



$P^2 + C = 6$

THE NEW DIFFERENT

FROM POST COVID
TO POST COOKIE

JUSTIN GIBBONS

P² + C = 6

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WRITTEN BY
JUSTIN GIBBONS

THANKS TO

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THE NEW DIFFERENT

FROM POST COVID TO POST COOKIE

If you watch any decent thriller movie there is never only one threat. They come in threes. A huge shark is good but add in a rickety old boat and a dodgy crew, and you've got something. James Bond taking on a baddie is ok, but when the clock on the bomb is ticking and he's just had his gun taken off him. Bingo.

If our world of advertising was ever to be the subject of a thriller movie, and I'm not for a moment suggesting this is a good idea, then it would be set now. Three things are coming our way.

CUE THE MUSIC

THE COOKIELESS FUTURE

A sharp, new force is on the way. The regulations around cookies are changing and we are heading towards what is being called the 'cookieless future'. This dramatic change will end the practice of advertisers following people around the internet based on their browsing behaviour. The promises that drove digital ad spend to swell to 72% of the total, namely micro-targeting, attribution and efficiency are at great risk.

THE NEW CONSUMER

A new consumer is emerging from nearly two years of lockdown and they have different attitudes, priorities and behaviours. They are suffering screen fatigue, they are craving safe ways to get back into the real world and they are looking for symbols of Trust in a world that suddenly turned upside down.

INVESTMENT

A big, broad force is also in play. The gloomy prophecies about under-investing in the brand are coming true and the thinking of Binet and Field and Byron Sharp are getting more and more traction as CMOs get better at making it CFO and CEO-friendly. Their argument – brands need investment because they are a business necessity. Media planning, perhaps more than any other discipline is facing these threats head on. How do media plans change in a cookieless world? What new consumer insights around things like Attention and Trust am I working with? What is the best budget allocation between brand and Activation?

This book presents new thinking about media planning based on the $P^2 + C = 6$ formula, an update to $P^2 + C = 5$ from my previous book.



Public and Private marketing working together remains the central concept and is presented with fresh evidence.



The Creative Bridge is about portability and distinctive assets that can be used across different channels.



Outcome-based planning means a focus on six results now, not five.

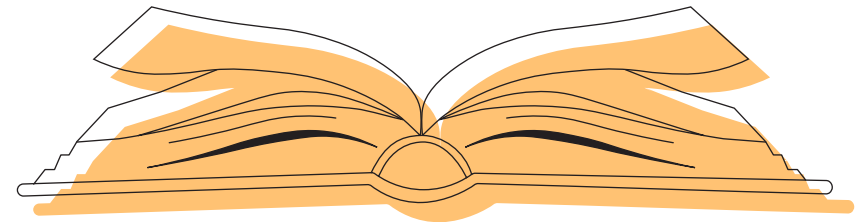
Priming comes to the fore as the way advertising fundamentally works. Plan for it.

Planning for Trust has never been so important and we look at the fresh evidence showing how Trust drives business outcomes.

Planning for Attention is a growing discipline and agencies share their latest findings.

Full-funnel marketing brings together Awareness, Consideration and Activation into one working model as leading brands share their experiences.

This new book is more than just an update and a tweak to the formula. It captures the new wave of thinking that has emerged from nearly two years of lockdown and the new thinking that will be needed to deal with the cookieless future. It is a planner's guide to The New Different, filled with new evidence and new ideas.



**READY FOR THE NEW
DIFFERENT? READ ON
AND ENJOY!**

WHY NEW AND WHY NOW?

It's always a good idea to make a list. Here are 10 reasons why now is the time for The New Different. The New Different exists because things are now different.

HERE'S HOW.

► REASON 1

Apple has already introduced its App Tracking Transparency Framework, requiring mobile applications to request permission to track the user. Google has announced that Chrome, the world's most popular web browser will stop supporting third-party cookies. It is confidently predicted that all browsers will be cookieless by the end of 2023. Rethinking the way digital works (and the way it doesn't) is going to happen.

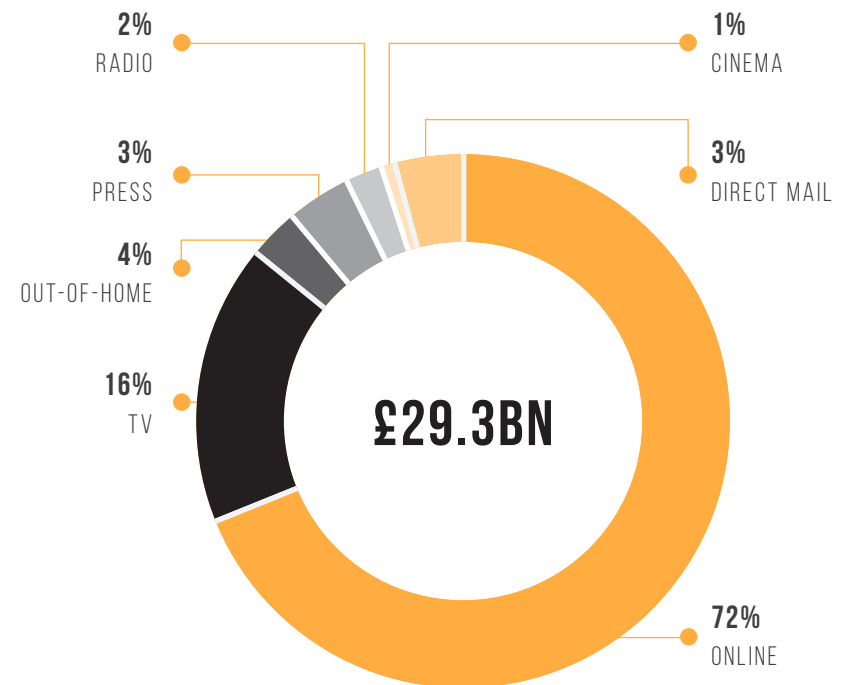
► REASON 2

What we are doing at the moment isn't working. According to Kantar BrandZ, British brands continue to trail behind global competitors who have enjoyed a 42% rise in brand value. There is now no British brand in the global top 100 most valuable brands.

► REASON 3

Digital Online spend is forecast to be 72% of all advertising expenditure by the end of 2021 and 73% by the of 2022. It doesn't mirror media behaviour, return-on-investment (ROI) analysis or any of the empirical studies that have been done into how advertising works best.

ADVERTISING EXPENDITURE FORECAST 2021



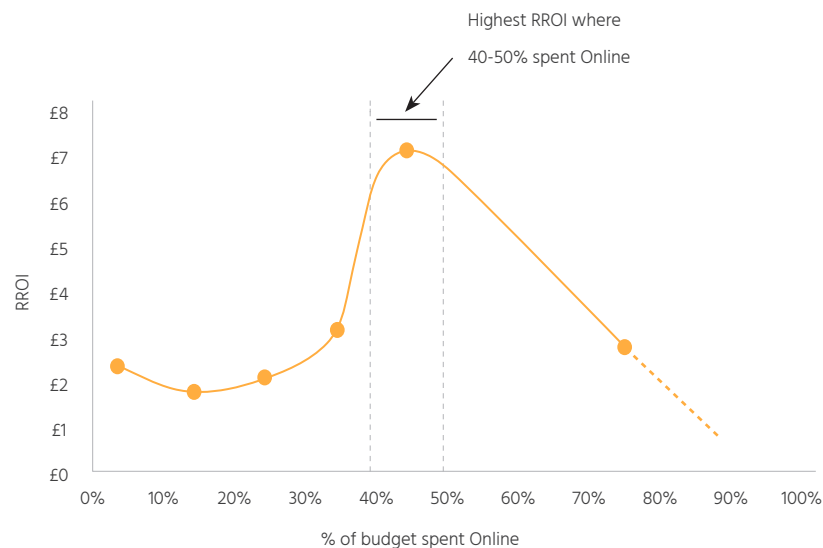
Source: AA/WARC Expenditure Report Q2/H1 2021, October 2021

► REASON 4

The latest analysis from the Advertising Research Community which draws on a 2021 database of 343 non-award-winning campaigns says the most effective media split should be 45% Online – 55% Offline.

RELATIONSHIP BETWEEN % OF BUDGET SPENT ONLINE AND RROI

Revenue per £1 spent is highest when 40-50% of the budget is spent Online.
Based on this simple analysis of very rich data.



Source: IPA/Magic Numbers

► REASON 5

There's a real-world mismatch as we have left lockdown. People want real experiences, less screen-time, more time outside and with people. They don't want their lives or their brands to be in lockdown any more.

► REASON 6

The Covid crisis has meant that people are looking for symbols of Trust to help them navigate a changed world. They are more alert to fake news and more aware of the drawbacks of Social Media. They have stopped looking down and are ready to look up and what they are looking for is brands they can rely on and believe in.

► REASON 7

The latest research into Attention has brought into focus the challenges facing the media trading ecosystem. As Professor Karen Nelson-Field says, "Currencies rely on impression data being an accurate measure of what a human actually sees, but this is far from reality".

► REASON 8

During lockdown, a number of brands pulled much of their ad spend. What they noticed in the months that followed was that performance metrics such as website visits returned to normal levels based on their previous brand investment. Their conclusion, that brand strength not performance marketing drives their business.

► REASON 9

Funnels work. They aren't old-fashioned contrivances lost to the waves of change nor are they dispensable concepts waiting to be swapped out. Brands can only harvest what they sow.

► REASON 10

People have lived through the biggest collective trauma of a generation. They have changed in ways they could never have imagined. This particular genie isn't going back in the bottle.

It's time to do better than where we've ended up. Creative, clever, ambitious, bold, innovative, rigorous, empirical. It's time to aim higher.

**STILL DON'T BUY
THE NEW DIFFERENT?
READ. ABSORB. REPEAT.**

IT'S TIME
TO AIM HIGHER

THE SHARP NEW FORCE **THE COOKIELESS FUTURE**

01.

A SHARP NEW FORCE

THE COOKIELESS FUTURE

I was working in a media agency in the late 90s when the 'internet department' was two people who dealt daily with people's home modem issues and questions like, 'How do I set up an email account?'.

As the buzz grew, the trade mags breathlessly likened it to the infamous gold rush. All of the things that made the rest of the media world work commercially had to be invented on the fly for digital; currencies, trading, measurement, audience definitions. It seemed that every few months the

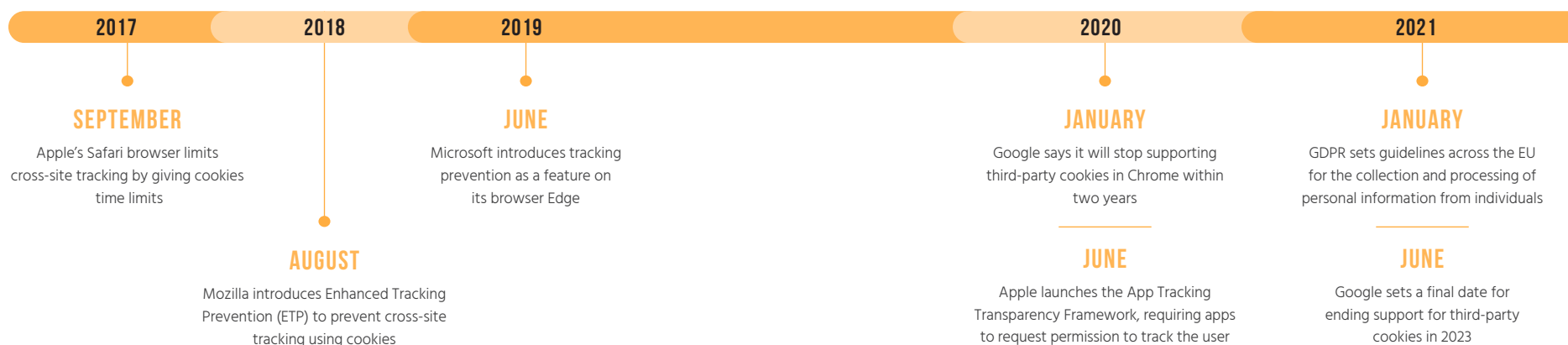
landscape changed and with it came a new lexicon of snappy Silicon Valley terms; uniques, impressions, cost-per-click, rich media.

Fast forward and the digital world is now starting to adopt the kind of rules and regulations that other media have lived by since their inception. Let's call it growing up. Don't forget Instagram is only 11 years old, Twitter is 15, Facebook is 18 and even Google is only 23.

The big driver of change has been the growing concerns about privacy. Consumers are increasingly concerned about the amount of data that companies can collect about them, and many have taken steps to reduce the amount of data they share Online. As we have seen in the research from the Advertising Association, one of the problems people have is what they call 'suspicious use of data'.

The response from digital media companies has been to announce restrictions around data collection and user tracking through their web browsers and operating systems.

HERE'S THE COOKIELESS TIMELINE:



WHAT DOES AN END TO THIRD-PARTY COOKIES ACTUALLY MEAN?

MICRO-TARGETING

Cookies allowed advertisers to target personalised digital ads to people who had exhibited a particular behaviour, for example searching for a brand or product. Without cookies this becomes very difficult.

RETARGETING

Cookies allowed advertisers to target specific consumers from all over the internet who had already seen an ad, clicked on it, or visited a brand's website. This will no longer be the case.

ATTRIBUTION

Cookies allowed ROI-focused reporting for analysts to see chains of browsing and ad exposure that could be connected to a sale or other action. Without cookies, these 'last click' chains become harder to see.

TESTING

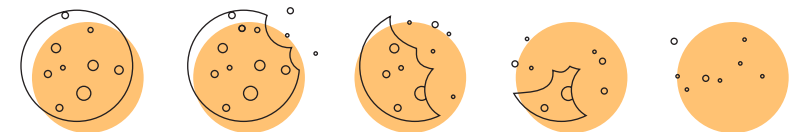
Cookies allowed methodologies like A/B testing to be easily rolled out. Without cookies these become more complicated to implement.

There are a number of very clear implications for digital advertisers:

From here it looks like the guts are being ripped out of digital advertising. No tracking people around the internet, no last-click analysis, no creative beauty parades? The significance cannot be overstated.

Terry Richards at All Response Media tells it like this, "There will be a big change to the entire industry. In the way that we work, in the way that we plan media, in the way that we roll it out, and the types of media platforms that are going to be available in the future as well. It's going to drastically change".

He predicts a kind of blindness as third-party cookies are stopped, "I predict we're going to lose about 30% of our visibility of traffic and conversions. We're already becoming a little bit more blind than we ever were before".



SO, WHAT SOLUTIONS ARE OUT THERE?

FIRST-PARTY SOLUTIONS

The best placed businesses will be those who have logged-in users and their own original content. Newsbrands for instance, will be able to offer smart targeting solutions across their own inventory. This is being called 'first-party cookies' and will attempt to replicate the current browsing experience just on one site at a time.

Clients with their own consumer data will be able to work with media owners to create matches and target, for instance, lapsed users or existing users who might be sold additional products or services. If you have customers who want to log in, this solution still requires time, budget, resource and Trust in your brand.

VERDICT

Expect lots of talk about first-party data, due to the total rethink of data needed.

CREATIVE SOLUTIONS

It is fairly widely acknowledged that the level of creativity in a lot of digital advertising is low. The culture of A/B testing has meant that for many brands, the creative solution has simply been a matter of making lots of ads and seeing which one works best. An emphasis on direct-response campaigns based on micro-targeting or retargeting has meant ads have been conceived as little more than shelf barkers, shouting out for a response. Digital ads that have to work on their own can only be effective if they are creatively designed to achieve stand out, relevance and a focus on the correct message.

VERDICT

It's too big an ask, requiring a creative supercharge.

MEDIA SOLUTIONS

Most media planners are thinking about the cookieless future in terms of a mixed-media response. The main tool in their armoury is to use Priming to try to drive up the Attention levels and response rates from digital ads. They do this by using high-impact, high-Attention channels to Prime the audience with the brand and then test to see if there is an effect on the digital activity. Make good use of distinctive creative assets and you have a working model for cookieless advertising.

VERDICT

This is where the smart money is.

ADVENTURES IN THE COOKIELESS FUTURE

In a new piece of research, Lumen, the leading eye-tracking and Attention research specialist, has been running a study which cleverly replicates a cookieless world in order to see what impact the switch off is likely to have.

The study explored three different scenarios; the current cookie-driven sequence of Online exposures, an Online exposure in which there has been no cookie-driven exposure, and an Online exposure which has first been Primed by a Public Screen medium, in this case, Out-of-Home.

THE HEADLINE FINDING COMES IN TWO STEPS

COOKIES WORK;

From the current cookie scenario to the cookieless scenario there was a 41% drop in spontaneous ad recall from 39% to 23%. This is a worry for all marketers as results show a hefty negative impact when cookies are removed.

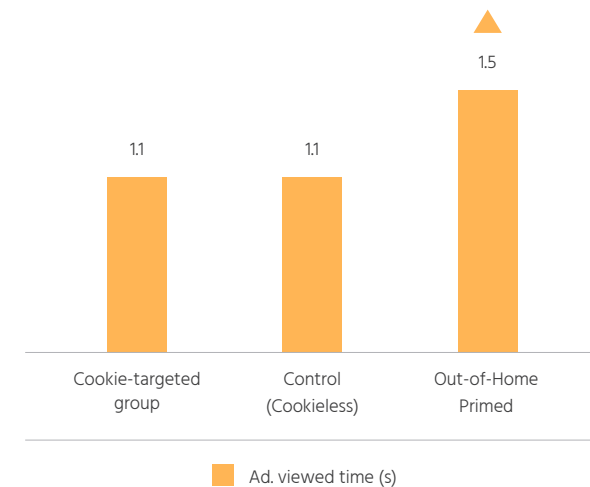
PRIMING RECOVERS LOST RESULTS;

When the same digital ads were shown to people who had been Primed with the Public Screen, spontaneous ad recall of the digital advertising went back to 39%.

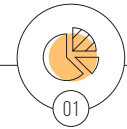
ADS WERE VIEWED AFTER BEING PRIMED WITH OUT-OF-HOME

Digital ads Primed with the Public Screen were viewed for significantly longer than the same ads that were shown to control groups or 'cookie-targeted' groups. Digital ads Primed with Out-of-Home advertising received on average 37% more Attention than those in the 'cookie-targeted' group.

OUT-OF-HOME PRIMES PEOPLE TO LOOK AT DIGITAL ADS FOR LONGER



Source: Lumen Research 2021



The study also looked at click-through rates and concluded that there will be a 'double dip' when cookies go – advertisers will not be getting the spontaneous ad recall they were getting and they will also be getting a significant reduction in click-through rates. The research offers a solution.

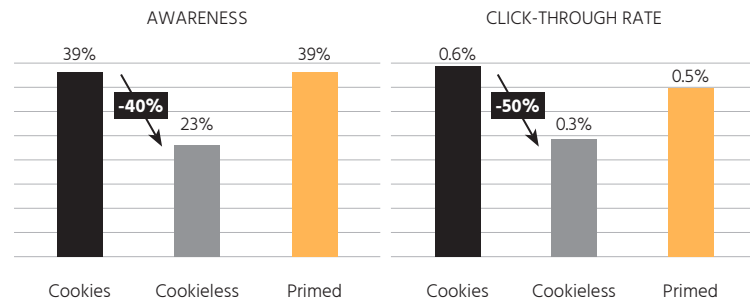
Priming with Public Media restores both the click-through rate and the Awareness levels. The New Different is a choice that advertisers have to make – do they embrace a new future with Priming baked into their media planning or do they try to continue with things as they were before by harvesting first-party data, using clean rooms, applying contextual and cohort targeting.

This is a chance to change; to stem the decline in brand equity, to create proper campaigns again and to use brand strength to support digital Activation.

We know that brands want to change.

COOKIES WORK

Significant decline in Awareness and click-through rate



Source: Lumen Research 2021

*“Priming recovers lost results
in a cookieless future.”*

LUMEN RESEARCH 2021

WHAT WE LEARNED IN CHAPTER 01

01

The major web browsers will stop supporting third-party cookies in the next 18 months. The clock is ticking.

02

Tracking, retargeting and attribution all become much more difficult, there is a lack of visibility coming our way.

03

New research says that without cookies, Online ads become half as effective.

04

Priming with big, high-Attention media is an effective strategy for bridging the gap.

WHAT'S GOING ON WITH **THE CONSUMER IN ALL THIS?**

02.

WHAT'S GOING ON WITH THE CONSUMER IN ALL OF THIS?

CHAPTER 02

One thing that every marketer is agreed upon is that lockdown forced their businesses to look at their consumer insight and understanding like never before. Lockdown was a time when the quarterly tracking studies wobbled, the smooth curves went spiky and the Online focus groups were like safari adventures.

As a researcher, it's been the most interesting time I can remember. Things have changed and they have changed quickly. Before lockdown, my experience had been about carefully unpicking slow-moving trends and patterns, trying to sort out the wheat from the chaff. Research during lockdown has been completely different. People can easily tell me what's different. The New Different is a consumer phenomenon.

I've arranged the important trends into three bundles:

- ▶ The more considered consumer.
- ▶ Looking up not looking down.
- ▶ Digital fatigue.

01. THE MORE CONSIDERED CONSUMER

There has been a lot of research into consumer habits during lockdown. One theme that has emerged has been the extent to which consumers have been spending more time considering their purchases. According to Opinium's polling, nearly two thirds of UK adults are now taking more time to consider what they are buying. That's up from about half pre-lockdown. In many ways, lockdown was experienced in a very uneven way in the UK. Significant differences existed between rural and urban centres for instance, between the rich and the poor and between the different industries that employ people. More considered choices seem to be a trend that cuts right across society.

For some, this has been an economic decision. According to Euromonitor International's Voice of the Industry: Lifestyles survey, 60% of consumers are now being more thrifty as result of lockdown. We're also seeing similar increases in the numbers of people shopping around for the best deals. This all makes sense, especially amongst the sections of society that have been hardest hit by losses of income.

The other side of the considered consumer is those who are becoming more reflective and who are taking into account a wider range of factors when making a purchase. For them, we see the numbers showing an increase in wanting a brand they can Trust. According to a global study by TNS, 71% agree that if they perceive that a brand is putting profit over people, they will lose Trust in that brand forever. A Mintel study shows that 65% of people say that a brand's response to the pandemic will hugely impact their likelihood to buy its products and there is a strong sentiment that businesses have a big part to play in helping society recover. The big stuff matters more than ever now. Add in sustainability credentials, diversity and inclusion and you have a new, more considered view of brands emerging.

CHAPTER 02

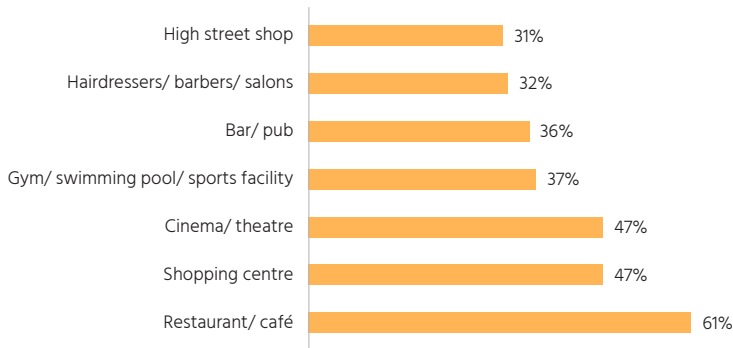
02. LOOKING UP NOT LOOKING DOWN

It's no surprise that after more than two years of lockdown we are ready to embrace the real-world once again. Cinemas, pubs, restaurants, gyms, friends' houses, record shops, the office, the list goes on. Real world, we've missed you. Time to look up again.

There is a huge desire right around the world to enjoy real-world experiences again with over 60% wanting to eat out again, followed by shopping, going to the cinema and the gym. And there is a real sense of optimism about moving from screen to street. 72% say they will be making the most of life post-lockdown.

COULDN'T WAIT TO GET BACK OUT

"Which of the following did you miss most during lockdown?"



Source: Attest (Global Sentiment Tracker) | Total Sample: 2,500

MAKING THE MOST OF THIS YEAR

As we emerge from lockdown, to what extent do you agree with the following statements?



Source: Attest (Global Sentiment Tracker) | Total Sample: 2,500

On top of the obvious explanation that we've all been cooped up inside for too long, there is a fascinating bit of neuroscience that adds another layer to the story.

The human brain is designed to keep growing. The hippocampus is central to learning and memory and it takes in new stimulus and creates new associations every day. The neuroscientists tell us that the creation of these new associations not only creates memory but also releases a hit of dopamine, literally lifting our mood. When we are starved of new stimulus, as we have been, our hippocampi starts to fall into disuse, our learning function starts to work less well, and as if things couldn't get any worse we also get less of the dopamine hits.

During lockdown, people reported a kind of 'brain fog' asking, 'what day is it?', 'what's the name of that contact I need to call?', 'what did I eat for lunch yesterday?'. It was more than just boredom setting in, it was a lack of novelty. There's no wonder we missed being out and about. As we emerged from lockdown, we were given a huge hit of new stimulus, our hippocampi were firing on all cylinders - and just think of all that dopamine!

We will also have had lots of feelings as we emerged outside with - relief, joy, happiness, what neuroscientists call emotional arousal. The neuroscience says that high levels of emotional arousal creates more vivid memories. Memory encoding is richer and more long lasting when we are emotionally aroused - it's the reason we can recall where we went on holiday when we were 17, who we went with, what we listened to and what we wore, but think back a few years and tell me what you were doing (unless that was when you were seventeen).

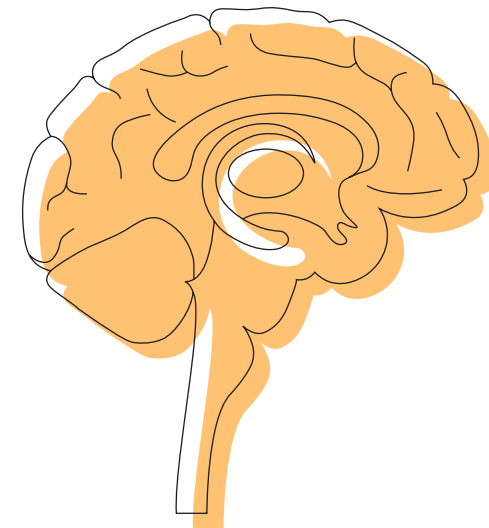
As a media planner, this will be a great opportunity for brand building and creating long-term memories.

There is another real-world story to tell, and it's a local one.

Lockdown has reconnected people with their local community like never before. We have shopped more locally (often out of necessity), we have relied on local services, we are now more aware of others in our local community. The flipside of all that time on the world wide web has been a return to the idea of locality.

This is supported by the Mintel data too. In UK studies, 43% of consumers believed that local businesses were good for the economy, and 57% of people said that, once restrictions were lifted, they were more likely to spend money at a business that offers locally-produced products than they would have done before. Google reports that searches which include 'close by' or 'near to me' rose by 900% over the past two years.

Put these two trends together and the opportunity is clear.

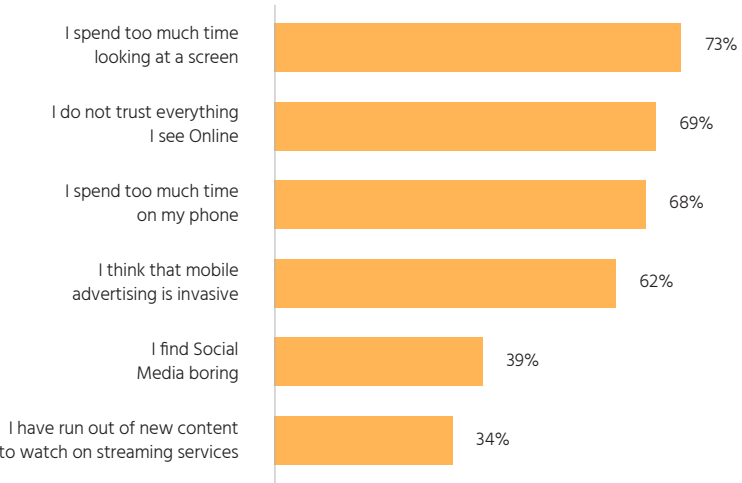


03. DIGITAL FATIGUE

Lockdown has been a digital overload for many people. Whether it's been a gruelling regime of Zoom meetings, endless scrolling of Social Media and Online news, binge viewing of Netflix and Prime, the ding dong of daily Amazon deliveries. We have been double-dipped in digital. For many there is a very natural fatigue setting in. Screen time is at an all-time high and it's exhausting. In a global survey of 2,500 people across five countries, the data shows a striking sense of overload with a life spent staring at a screen.

SCREEN FATIGUE

"Due to Covid our day-to-day behaviours and daily habits have been impacted, to what extent do you agree with the following statements?"



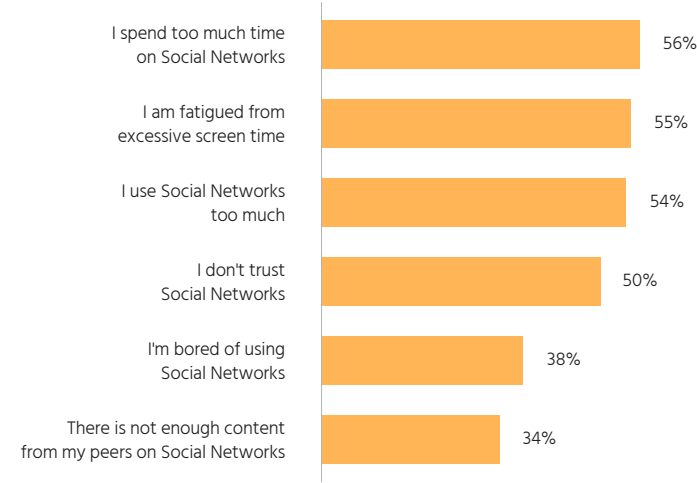
Source: Attest (Global Sentiment Tracker) | Total Sample: 2,500

In the survey, 73% said that during lockdown they were spending too much time looking at a screen and 55% said they were fatigued from excessive screen time.

There is a plethora of new conditions springing up which people are suffering from. Famously the founder of Zoom complained himself of Zoom fatigue. From information overload to internet addiction to doom scrolling, we have all felt the effects of too much time Online. It is no surprise that just as people are wanting a return to the real world, they are also relishing a break from their screens.

SOCIAL MEDIA FATIGUE

"Over the past year, usage of and attitudes towards Social Networks may have changed for you personally, with that in mind to what extent do you agree with the following statements?"



Source: Attest (Global Sentiment Tracker) | Total Sample: 2,500

The stats we are seeing about screen time and specifically around Social Media show that people have found the overload a dissatisfying experience. 39% of the sample now find Social Media boring, 34% say there isn't enough content from their peers on Social Media.

This is where the real-world mismatch is most apparent when it comes to advertising. More money is going into digital channels, up to 72% of spend in the UK in 2021, and yet this isn't three quarters of what people want from their brands and the advertising they consume.

If lockdown has been in many ways a giant experiment, then it has proven to everybody that there is a limit to the amount of time we can spend Online.

One reason for this is that while Online life can replicate many of the functional aspects of real life, such as shopping or having a business meeting, it fails to deliver the emotional aspects of those interactions.

Dr Jena Lee, an Associate Professor at UCLA, writing in Psychiatric Times, draws out a number of reasons for this. One is the slight delays between facial movements and voices on Online meeting software. The delays mean that people's reward centres are less likely to be triggered and are a major reason that people feel drained after an hour on Zoom. Lack of direct eye contact and even the habit of staring at your own face also decreases the level of reward.

Somebody described the last two years not as working from home but as living at work. They have a point.

"There is a big upside here in terms of reminding consumers of the benefits they have experienced with our brands and how they have served them and their families' needs."

JON MOELLER, CFO, P&G

WHAT WE LEARNED IN CHAPTER 02

01

Not surprisingly, lockdown has changed consumers.

02

They have become more considered – they are looking for different things from brands, they are seeking symbols of Trust, big issues like climate and diversity and inclusion are now guiding brand decisions.

03

After two years of looking down, people are ready to look up. People have suffered screen fatigue and value the return to the real world and the hit of dopamine.

BRANDS ARE **THE NEW NECESSITY**

BRANDS ARE THE NEW NECESSITY

The big, broad change is this - brands are more necessary than ever. It's hitting home for most marketers as they face a cookieless future and need to review how they use their digital spend, that chasing people around the internet is becoming more difficult.

As we recover from lockdown, there are positive indications of the resilience of British consumer-facing businesses. Overall brand value for the Kantar BrandZ Top 75 UK brand ranking is now slightly ahead of 2019 levels which Kantar ascribes to, "the power of strong brand equity to drive business performance".

In a note of caution, Kantar BrandZ's 2021 report notes that despite this post-pandemic optimism, British brands continue to trail behind global competitors who have enjoyed a 42% rise in brand values, pointing out that while there is headroom for British firms to grow, they they've got to be bolder.

At a time when more and more adspend is going into Online channels that by their very nature are largely geared towards response, it is even more important that businesses realise the power of creative brand building to create long-term value. It's clear that over time, strong brands create value for shareholders.

If we unpack why brands are the new necessity, we can build our thinking in two ways:

- ▶ The business advantage of brands
- ▶ The communication advantage of brands

01. THE BUSINESS ADVANTAGE OF BRANDS

Tom Roach describes brands as, "the most valuable business tool ever invented". It's part of an argument that he and other wise people like Mark Ritson and Ian Whittaker have been making. They all say that we all need to get better at making the case to the CEO and the CFO, rather than only to the brand team or the agency.

Studies such as The Board-Brand Rift, FT/IPA (2020) show that while boards acknowledge the importance of brands in delivering business objectives, the levels of knowledge about specifically how or why remain low. Knowledge of how brands are built and maintained is average to poor in over 50% of businesses surveyed. Get into the detail of why brands are valuable and again knowledge levels are low; only 54%, for instance think that strong brands can improve margins.

There is a business case to be made which means going back to Binet and Field, the IPA, Kantar BrandZ, Thinkbox, Ebiquity and others. There are three killer charts that I'd be putting front and centre of any presentation.

CHART 01 STRONG BRANDS CREATE MORE BUSINESS GROWTH:

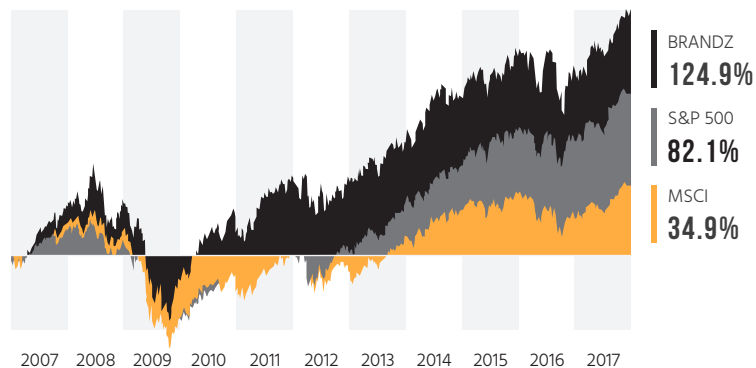
According to Kantar BrandZ, strong brands outperform the average in terms of shareholder return.

SHAREHOLDER VALUE

Strong brands far out-perform the shareholder growth of the average company. The value of the Kantar BrandZ Strong Brands Portfolio increased 124.9% between April 2006 and April 2017, out-performing both the S&P 500, which grew 82.1% and the MSCI World Index, which grew 34.9%.

STRONG BRANDS PORTFOLIO VS. S&P 500 VS. MSCI WORLD INDEX

The value of the Kantar BrandZ Strong Brands Portfolio increased 124.9 percent between April 2006 and April 2017, outperforming both the S&P 500 and the MSCI World Index.



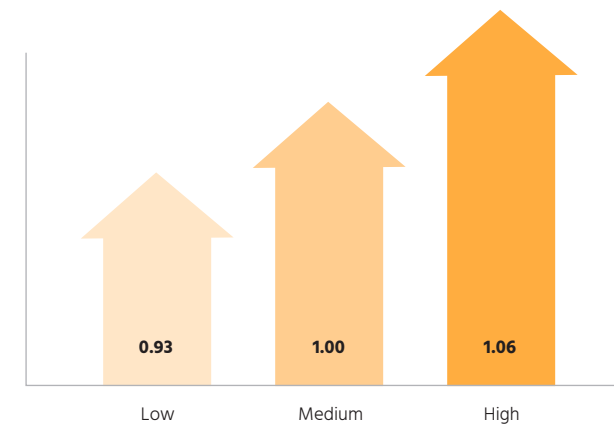
Source: Kantar Milward Brown/Kantar BrandZ
The Kantar BrandZ Strong Brands Portfolio is a subset of the Kantar BrandZ Top 100 Most Valuable Global Brands

CHART 02 STRONG BRANDS DELIVER HIGHER PROFIT AND HIGHER PRICE:

Kantar, who analyse shopper behaviour, see that strong brands command an average 13% price premium over their weaker brand rivals and 31% more operating profit.

PRICE PREMIUM

Strong brands command an average price premium 13% higher than weaker alternatives, 6% higher than the average brand and achieve 31% more operating profit as a proportion of revenue.

PRICE PAID (INDEX TO AVERAGE)

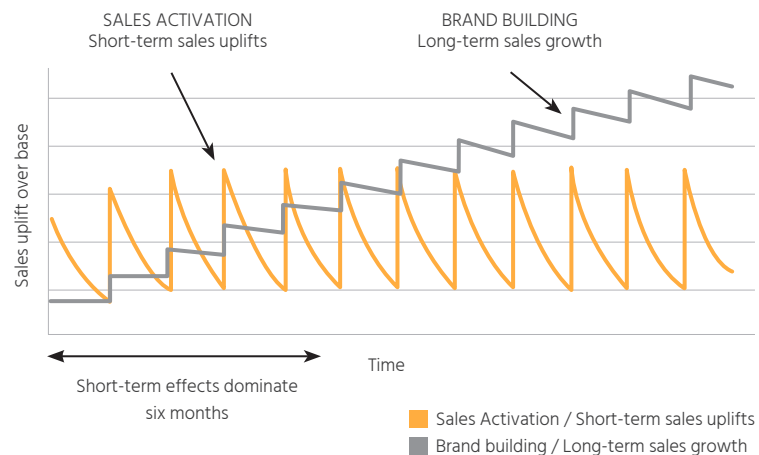
Source: The Meaningfully Different Framework, Millward Brown, 2013. Shopcom data merged with equity survey scores. Based on comparing Power and Premium scores to shopping habits of 1600 consumers. Analysis includes 65 brands in 4 categories. Low = bottom 25%, Medium = middle 50%, High = top 25%.

CHART 03 BRAND BUILDING DELIVERS FOR LONGER:

You have to look beyond six months, that's when brand-building activity starts to overtake short-term sales activity.

BRAND BUILDING PAYS BACK

Investments in brand-building activity pay back much more strongly than tactical sales activation activity over periods of six-plus months, which can deliver sales uplifts in periods up to six months, but do not build base sales and help drive future growth.

BRAND BUILDING AND SALES ACTIVATION WORK OVER DIFFERENT TIMESCALES

Source: Les Binet and Peter Field, Media in Focus: Marketing Effectiveness in the Digital Era, IPA, (Figure 02)

**SOMETIMES IT TAKES
A 'HAPPY ACCIDENT'
TO PROVE IT**

It goes without saying that many brands hit lockdown and experienced huge changes. For many there were enormous, overnight falls in business, and they had no option but to pull their spends very quickly. What followed was like a huge experiment designed to ask the question, 'What happens if we stop our paid Search activity?'.

You would expect to see brand metrics decay slowly (because that's what brands do without support) and response decay quickly (because that's what response does without support).

In fact, what happened was not what was expected. Brand metrics declined slowly but marketers found that in many instances the response measures, specifically around Search metrics and site traffic, dipped temporarily and then bounced back to the same levels without the return of paid Search and digital Online Activation support.

Do we need to rethink our media strategies?

THEIR HYPOTHESIS: THAT BRAND STRENGTH CONTINUED TO DRIVE THE RESPONSE LEVELS.

Airbnb has been the most outspoken proponent of the 'happy accident.' Brian Chesky, co-founder and CEO of Airbnb tells the story like this, "2020 occurred, our business drops by 80% in eight weeks, and we pulled back all marketing, including performance marketing. But something remarkable happened. Even before we started resuming our marketing spend, our traffic levels came back to 95% of the traffic levels of 2019 without any marketing spend. And what this revealed is that our brand is inherently strong. It's a noun and a verb in pop culture".

He makes a clear distinction between brand and response. The company's report goes on to say, "Our marketing plan, therefore, our strategy is the following: a full-funnel marketing approach. The top of the funnel is actually PR. We got more than 0.5 million articles in the last year, in 2020, and we had as much share of voice as most of the other major travel companies combined. And that's how we really built the brand of Airbnb – more than anything, probably, is PR. Second is brand marketing. We think of brand marketing as education and an investment".

Other brands had similar epiphanies when they cut their spend. Adidas, P&G, Netflix, Chase, Uber have all seen that their brand strength is a strong driver of business performance.

Sometimes it takes a behavioural nudge rather than an attitudinal one to bring about change. In this case, lockdown prompted a shift in behaviour and from that, attitudes have become more focused on why brand strength is an essential part of marketing's job.

NOT SO FINE MARGINS

In his 'Pause or Play Forecast 2021', the author and analyst Ian Whittaker identifies a recurring theme emerging from company results - that businesses are expecting their supply costs to rise. These costs include raw materials, distribution costs, energy costs and staff wages. What consumers are likely to experience on the High Street is inflation, indeed the Bank of England expects inflation to rise to over 7% by Spring 2022.

This gives extra edge to the argument about strong brands being able to command higher price premiums. It's a key role of a brand to help justify why a consumer should spend that little bit more. They literally buy the extra magic that a brand brings. From luxury cars to bottled water, a strong brand explains to the consumer why they need to spend more. The converse is also true, a weak brand does no explaining, it leaves the business a hostage to fortune with consumers deciding to look elsewhere for more compelling offers.

As the American business magnate Warren Buffet said, "The single most important decision in evaluating a business is pricing power. If you've got the power to raise prices without losing business to a competitor you've got a very good business. And if you have to have a prayer session before raising the price by 10% then you've got a terrible business".

Ian Whittaker's forecast blends three factors; inflation, the cookieless future and Boards waking up to the business value of brand investment.

A REDUCTION IN SPEND ON SEARCH

The analysis shows that Paid Search's share of advertising should be lower than its current share, and certainly under 20% (not over 30%). It can be extremely useful (especially for SMEs) but not for established brands as its ROI effect is being exaggerated. In many cases, consumers know what they want, but use the Search engine as a shortcut to the website. He notes that Search is losing share to Social.

A REBALANCING OF BRAND AND ACTIVATION

Advertisers will look to media channels that will support them for long-term brand growth as well as short-term uplift in sales.

The three platforms that stand out for this are TV, Out-of-Home and Social Media which combine brand building and digital targeting. Added to this, the traditional approach of having separate brand and digital budgets is likely to become outdated as results show cross-platform advertising amplifies effectiveness and that creative assets can be easily bridged across channels for Social Media, TV and Out-of-Home. He calls this tromni-channel.

02. THE COMMUNICATION ADVANTAGE OF BRANDS

There has been a change of emphasis in the communications people have seen over the past two years away from sales response campaigns and towards the brand.

Some of this has been driven by the unforeseeable changes in the way supply chains and production have been affected by the crisis. Businesses that would ordinarily have been rolling out a calendar of new product development activity have been unable to do so and instead have returned to the core brands and how they can best be managed.

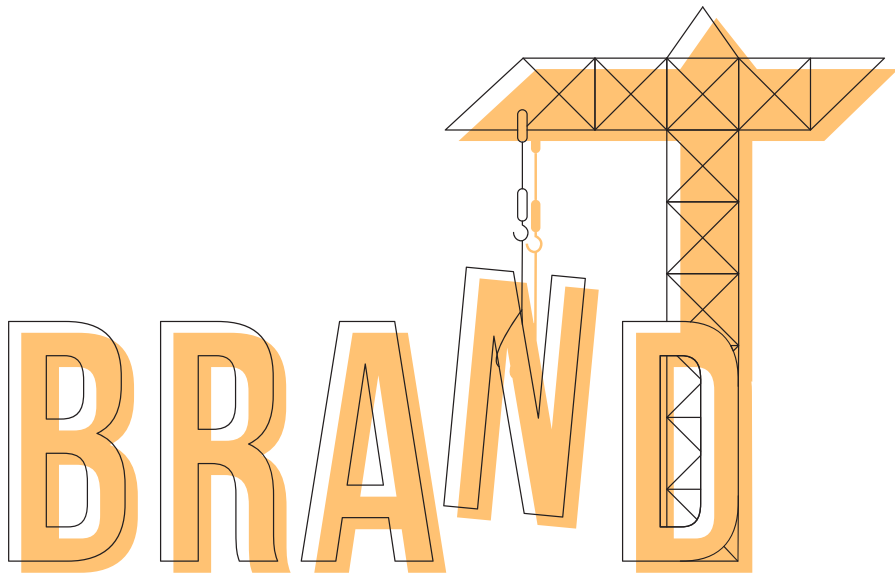
Other businesses had to digitise parts of their operation at high speed, forcing through what has been called 'ten years change in one'. For them, the brand became a focus because it was the one consistent element, the totem of Trust, as people got used to new ways of being customers. One high street chain I spoke to had to build an e-commerce operation from scratch in three months, the brand was the thing that carried the new messages and guided people to the new platform.

My local pub now has an app, in its own small way it will have had to grapple with brand questions for possibly the first time.

Marketing departments also talked about wanting to 'bond not sell'. Some businesses had to be careful about overloading already creaking delivery systems, others didn't want to be seen to be profiting from the crisis. One business just wanted to use its brand communications to reassure people that they were open and there for them. Some had nothing to sell and simply had to stay top of mind for when the moment came.

Jon Moeller, CFO of P&G, supported the company's decision to 'double down' on brand marketing during lockdown, saying, "There is a big upside here in terms of reminding consumers of the benefits they have experienced with our brands and how they have served them and their families' needs".

The effect within these businesses has been clear and profound. Without the distraction of new launches or the seasonal sales calendar there has been time for a focus on brand and a new understanding of what value it brings.



"Brand marketing increases Awareness among potential hosts and guests, helping them understand the benefits of hosting and booking stays and experiences and what makes these stays and experiences distinctly Airbnb while performance marketing drives additional traffic from high-intent prospective guests, the strength of the Airbnb brand and our communications strategy allows us to be less reliant on performance marketing."

BRIAN CHESKY, CO-FOUNDER AND CEO, AIRBNB

WHAT WE LEARNED IN CHAPTER 03

01

Brand building is being understood for what it is, a necessity not a luxury.

02

Selling brands to the Board is about making the business case for long-term growth.

03

As inflation approaches, brands are critical in supporting price premiums.

04

Invest in your brand so you can support a price premium and overcome market pressures for long-term growth.



THE NEW DIFFERENT
THE NEW FORMULA

04.

THE NEW DIFFERENT

THE NEW FORMULA

$P^2 + C = 6$ (NOT 5)

The big question then is this: what's the best response to the three threats coming our way?

- ▶ How do we navigate the cookieless future?
- ▶ How can we best connect with the new consumer?
- ▶ How can we reinvigorate our brands as business tools?

THE ANSWER IS A NEW FORMULA

The first book was fundamentally about how brands prosper and grow in our changing world. Before lockdown there was a growing disquiet about the gap that was emerging between what was known about best practice in communications and what was actually happening in terms of media investment. The research, insights and new intelligence in the book provided a way to build more effective, more balanced communications.

THE ALGEBRA IN THE TITLE WAS A NEW FORMULA FOR BETTER ADVERTISING:



+



=



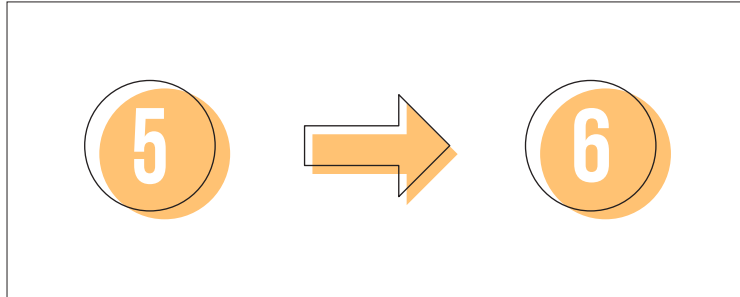
We started with the P^2 bit. The powerful combination of Public marketing and Private marketing working together, the effect synergistic.

C was the creative contribution. The rules of distinctive assets and consistency still hold true, the Creative Bridge is how those assets are now portable across channels, making-mixed media planning easier to execute.

5 was about planning for outcomes. We started with new research about planning for Attention and Trust and from there looked at the latest evidence about how these drive Awareness, Consideration and Activation.

The summary was the Public Screen working with the Private Screen + Creative Bridge = five enhanced outcomes.

THE NEW FORMULA FOR THE NEW DIFFERENT IS $P^2 + C = 6$



Five has become six because Priming has moved centre stage as one of the best responses to the cookieless future.

Here's the running order for the new formula for media planning from post Covid to post cookie:

- ▶ Public and Private and cultural imprinting.
- ▶ The Creative Bridge and portability of distinctive assets.
- ▶ Priming – the new thinking and new evidence.
- ▶ The business of Trust and why it's a primary driver.
- ▶ The Attention economy and what the new media plans look like.
- ▶ Planning for Awareness, Consideration, Response and full-funnel marketing.

THE NEW DIFFERENT - PUBLIC AND PRIVATE

Since writing $P^2+C = 5$, I have had lots of conversations with marketers and agencies (and even with friends) about the ideas in the book. We've riffed on the importance of Trust and Attention and discussed how funnels work and why creativity is vital.

The one idea that we've discussed more than any other is the use of Public Media and Private Media. Public and Private gave the book its first piece of the algebra in the title and I think it's the core media planning idea. If I was a planner this is the idea I'd be shamelessly stealing ... ahem I mean borrowing.

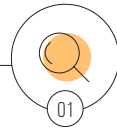
WHAT DID WE MEAN BY PUBLIC AND PRIVATE?

- ▶ Public marketing is highly regarded; it's regulated, used by big brands, a symbol of Trust, it drives perceptions of quality and price.
- ▶ Private marketing needs the halo of Public exposure; it's why the biggest digital media companies use Public Media for their campaigns.
- ▶ Used together Public and Private Screens are a powerful combination.

WHAT RIGHT FOR NOW

Public and Private is right for now. At a time when we've overdosed on web surfing and our mobiles are exhausted, there's a reason that brands like Just Eat, LinkedIn, Xero and QuickBooks and of course Airbnb have been advertising in public. It's because that's where brands build Trust, and the rest of a campaign spend works harder with that in place.

Here's the latest evidence from the Public and Private marketing campaigns.



VISIT KOREA

Travel marketing has, let's face it had a tough two years. For Visit Korea, the ambition was always to do more than simply raise Awareness levels of South Korea (presumably most people have heard of South Korea!). The advertising needed to prompt Consideration of South Korea as a diverse, exciting holiday destination.

The goal relied on driving those exposed to the Public campaign to the Private channel of YouTube to watch the destination videos, either directly or by searching 'Feel the rhythm'. Public Media and Private Media working together.

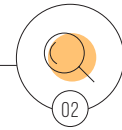
The Result:

YouTube hits were +34% higher when Primed by Public Media.



"The Digital Out-of-Home element of our campaign fulfilled a key objective by increasing engagement with our YouTube content by more than a third. It led to the same number of views for our 'Visit Seoul' film, as the other videos put together."

RUBY JAMES, MARKETING COORDINATOR, VISIT KOREA



CIRCLA SUSTAINABLE BEAUTY

I'm always interested when an Online brand finds the need for a real-world presence. It's true, time and again, for the big digital businesses that regularly use TV and Out-of-Home to give their brands Public stature. It's also true of fast-growing Online businesses who find themselves needing a Public presence.

CIRCLA is an innovative beauty website which prioritises environmental responsibility. It's a great example of a business that wants to do good, from carefully selecting which brands get stocked to collecting and refilling packaging when empty. CIRCLA Founder, Claudia Gwinnut wanted to bring her Online-only brand into the real world to communicate the things that make CIRCLA unique: convenience how easy it is to swap to reusable packaging and showing how straightforward it can be to make sustainability a fulfilling ritual.



"Nothing beats the feeling of cycling down the road and seeing my brand on the side of a bus stop! We've seen a 62% increase in sales, our average order value doubled and we made more in the two weeks of the campaign than in the previous six weeks combined. Our 'real world' campaign was very effective at pushing customers Online to find out more."

CLAUDIA GWINNUTT, FOUNDER & CEO, CIRCLA

PUBLIC AND PRIVATE WORKS WITH PURPOSE

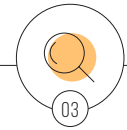
It's pretty clear that Public Media, doing the job of Priming audiences, makes Private Media channels work harder. They also work powerfully with the growing interest in another P, and that's Purpose. Purpose campaigns need a Public presence and they also need the richness of the Private Screen with longer-form content and interactivity.

Lockdown seems to have given brand purpose a fresh lease of life. In a strange way it has given purpose a purpose. Customers can now see the point in talking about a business's role in society and its guiding values and mission.

Lauren Raymond, Strategy Partner at UM in London says that pre-lockdown, many brands in search of a purpose would be drawn to charity partnerships and CRM. Lockdown, in her view has changed all that and she has witnessed brands thinking differently about purpose. The New Different has been to bring together a higher ideal with a true consumer benefit, or as she puts it, "what does the brand do to make people feel better, it's a human thing now and suddenly purpose drives the proposition in all sorts of interesting ways".

At one end of the spectrum, she works with Redemption Roastery which helps excluded groups, specifically ex-convicts, get back into the workplace. It's a brand with a huge purpose and an ambitious human outcome. She also cites more well-known examples, like Just Eat which takes its purpose of 'spreading joy' beyond the delivery of delicious food into highly entertaining communications that have given people a lift during lockdown.

I've been taken by another brand that has got this spot on.



QUORN

Quorn has for years, and with much success, introduced consumers to its meat-free products, first with a healthy protein campaign featuring Sir Mo Farah and then in a series of familiar family scenes, featuring kids enjoying the food.

In lockdown the brand embraced The New Different. Quorn took a purposeful stance on the climate and sustainability. 'Helping the planet, one bite at a time' featured enormous bodybuilders, strutting executives and a cave woman.

Gill Riley, the Marketing Director at Quorn Foods knew that the time was right.



"Lockdown took the planes out of the skies and the cars off the roads, people were talking about being able to hear the birds tweeting again and that they were reconnecting with nature. It was the perfect context for us to talk about the planet and how the brand was a part of saving it."

GILL RILEY, MARKETING DIRECTOR, QUORN

It is clear that lots of brands have turned to purpose as a result of the crisis. These brands have had to hit refresh on their media plans because Purpose is by its very nature a Public message.

For those brands who have discovered their purpose in lockdown there seems to be a natural triangulation between the Purpose, Public Media and Private Media.

Some questions you might want to ask if your plan is heading in this direction:

- ▶ What unique role does your brand play in your target customer's life and in society as a whole?
- ▶ Are people aware of your brand and the unique role you could play?
- ▶ Is this something you want to shout about?
- ▶ Does your media plan commit sufficient Public Screen messaging to support this?

“Lockdown took the planes out of the skies and the cars off the roads, people were talking about being able to hear the birds tweeting again and that they were reconnecting with nature. It was the perfect context for us to talk about the planet and how the brand was a part of saving it.”

GILL RILEY, MARKETING DIRECTOR, QUORN

WHAT WE LEARNED IN CHAPTER 04

01

Public marketing working with Private marketing is the core planning concept for The New Different.

02

The new evidence shows how the two work together to deliver real uplifts.

03

Many brands have turned to reviewing their Purpose as a result of the pandemic and changing consumer mindsets.

04

These brands have had to hit refresh on their media plans because Purpose by its very nature is a Public message, requiring brand investment.

THE NEW DIFFERENT
**THE MAGIC OF
THE CREATIVE BRIDGE**

THE NEW DIFFERENT

THE MAGIC OF THE CREATIVE BRIDGE

It's never been easier to 'port' campaign assets between media. The 'magic of 9 x 16' as one creative I spoke to calls it, is that one format ratio means a mobile ad can be a Broadcast Video-on-Demand (BVOD) ad and a Digital Out-of-Home ad with ease and speed. The internet Advertising Bureau reports that 64% of digital spend is now on mobile showing the draw of connecting the dots between content and digitised media channels.

Given the need to 'Prime' people now that third-party cookie regulations are changing, this portability becomes an important feature of the future marketing landscape.

IT STARTS WITH DISTINCTIVE ASSETS

Jenni Romaniuk in her book 'Building Distinctive Brand Assets' (2018) describes how advertising works to build brands. She unpacks the neuroscience of how our memories work to create associations, "Our memory is where we store past experiences for future use".

This is what we're doing when we advertise, we are hoping to create experiences in the advertising which build associations which people can use in the future.

Seen in this way, the creative works in two ways; how effectively has it got the simple message across and can I still remember it in x months' time? In my experience, it's the first part that absorbs a lot of Attention and hard work and the second part which is the hardest to do.

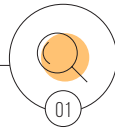
This is what Byron Sharp is talking about when he says it's about distinctiveness not differentiation. Consumers, he says, care less about your positioning or your relative strengths and more about whether they can actually remember you. It's a fair point.

It's why brands have meerkats, dogs that say 'oh yes', black horses, Gary Lineker or blue bubbles. It's why the design brief for the first ever Coca-Cola bottle was to make something that was recognisable even when it had been smashed. Jenni Romaniuk calls these a brand's distinctive assets, and the evidence says that they work to build both brands and campaign effectiveness.

Distinctive assets provide the bridge between the activity at the top of funnel and the bottom. They are the best response a brand can have to the challenges of the Attention economy and short-form advertising. An original creative device joins the campaign up for people, giving them something they recognise whether that's in the High Street, their favourite soap opera or their Social feed.

Tom Roach, VP of Brand Planning at Jellyfish, a digital creative agency, says, "You absolutely need distinctive assets and you lose them at your peril".

Ben Golding, Creative Director at Fox & Hare has a very clear view on distinctive assets and how they should be developed for campaigns - start with the big stuff not the little stuff, "You have to create on a proper canvas to begin with, then see where it goes".



CANDY CRUSH

Candy Crush is arguably the most well-known mobile game of them all. It keeps things exciting with a calendar of competitions and special games. Their biggest launch of 2020 was a series of game events featuring celebs. Roman Kemp, Alesha Dixon, Adebayo Akinfenwa and Mark Wright all became in-game avatars.

It would have been easy to use the Social reach of the stars to launch the game but Candy Crush knew they had to start big and that only then could the distinctive assets be made to work much harder. They used Public Media to drive the reach and the sense of event. Mobile ads then worked to connect the campaign up and harvest the demand on people's mobiles. All 9x16 and all with matching creative.

The eye-tracking research showed that when people saw the distinctive assets of the brand on the Public Screen while out shopping, that this provided the cognitive link with the ad that they saw later on their phones.

The creative work used a palette of four colours so that even between the four creative treatments there was consistency and therefore portability. Alesha's party outfit was the same colour as Roman's background, Mark's background was the same as Adebayo's t-shirt. This whole campaign moved effortlessly and also very effectively between screens.

The results of using distinctive assets well and porting them between screens shows a 50% uplift in ad Awareness when the campaign was seen in both channels versus just one.

THE CREATIVE RENAISSANCE

As we think more profoundly about media planning and specifically about how we Prime audiences in high-Attention media, there is a refreshed focus on the creative contribution. What makes a good distinctive asset? What kind of asset travels well across media? Travelling well means carrying associations and meanings. How do we do that?

I've worked with many creative directors over the years and this is the stuff they got into the industry for and what the best of them are really good at.

There's a famous and possibly apocryphal story from the boom years of Madison Avenue and the New York ad scene which tells of a creative head honcho whose standard response to the creative team's pitchwork was, 'Great idea but show me the poster'.

His point was that we don't get much Attention from our audiences, they don't always sit around and watch all 30 seconds of the ad or read all of our copy. What's the memorable asset, what is the single-minded thing it is saying, can I make it work even if it's only given a glance?

This chimes with recent research conducted by Lumen into time lengths and Attention. Mike Follett, the Managing Director of Lumen Research summarises the findings as "the six-second sweet spot".

On the one hand, Attention levels have gone down and any commercial messaging has to communicate within six seconds or run the risk of being missed, on the other hand his research shows that you can get all of the important stuff across in six seconds, and you should.

Meta's own research into the power of the six-second ad also found that people are more inclined to remember an ad that quickly communicates the message and grabs people's Attention in the first few seconds.

Jon Mew, the CEO of the Internet Advertising Bureau, sees this trend in his own data where he has witnessed "an explosion in short-form video content and a move from advertisers to harness this as a vehicle for effective brand building".

The future it would seem is short and sweet.



"Ads in one media work harder if they are Primed by previous ads – in the same media, or in different media. This will come as no surprise to advocates of cross media amplification effects – the ads are working harder because they are more likely to be getting more Attention."

MIKE FOLLETT, MANAGING DIRECTOR, LUMEN

WHAT WE LEARNED IN CHAPTER 05

01

Good creative starts with distinctive assets – they are what people process and remember.

02

It's never been easier to move distinctive assets between screens – the magic of 9x16 is its portability.

03

We live in a world of short-form content, it's back to the rules of a good poster; communicate succinctly, with few words and Attention-grabbing visuals.

THE NEW DIFFERENT **PLANNING FOR PRIMING**

THE NEW DIFFERENT PLANNING FOR PRIMING

In the research for this book, I kept finding myself talking to people about Priming. For some it was a way of facing the cookieless future, for some a way of tackling Attention issues, for others it was their way of making the marketing funnel work. One thing was clear, when we think about outcome-based planning, we need to be planning for Priming. In the world of The New Different, it gets a chapter to itself.

Priming starts in the world of psychology and, in many ways, it is actually a closer friend to our relatives in the creative agencies. Priming describes how first associations go on to affect subsequent exposures and experiences.

One supermarket conducted an experiment, playing different styles of music in the wine aisle and then analysing wine sales. French accordion music, Italian opera, Spanish flamenco guitars. The results showed that the music Primed people to be more aware, more receptive, more in the mood for wines from that country. I cannot report how Australian wines fared in this experiment!

Creative agencies use this principle in the development of campaigns. Casting, locations, music, mood and voice overs are all ways to attach

associations to brands. Associations which will be recalled later on in the aisle or on the Public or Private Screen.

The principle of Priming in media is slightly different. We tend not to get involved in the associations in the adverts themselves but we do think about the context in which the adverts are seen; what mindset are people in, what company are you keeping, what kind of media moment are you being seen in?

As media people, we also think about Priming theory in terms of being more likely to notice something when they have seen it before. This is how we've used cookies, building series of exposures in which people are more likely to be in market and may have already seen the ad once. There is now a need to plan media with no cookie Priming.

Priming in Offline (TV, Out-of-Home, etc) channels works for us in three ways;

- ▶ It provides a halo of Trust right at the start of people's campaign registration.
- ▶ It works with, not against, the Attention economy, getting noticed.
- ▶ It drives more effectiveness out of subsequent exposures.

The latest evidence says it works. Posterscope has conducted a meta-analysis of 57 campaigns to really dig into the Priming effects of big, high-Attention exposure. They analysed each campaign in terms of Awareness, Consideration and Activation. The exposed versus non-exposed scores show significant uplifts right through the funnel. The data quoted is actual uplift in percentage points rather than the larger percentage increases.

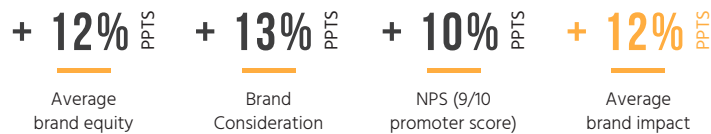
OUT-OF-HOME CAMPAIGN EFFECTIVENESS (PPTS INCREASE)

+ 14% PPTS | Increase in overall effectiveness*

MEMORABILITY



BRAND EFFECTS



ACTION TAKEN

ANY ACTION TAKEN TOWARDS BRAND IN LAST 4 WEEKS

- Brand purchase/usage
- Word-of-mouth
- Any Online action
- In store visit
- Increased brand positivity
- Aware brand offering

+ 21% PPTS
Action taken

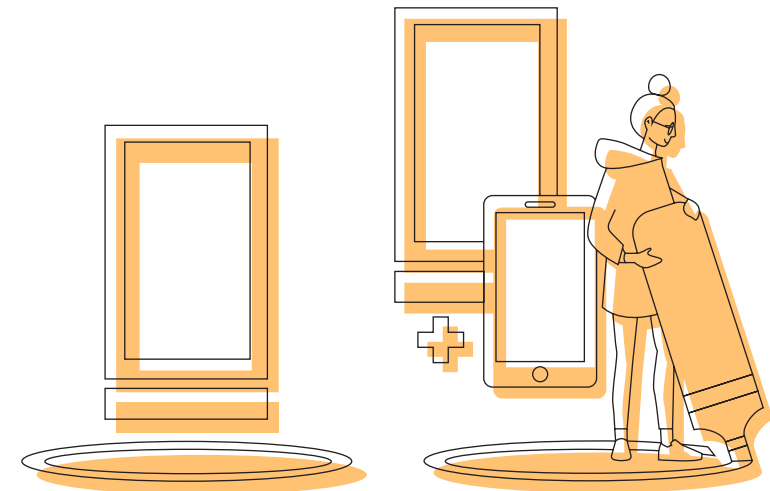
Uplift for consumers recalling/exposed to Out-of-Home versus all respondents

*Overall effectiveness - average of three metrics (memorability/brand effectiveness/action taken)

Source: Posterscope 'Out-of-Home Effectiveness at levels of the brand funnel' 2016 - 2020. 35,652 respondent interviews

THE HEADLINES MAKE THE CASE FOR GETTING PRIMING RIGHT:

- ▶ Public Media has always got brands noticed and the headline stats show a 10% uplift in brand and campaign Awareness measures – more people noticed the campaign.
- ▶ Consideration is the golden metric, linking the top and bottom of the funnel, campaigns that used Public channels to Prime their audience saw a 13% uplift in Consideration levels – more people wanted the brand.
- ▶ At the bottom of the funnel, Priming in Public channels made people more responsive, across a range of actions, there was a 21% uplift amongst those Primed with Public Media – more people did something.



"If people look at an ad from a brand once, they are more likely to look at a subsequent ad later. In part, this is down to targeting effects, but it also seems to be down to Priming effects: you are more likely to look at something that is already familiar than spend time with something that comes to you totally cold."

MIKE FOLLETT, MANAGING DIRECTOR, LUMEN

"Specifically, we saw the Public channel of Out-of-Home driving a range of Online interactions for brands, with a 9% percentage points uplift across actions such as Search, web visits, app downloads or Online Social responses."

RUSSELL SMITHER, HEAD OF RESEARCH AND INSIGHT, POSTERSCOPE

WHAT WE LEARNED IN CHAPTER 06

01

Priming may be the best response to a cookieless world – it replaces cookie-tracked exposures with real-world impact.

02

Priming works by pre-sensitising people to what you're going to tell them.

03

Primed campaigns see uplifts in every measure – Awareness, Consideration and Activation.

THE NEW DIFFERENT **THE BUSINESS OF TRUST**

THE NEW DIFFERENT

THE BUSINESS OF TRUST

Let's start with a couple of views, one from the 1960s and Josh McQueen, one of Leo Burnett's right-hand men for many years. He says, "Trust is at the root of the relationship that advertisers are attempting to build with people who might buy and use their brand. Implicit in Trust is the promises a brand makes in its communications that need to be met".

This is what advertising is about because, when you boil it all down, that's all advertising is, a series of promises. A promise that, if you part with your money, these brands will do what they told you they would.

Now a view from today, based on Clear Channel's Trust Research 2020 survey by Toluna.

- ▶ 61% of people are now more likely to consider how much they Trust a brand before they part with their cash.
- ▶ Trust now sits as the second most important factor in purchase decisions behind only price.

In many ways, Trust has always been central to good branding and a key outcome of good advertising.

The new problem is Trust in advertising. The latest data on mistrust of Online advertising in particular lays the problem bare.

In a global study, 69% of people said they didn't Trust what they saw Online. 57% said they didn't Trust the adverts they see on Social Media. The Advertising Association measures this in the UK and has witnessed a steady decline in Trust in advertising over the past ten years. On the back of this research, much work has gone into remedying the specific problems of invasiveness, suspicious use of data and ad bombardment.

TRUST IS A CHALLENGE AND IT NEEDS TO BE TACKLED.

Let's start (as we should) with the consumer. Human beings are driven by basic needs. Maslow's hierarchy, a favourite of planners everywhere, has at its base the physiological needs of food, water and shelter, and then the safety needs of security and resources. Next comes the need for belonging - the need for friendship and a sense of connection.

According to Professor Nancy Puccinelli, from the University of Bath who specialises in consumer behaviour, Trust slots in just ahead of belonging. In other words, you have to achieve a degree of Trust before you can get to a sense of belonging, or indeed the other levels of esteem or status.

Her view is that the pandemic has led Trust to become even more dominant in the way people make choices. Nancy has explored the topic of Trust in some depth and has developed a view of how Trust is built. What is most interesting to us in advertising and media is that the process of building Trust works best when the rational factors, things like 'do I believe it will work' and 'cost versus reward', are combined with a factor called 'transference'. Transference is what happens when people draw on 'proof sources' from which Trust is transferred.

In media terms, it's about being in places where messaging can be Trusted. If Trust is an essential building block, then being seen in environments which transfer a sense of Trust becomes a core part of any media plan. Bear in mind transference also cuts both ways - appear in dubious environments and your 'proof sources' quickly become sources of suspicion.

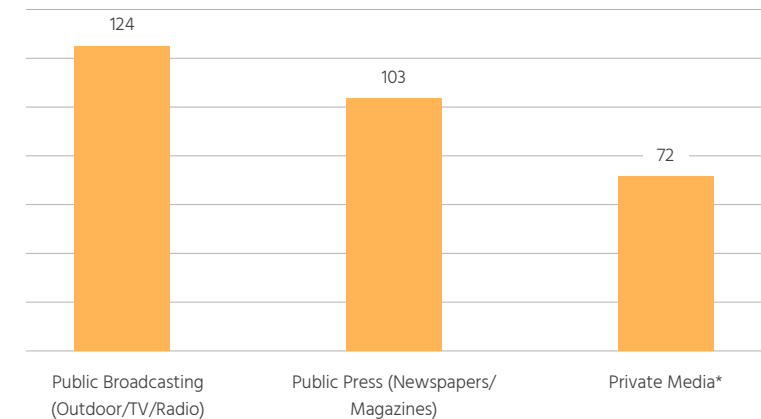
There is a piece of research that looks at how different media channels perform in terms of their positive transference. In Clear Channel's Trust Research 2020 study, they asked people to what extent they agreed that they could Trust the advertising on a variety of channels. The data is aggregated for Public Broadcast channels (TV, Out-of-Home, Radio), Public Press channels (Newspapers, Magazines) and Private channels (Social Media, Online).

There has also been a study called Moment for Trust by Clear Channel and JCDecaux UK, which drilled down into whether different channels affected the levels of Trust in the ads themselves by focusing on the claims made by the brand.

What is interesting is that there is a correlation between the two sets of results, Out-of-Home followed by TV top both sets of rankings, both Public Media with strong credentials in social proof. By contrast, Private Media channels that are consumed alone and which don't have the same social validation score less well across both rankings. There is clearly a link between Trust in the brand and believing what they say.

TRUST: PUBLIC VERSUS PRIVATE MEDIA

Likelihood to agree: "I trust advertising on these channels"
(Index versus average likelihood to agree)



*Private Media based Social/Online

Source: Moment for Trust Research in partnership between JCDecaux and Clear Channel

MOST MARKETING QUESTIONS LEAD TO THE SAME PLACE - 'NICE IDEA BUT DOES IT HELP SELL MORE?'

A quick flick through any number of marketing books will tell you that Trusted brands benefit from a number of business uplifts:

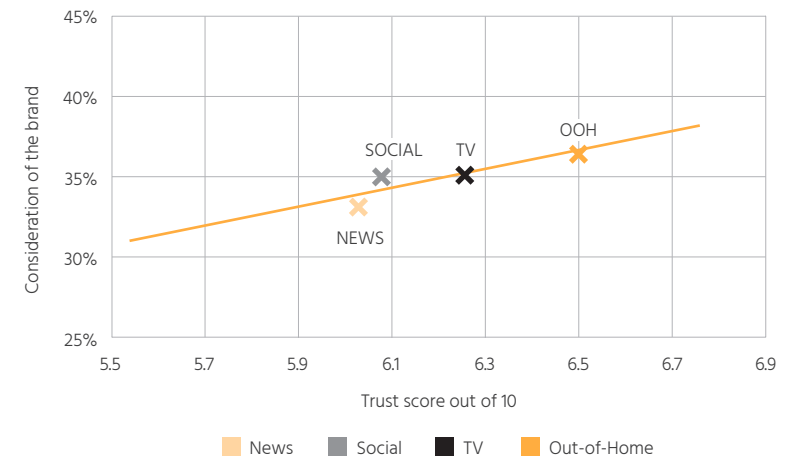
- **INCREASED CUSTOMER LOYALTY:**
Deliver on your promises and customers will Trust you to do it again.
- **MARKET PENETRATION AND SHARE:**
Those that Trust in brands will advocate brands.
Encouraging competitors to switch and non-users to start.
- **PRICE ELASTICITY:**
Make good on your promises and fulfil those consumer needs and you'll have more control over how much you charge people for that privilege.
- **DIVERSIFICATION:**
If consumers Trust that you can provide them with a service in one vertical, they are more likely to consider you if you decide to move into other verticals.

In interviews with clients, I hear again and again that they are super-focused on Consideration, the middle bit of the funnel that links top-level brand Awareness and bottom-of-the-funnel metrics like Purchase.

The Moment for Trust study picks up very strong correlations between the level of Trust in claims made by the brand and how much the brand is considered. In other words – as Trust increases so does Consideration – and this is a statistically significant relationship suggesting there is a real connection between the two metrics. I think this goes back to an earlier point about consumers becoming more considered as a result of lockdown.

HOW MEDIA CHANNELS DELIVER TRUST AND CONSIDERATION

Trust in brand claim versus Consideration - average of media



R = 0.8315 (strong correlation between Trust and Consideration)

P = <0.5 (variance is low)

Source: Moment for Trust Research in partnership between JCDecaux and Clear Channel

*Trust is at the root of the relationship that
advertisers are attempting to build with
people who might buy and use their brand.
Implicit in Trust is the promises a brand
makes in its communications that need
to be met."*

JOSH MCQUEEN, EXECUTIVE DIRECTOR, LEO BURNETT

"You can't tell lies in Public."

JUSTIN GIBBONS, WORK RESEARCH

WHAT WE LEARNED IN CHAPTER 07

01

Trust sits at the heart of how brands work – without the Trust they build, it's just a product like any other.

02

Trust speaks to new consumer priorities – their sources of Trust are changing and many are looking for brands to help them navigate a new world.

03

Professor Nancy Puccinelli uses the term 'transference' when thinking about how people judge sources of proof.

04

The Moment for Trust research shows how brand Trust drives business outcomes – messages are more believable and more likely to result in an action.

THE NEW DIFFERENT
**THE LATEST FINDINGS FROM
THE ATTENTION ECONOMY**

THE NEW DIFFERENT

THE LATEST FINDINGS FROM THE ATTENTION ECONOMY

Attention sits alongside Trust as being a sort of oxygen for brands and advertising. Take it for granted at your peril. This time last year we landed on three conclusions when it came to Attention:

- ▶ We live in a world of information overload and this has created a flow of short-form communication in which Attention becomes key.
- ▶ The latest evidence shows us that media channels generate different levels of Attention and so media planning is now about planning for Attention.
- ▶ High-Attention media 'Prime' people with the message and make low-Attention channels work harder.

Attention is a vital new metric in campaign planning, which is why Mike Follett at Lumen Research has made it his business to provide a rigorous way of measuring how different media channels deliver different levels of Attention.

His thinking on the issue of Attention begins with a surprising truth, "People are very good at ignoring things. Ads are just one of the things that they are really good at ignoring". In our industry we spend a lot of time thinking about what advertising does to people, and clearly not enough asking what they do to advertising.

The starting point is to say that all media channels are not created equal. If you think about it from a consumer's point of view, a huge poster on their High Street is different from a radio ad in their favourite breakfast show which is different from an ad on YouTube.

Lumen boils this down to a simple principle, "Just because an ad is viewable does not mean that it will get viewed". Lumen works out the mechanics of Attention in two steps:



Firstly, does the ad get noticed – in other words we can begin by filtering out the people who simply don't see it at all.

Secondly, how long do they look at the ad for – what differences exist between channels?

Measure these two things enough, as Lumen has, and you start to get robust norms of how much actual Attention each media channel delivers. Lumen's methodology uses the latest eye-tracking technology to track people's gaze as they look at websites, watch TV or walk around shopping malls. They have clever ways to show the same brand across the channels so that individual campaigns can be measured. They can see which ads get noticed, for how long and then with surveys establish what effects these exposures have on the brand in question. As the saying goes, "The important thing isn't just to count the impressions you buy, but measure the impression you make".

SO, WHAT'S THE LATEST THINKING ABOUT ATTENTION AND HOW IS IT BEING USED TO MAKE BETTER MEDIA PLANNING DECISIONS?

Let's start with the wonderful Faris Yakob. He has developed a really interesting new perspective on media and how it works. He has called it 'fast media and slow media' and it's about the difference between long dwell-time media like magazines and newsbrands and 'fast' media with high impact and shorter dwell-time like Out-of-Home.

Faris' view is that, "Fast media like billboards keep the brand top-of-mind and leave implicit memories that nudge consumers towards purchase".

This builds on what we know about the Priming effect that explains how lots of advertising campaigns work. The job of certain channels is to put the brand and its distinctive assets in the consumer's mind, ready to be triggered later either by a purchase impulse or another advertising trigger. Faris makes the point that a lot of our decisions are made in 'fast' mode. Daniel Kahneman uses the distinction between thinking fast and slow, to show how much of our decision-making process is in fact instinctive and automatic, what he calls System 1. Robert Heath agrees, pointing out that most consumer decisions are made without much thinking at all.

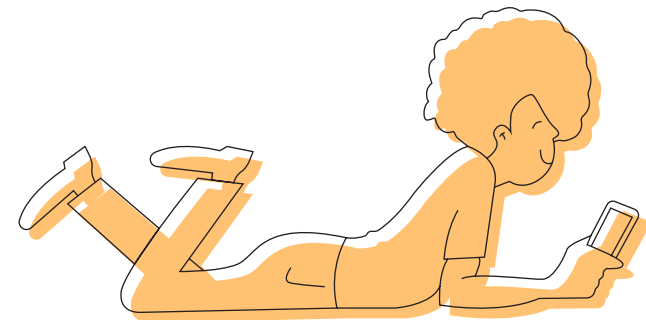
Certainly there is a role for both slow and fast media but all the new thinking seems to point towards the effectiveness of 'fast' channels that can do the Priming job.

Some major agencies have started to incorporate Attention metrics into their planning process. They've expanded the body of research using innovative methods such as eye-tracking technology as a first step in updating how our industry measures, plans, and trades media in the digital economy.

A senior leader at a major agency sees the renewed study of Attention as part of a bigger story.

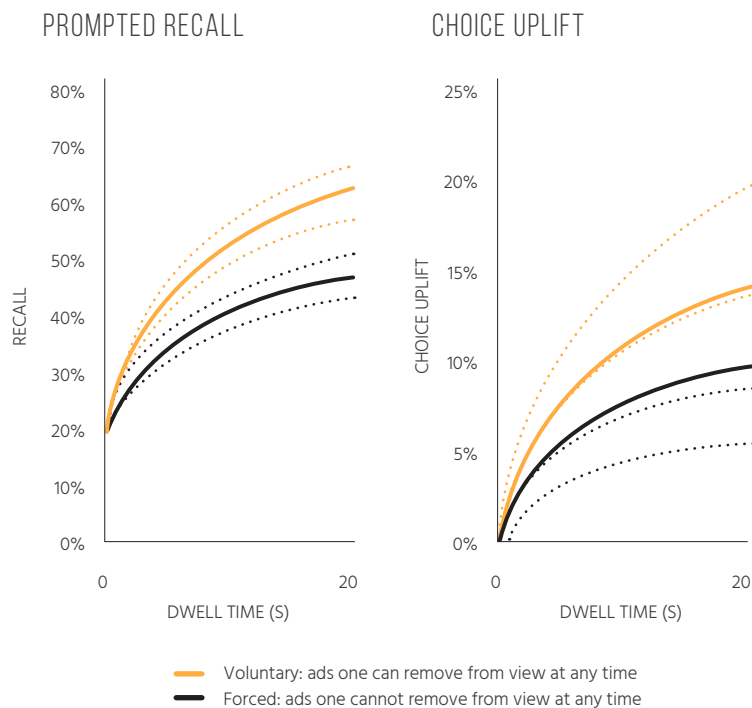
"Loads of advertisers who had been beguiled by the world of digital and were invested in micro-targeting, small cohorts, behavioural outcomes and all of that, started asking questions that were fundamental advertising questions like, 'how many people did we reach?' and 'what about Byron Sharp who says it's all about mental availability?' and so on. The pendulum had swung one way with the first wave of digital advertising into advertising as a performance game, and now the pendulum is swinging back and it's why we are talking about reach and Attention".

Dentsu's study, 'Unlocking the new currency of Attention' is based on an extensive study of Attention and media. In the study, they explore the difference between voluntary Attention (stuff I choose to look at) and forced Attention (stuff that I can't remove from my view). Their research shows that if the Attention is voluntary, both the ad recall and the Consideration metrics are higher than versus forced Attention. Intention and willingness clearly make a difference.



VOLUNTARY ATTENTION IS MORE IMPACTFUL THAN FORCED ATTENTION

- If you choose to watch an ad, it has a greater effect on recall and choice uplift.
- Ads that people are forced to watch do get more Attention than ads that people are free to ignore.
- However, if people choose to watch your ad, the effects on prompted recall and uplifts in choice are far stronger.



Source: dentsu UK Controlled Test Fieldwork Q4 2020, 2,900 respondents, 10,741 impressions over 6 platforms, 14 formats and 15 different brand sectors

During lockdown, we saw a rise in the number of both cause-related and public information campaigns. Both used 'fast' and 'voluntary' media to do the job of grabbing Attention with high-impact messaging and creative.

EXAMPLE 1: CROWDFUNDER

Marcus Rashford MBE has been a busy man tackling the problem of children going hungry during lockdown. His Crowdfunder campaign used Attention-grabbing Out-of-Home media to raise broad Awareness of their #14millionpeople food bank fundraising campaign. The creative 'ported' between Online and Out-of-Home to encourage donations, ensuring those who had seen the campaign on the Public Screen were Primed to act when they saw it on the Private Screen of Social Media.

The campaign reached its £1m target following a campaign across December 2020 and January 2021 with Crowdfunder confirming that it was the combination of the high-impact channel of Out-of-Home with its campaign on Facebook that successfully drove donations.

EXAMPLE 2: GUT STUFF

The Gut Stuff's campaign was all about seizing consumer Attention through fantastic creative. The campaign also created contextual relevance with questions within the copy specifically tailored to its geographical locations where the posters were displayed. Attention clearly translated to action and had a significant positive impact on other communication channels too. On-site sales increased by 73% and website user numbers by 165%, and Gut Stuff posters were used to illustrate an article in the Guardian inspired by the journalist spotting the campaign while out and about.

*"The Out-of-Home element of our campaign brought the hard-hitting campaign message to life outside the Online space, grabbing potential supporters' **Attention**, which is difficult to do using Online channels alone.*

Out-of-Home worked in tandem with our Facebook campaign, as the Facebook content was easily recognisable from the Out-of-Home creative, providing an eye-catching direct Online route to donate."

LUCY LOMAS, HEAD OF MARKETING, CROWDFUNDER

"We really believe it's vital to provoke thought and conversation to inspire consumers to find out more about gut health.

*The results of our Out-of-Home campaign prove the power of a bold campaign. Our unique creative and Out-of-Home's ability to attract **Attention** and build Awareness lead to exceptional business results."*

LISA MACFARLANE, FOUNDER AND CEO, THE GUT STUFF

WHAT WE LEARNED IN CHAPTER 08

01

Planning for Attention is a serious business – brands and agencies are building Attention metrics into their media planning right now.

02

'Fast' Attention and 'slow' Attention work together, one delivering richness, the other registration.

03

Attention is higher when it's voluntary – ads that interrupt are more likely to be mentally discarded.

04

Attention metrics correlate with your marketing objectives – get Attention and you can get Awareness, Consideration and Activation too.

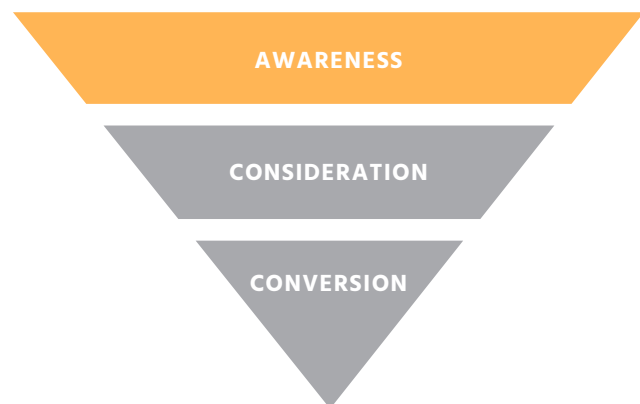
THE NEW DIFFERENT **FULL-FUNNEL MARKETING**

THE NEW DIFFERENT FULL-FUNNEL MARKETING

THIS IS WHAT WE KNOW ABOUT THE MARKETING FUNNEL:

- ▶ 'You've got to fill the hopper', put simply marketing can only harvest what it sows.
- ▶ That the big numbers at the top drive the smaller numbers at the bottom.
- ▶ That the levels of the funnels are linked and work together.

THE MARKETING FUNNEL



And of course, we know that in the rush to digitise marketing plans, some brands have been spending too much time and Attention on bottom-of-the-funnel activity.

The brand versus response debate hasn't gone away but it has moved on. A sign of this has been talk of a new concept that replaces the dichotomy of brand versus response and replaces it with a single solution. Enter full-funnel marketing.

I first heard P&G talking about it, saying that for them it comes off the back of a lockdown in which they invested heavily in their brands, describing lockdown as a reset opportunity to ensure they are providing the brands that consumers really want.

P&G has been outspoken about pulling response spend in favour of brand spend, indeed it was reported in AdWeek that it pulled \$200m in digital ad spend and saw no change in business outcomes.

It's also been the watchword of McKinsey who published their first piece on the topic in February 2021 reporting that, "Full-funnel marketing is not just a campaign strategy, it's a total shift in how marketing works". McKinsey has acknowledged the imbalance in most marketing plans saying, "Many CMOs shift too much of their marketing spend towards the easy-to-justify capture of customers at the bottom-of-the-funnel at the expense of the less tangible generation of customer demand and Attention at the top". It's a familiar story to those of us who have been working in media agencies over the past ten years.

McKinsey describes full-funnel marketing as, “an approach that combines the power of both brand building and performance marketing through linked teams, measurement systems, and key performance indicators”.

This approach isn't just about doing more across each stage of the funnel. It's about understanding how each of the stages impacts the others for a complete customer experience. How media spend on addressable TV, for example, can boost the impact of personalised emails, or how Social Media ad campaigns can drive Online and in-store visits.

WESTERN UNION – FULL-FUNNEL MARKETING:

Keerthy Bamrah is the Head of Marketing at Western Union, the international money transfer service. The brand has been on a journey during lockdown. She describes it as a ship turning slowly, but turn it has. The turn has been in the direction of 'brand response' based on a new global brand positioning developed by BBH.

Prior to hitting refresh, the business was primarily a response-based advertiser, using performance activity to push specific features, offers and calls to action. The new strategy has been to build a full-funnel approach.

WHAT DID THIS MEAN IN REAL LIFE?

- ▶ Laddering everything up to the new brand purpose.
- ▶ An emphasis on driving Consideration.
- ▶ Measurement that builds a full picture of what is creating a sale.

Keerthy Bamrah, Head of Marketing at Western Union says,

”

“The new creative platform is that when you send money with Western Union you send more than money. It's become our new mission statement to make us more relevant to the modern world. It's an interesting space for us to be in because it emotionally connects with consumers.”

”

“We've shifted our media spend around, nearly 50% is now on connect and convince activity - which is trying to drive as much Consideration as possible.”

”

“We've now got a model where we're able to provide both direct and indirect attribution, not based on cookies but instead an amazing algorithm that works out the impact of all our activity in terms of what we get in visits to our website, both long-term and immediate.”

WHAT WE LEARNED IN CHAPTER 09

01

When it comes to the marketing funnel, 'you've got to fill the hopper', the numbers at the top of the funnel drive the numbers at the bottom.

02

Brands are rebalancing their spend and there is a new focus on full-funnel marketing, making sure that each part of the funnel delivers, as shown by brands from P&G to Western Union.

03

Full-funnel marketing is about understanding how each stage impacts the other parts of the funnel for a complete customer experience.

04

McKinsey's report finds that a full-funnel marketing strategy can drive significant value, and by incorporating brand building and performance elements into a campaign, the overall return on ad spend is optimised.

10

FROM POST COVID
TO POST COOKIE

THE NEW DIFFERENT FROM POST COVID TO POST COOKIE

Things are going to change. There is the new, sharp force of a cookieless future which will fundamentally disrupt digital advertising. There is a new post Covid consumer emerging with new behaviours, attitudes and priorities. And there is the big, broad force of business waking up to the necessity of making strong brands work better.

It's certainly the time when we need to change things. There has been a ten-year decline in creativity, an overstep in terms of spend going into digital and a growing imbalance in brand investment versus response spend. The KantarBrandZ data lays plain the consequences. There are no longer any British brands in the global Top 100 and British brands continue to trail behind global brands in terms of growth.

THE FORMULA FOR THE NEW DIFFERENT LAYS OUT A PATHWAY TO RECOVERY.

I still believe that Public and Private channels working together is the best way to think about media planning. The latest research says it's effective and with the rise of Purpose it's the right way to get big, values-based messaging to work with the business-as-usual activity.

OUTCOME-BASED PLANNING NOW HAS SIX TARGETS

01. PRIMING

Enter Priming. It's how advertising builds associations for brands, it's a way to think about big and little media, and there is an impressive body of evidence that says Public, high-Attention communications is the Priming that digital Activation needs now that cookies can't do the job.

02. ATTENTION

Attention has moved from the periphery to centre stage. Big clients and serious agencies are investing in Attention metrics and using them to rethink where the money goes.

03. TRUST

Trust has grown in importance and is now a primary driver of communications. Lockdown consumers want to know you're one of the good guys.

04. 05. 06. AWARENESS, CONSIDERATION, ACTIVATION

Awareness – Consideration – Activation. Full-funnel marketing involves thinking about how communications work at every level to drive real-world prospecting. When you do that it makes no sense to put all the money at the bottom.

And finally the good news. Creativity is heading towards a renaissance. In the cookieless future consumers are looking for more, a refreshed attitude towards brand building, the portability of distinctive assets – all fuel for great creative and are a shot of adrenalin for creative departments everywhere. Renaissance creativity grabs Attention, earns Trust, works across Public and Private Screens and is the central ingredient of any Priming campaign.

The New Different is our tipping point. Cookies, consumers and the C-suite are changing, it's our job to change too.

ENJOY THE RIDE!





THE GLOSSARY



THE GLOSSARY

JARGON BUSTING

SOME OF THE TERMS AND ACRONYMS WE'VE USED IN THE BOOK AND WHAT THEY MEAN.

01 THE ATTENTION COUNCIL

The Attention Council comprises ad industry professionals, academics and marketers. Their aim is to promote the use of Attention metrics in the planning and buying of media.

02 BEHAVIOURAL TARGETING

The ability to target digital adverts based on previous behaviours.

03 BEST-OF-BOTH WORLDS CHANNELS

Media channels that are seen as being able to do both brand building and response driving.

04 BRAND-BUILDING CHANNELS

Media channels used primarily for brand-building purposes such as TV and Video-on-Demand (VOD), Digital Out-of-Home, Cinema and Press.

05 BRAND EQUITY

Brand equity refers to the value of the brand by looking at it through the eyes of consumers and their perceptions of the brand and its services.

06 THE BRAND GAP

The gap that exists between brand-building best practice as defined by Binet & Field and Byron Sharp and what actually happens in terms of media investment.

07 BROADCASTER VIDEO-ON-DEMAND (BVOD)

Broadcaster Video-on-Demand: ie in the UK, BBC iPlayer, ITV hub, All4.

08 BYRON SHARP

Author of 'How Brands Grow' and shining knight of marketing evidence.

09 CALL TO ACTION

The part of the advert that asks the consumer to do something – to buy a product, go to a website or ring a number etc.

10 COOKIES

Cookies are small blocks of data built specifically for Internet web browsers to track, personalise, and save information about a user's session.

11 COST-PER-CLICK

Cost-per-click (CPC) describes where an advertiser pays a cost to a publisher for every click on an ad.

12 COST-PER-ACQUISITION

Cost-per-acquisition or CPA is a metric that measures the cost of acquiring one paying customer on a campaign or channel level.

13 DANIEL KAHNEMAN

Behavioural scientist and author of 'Thinking Fast and Slow'.

14 DIGITAL ECOSYSTEM

This term describes the interconnected nature Online platforms. For a brand this relates to the digital platforms used by the brand and how they interconnect.

15 DIRECT RESPONSE ADVERT

Adverts designed primarily to ask consumer to respond in some way which could be to visit a website or make a call.

16 DISTINCTIVE ASSETS

The non-brand name elements of a brand that trigger recall (logo, colour, devices, jingles, straplines).

17 DOOH

Digital Out-of-Home; digital Outdoor screens.

18 EYE-TRACKING RESEARCH

Eye tracking involves measuring either where the eye is focused or the motion of the eye as an individual views a piece of stimulus such as a web page or an Out-of-Home advertisement.

19 FARIS YAKOB

Author, commentator and industry wise man.

20 FREQUENCY

Frequency is the number of times the advertisement will be seen by one person.

21 IMPRESSION

One impression is generated when an advertisement is shown on a digital screen.

22 IAB

Internet Advertising Bureau, trade body for digital advertising.

23 IPA

Institute of Practitioners in Advertising is the professional body for UK advertising. It sets the protocols for the UK industry's best practice standards.

24 JENNI ROMANIUK

Author of 'Building Distinctive Brand Assets' and champion of better branding.

25 KANTAR BRANDZ

Kantar BrandZ is WPP's brand equity database. Created in 1998 and continually updated, it measures the contribution made by the brand to the financial performance of the business.

26 LAST-CLICK ANALYSIS

Last-click analysis refers to a web analytics model in which the 'last click' is given credit for a sale or conversion.

27 MARKETING FUNNEL

A model used by marketers to understand how consumers move from Awareness of the brand to Consideration to Conversion.

28 MEDIA MIX

A term used to describe how media investment is split between channels.

29 MEDIA MULTIPLIER

A theory that suggests that the impact of two or more media is stronger than using either medium alone.

30 MENTAL AVAILABILITY

A term which describes if a brand is one 'that I have heard of and know about' – mental availability works alongside physical availability 'it is a brand I can find in a shop'.

31 OOH

Out-of-Home advertising.

32 PRIMING

Priming is a phenomenon whereby exposure to one advert influences a response to a subsequent advert. For example, seeing an ad on a poster makes it more likely to be clicked on when seen later Online.

33 PRIVATE SCREEN

Screen-based advertising consumed alone – mostly via the mobile phone so refers to Online advertising and Social such as Facebook.

34 PROGRAMMATIC

Programmatic ad buying typically refers to the use of technology to automate the purchase of digital advertising. This replaces the traditional process which involves briefs, human negotiations and manual insertion orders.

35 PUBLIC SCREEN

Screen-based advertising consumed in Public, including Out-of-Home, Digital Out-of-Home, TV and Cinema.

36 REACH

Reach is the number of people exposed to an advertisement.

37 VIEWABILITY

A measure of how visible an ad is. The industry standard for viewability online is that at least 50 percent of its pixels be in view for at least one second, for video, 50 percent of a video player must be in view for at least two seconds.

38 LES BINET AND PETER FIELD

Authors of the seminal 'Long and Short of it' and champions of why brand building matters.

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$$P^2 + C = 6$$

THE NEW DIFFERENT

FROM POST COVID TO POST COOKIE

**$P^2 + C = 6$ is the new formula for success as we enter
'The New Different' era – packed with the latest evidence
and agile thinking from the frontline of media planning.**

How do you plan media in a cookieless world? What is the key insight around Trust, Attention and Priming that brands need to know about? How do you balance brand and Activation when consumer priorities have changed? $P^2 + C = 6$ tackles the issues facing marketers post Covid, in this sequel to $P^2 + C = 5$.

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