Who *really* won Christmas?

An analysis of the impact of genuinely integrated communications measurement by Karen Prichard, Managing Director Reputation at Ebiquity.

Introduction

Consumers don't receive messages from brands in an isolated, siloed fashion – some tweets there, a TV ad over here, a company blog post over there. They build up their impression of what brands mean and stand for by absorbing and integrating messages from multiple channels simultaneously, and cumulatively, over time.

The problem, of course, is that too many organisations are still siloed. While they may have good intentions and talk the talk of integrated brand communications, too often they plan and execute campaign activity in isolated, disconnected pockets. Departments work with agencies, and multi-agency teams meet more often just to tick a box than to work as real partners.

When it comes to measurement, most businesses are even worse. This is ironic, given the increasing availability of tools and techniques needed to assess the relative and absolute impact of different channels. The trick is to start with a channel-neutral, open mind and to analyse the individual and combined impact of the many different elements that go to make up a modern campaign.

At Ebiquity we took exactly this approach when analysing that most talked-about period of multi-channel communication for high street and supermarket retailers in the UK: the six weeks leading up to Christmas. November/December is traditionally the busiest, most competitive time of the year for retailers, in terms of both sales and – of course – supportive marketing activity. Supermarkets typically spend 25-30 percent of their annual offline media budgets in the last eight weeks of the year, and for high street chains this figure is even higher; usually 30 percent, in some cases 40, and in one – House of Fraser – over 50.

In recent years, retail brands have taken a Super Bowl approach to the season, with showcase ads run by several retailers. Large numbers of additional views are secured online through YouTube and other social media channels, and retail brands seek to amplify campaign impact through earned media coverage across editorial media, blogs and forums. John Lewis and Sainsbury's have been in the vanguard of this approach.

In 2014, Black Friday was the latest marketing import to the UK from the USA. High street retailers diverted marcomms efforts to the Friday through Monday after the US holiday of Thanksgiving, with the aim of kick-starting Christmas shopping early. In 2015, Black Friday shifted its emphasis from in-store to online.

Ebiquity's analysis of the impact of retailer marcomms activity in the run-up to Christmas 2015 considered the widest variety of inputs, outputs, and outcomes of any analysis we have seen. We looked at creative, messaging, media spend, social and PR amplification, news media coverage, and polling data reflecting how consumer attitudes and spending behaviour were affected by the major retailers' activity.

Our exam question

Every year, many analysts with different channel affiliations have asked one-dimensional questions to try to determine 'Who won Christmas?' This new analysis shows that there have been several winners and losers for both Christmas and Black Friday. We have found that just because a retailer does something smart – for instance in weight of spend or creative treatment – they cannot be declared the single, absolute 'winner' of the season. Often they perform less well elsewhere – for instance in social, or the engagement that their advertisements drive. To have a truly three-dimensional understanding of how brands successfully cut through the clutter around the festive season demands that we have assessed brand behaviour and activation, as well as the reaction this generates among consumers.

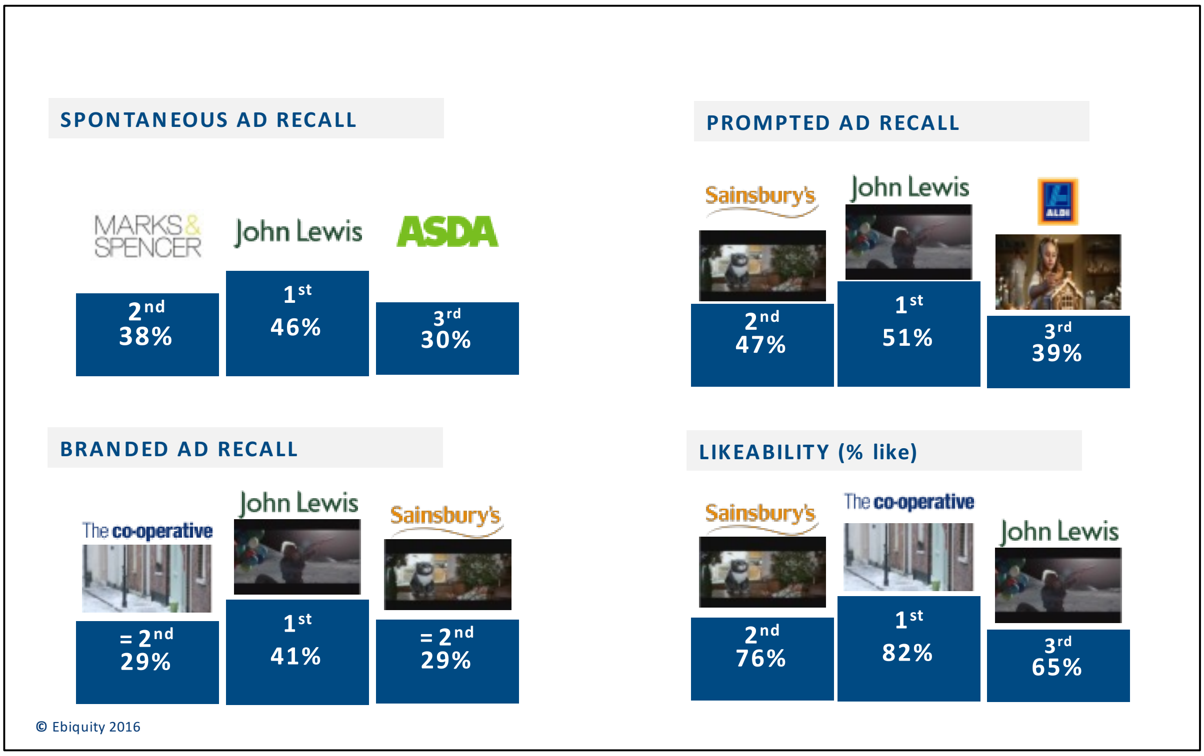
Key research findings

Coherence between earned, owned and paid media really matters when telling rich stories with impact in the incredibly competitive run-up to Christmas. Our researchers found that putting significant resource behind advertising alone did not guarantee success – particularly when the messaging did not resonate with consumers in social and editorial media content; when they found the central themes of the advertising to be discordant to both brands and the season, and when the messages delivered by earned media were not aligned to those driven by paid media.

For the first time, we overlaid the results of a bespoke wave of consumer attitude and awareness research on Ebiquity media data detailing relative investment in advertising, and volume and favourability of social media commentary. We found that, although John Lewis may have won the sales war (year-on-year sales performance up more than five percent), there is an altogether different story in consumer sentiment around its Christmas campaign. What's more, Co-Op's considerably more modest investment behind a more resonant and seasonally-appropriate campaign found very much more support, endorsement, and positive sentiment in social and editorial media commentary than John Lewis.

Only 30 percent of online conversation around the John Lewis Man on the Moon ad was positive, compared with Sainsbury's 82 percent and the Co-Op's 62 percent. As a result, the Sainsbury's ad has been watched over five million times more than John Lewis' on YouTube. It is impressive that Sainsbury's drove so much more positive sentiment and direct engagement with consumers – as measured by views and downloads of the ad – again on a smaller media investment than John Lewis. It is, after all, John Lewis who are often considered to 'own' and have written the rules for Christmas advertising, and on how best to amplify the reach and impact of showpiece festive ads in social and editorial.

Figure 1. Spontaneous, prompted and branded ad recall compared with likeability



Top five observations of effective UK festive communications in 2015

1. Spending big does not guarantee recall or familiarity

Discounters Aldi and Lidl spent more than any other supermarkets in the run-up to Christmas 2015. While consumers were familiar with their ads (Aldi in particular), consumer research showed that they didn't find them distinctive and they struggled to correctly identify which supermarket the ads were promoting.

2. Likeability drives social downloads, shares, and talkability

Sainsbury's ad featuring Mog the clumsy cartoon cat accidentally wrecking family Christmas – only for the local community to rally round and put it back on track – was viewed online 5m more times than John Lewis' Man in the Moon – 29m vs 24m. Just like 2014, in fact, when Sainsbury's World War One ad was viewed/downloaded more frequently than John Lewis' Monty the Penguin, according to reports.

3. Memorability is not the same as likeability

John Lewis' Man in the Moon was the leading retailer brand in terms of spontaneous ad recall, prompted ad recall, and branded ad recall. But it wasn't nearly as well liked as Co-Op's TV ad (liked by 82 percent of those interviewed) or Sainsbury's (76 percent), with just 65 percent liking the creative. See Figure 1., above. Consumers found it difficult to connect the theming and narrative of Man in the Moon with Christmas, unlike Co-Op's Ice ad or Sainsbury's Mog. In social media, indeed, a quarter of all mentions for Man in the Moon were classified as negative, as shown in Figure 2.

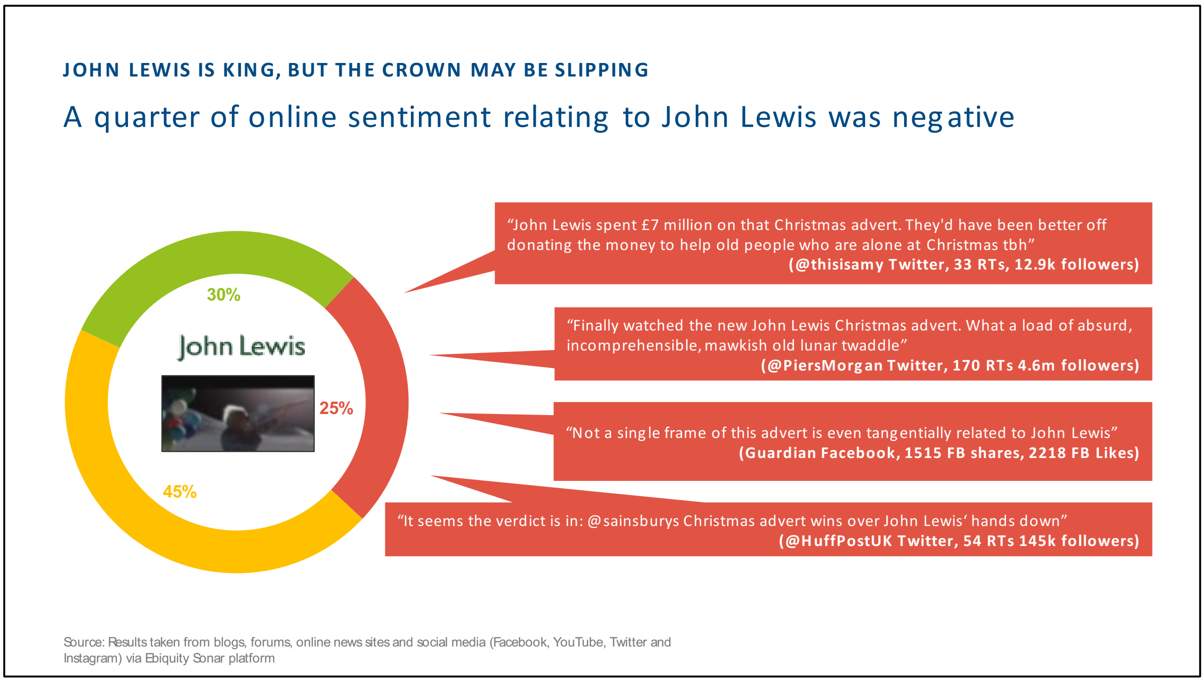
4. Food advertising dominates supermarkets' Christmas ads, but fails to engage

Three quarters of supermarkets' pre-Christmas spend in 2015 promoted food and drink, up from 67 percent in 2014. In the last two weeks, more than 80 percent of ads focus on food – from cocktail canapés to Christmas pudding, turkey to mince pies.

We work in partnership with media eye-tracking experts Lumen Research, who record where and for how long people look at both advertising and editorial content. The longer time (technically 'dwell time') and the more of an image people look at, the more attention and interest they are paying to a piece of content. And so, the theory goes, the more likely they are to remember and act upon the calls-to-action in the content.

Eye-tracking data from Lumen show that food ads from supermarkets command less attention for less time than high street retailers' ads for clothes, DVDs, perfume and other presents; there's less standout and lower engagement. Both these factors are related to shallower processing and reduced impact. However, Lumen found that consumers find ads for alcoholic drinks – often sold at seasonal low prices and at special offer prices – more interesting than seasonal food ads.

Figure 2. Negative online sentiment about John Lewis's Man in the Moon ad



5. Black Friday matters to the high street, not supermarkets

The Black Friday retail event makes Christmas start early for high street retailers, who took as much space in press in the week leading up to Black Friday in 2015 compared with 2014. As a result, the following week their spend fell significantly for the first week of December. Supermarkets, meanwhile, bought less space in the week leading up to Black Friday 2015 vs 2014, but maintained their levels of spend at 2014 levels in 2015 for Christmas promotions.

What this means

Ultimately, 'who won Christmas' from a retailer's perspective boils down to sales performance. When looking to align and integrate findings from multiple channels, however, brand custodians should map channel performance against relevant campaign objectives and choose the most appropriate mix of channels to deliver against those sales objectives.

Integration has been a buzzword for more than 25 years. Yet because of the fractured and siloed ways most businesses are structured – exacerbated by the advent and ascendancy of digital –

integrated planning and execution has only been a reality for a few brands and a very few years. What our key observations about the pre-Christmas battle suggest is that, at last, marcomms professionals can start doing what they set out to do a quarter of a century ago. Including in measurement and evaluation.

Metrics and methodologies used in this analysis

Ebiquity's integrated analysis across paid, earned, and owned media assessed the investment inputs, outputs, outtakes, and outcomes for the UK's 16 major high street retailers and supermarkets during November and December 2015. This includes:

- Total above the line media spend for traditional media, including total weight and exposure of TV advertising and press spend
- Creative messaging across paid, earned and owned media, including duration of ads
- Fixations and dwell time, standout and engagement on press ads (Lumen Research)
- Consumer outtakes across spontaneous, prompted, and branded recall, as well as overall likeability and favourability of campaigns (nationally representative sample of adults aged 16+, with n=500)
- Earned media content generated by consumers and media in response to the campaigns, including social media volume and sentiment
- YouTube views and downloads of ads

Earned media metrics were gathered and integrated in line with the guidance of the Barcelona Principles 2.0, focusing on connecting outcomes with organizational performance qualitatively and quantitatively. Social media metrics were measured consistently and correlated against media performance across other media channels.

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