

iab

Internet Advertising
Bureau www.iabuk.net

thinkbox

www.thinkbox.tv

TV & Online: Better Together



Objectives

The overall objectives of the study were;



1. To establish how and why TV and Online work well together
2. To understand how rich media extensions of TV campaigns affect engagement and vice versa
3. To deliver informed ideas about how brand advertisers can use TV and Online in conjunction more effectively



Methodology

Qualitative Exploration

10 households

Mix of pre/family/post lifestage

Mix of average/heavy online usage

For each household;

Online TV/Internet consumption diary (each household member)

3 hour in-home session



Quantitative Corroboration

3,011 online interviews

Nationally representative : gender, age, social grade, region (weighted)

All were 16-54 years old

All were medium-heavy users of Internet and TV viewers

All had broadband and digital TV

Each person looked at one example campaign; chosen by demographics

Examples included;

- Cadbury Creme Egg: 501 interviews
- Lynx: 503 interviews
- Honda: 504 interviews
- Churchill: 501 interviews



HONDA

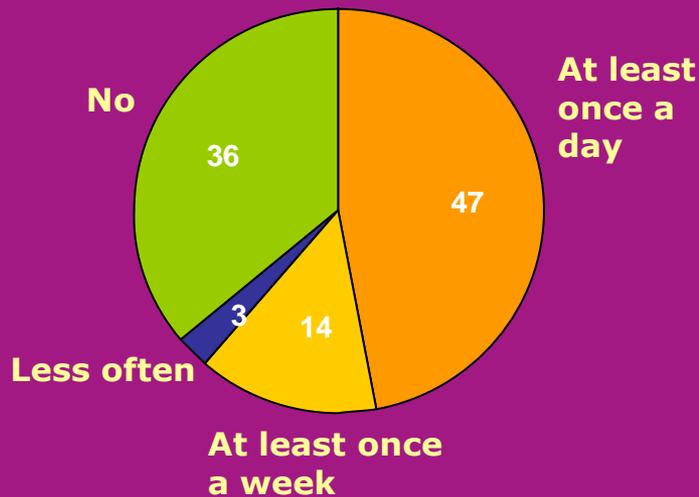




Concurrent Usage

Using Internet And TV Together Is Becoming More Common

Half Now Use Together Daily



This is second only to eating, for activities whilst TV is on

More online chat, music, games, sports: relaxed usage

Internet usage is genuinely during TV programmes

“With a laptop you don't have to sit at one point, it's more flexible and you can watch TV whilst you're on it
(Pre-family, female)”

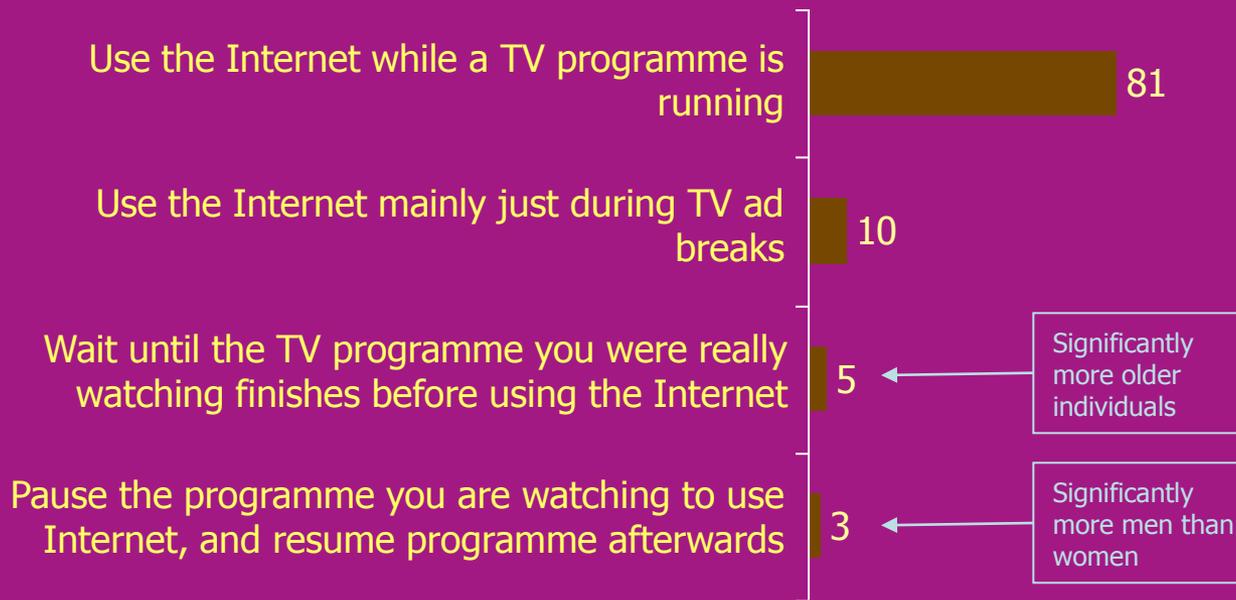
“ I sit with it (laptop) on my knee, all night sometimes... watching TV and messing around online
(Pre-family male)”



Internet Use Really Is Concurrent With TV Viewing

%

TV Behaviour Whilst Using The Internet



“I sit with it (laptop) on my knee, all night sometimes... watching TV and messing around online”

Pre-family male

The balance of attention will often fluctuate dependent on content



Entertainment And Relaxation Significant Motivators Of Using Both Media

% Agree

Online Motivators ...



TV Motivators ...



Merging of mindsets between TV and online consumption



TV Content Increasingly Being Viewed Online

66% have watched TV/film online

- Broadcaster Site 53%
- Youtube 45%
- Non Broadcaster Site 9%

“The differentiation between TV and Internet is much less now”
(Young family, Dad)

Top reasons among those that view TV/film online;

- **Catch up**
 - On programmes missed 58%
 - On series missed 28%
 - On programmes sent to me/recommended 23%
- **Control**
 - Watch what I want when I want 29%
 - To watch highlights of a programme 21%
- **Content not yet shown on UK broadcast TV**
 - Previews/trailers of programmes 25%
 - New episodes of programmes 22%



Changing Consumer Attitudes To Online Advertising In An On Demand Context

Pre-Roll For TV Online

45% had seen a pre-roll ad before:

- 56% of those who've watched TV online via commercial sites

74% believed this type of pre-roll ad was more like a TV ad (vs 26% who felt it was like an online ad)



“ I think it's a great idea having an advert whilst you're waiting for it, as long as it didn't slow the buffering. You have my attention and it actually makes waiting less frustrating ”
(Pre family, Male)



TV Ads Increasingly Being Shared Online

60% have looked for a TV ad (or its song) online

22% have sent a TV ad (or link to one) onto someone else



32%

Search engine

27%



“I get sent a lot of links for adverts, like the Mini one where they are slapping each other with fishes”
(Pre family, Male)

“I joined the ‘We all love the Cadburys’ gorilla’ Facebook group, but then my mum started liking it and I decided it wasn’t very cool anymore”
(Pre family, female)

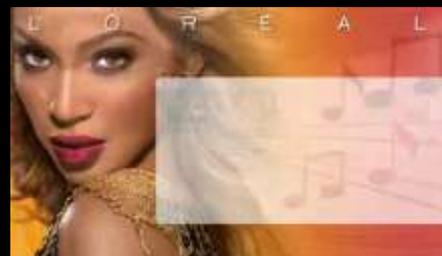
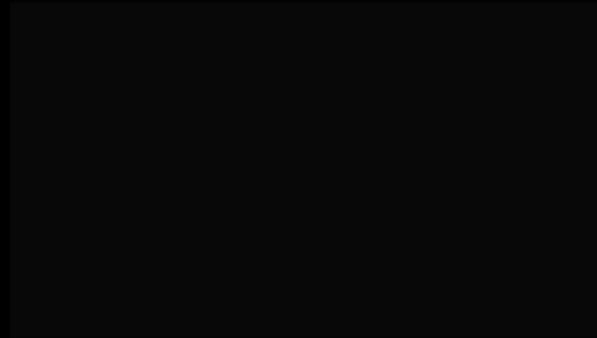




The Perceived Roles Of TV & Online Advertising

Favourite TV Ads Are Recalled And Talked About...





Consumers Are Able To Recall Examples of Acting Upon Online Adverts

TV ads are mentioned more than online ads in terms of recall and action/responses (75%)

However, 52% could recall acting upon online ads 33% agreed they had clicked through banner ads

Some examples of online campaigns acted upon;



Static skyscraper



Fold out moving skyscraper



Static skyscraper



Interactive moving banner



Moving skyscraper



Moving skyscraper



Extended TV Advert



Banner



Static skyscraper



Banner



Both TV And Online Advertising Can Fulfill Roles Across All Stages

Online Ads

% Agree

TV Ads



TV And Online Work Together

TV
○

Exposure to
online before
TV ad

59% said
more likely to
notice

Online sharing
of TV ads

Registering on
website

**Consideration
and Purchase**



TV ad
prompting
online search
57%

TV ad leading to
online purchase
21%

Exposure to
TV ad before
online ad

66% said
more likely to
notice

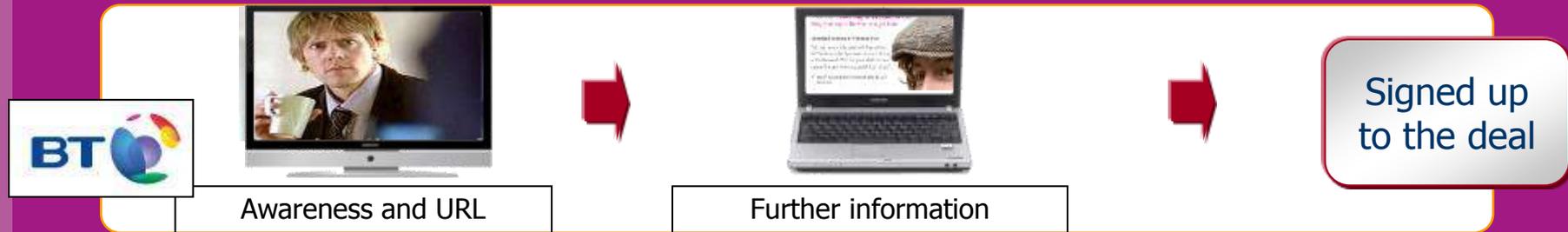
TV broadcast
content leading
to online
search/purchase

Searching for
TV ad online
60%

Both can fulfil a role across all stages, although often
relationship flows from TV to online



TV Ad Prompting Online Search/Purchase



Seeing TV Ad Before Online Ad



Raised awareness



Developed engagement/interest



Went to see film



Familiarity and reassurance



Recognised character



Explored products



Demonstrated features



Reinforced interest



Considering purchase

Seeing Online Ad Before TV Ad

SAMSUNG



Brand engagement prompts click



Explore product detail



Reinforces interest



Plans to upgrade

THE BIG YELLOW SELF STORAGE



Repeated exposure to online ads



Reinforced awareness



Awareness of brand

orange



Initial awareness of Animals tariffs



Further information on tariffs



Awareness of new tariffs

TV & Online: Better Together

TV Broadcast Content Prompting Online Search/Purchase



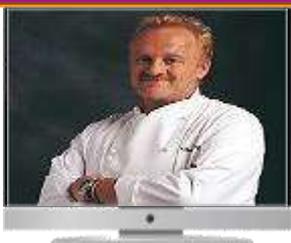
Sparked an idea for a gift



Searched for new mascara product on programme's website



Purchased product



Watch every week for food ideas



Go online to BBC recipe pages to download recipes



Bought ingredients for recipes



Sparked interest in the keeping of chickens as a hobby



Searched on Google to find out how to keep chickens



Considering keeping chickens!



Both TV & Online Ads Can Trigger Offline or Online Search & Purchase

Online Ads



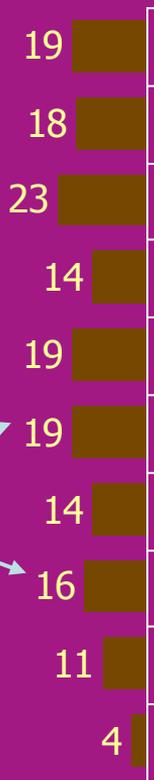
% agree they have responded to ads in this way



TV Ads

Any of these responses = 52%

Given that most figures lower for online ads, these online search responses are relatively strong (and stronger than the offline responses)



Looked in shop for brand

Remembered brand when considering buying

Visited brand's website to find out more

Talked to someone about brand

Used comparison/review site

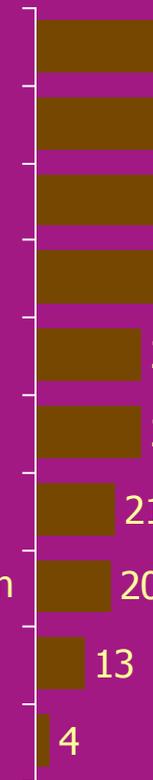
Searched net for where to buy brand

Bought brand online

Immediately searched net for more information

Searched for competitors

Blogs and forums to discuss



Any of these responses = 75%

TV ads are more likely to have triggered offline responses, than online



TV Ads More Likely To Trigger Offline Purchase

Online Ads

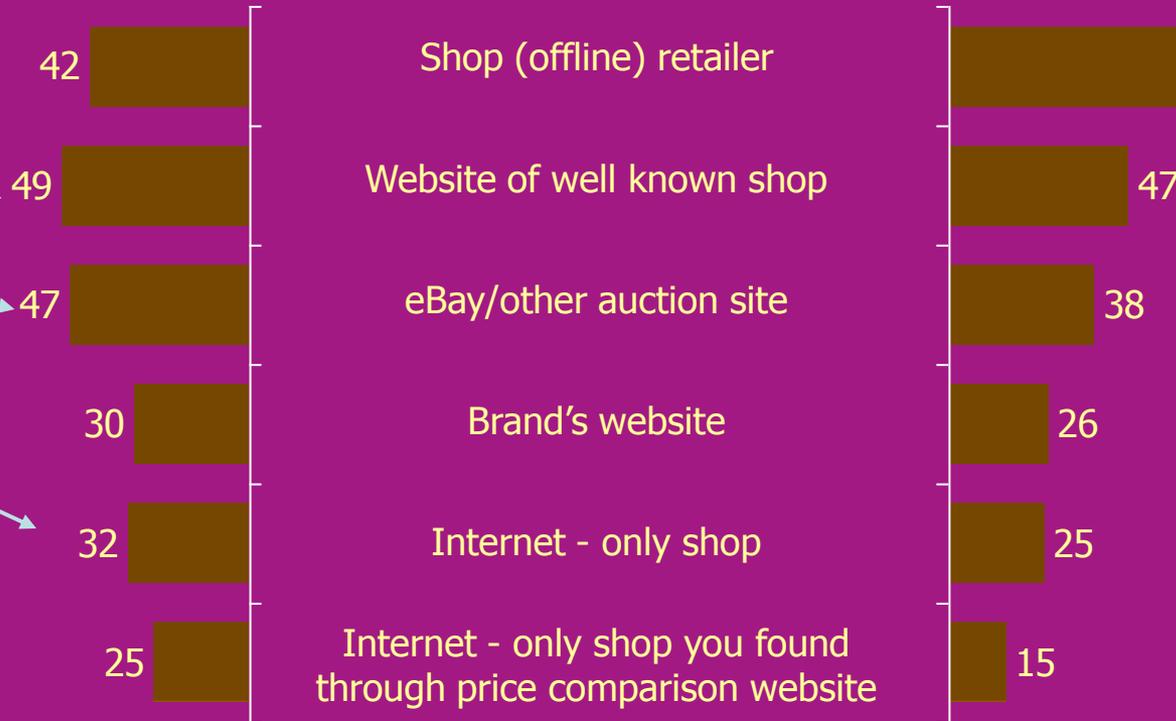


% who have purchased from this channel, as a result of seeing ads



TV Ads

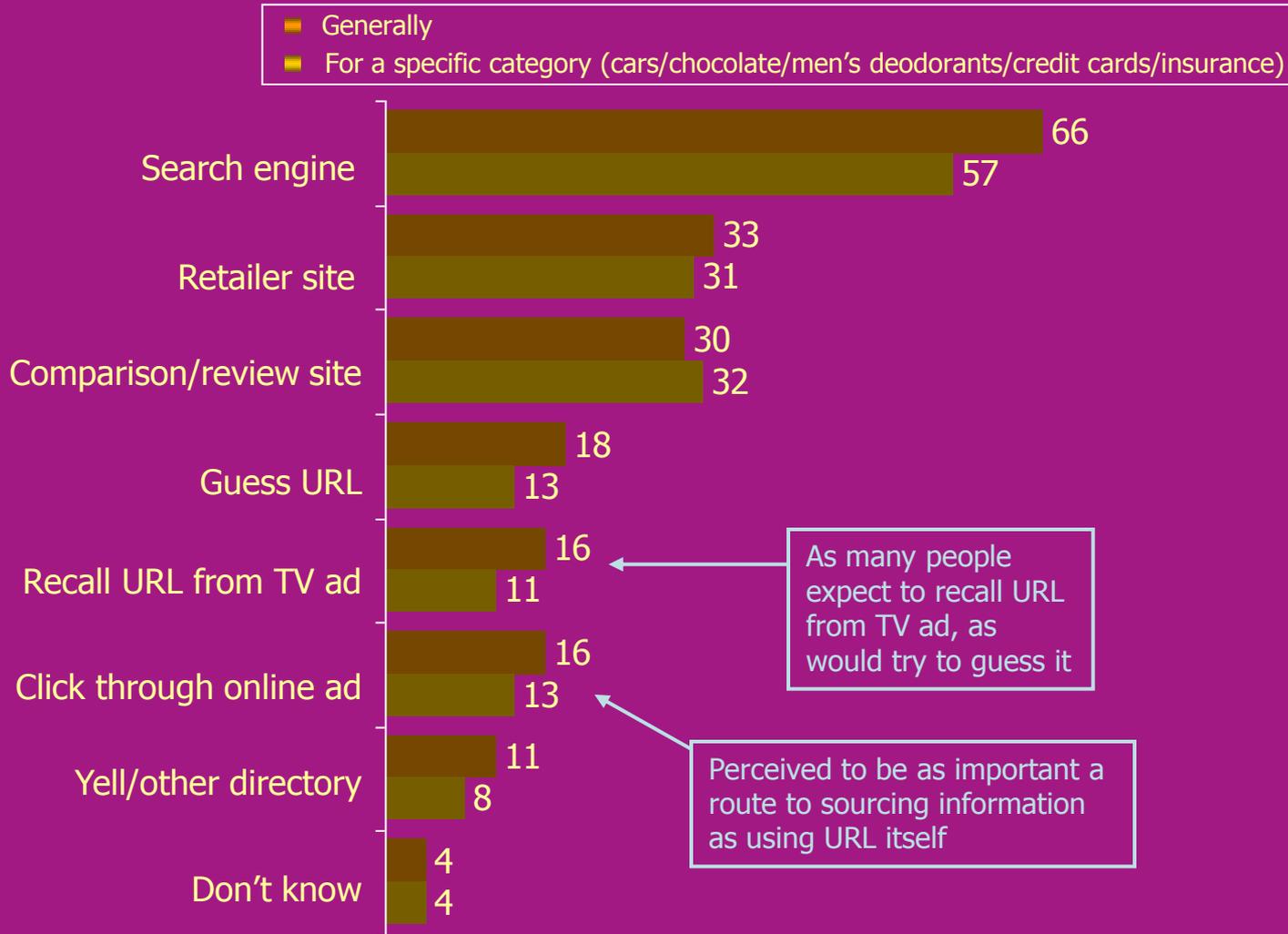
Given that most figures lower for online ads, these online channels are relatively stronger than for TV ads



TV ads are more likely to have triggered offline purchases



Ads Have A Direct Role In Enabling Investigation



Base : All adults (3,011 weighted); Q34a/b <4% not shown



Sponsored Links Genuinely Creating Awareness

When recalling advertising seen recently, for our tested campaigns;



“ I guess I normally click on the ones at the top because you think they’ll be the best sites ”
Young family Mum

“ I ignore the ones at the top ”
Older family Dad





Honda

Campaign Evaluation

Creative Approach

HONDA

- Consistent themes = problem solving, technology
- Rubik's cube provides visual link, impactful/iconic image
- Online creative – branding, movement
- Link to 'Problem Playground'
- Link to find out about how TV advert was made



“ The TV ads stand out as illustrating team work resolving problems, the online ad really augments the TV ad ”

“ The Honda ads work together on a more subtle level, by just using certain images from the TV ads in the online (creatives) whilst still invoking memories of the TV ad ”





Churchill

Campaign Evaluation

Creative Approach



- Consistent theme = challenging Churchill
- Visual fit and familiarity: dog, quiz show format
- TV = high profile
- Online = individual engagement and additional information



“ The use of the strong image of Churchill the dog in both online and TV makes it instantly recognisable ”

“ The Churchill ads work well together as they have the same premise of the quiz show ”



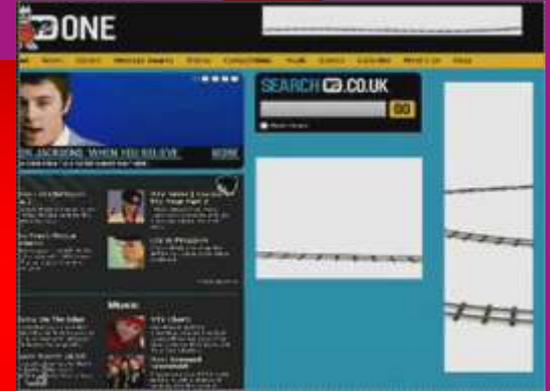


Cadbury Creme Egg Campaign Evaluation

Creative Approach



- Consistent themes = instant consumption, enjoyment
- Creme egg central 'character' in both media
- Online creatives = instant impact, motion, roll-over, tailored to media (laptop squashing egg)



“ I especially liked the laptop closing and squashing the egg. The adverts worked really well together because the theme was the same ”

“ The Creme Egg ads work really well together, as they all have the same basic idea of the eggs having a short life. I really like these ads as I feel they keep it short and sweet and are really fun ”



Lynx Campaign Evaluation

Creative Approach



- Consistent theme = women notice you, women want you
- Chocolate man provides visual synergy
- 'Get in there' viral approach maximising strengths of media
- TV ad works as online creative because of strong appeal



“If you really like an ad you want to see it again and again”



Summary: Creative Approach

Visual synergy is important – branding, characters, images

Where TV advert appeals strongly, showing the creative online can create impact (eg Lynx), however...

Creatively, combined campaigns benefit from playing to and maximising the strengths of each media

Different creative approaches across TV and online should deliver **consistent theme/message**

Capitalise on opportunities to engage consumers with campaigns

- User generated content
- Relevant online interaction (eg Honda's Problem Playground, Churchill's multiple choice quiz)
- Links to brand website





TV & Online Advertising Are More Effective When Used Together



TV & Online Together Create Stand-Out and Familiarity

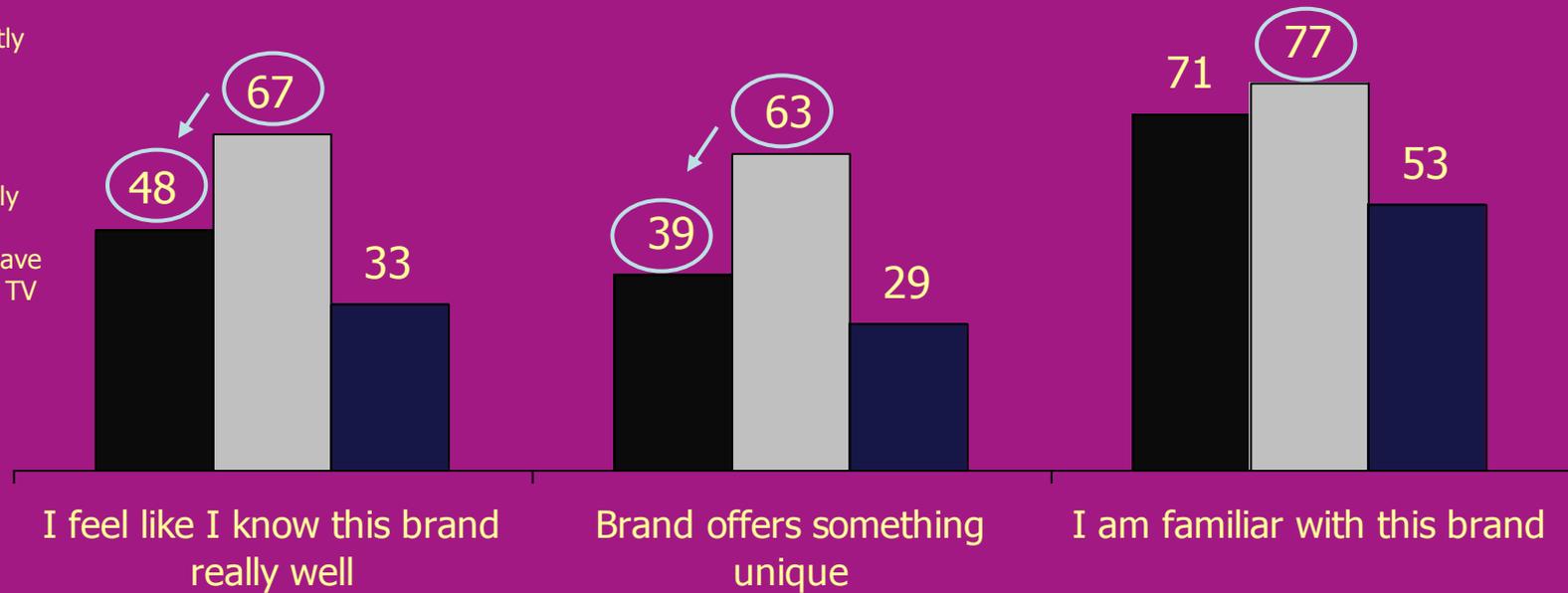
% Agree

All Brands

■ Seen TV only or Online only ■ Seen Both ■ Seen Neither TV nor Online

↙ = Significantly higher

○ = Significantly different to group who have seen neither TV nor online



Agreement amongst whole sample :

44

37

65



Base : All adults 16-54 (3,011 weighted)

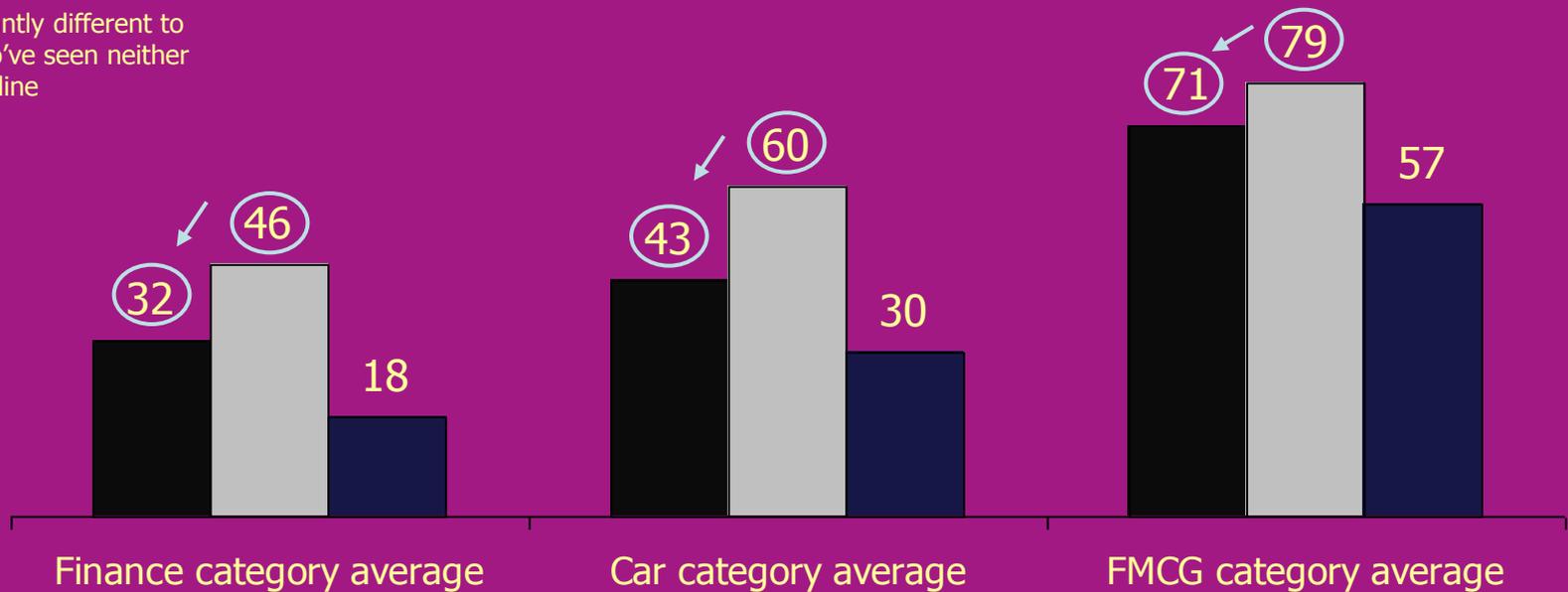
For All Categories Across Softer Metrics

% Agree 'I feel I know this brand really well'

■ Seen TV only or Online only ■ Seen Both ■ Seen Neither TV nor Online

↙ = Significantly higher

○ = Significantly different to group who've seen neither TV nor Online



Uplift among those exposed to both TV + Online:

+14% points

+17% points

+8% points



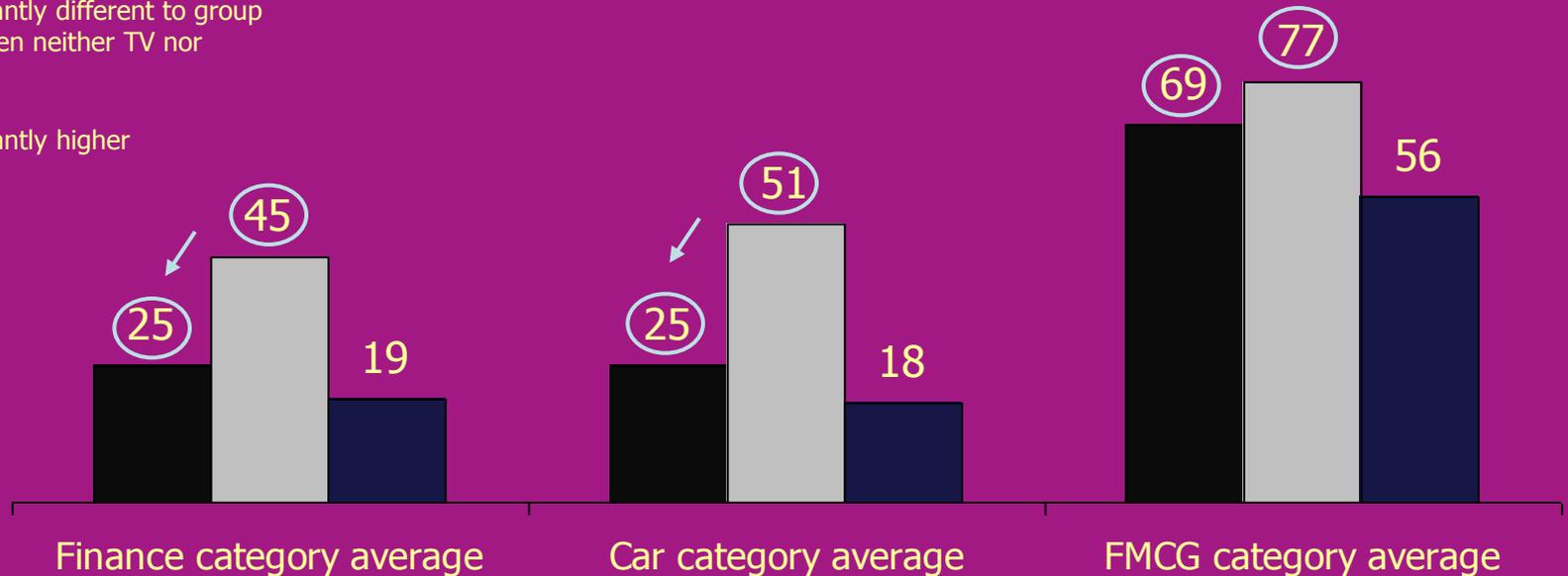
As Well As Harder Metrics Such As Purchase

% Agree: 'I am likely to buy/use this brand in the future'

■ Seen TV only or Online only □ Seen Both ■ Seen Neither TV nor Online

○ = Significantly different to group who've seen neither TV nor Online

↙ = Significantly higher



Uplift among those exposed to both TV + Online:

+20% points

+26% points

+8% points



FMCG: Purchase Frequency raised considerably

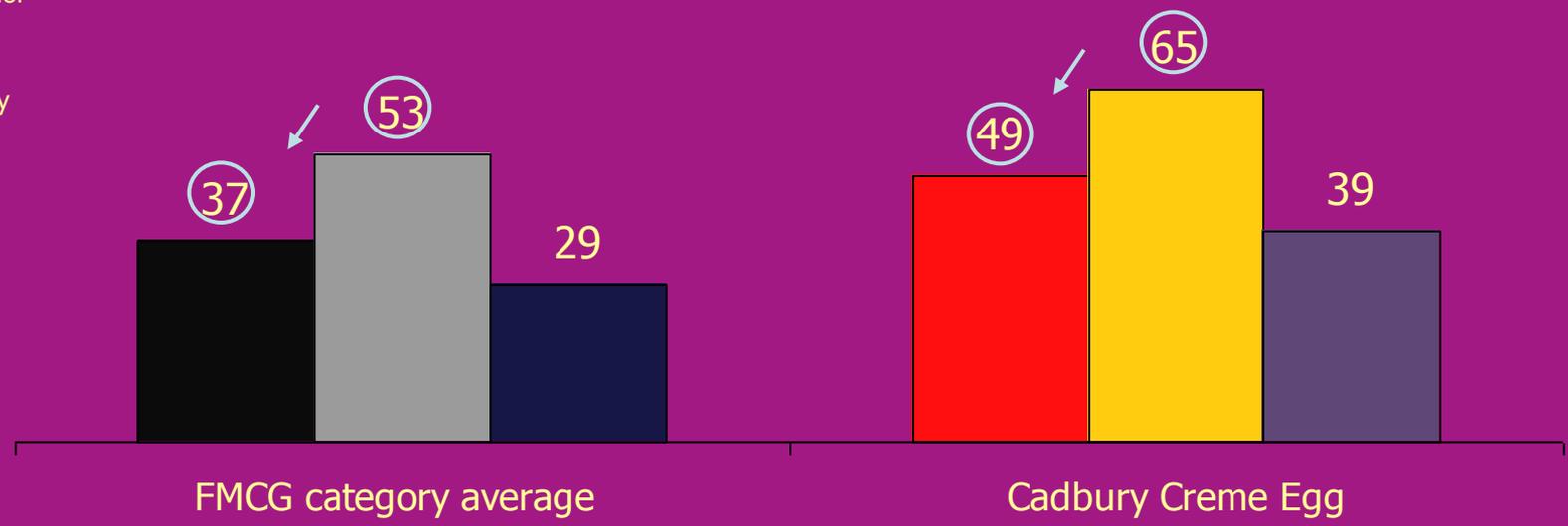


% Agree: 'I am likely to purchase more frequently'

■ Seen TV only or Online only ■ Seen Both ■ Seen Neither TV nor Online

○ = Significantly different to group who've seen neither TV nor Online

↙ = Significantly higher



Uplift among those exposed to both TV + Online :

+16% points

+16% points



Switching to New Lynx Product increased

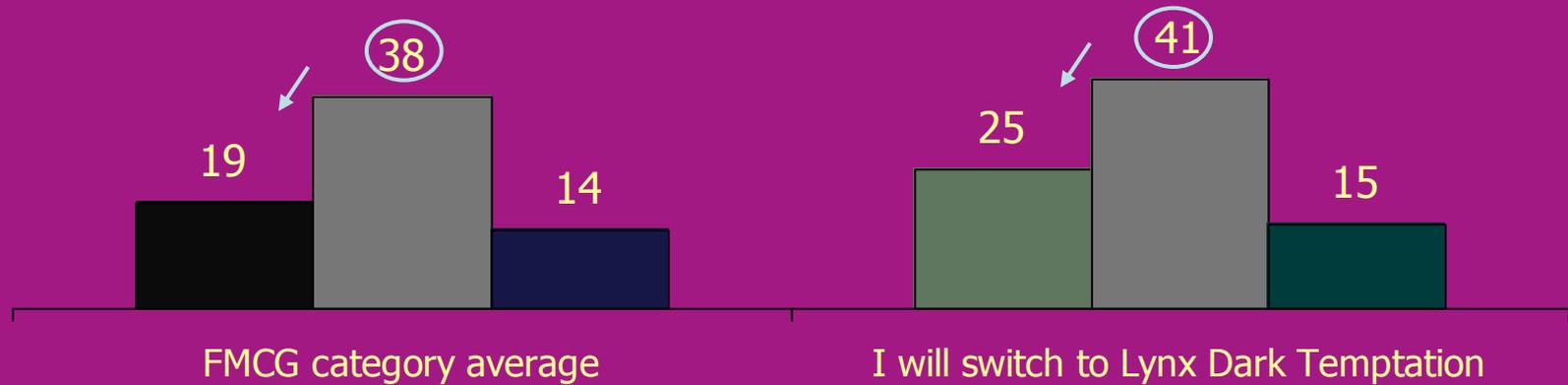


% Agree: 'I will switch to this brand'

■ Seen TV only or Online only ■ Seen Both ■ Seen Neither TV nor Online

○ = Significantly different to group who've seen neither TV nor Online

↙ = Significantly higher



Uplift among those exposed to both TV + Online :

+19% points

+16% points



FMCG: Offline Behaviour and Talkability

Online Ads



% who might respond this way after seeing ads

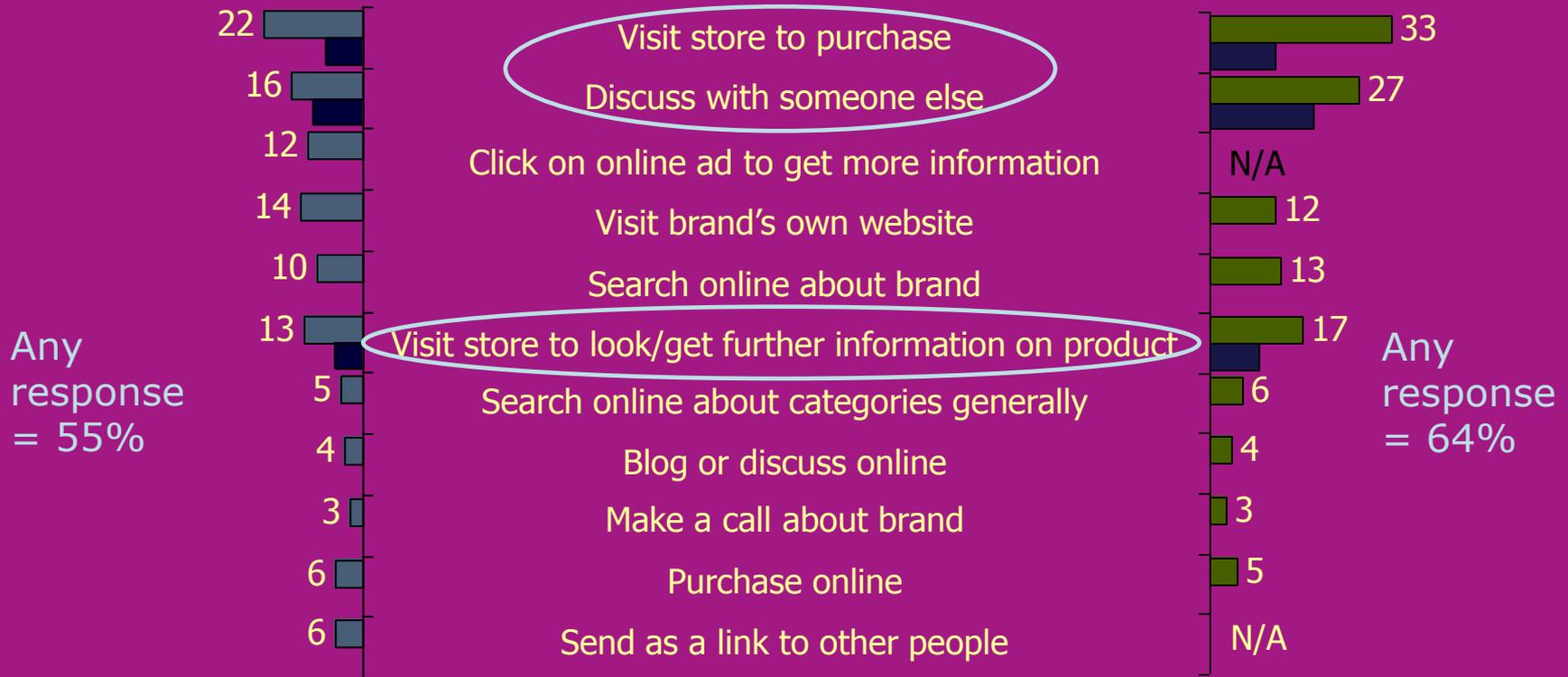


TV Ads

- Online Ad Response

- All Brands Average

- TV Ad Response



Base : 16-34 main shoppers (1,004)



Finance: Purchase Consideration Raised

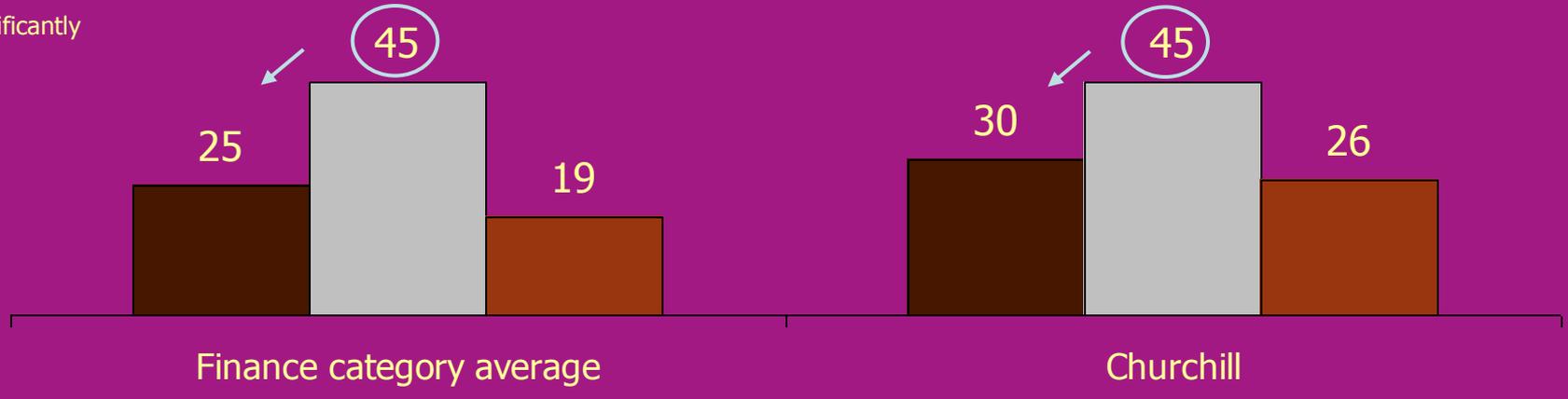


% Agree: 'I am likely to buy/use this brand in the future'

■ Seen TV only or Online only □ Seen Both ■ Neither TV nor Online

○ = Significantly different to group who've seen neither TV nor Online

↙ = Significantly higher



Uplift among those exposed to both TV + Online :

+20% points

+15% points

○ Exposure to both TV and Online creates the strongest brand consideration levels, whereas seeing one medium alone did not produce significant uplifts

Finance: Search behaviour is Greatest Influenced

Online Ads



% who might respond this way after seeing ads

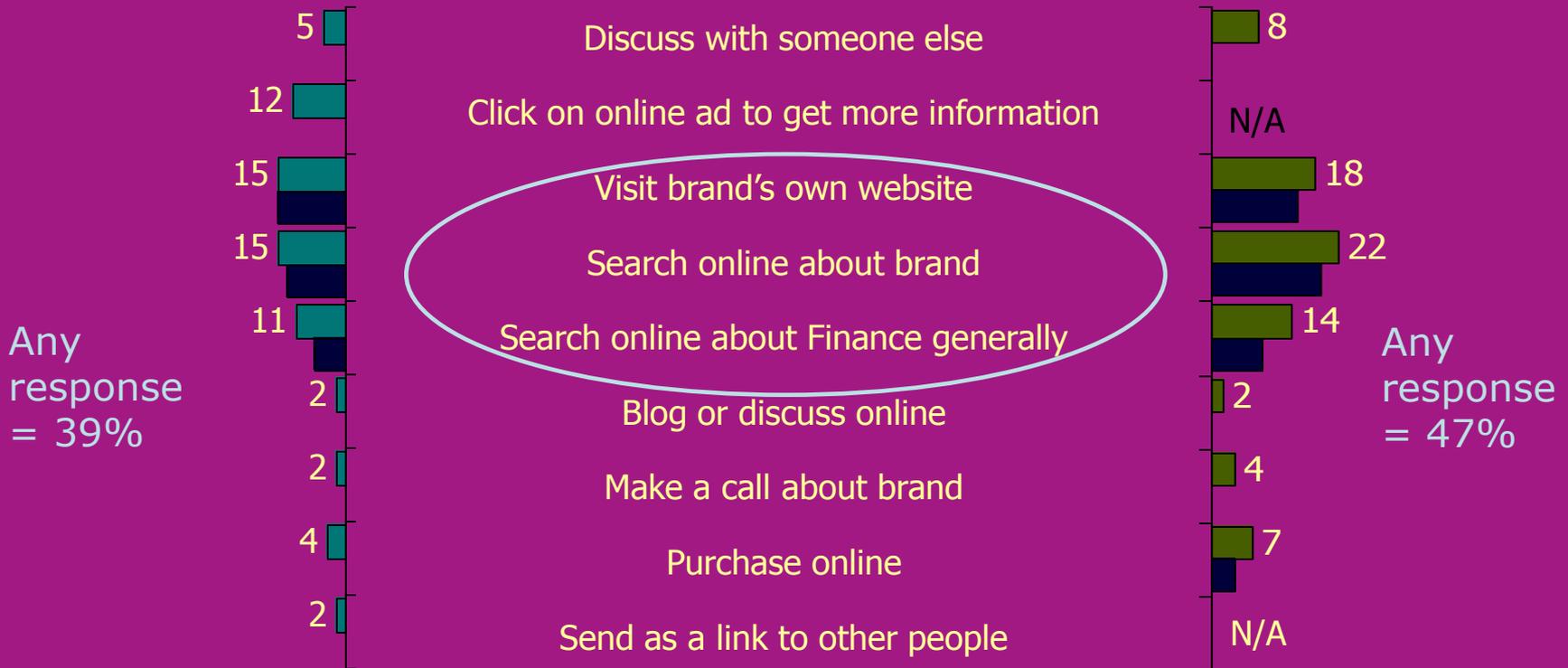


TV Ads

- Online Ad Response

- All Brands Average

- TV Ad Response



Cars: Consideration Raised In This Category

HONDA

% Agree: 'I will place on a short list for consideration'

■ Seen TV only or Online only ■ Seen Both ■ Seen Neither TV nor Online

○ = Significantly different to group who've seen neither TV nor Online

↙ = Significantly higher

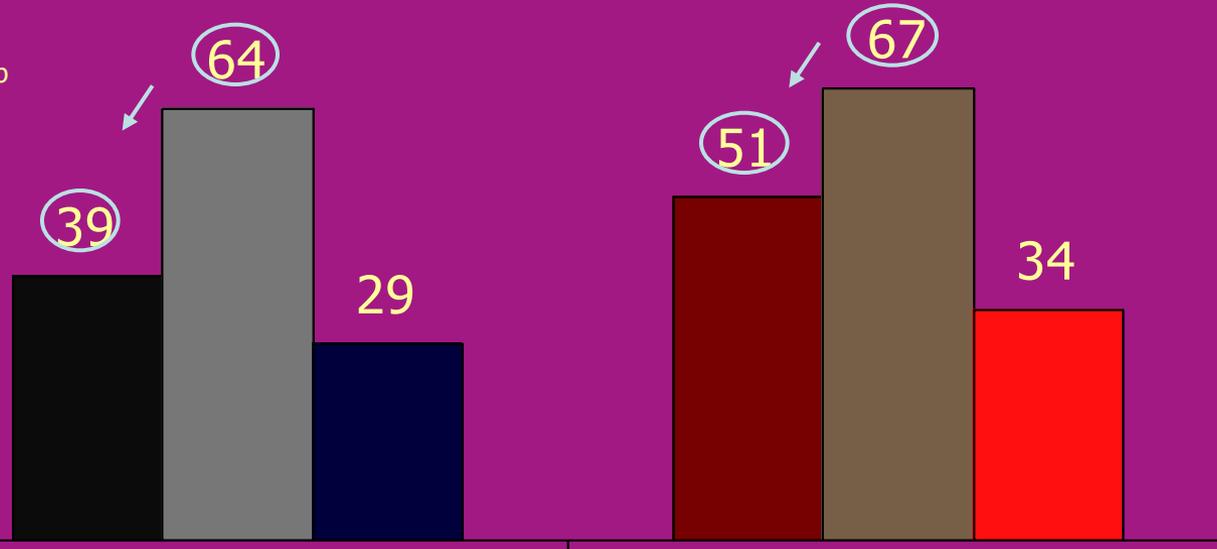
Uplift among those exposed to both TV + Online :

Car category average

+25% points

Honda

+16% points



Cars: Online and Offline Behaviour

Online Ads

% who might respond this way after seeing ads



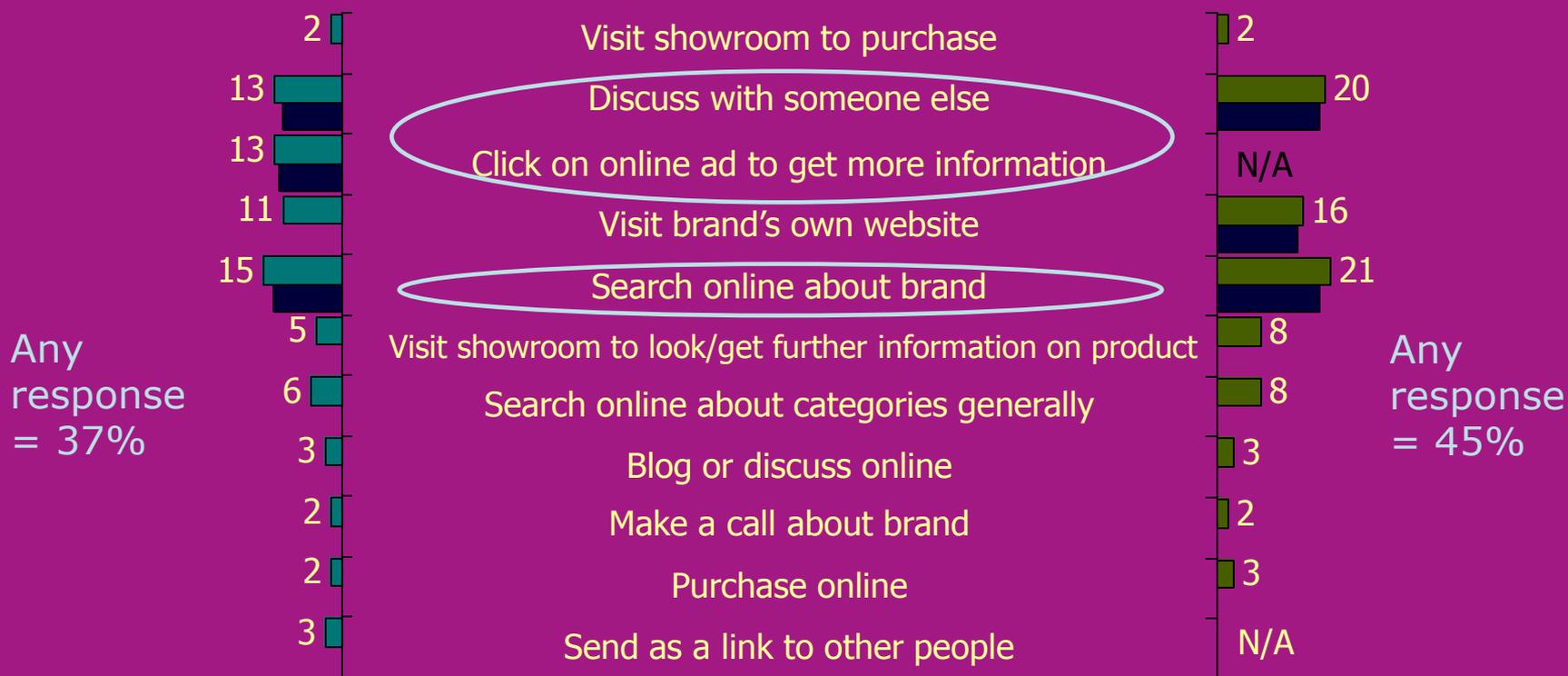
TV Ads

 - Online Ad Response

 - All Brands Average

 - TV Ad Response

Cars



Uplifts In Brand Perceptions

| | Total | FMCG | Cars | Finance |
|--------------------------------------|-------|------|------|---------|
| Know brand really well | 19% | 8% | 17% | 14% |
| Unique | 24% | 13% | 27% | 21% |
| Relevant to me | 16% | 9% | 23% | 14% |
| Likely to buy / use | 21% | 8% | 26% | 20% |
| Likely to try | 16% | 13% | - | 20% |
| Place on shortlist for consideration | 14% | 18% | 25% | 2% |
| I will switch | 17% | 19% | - | 18% |
| Likely to purchase more frequently | 16% | 16% | - | - |
| <hr/> | | | | |
| Average | 18% | 13% | 25% | 16% |

TV + Online = an extra 18 percentage points on brand metrics



Summary: Benefits Of Using Both TV & Online





Six Key Points



TV + Online: Better Together



1. 61% of respondents watch TV whilst using the Internet on a regular (weekly) basis
2. Respondents use both TV (80%) *and* internet (56%) for entertainment
3. When TV + online ads are used together, the average uplift across all brand metrics for all tested categories was +18% points
4. Creative approaches should aim to express a central campaign idea but in a way that is tailored to each medium
5. Creative synergy is important
6. Purchase consideration was raised an average of 21% points, by exposure to both TV + online ads