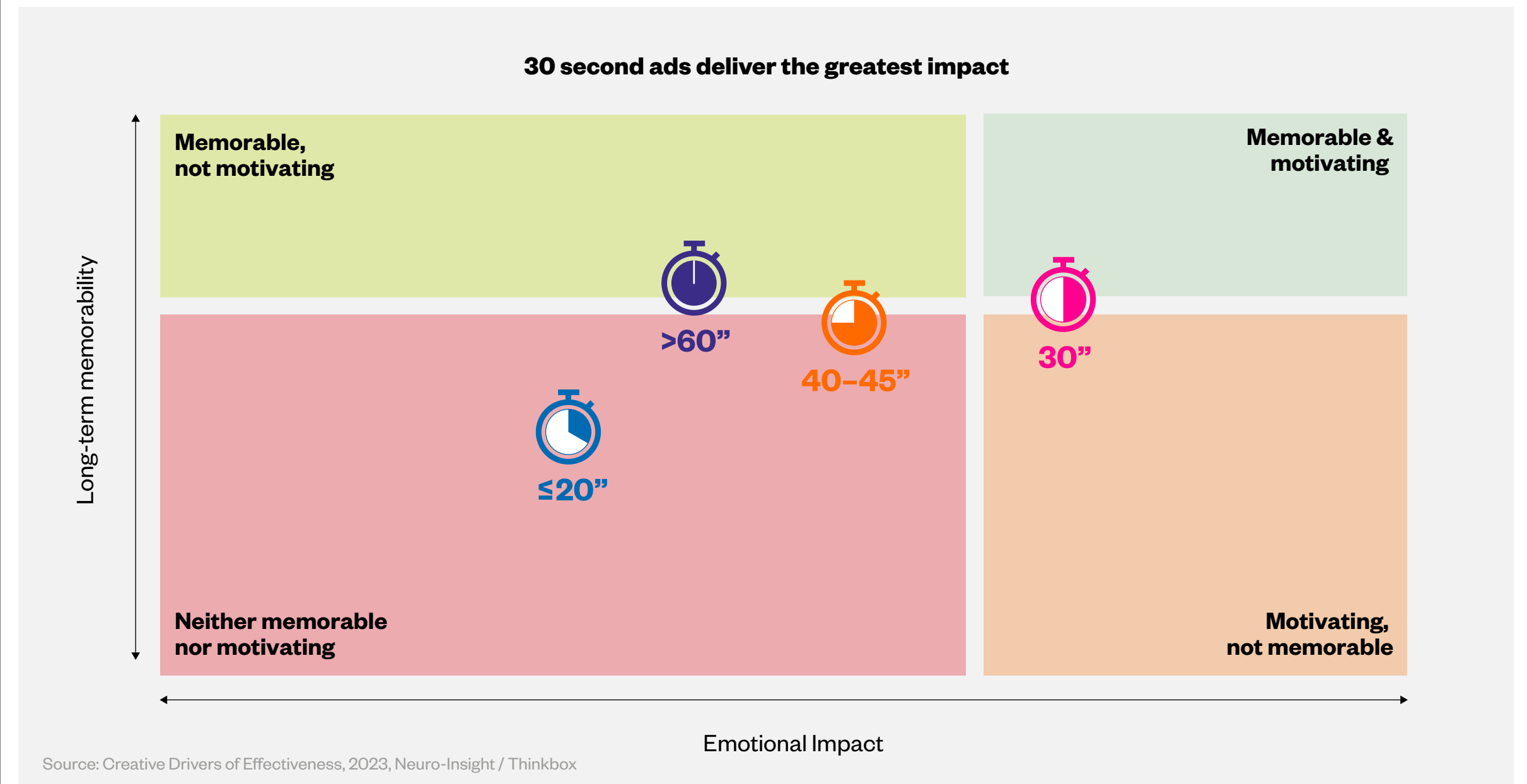
to an end. The brain treats this as a 'punctuation point' – it takes what it has just seen, bundles it together and files it away. Whilst it's occupied doing this, it is relatively unreceptive to new information and brain responses fall sharply for a second or so.

Conceptual closure can occur throughout an ad at junctions in the narrative and is a positive thing – a sign that the brain is responding actively to a good story. However, if it happens immediately before a key branding moment in an ad, it becomes a problem because the branding will coincide with the period of low receptivity and so the branding is likely to be missed.

Neuro-Insight's analysis showed that ads that kept final branding on screen for longer (3 seconds or more) delivered stronger levels of impact, with significantly higher levels of memory (+3%), emotion (+11%) and relevance (+11%). So any 'reveal' in an ad should happen a few seconds before end branding, or feature the brand as a key part of the 'reveal' itself, in order to avoid the negative impact of conceptual closure.



Source: Creative Drivers of Effectiveness, 2023, Neuro-Insight / Thinkbox



Source: Creative Drivers of Effectiveness, 2023, Neuro-Insight / Thinkbox



Britain's Got Talent, ITV

Creative license to play

Whilst the findings outlined above are factors that saw statistically significant brain responses, Neuro-Insight unearthed other factors that are also worth considering:

Branding moments: There was no statistically significant difference in how many branding moments an ad has, either visual or audio. This means that, as long as the brand is woven into the narrative, there are no clear rules on how many times you should show branding.

Brand assets: Neuro-Insight also looked at brand assets other than colour, such as featuring celebrities, brand characters and iconic packaging and shapes. Although there was no statistically significant differences for these assets, this was likely due to low sample sizes. Previous analysis has indicated that broader brand assets can be a good way to get around the brain's 'ad blocker'. This is an area for potential future investigation.

Tonality: Neuro-Insight also investigated different tonalities – such as light-hearted, factual, serious, humorous etc. Again, there was no huge statistical difference, but analysis did show that they worked slightly differently to each other. For example, factual ads were well remembered but not appealing, whereas humorous ads were less memorable but more appealing.

Celebrities: The study also explored the use of celebrities in any shape or form, rather than celebrities that had a strong connection with the brand. It found that celebrities had little impact on brain responses so will not make or break your ad.

Character interaction: The 2016 study found that character interaction was highly impactful, but this study didn't, which was surprising. However, when the types of interaction were broken down, there were interesting differences between the use of verbal and physical interaction.

Physical interaction elicited a less positive response, whereas verbal interaction elicited strong levels of response. This nuance is likely explained by the fact that the ads were tested during and immediately after the pandemic, a period when physical interactions were restricted and had negative associations and verbal interactions were 'safe'. This was reflected in the subconscious data and it's probable that, as we get further away from the pandemic, there may be a shift back towards finding physical interaction a positive.

Methodology

The study explored the link between TV advertising, creative and memory by analysing the brain responses to 150 TV ads using Neuro-Insight's Steady State Topography (SST) technique. The ads were categorised against a list of 21 creative variables such as brand assets, category, sonic branding, use of celebrities, the role of music, and style. By coding the ads, Neuro-Insight could identify, using statistical analysis, which of those factors delivered strong and meaningful results in terms of delivering long-term memory encoding (LTME) and the emotional impact that fuels it.

LTME is important because it's proven to link to decision making and future purchase behaviour. If an ad doesn't impact the area of the brain that is responsible for memory encoding then it serves no purpose as a marketing tool. It is purely an expensive piece of entertainment.

[Download all of the charts from this section here](#)

Fur Babies,
Channel 4



Earning Attention

Advertising attention measurement is a hot topic. Thinkbox's exploration of it began in 2021, and resulted in the publication of ['Giving attention a little attention' \(2022\)](#), a white paper comparing approaches to attention within the media industry with approaches taken in academia. In 2023, we put attention back in the spotlight to build on that white paper and explore how TV ads compete for attention in our lives, and to delve into the roles audio and visual signals play in gaining and keeping attention.

Key findings

- When distracted, people are significantly (+20%) more likely to remember what they heard than what they saw.
- When distracted, a lot of ad processing still happens.
- Ads that conveyed information in both a visual and auditory way performed better.
- Eyes and ears do not work independently – memory levels are impacted by total cognitive load.
- Our senses fill in for each other. For auditory content specifically, if vision is elsewhere, sound will carry meaning.

Background

Most early explorations of attention focused primarily on visual sensory input. However, we live in a multisensory world, so the role of audio also needs to be considered in the attention debate – especially as new attention metrics continue to emerge that are beginning to influence planning and buying decisions. It's important that they are fit-for-purpose.

To start, we revisited earlier unpublished research by ITV in which Dr. Ali Goode (Gorilla in the room) conducted virtual reality 360° filming of different families in their homes (Oct 2019–Mar 2020). The content consisted of 17,017 ad exposures (equivalent to 150 hours of ad watching). These exposures were then categorised into three groups and their behaviours while watching TV ads: engaged (e.g. commenting on the ad), reachable (e.g. partially watching ads) and unreachable (e.g. present but fully distracted).

When respondents were reachable, high attention accounted for 29% of the time. Visual distractions (such as second screens) accounted for 26% of the time, auditory distractions (such as talking) accounted for 18%, low/ fragmented attention (such as interruptions by children/pets) accounted for 27%.

Focusing specifically on the non-high attention time within the 'reachable' group, we set out to investigate how much value ads have when other tasks are being done at the same time, i.e. distractions are happening.

World's Most Dangerous Roads, Dave



Smothered, Sky



Deal or No Deal, ITV

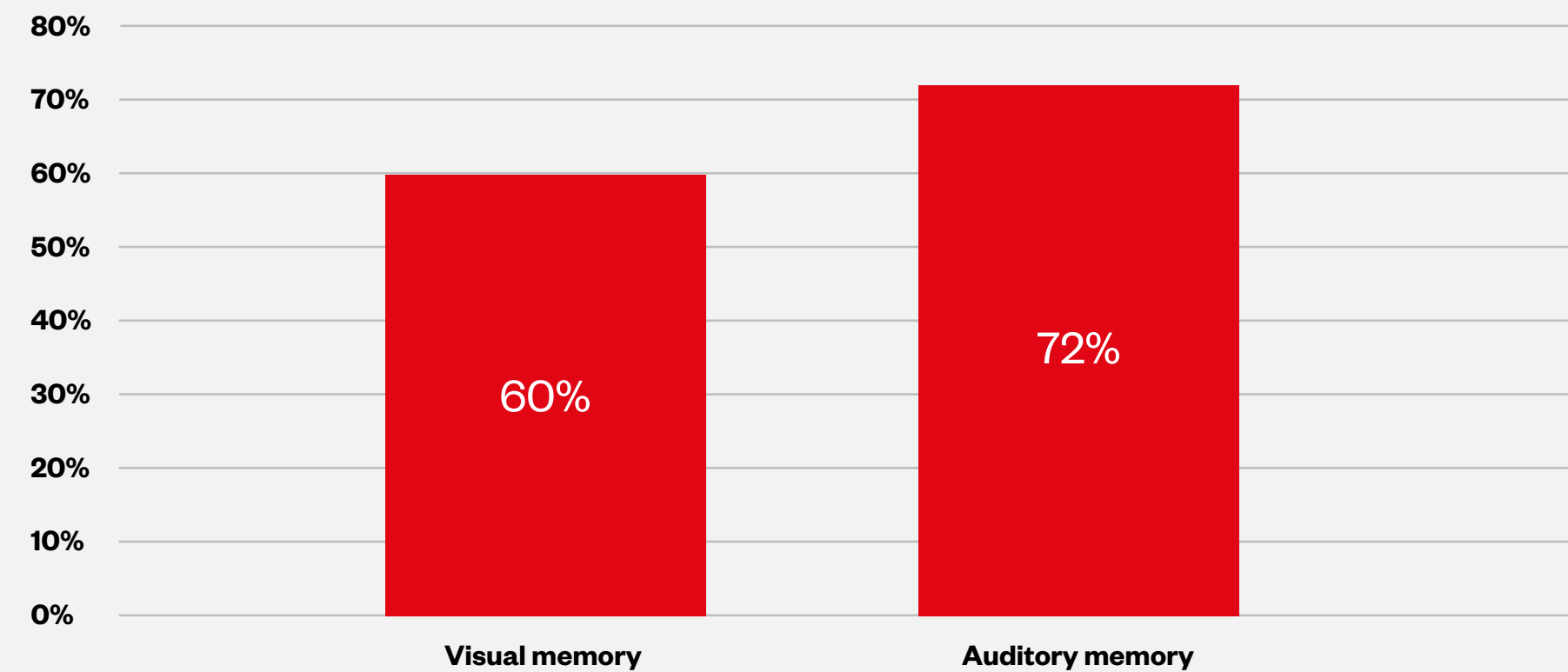
How important is what you hear?

We don't look around for things to listen to, instead our ears tell us where to look: when distracted, people were significantly (+20%) more likely to remember what they heard than what they saw.

The role of sound plays an important part of the TV ad experience. Sound has the ability to communicate in its own right, it can mediate attention and draw eyes to the screen and fill in the gaps when there is no visual attention.

Audio stimuli are important in human behaviour as ears are permanently 'open'. As a result, we should expect people to be able to process and retain spoken messages (e.g. phrases or propositions), sonic or unique brand assets (e.g. Intel sting, McDonald's whistle, Confused.com guitar riff), sonic cues that communicate meaning (e.g. loud noises/alerts, celebrity voices, emotional vocalisations), music driving the creative (that they sing/dance along which becomes associated with brands), or jingles.

When distracted, people were significantly (+20%) more likely to remember what they heard than what they saw



Compared to full attention how much attention is left, across all distractions

Source: Competing for Attention, GITR / Thinkbox 2023, n=305

How much attention is left over for ad processing when people do other stuff?

The tasks (distractions) affected the amount of attention available for visual and auditory processing of an ad.

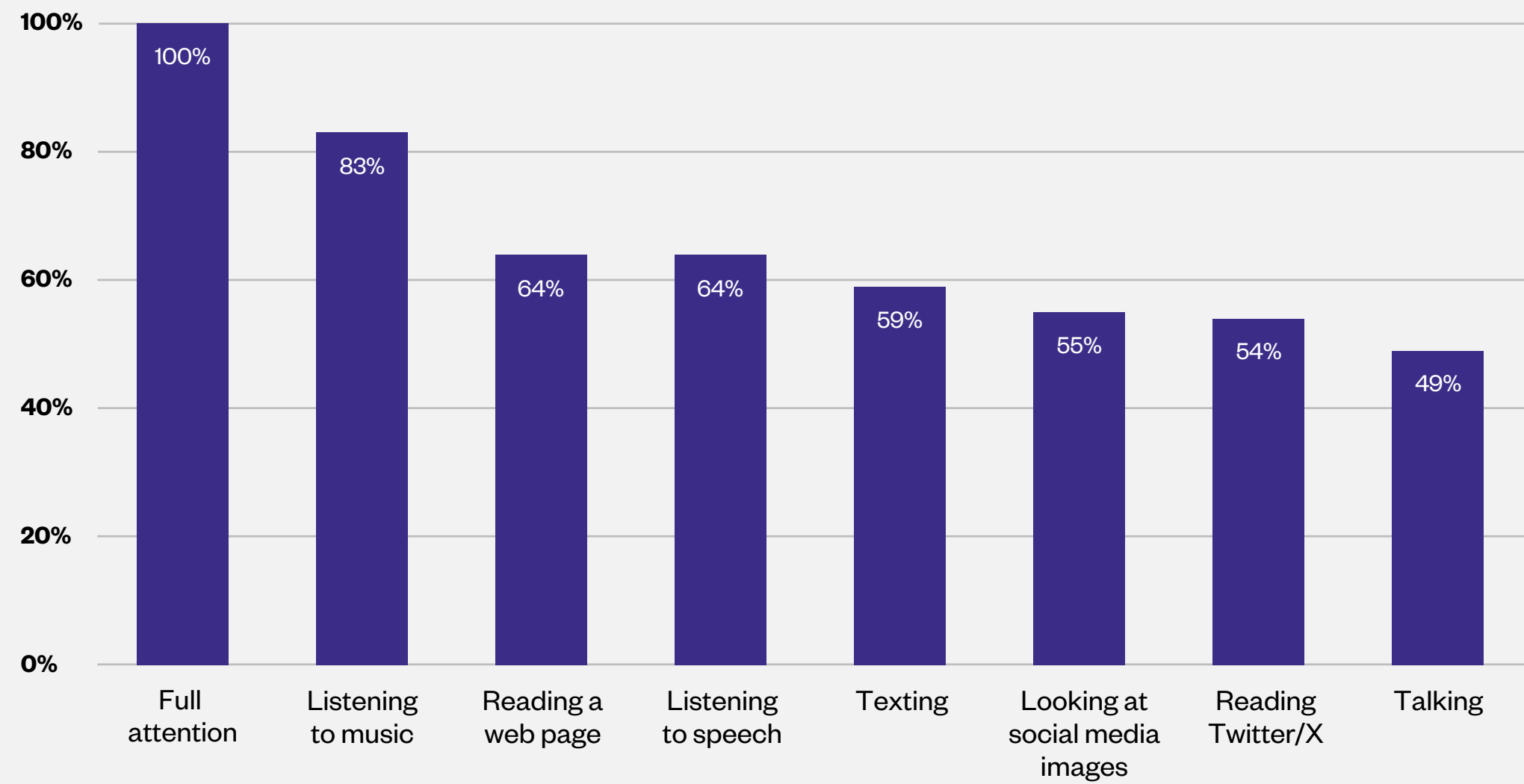
'Talking' was the most attention-demanding task in comparison to 'listening to music' on the other end of the spectrum for both auditory and visual memory.

We found that the amount of effort taken up by the distraction (attentional/cognitive load) had an impact on the amount of attention left to process the ads, but it is clear that the ads were still processed.



When distracted, a lot of visual ad processing still happens

Visual Memory

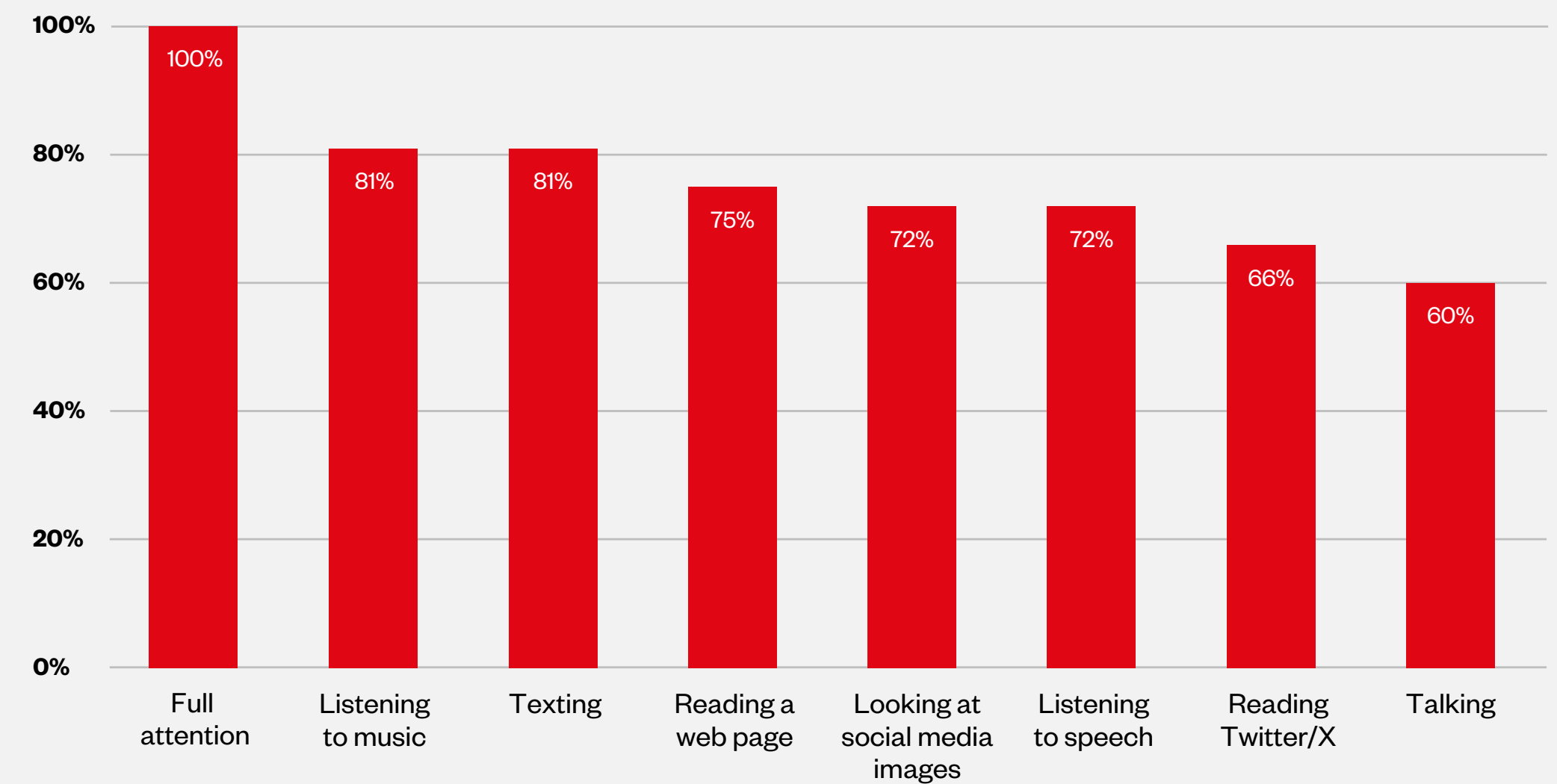


Attention (%) indexed to full attention

Source: Competing for Attention, GITR / Thinkbox 2023, n=305

Distractions less impacted auditory ad processing and memory

Auditory Memory



Attention (%) indexed to full attention

Source: Competing for Attention, GITR / Thinkbox 2023, n=305

Do eyes and ears work independently?

As individuals, we have a finite amount of attentional resource. As a result this attentional load is shared around the senses. Other tasks will deplete the amount of attention we have left regardless of the sense being used to do it.

We found that eyes and ears do not work independently and that visual and auditory distractions interfered with both visual and auditory attention. As a result memory levels are impacted by total cognitive load.

Are ads better when they are multisensory?

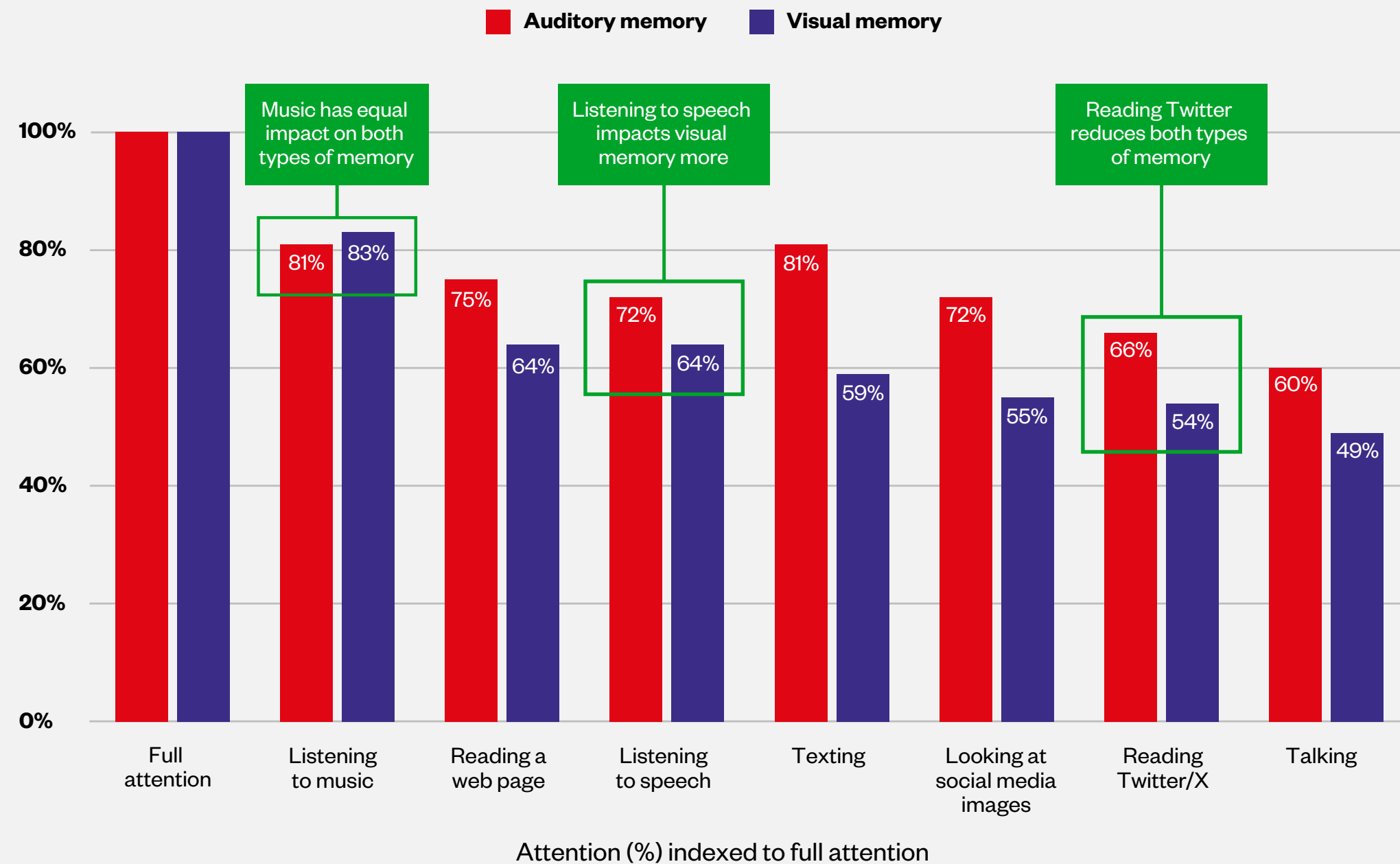
To explore this sense interdependency, we looked at whether a multisensory experience has an impact on attention.

We found that ads conveying information in both a visual and auditory way performed better. It's the combination of the auditory and visual experience that allows individuals to piece together a narrative – and the same seems to be true for ads. This suggests that when the respondents were not sure if they had seen or heard an ad, they used another sense to assist in establishing whether it had been experienced.

Essentially, there's an advantage when ads communicate in a multisensory way. We combine what we see and hear to process an ad and use sound and vision to fill in for each other to subsequently form a narrative.

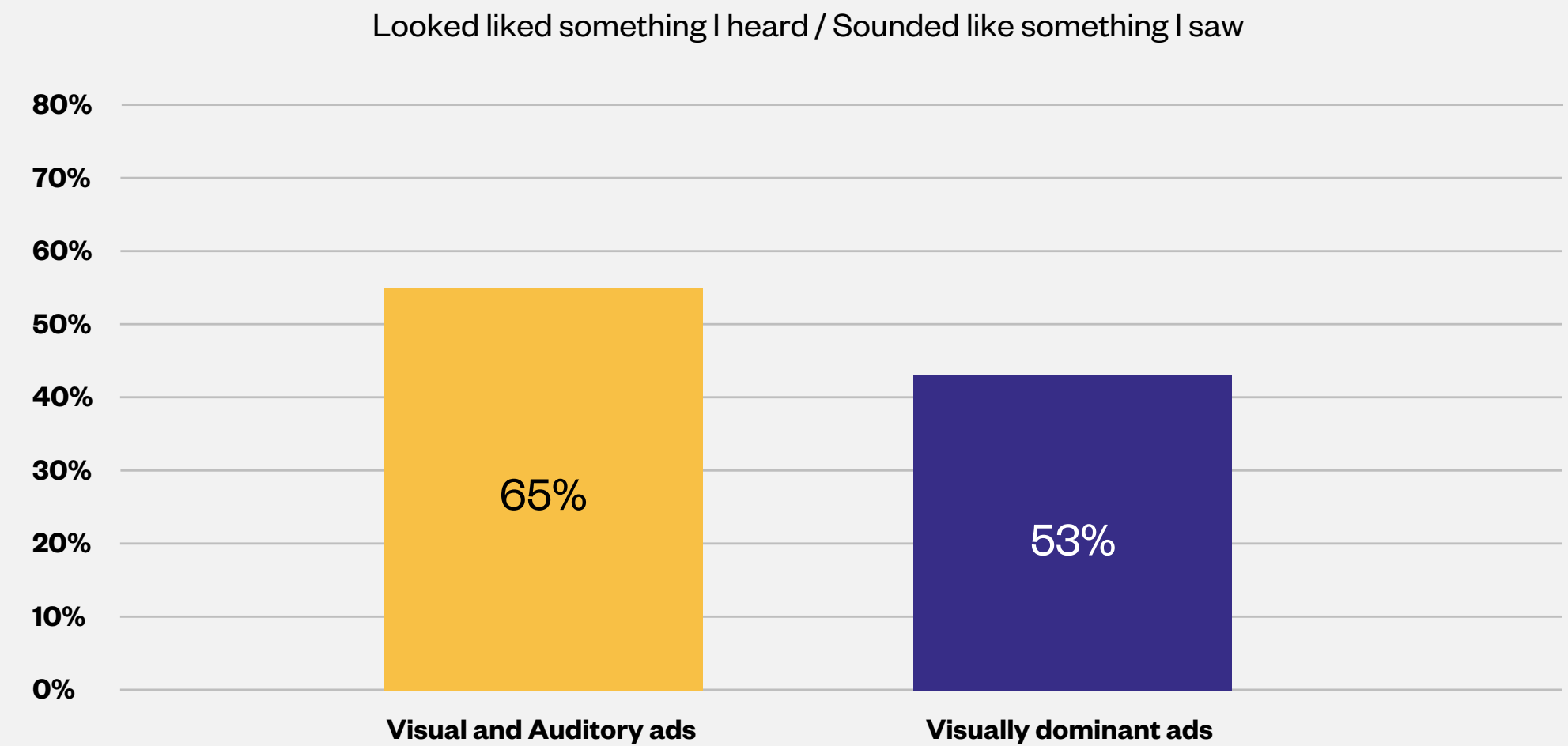
Our senses fill in for each other. For auditory content specifically, if vision is elsewhere, sound will carry meaning. When people hear a sound they recognise, they will know what it looks like, e.g. Go Compare, Snap, Crackle and Pop. People can use auditory cues to follow a narrative for both new and previously seen ads. In addition, music that drives the creative or the narrative is better than background music; the auditory carries it through, even though the visual attention isn't there.

Eyes and ears do not work independently. Visual and auditory distractions interfered with both visual and auditory memory



Source: Competing for Attention, GITR / Thinkbox 2023, n=305

Ads that conveyed information in both a visual and auditory way performed better



Source: Competing for Attention, GITR / Thinkbox 2023, n=305. Full attention state only

Summary

Whilst attention is a complex topic, this research showcases the importance of both visual and auditory attention and advocates the use of audio and visual stimuli together when forming a narrative.

Sound, when used effectively can communicate in its own right, mediate visual attention and fill in the gaps when there is no visual attention.

This study contributes to the long-standing attention debate and helps give audio the recognition it deserves within AV content.

The analysis from the 2022 white paper ([‘Giving attention a little attention’](#)) showcased the importance of auditory content. The 2023 study clearly shows that if this element is not maximised to its full potential, there may be lost opportunities because auditory content is more important than visual when people are distracted, as it is more resilient. The study also brings to light the importance of making the most of a multisensory ad experience in order to maximise the opportunity to gain the most attention.

[Download all of the charts from this section here](#)



Three Little Birds, ITV

Methodology

‘Earning Attention’ was rooted in academia. As with its predecessor, ‘Giving attention a little attention’, it was authored by award-winning cognitive scientist Dr Ali Goode. In addition to Dr Goode’s expertise, we brought on board Professor Polly Dalton, Professor of Cognitive Psychology at Royal Holloway (part of the University of London). Professor Dalton also runs Royal Holloway’s Attention Lab and has published a variety of academic papers on attention.

Professor Dalton helped develop a number of hypotheses about the likely attentional impact of distractions. We then designed tests to prove/disprove these hypotheses, building a methodology to assess how much attention can be shared between ads and other ‘distractor’ tasks.

Yonder Data Solutions created a research environment where we had the ability to control all of the respondents’ auditory and visual attention with no other distractions. Respondents were provided with two different tasks on two different devices. An ad would appear on the first screen (acting as the TV screen) synchronised with a task on the second screen.

This process was then repeated to cover all the test ads and distractions. Respondents were forced to divide their attention between two different tasks – and tested on their memory of both.

For the stimulus, the ads featured were for familiar brands and in English originating from the United States, Australia and Canada (and so never seen before in the UK). In order to create a convincing ad break, a range of different brands were used. They were a combination of ‘visual only’ (ads that had a soundtrack but carried little information, e.g. no voiceover) and ‘auditory and visual’ ads. With the help of System1, we acquired a range of good, medium and ‘bad’ ads from a range of product categories.

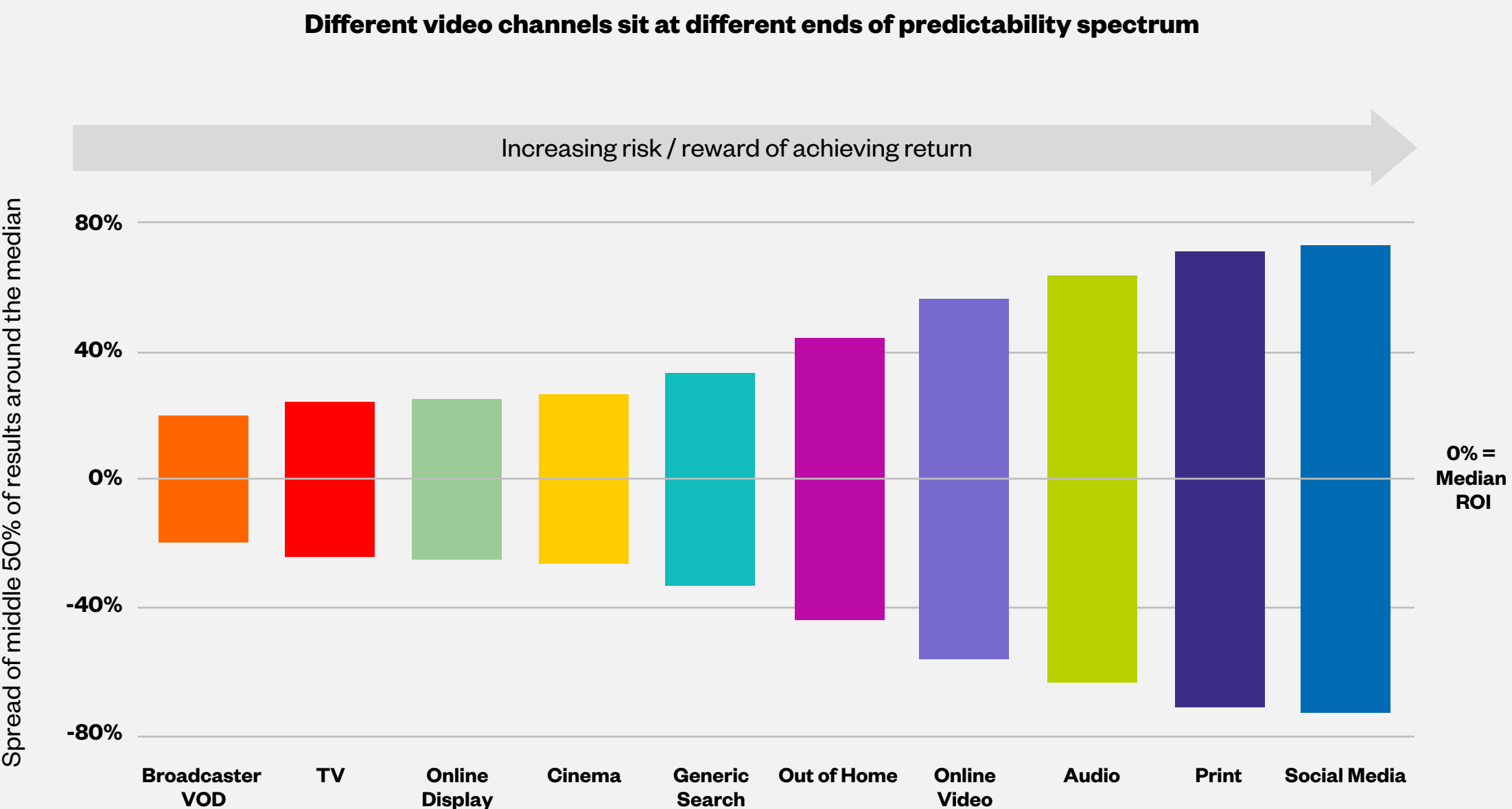
The distractor tasks were identified using IPA TouchPoints to determine the most common activities done whilst watching television, e.g. listening to music, looking at images (Instagram), listening to speech, reading social media (Twitter/X), reading a web page, texting and talking. We also tested with no distraction, which was used as a baseline.

Results were determined via ad memory testing (recognition) as an indication of what respondents’ attention ‘let through’. To test visual memory, respondents were shown 24 images from ads they had been exposed to, as well as a set of control images for ads that had not been included in the study, and were asked whether they had seen the image in one of the ads. Similar questions were asked to test auditory memory after respondents heard 24 audio clips.

Best of Charts of the Month

Different video channels sit at different ends of predictability spectrum

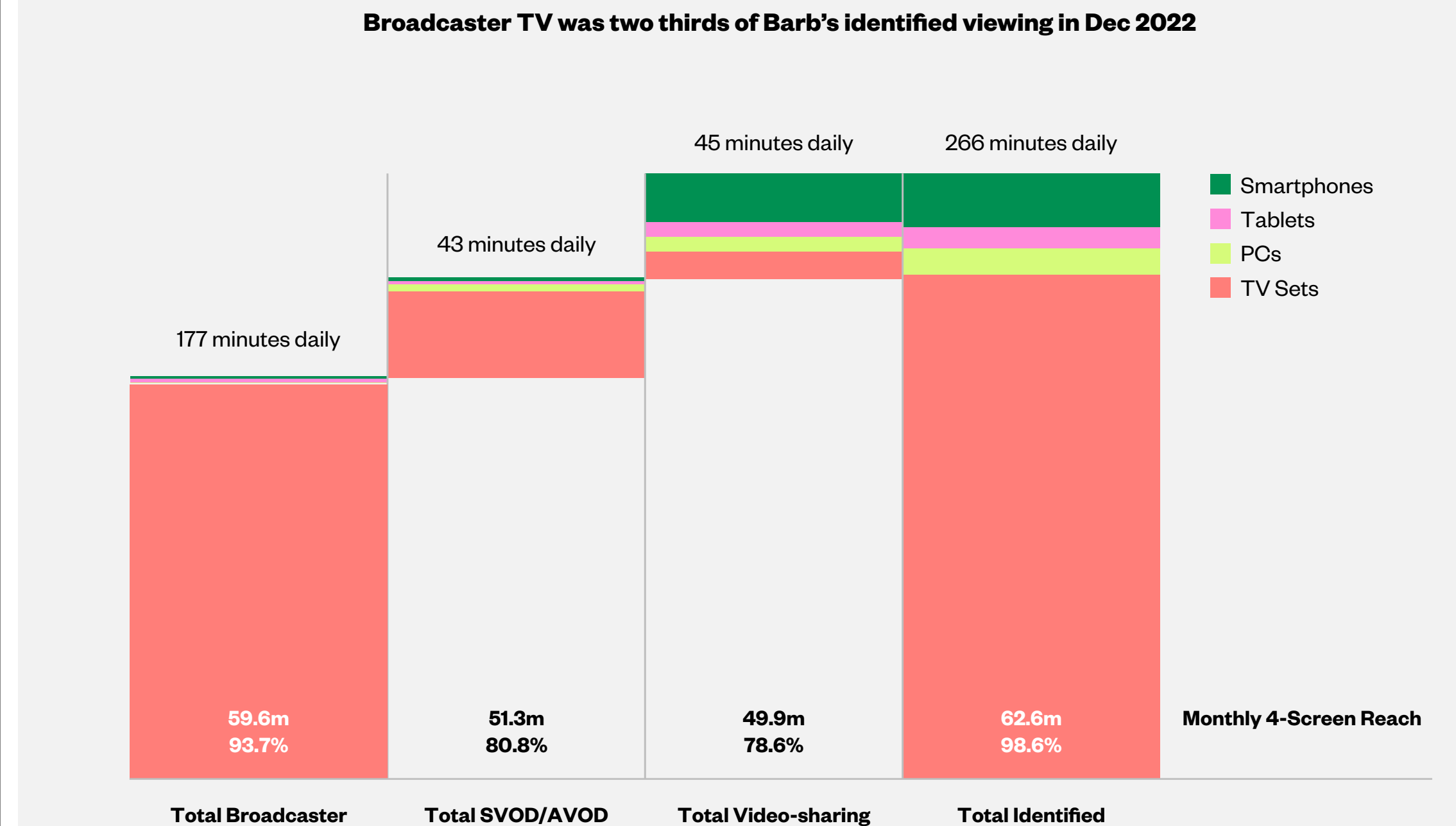
Using the econometric modelling data that powers the Media Mix Navigator, this chart showcases how the variability of returns differ significantly across different forms of advertising, indicating the risk of investing in different channels based on the predictability of their returns.



Source: Media Mix Navigator, Sep. 2022, EssenceMediacom / Wavemaker / Mindshare / Gain Theory, 2018-mid 2021

Broadcaster TV was two thirds of Barb's identified viewing in Dec 2022

This analysis from Barb unpicks exactly what people are watching at home and on what device. It breaks down viewing to the various platforms, and clearly shows that the majority of viewing was spent watching broadcaster channels and VOD services.



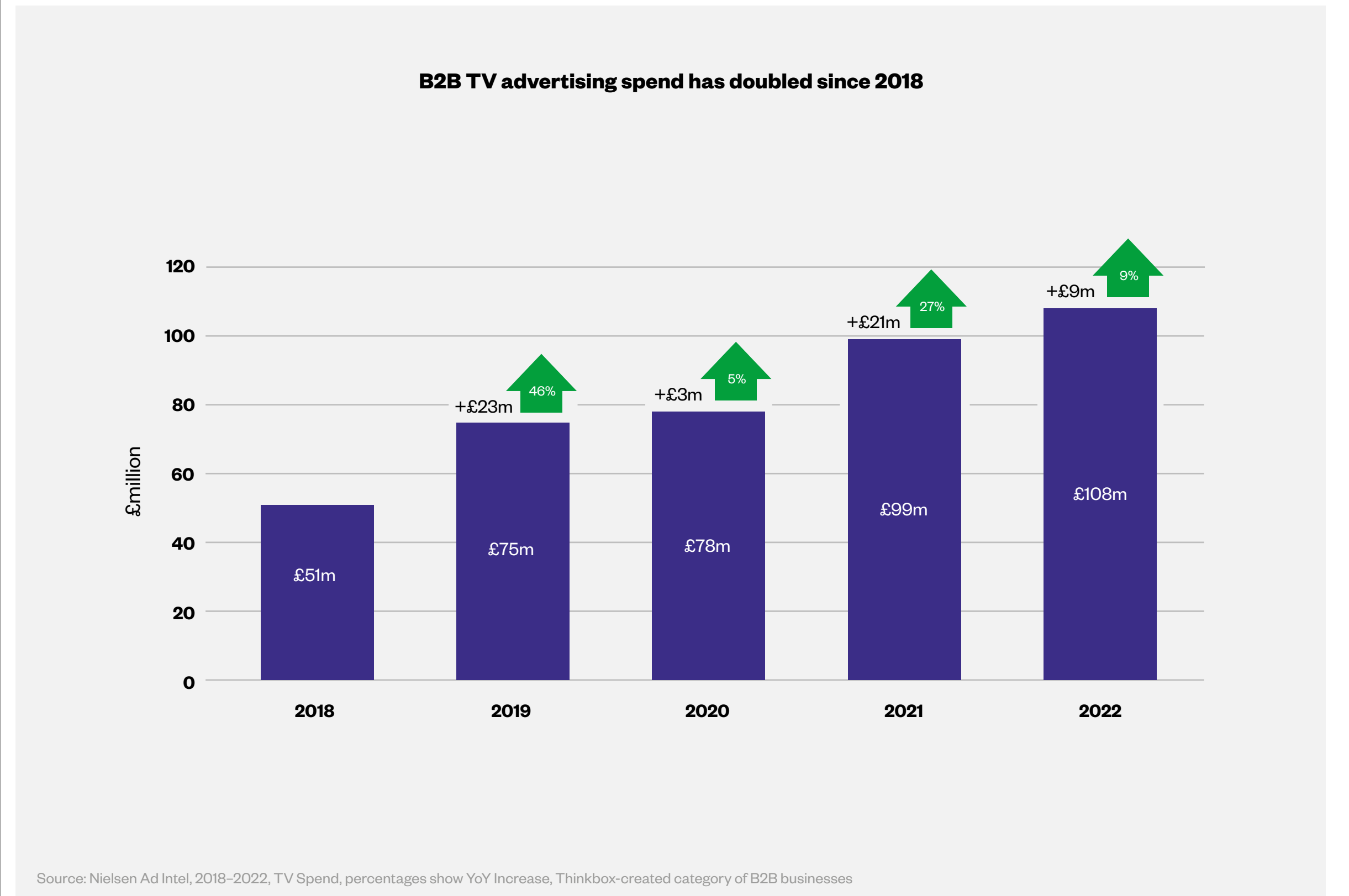
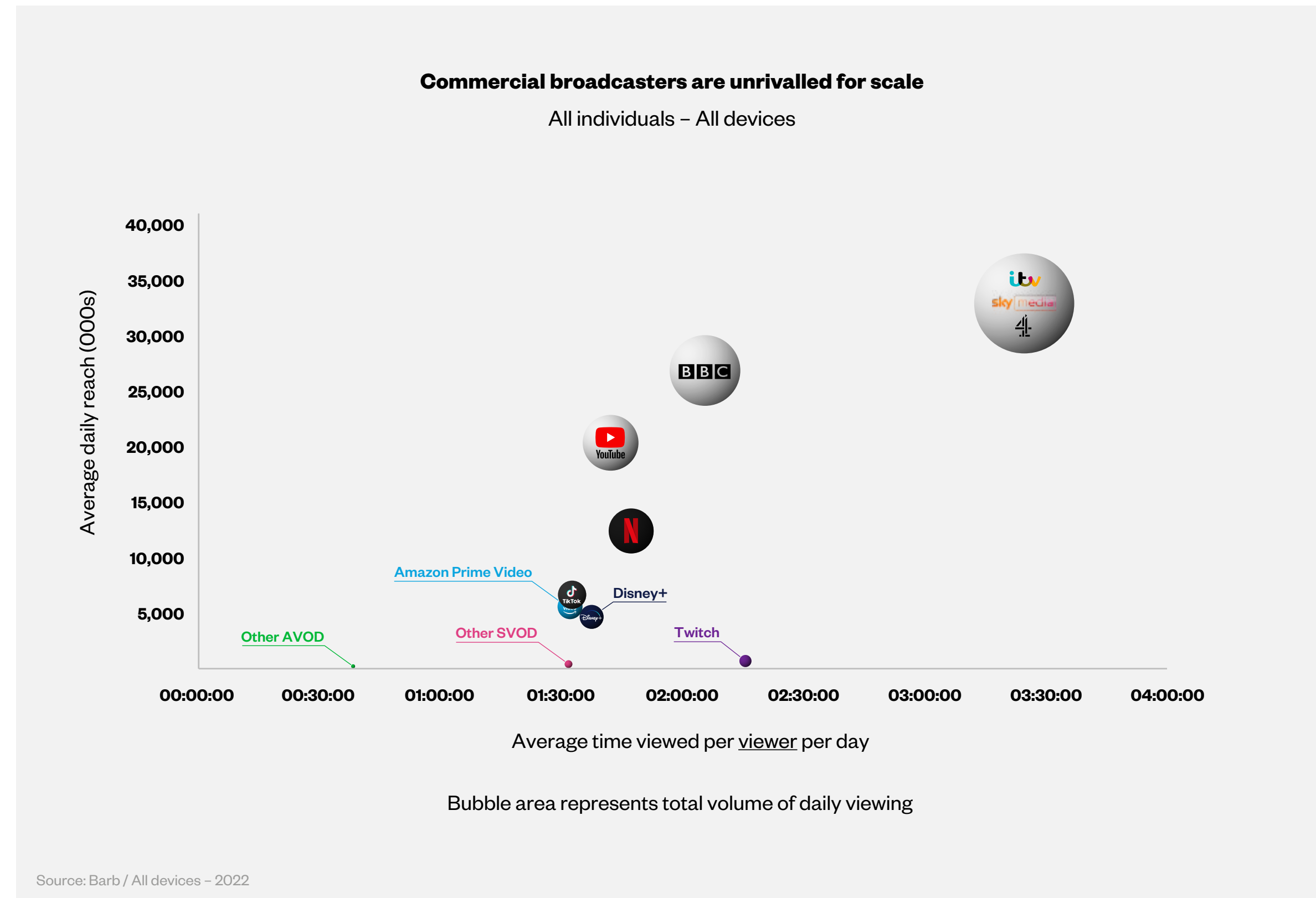
Source: Barb, Individuals 4+, Barb Online Multiple Screens Network, 1st-31st December 2022

Commercial broadcasters are unrivalled for scale

Using the granularity offered by Barb when examining viewing patterns, this chart shows how the commercial broadcasters are unrivalled for scale. They collectively reached over 33 million viewers every day when compared with other viewing platforms with people watching on average about 3½ hours per day.

B2B TV advertising spend has doubled since 2018

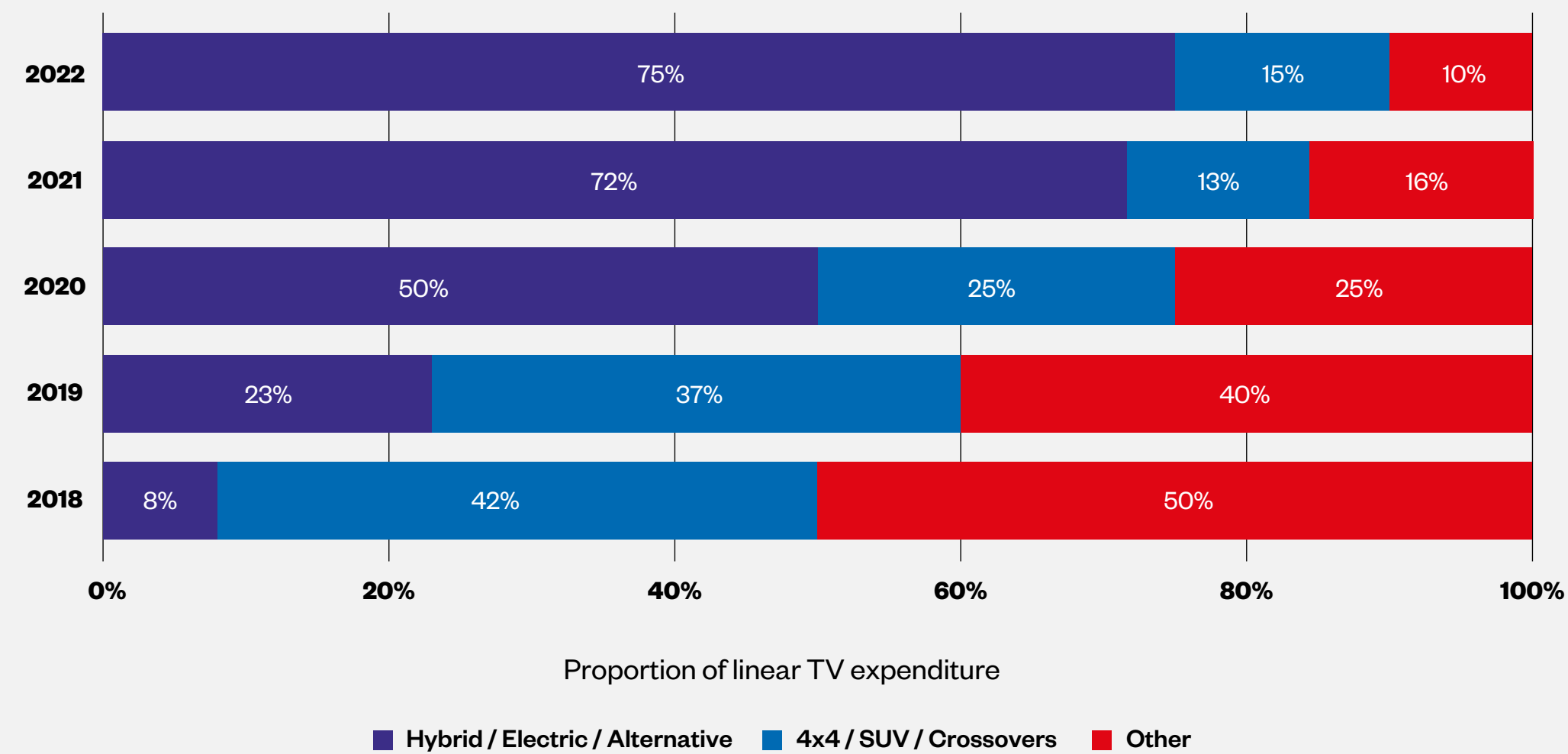
According to Nielsen Ad Intel, B2B brands have more than doubled their investment in TV advertising over the past five years, reaching £108m in 2022. TV expenditure from B2B advertisers saw a 9% growth in 2022 from the previous year, with the largest spend attributed to Ikon By 1&1.



Electric/hybrid vehicles are motoring ahead in TV advertising

Focusing on the motor sector, analysis from Nielsen Ad Intel shows the movement of TV expenditure towards the promotion of electric or hybrid vehicles, showcasing that TV has the ability to help drive societal change.

Electric/hybrid vehicles are motoring ahead in TV advertising

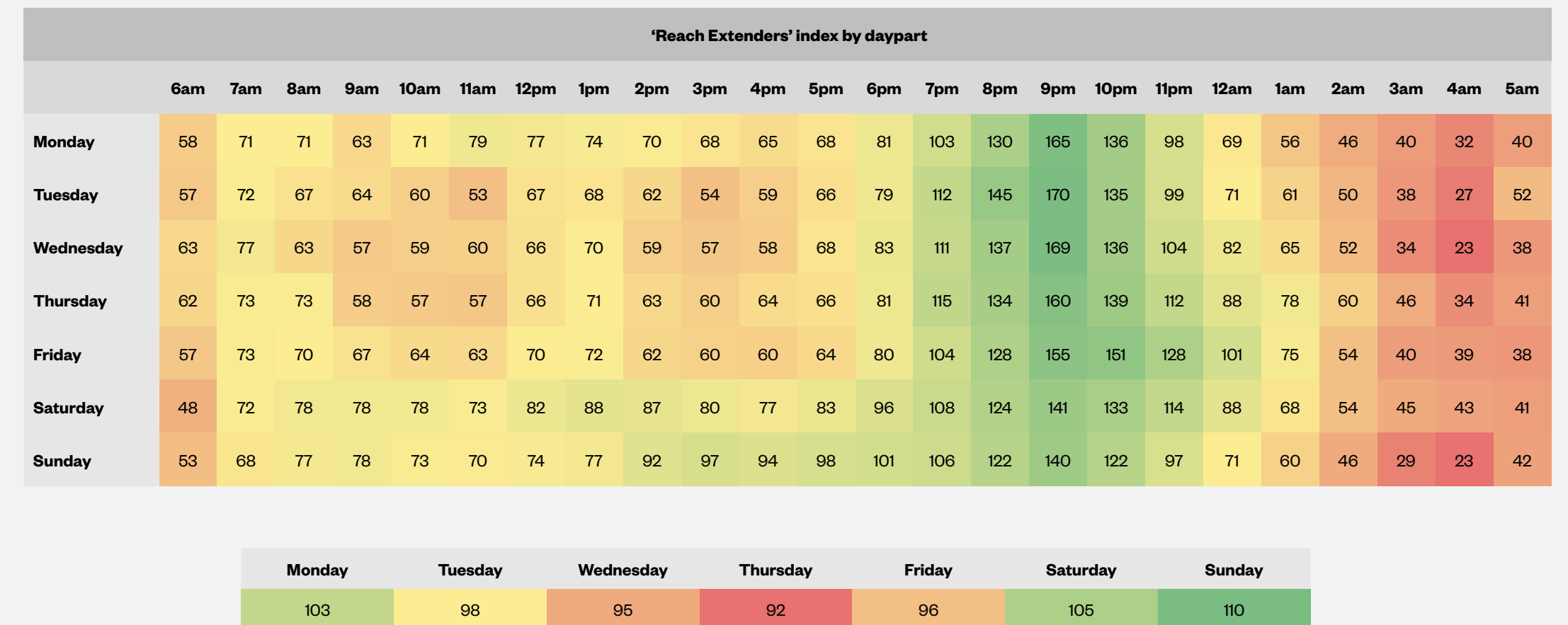


Source: Nielsen Ad Intel, linear TV expenditure, Advertisers and brands included in this analysis are a Thinkbox-created category specifically in relation to cars (and includes brand building), and does not include other vehicles, car dealers or motor accessories etc. 'Other' includes all other categories in product / advertiser mid category

Late evenings and weekends are valuable dayparts when targeting 'Reach Extenders'

The Reach Extenders, identified through analysis by PwC as part of BVOD Almighty, refers to the 'middle tier' of viewers. This group has been determined by splitting the UK viewing population into groups based on their weekly linear TV consumption; the lightest tier (0-19%), the middle tier (20-49%) and the heaviest (50-100%). Further analysis showed that the middle tier proportionally watch a lot of BVOD, making them a vital audience to extend campaigns through the use of BVOD. Analysis from Barb shows that their peak viewing hours are 8-11pm, with a higher likelihood of viewing occurring at the weekend.

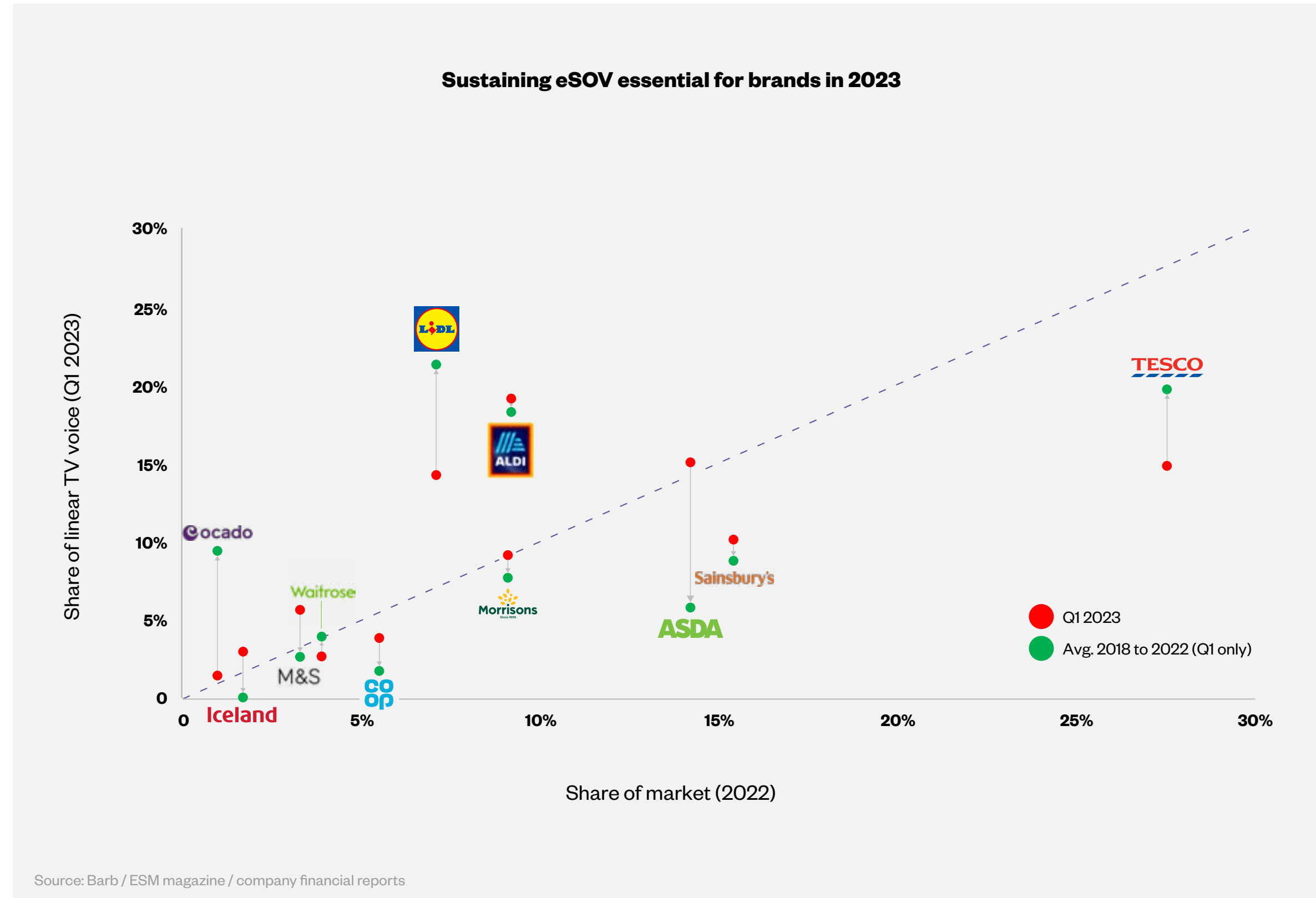
Late evenings and weekends are valuable dayparts when targeting 'Reach Extenders'



Source: Barb Q3 2022, commercial linear & BVOD, 'Reach Extender' index vs all adults.

Sustaining eSOV essential for brands in 2023

Excess Share of Voice (eSOV) is an important factor for brands to consider. This chart uses the supermarket category as an example of different SOV strategies at play. In the current economic climate, being bold and strategic in pursuing eSOV could offer significant advantages for businesses.



The Best of the Rest

Here you can explore a wealth of links to other recent studies that deserve your attention. We've put together some recommendations, giving you quick access to valuable insights you should be aware of.

Listen Up!

By Radiocentre

When Brands Go Dark: A Replication and Extension

By Ehrenberg-Bass Institute

The Heuristic Highway

By Sky Media

The Point of Search

By JCDecaux

Brand marketing drives sales, ROI and even performance campaigns. Don't cut it!

By Analytic Partners

Online Nation

By Ofcom

Recovery Budget Planner

By ITV & Magic Numbers

Beyond Z – The real truth about British youth

By Channel 4



Big Zuu's Big Eats, Dave

And finally...

From Good to Great: Improving the Odds

by Laurence Green

Based on in-depth interviews with industry leaders, this white paper by Laurence Green, Director of Effectiveness at the IPA, uncovers common barriers to advertising creativity and offers a comprehensive guide to creative best practices. With actionable strategies for both clients and agencies to enhance creative outcomes, foster successful relationships, and drive advertising effectiveness, it's a must read.

[↓ Download the whitepaper now](#)



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