



AdReaction

Global Report

A well executed multichannel campaign is a thing of beauty. You know one when you see it, effortless in its cohesion, with connected and complementary elements adding up to a greater whole. These campaigns feel harmonious; they draw us in, and make us want to learn more.

So why aren't all campaigns like this? Over one in four of the campaigns we measure are not well integrated, and consumers are much more critical than marketers are about campaign connectivity. Also, less than half of all campaigns take full advantage of different channels by properly customising content to different contexts.

The best campaigns see a substantial increase in effectiveness, so AdReaction set out to explore the secrets of their success. What can marketers learn from the campaigns which grow brands successfully while avoiding the dangers of fragmentation? **What is the art of integration?**

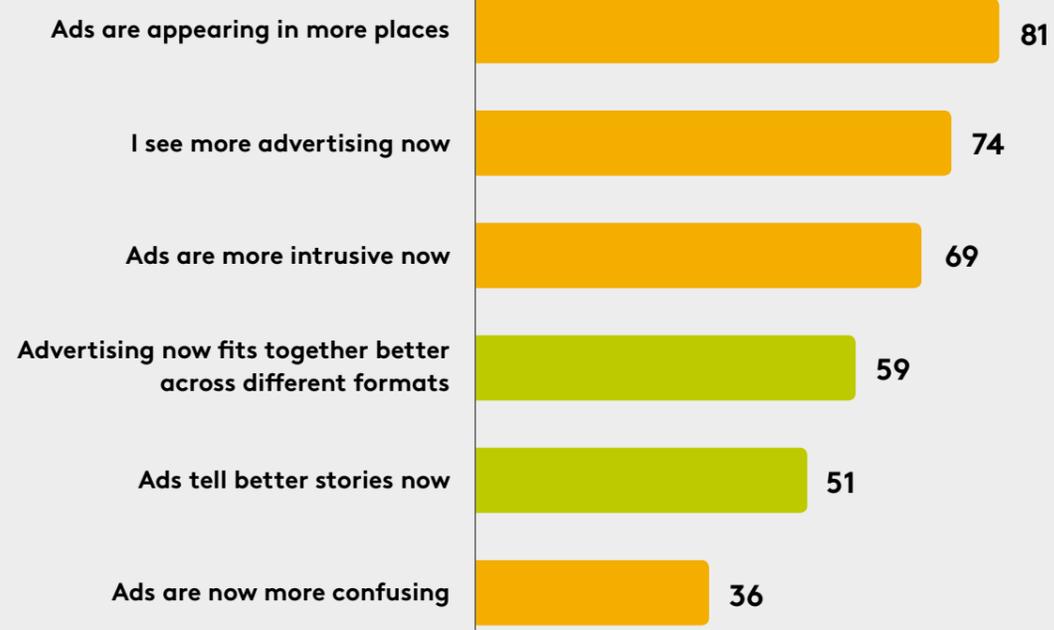
Consumers feel overloaded so quality is key.

People feel bombarded by the marketing content they see, and the number of places they see it. As we would expect, heavy media users and frequent online buyers feel the most overloaded, but they are also the most positive about improved campaign integration and storytelling now possible across placements.

People feel media fragmentation and an increasing pressure and intrusiveness of ads but some also say campaigns fit together better and tell better stories

How people feel today compared to how they felt 3 years ago:

% agree



Source: Kantar Millward Brown AdReaction global consumer survey 2017

We know using more media channels can improve campaign effectiveness, but only if the channels work synergistically. So how can marketers develop successful, multichannel campaigns that build brands and avoid the pitfalls of fragmentation?

Follow our 5 principles for success.



INTEGRATION

IDEA

CREATIVE

PLACEMENT

CUSTOMISATION

1. Integrate more campaign cues

2. Start with a strong campaign idea

3. Make each piece of content amazing

4. Invest only in channels that have a clear role

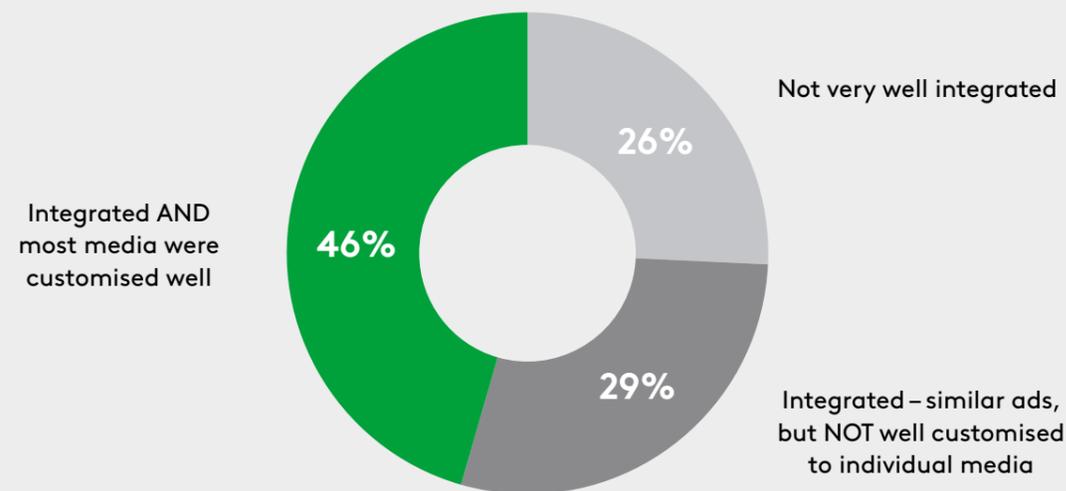
5. Customise content for each channel

1.

Integrate more campaign cues

Even without any customisation, integrated campaigns are 31% more effective at building brands, yet still one in four of the campaigns we measure are not well integrated.

Currently one in four of the campaigns we measure are not well integrated



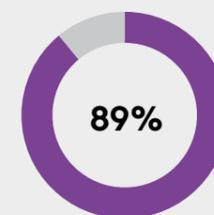
Source: Kantar Millward Brown global CrossMedia database

While almost all marketers believe they have integrated strategies, consumers are less convinced that the multichannel campaigns they see fit together well.

There's room for marketers to improve campaign fit across all channels. This is not just an issue of traditional and digital silos; integration could be enhanced both across and within offline and online media.

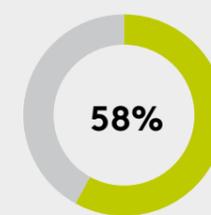
There is a gap between how well marketers think they integrate strategies and what consumers see. Fit could be better across channels.

Marketers' view of strategy integration



Desktop, mobile & TV

Consumers' view of campaign fit



Across all



Between online and offline



Between different offline formats



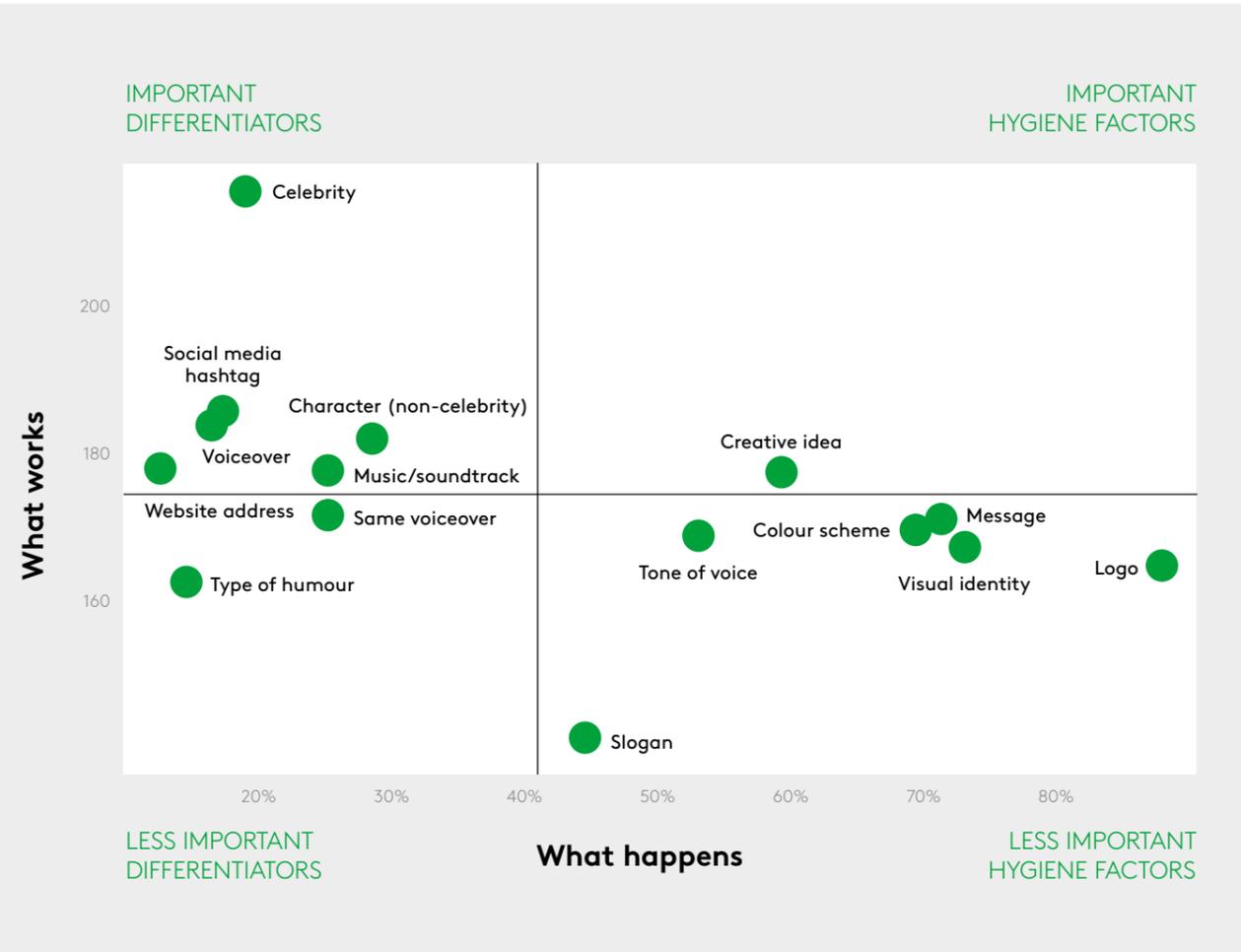
Between different online formats

Sources: Kantar Millward Brown Getting Media Right global marketer and AdReaction global consumer surveys 2017

Consumers expect multichannel campaigns to deliver basic connective elements or hygiene factors like the same logo and slogan. To some extent consumers are right. All brand cues contribute to campaign effectiveness, and the more cues the better.

However, effectiveness learning shows that consistent characters or personalities are the individual cues which most help brand impact; these differentiate the best campaigns.

Consistent use of characters or personalities differentiates the best campaigns. Hygiene factors such as logo and slogan also help, but have less impact.



Source: Kantar Millward Brown global CrossMedia database
 What works: Index of average contribution for campaigns featuring that cue versus campaigns with no integration cues (100)
 What happens: % of campaigns featuring the integration cue among campaigns tested

How integration cues are incorporated is also important. Viewers expect TV to fit the best with the rest of a campaign, but integration benefits all channels. Brands should plan for synergy because about 25% of all brand contributions from media are typically attributable to synergy effects. We know that all channels benefit from synergies, but some channels work particularly well with each other. The strongest overall synergy combinations are TV & Facebook, and TV & outdoor.

A recent Budweiser campaign in China was strongly integrated thanks to multiple consistent elements (celebrity, colour scheme, bottle, logo, slogan) across TV, online and outdoor executions. It is a well executed example of 'matching luggage' which also extends to the style and mood of the content.

Budweiser
 'Bud Music 2017'

Eason on stage - static outdoor ad

Eason with women - static outdoor ad

60 second and 15 second website ads

30 second TV ad

BRANDING PERCENTILES	
Campaign	89
Eason on stage - static outdoor ad	96
Website ad - 60 second	95
Website ad - 15 second	90
Eason with women - static outdoor ad	90
TV ad - 30 second	72

"The ads are linked by electronic music, similar ad scenes, Eason Chan and the message - this Bud's for you."

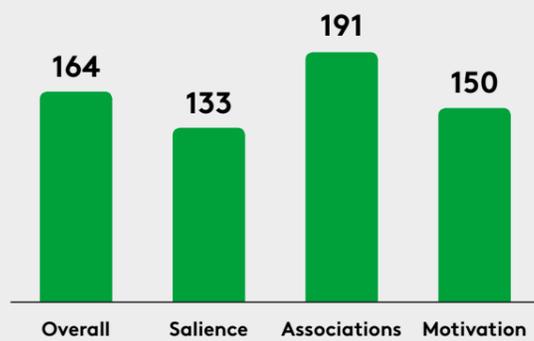
Source: Kantar Millward Brown Link for Campaign copy testing

2.

Start with a strong campaign idea

While matching luggage is good, it's not enough. Great campaigns need a strong central idea to cue the integration, and campaigns that have this perform better across all brand KPIs (+64%), especially brand image associations (+91%), as well as across all channels.

Campaigns with a strong central idea perform better across all brand KPIs, especially image associations



Source: Kantar Millward Brown global CrossMedia database
Index of average contribution for campaigns with a central idea versus campaigns with no central idea (100)

Why is this? It's partly because a strong campaign idea results in better executional discipline. These campaigns usually include a higher number of integration cues overall (7 cues on average, as opposed to 5 cues for campaigns without a big idea), and they are also particularly likely to have a common message and visual identity.

Campaigns with a strong central idea are also far more likely to remain integrated even when individual elements are customised for specific placements (the platform provides greater flexibility or elasticity).

Idea-based campaigns can also help to redefine the creative development process, because it's possible to distil a clear idea down to a short sentence. This may be an easier starting point for brands when designing outdoor or online display executions, rather than working backwards from a longer piece of TV or video content.

Campaign idea:
The theme that will support all brand content over a set period of time

There was a very strong campaign idea behind the award-winning 'Dive into Life' campaign from Hornbach, a German home improvement retail brand. 'Dive into Life' delivers the message that DIY is a sensory experience, a moment of pure freedom, real and a bit painful, that reminds people: You are alive! (Du lebst!).

All elements of the campaign were highly distinctive and involving, and all were strongly linked to the central idea, despite the use of slightly different visuals across the video and outdoor executions. The sensory elements on the website helped people feel themselves diving into life.



Hornbach
'Dive into Life'



60 second TV ad



20 second YouTube ad



Website



Static outdoor ad



Static outdoor ad

"...the idea of promoting the senses. If you have seen the whole story to the end, you will always have to smile a little when you see a poster"

Source: Kantar Millward Brown Link for Campaign copy testing

3.

Make each piece of content amazing

The strength of each element within an integrated campaign usually defines campaign success. Within our multichannel pretesting database we see a campaign is defined most closely by the average of all executions, even more so than the best or worst individual execution. Therefore, unless media spend will be heavily skewed towards one execution, every piece of content matters and contributes to overall success and brand building.

Even with strong integration and an inspiring campaign idea, individual creative executions can still fail to engage. For this research we copy tested 12 integrated campaigns which seemed to have clear ideas behind them, yet still five of them scored below average in terms of their overall campaign impact.

Qualitatively we have seen that how integration cues are incorporated can make a difference. Consumers seem to appreciate campaigns that use the same cues and slogans consistently across multiple pieces of content rather than taking a haphazard approach. So, attention to design details is important.

Kantar Millward Brown has written a good amount about the importance of great creativity, and harnessing it to the brand. The more creative the material, the stronger the emotions it's likely to generate, and the more memorable it's likely to be. There are no hard rules for creativity; content simply needs to be original and different. But there are useful tips like: the use of powerful news can make static content more impactful; and it's important to grab attention in the first few seconds when developing skippable video content.

To successfully market anything, the brand needs to be structurally integrated into the content. This can be done in a variety of ways including, making the brand the focus of the story, or by using established branding cues or slogans. Leading a campaign with content that best establishes the link with the brand can be helpful, and can later be followed by content that focuses on communication.

In a recent campaign from Toyota in Japan for its Vitz model, all individual executions (TV, online video, Instagram video, online banner and magazine) are highly enjoyable, involving and distinctive. Cleverly, the car is the star across the campaign even in content

where it doesn't appear. All content builds on the car's distinctive design aesthetic, and adds layers of subtle humour and entertainment. As soon as people see the car and these executions, they know "This is Vitz."



Toyota
'Is this Vitz?'



15 second TV ad



50 second YouTube ad



Interactive Instagram ad



Static digital ad



Static magazine ad

INVOLVEMENT PERCENTILES	
Campaign	82
15 second TV ad	93
50 second YouTube ad	92
Interactive digital Instagram ad	72
Static digital ad	72
Static magazine ad	69

"front facial expressions of everything that appears are the same and emphasize the design"

Source: Kantar Millward Brown Link for Campaign copy testing

4. Invest only in channels that have a clear role

Through our ongoing partnership with EFFIE, and our analysis of Effie winning campaigns, we know what often sets apart the winners is that they have a specific reason for placing each creative execution in each channel. Advertisers will only achieve strong creative across multiple placements if they understand that attitudes to ads vary by channel and format, and different media have different inherent strengths.

For example, we know TV has great reach and is best at building awareness, but it tends to be less cost effective for other metrics like purchase intent. Magazines are cost effective in multichannel campaigns, and point of sale can deliver strong brand building.

Online also works well – cost effectively extending TV reach and building brand metrics from awareness through to purchase intent. However, all is not rosy in the online world. We know from our AdReaction studies that consumers’ attitudes are far more positive to traditional media than online advertising.

Meanwhile, the marketing industry does see cross-platform and cross-device marketing as best in class, but the focus beyond that is mainly on TV and online. Given there is higher receptivity to print and outdoor, some marketers may be underestimating the importance of secondary traditional media.

The digital mismatch is partly explained by exploring attitudes to online targeting – while most industry executives think it’s reliable (56%), less than half of consumers agree (45%). People are far more likely to recall negative online targeting experiences than positive ones. Even allowing for the fact that negative experiences may be amplified in recall, this clearly suggests that not enough advertisers are getting their online targeting right.

People are far more likely to recall a negative online targeting experience in the past week than a positive one

Any positive 38%

Ads that were personalised based on my interests **22**

Ads that were helpful in the precise moment they were delivered **13**

Ads that I found helpful in a precise location **12**

Any negative 61%

Ads I have seen too many times **31**

Ads that were not at all relevant for me **23**

Ads for something I already purchased **20**

Ads that made me feel someone was stalking me **14**

Source: Kantar Millward Brown AdReaction global consumer survey 2017

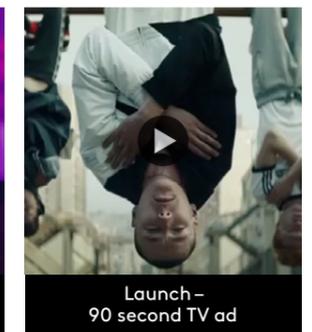
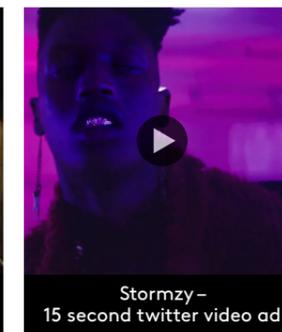
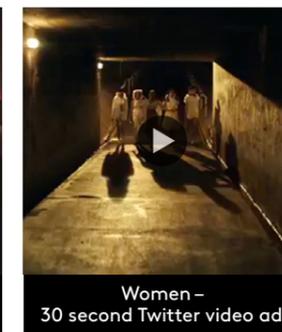
There are some specific moments that make the lack of receptivity even worse. For example, people are even less receptive to mobile ads when they’re traveling. Yet they are more responsive in other moments. People are more open to receive online advertising when they are researching products and services, and some campaign types do lend themselves stylistically to the online space.

The recent campaign for Adidas Originals in the US was seen by consumers as ‘dark and edgy’; ‘primarily for young people’; ‘interesting. . . trying to fit in with new social movements’, and ‘hardcore’. This added up to a campaign which people felt was far better placed online than on TV (which is the usual default response).



Adidas

‘Original is Never Finished’



APPROPRIATENESS %	TV	BEFORE YOUTUBE VIDEO
Stormzy	26	42 ↑
Women	37	46
Mirrors	40	46
Launch	37	46

“they want to be hardcore, and stand out from others. But not in a bad way”

Source: Kantar Millward Brown Link for Campaign copy testing

5. Customise content for each channel

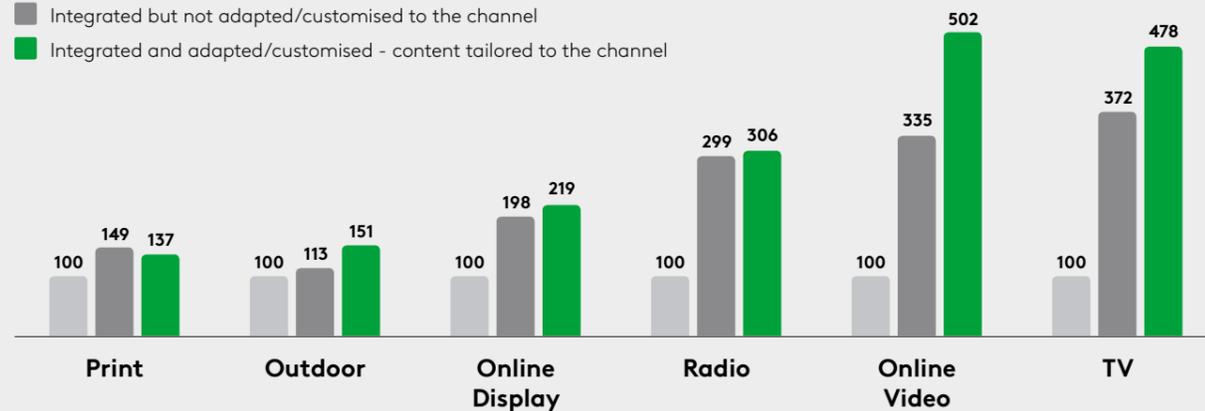
Once a campaign is integrated, marketers must think about customisation for each placement to further boost effectiveness. Integrated and customised campaigns are 57% more effective than non-integrated campaigns, but less than half of the campaigns we measure are both integrated and customised.

Launch campaigns seem to benefit most from integration and customisation, likely because marketers and their agency teams view the job of creating a new campaign as a bigger, more exciting challenge so everyone tries a little harder. This emphasises the need to develop a durable creative platform that has the legs to support multiple executions that will remain interesting over a long period of time.

Integration and customisation are most critical when a campaign plan involves more media channels. And, while customisation will further help effectiveness across channels, it's especially important for TV and online video.

In addition to integration, TV, online video and outdoor benefit most from customisation.

- Not well integrated with the rest of the channels
- Integrated but not adapted/customised to the channel
- Integrated and adapted/customised - content tailored to the channel



Source: Kantar Millward Brown global CrossMedia database. Index of average channel contribution is based on nature of that channel's integration to rest of campaign.

A pitfall to avoid is that not all customisation makes things better. For example, using edgier content that is disconnected from the campaign carries the risk of reducing overall effectiveness. So, if you're not genuinely edgy like Adidas, don't try to fake it just for your online videos.

People prefer online video to be short or at least customised. Marketers should keep this in mind when customising video to improve effectiveness.

The Opel auto brand ran a good launch campaign for the new Crossland X vehicle in Germany. The successful TV ad worked even better when it was customised for Facebook viewing; enhanced branding resulted in stronger relevance and affinity.



PERCENTILES	BRANDING	AFFINITY	RELEVANCE
Handbag - 30 second TV ad	38	69	32
Handbag - 30 second Facebook video ad	64	91	74

"I think the ad is good, original compared to others, not so boring. The Opel has a very good rear-view camera and is very innovative".

Source: Kantar Millward Brown Link for Campaign copy testing

RECOMMENDATIONS

for marketers



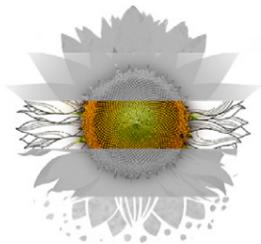
1. **INTEGRATE COMPREHENSIVELY:**

Use all senses. Visual cues are important, and memorable characters differentiate, but audio cues like consistent voiceovers and music also help. Consumers will not notice all brand integration cues, so test to see if your campaign fits together.



2. **CUE THE IDEA:**

Start with a killer, insight-fueled campaign idea and develop tightly integrated executions that work together to bring the idea to life. Build out from the core, don't work back from a TV ad.



3. **EVERY PIECE OF CONTENT COUNTS:**

Individual creative quality defines overall campaign success. Do your idea justice by testing executions for all major channels.



4. **CHOOSE CHANNELS WISELY:**

There is little benefit to more channels unless they have a clear role in the campaign, and in reaching your audience. In the online space, target judiciously and don't intrude.



5. **CUSTOMISE CAREFULLY:**

Only develop content for channels where you can adapt excellently and make the most of the format. Find a balance between integration and customisation. A great campaign needs enough familiarity to tie campaign elements together, but enough novelty to engage with complementary content.

APPENDIX

Methodology

AdReaction global consumer survey: Over 14,500 interviews among 16-65 year olds were conducted between August-November 2017 in 45 countries (at least 300 per country). Fieldwork commissioned via Lightspeed. Results in this report are global averages across the following countries: Argentina, Australia, Belgium, Brazil, Canada (English & French), Chile, China, Colombia, Croatia, Czech Republic, Egypt, France, Germany, Greece, Hong Kong, Hungary, India, Indonesia, Ireland, Israel, Italy, Japan, Kingdom of Saudi Arabia, Korea, Malaysia, Mexico, Netherlands, New Zealand, Nigeria, Peru, Philippines, Poland, Romania, Russia, Singapore, Slovakia, South Africa, Spain, Switzerland, Taiwan, Thailand, Turkey, United Kingdom, United States, Vietnam. A summary of country-level results are available online and full results are available on request from local Kantar Millward Brown teams.

Kantar Millward Brown CrossMedia database analysis: 223 campaigns from 2015-2017 within our global CrossMedia database were classified based on the types of integration and customisation approaches they used. These campaigns covered all regions of the world and included studies from the following categories: food & beverages, household, retail, travel, personal care, financial services, technology and automobiles.

Kantar Millward Brown Link for Campaign copy testing: 12 campaigns, each containing 5 content elements, were tested between August-December 2017 in Brazil, Canada, China (2), Germany (2), Japan, Spain, United Kingdom (2), United States (2). Fieldwork commissioned via Lightspeed.

Kantar Millward Brown Getting Media Right global marketer survey: More than 300 interviews were conducted during June-August 2017 among leading global marketers representing advertisers, agencies and media companies.

Campaign Definitions

Not well integrated: The campaign idea was not clear in many channels.

Integrated: The campaign idea was clear in most channels.

Integrated and customised: The campaign idea was clear in most channels AND creative was tailored to bring the idea to life in each media channel.

Creative platform: The advertising approach which will be used for a long period of time across multiple individual campaigns.

Campaign idea: The theme that will support all content from a brand over a set period of time.



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